

Small Business Acquisition Program

Kickoff Discussion

July 3, 2025



Discussion Agenda

- Introductions and Roles
- Overview of Objectives
- Activities and Timeline
- Open Discussion/Next Steps

Overview of Objectives/Scope

► **Geography:** 7/8 branch-centric markets

- 5 Exchange Street, Providence, RI 02903*
- 215 Armistice Blvd., Pawtucket, RI 02860
- 584 Putnam Pike, Greenville, RI 02828
- 2152 Mendon Road, Cumberland, RI 02864
- 215 Pleasant Street, Fall River, MA 02721
- 502 State Road, North Dartmouth, MA 02747
- 851 County Street, Taunton, MA 02780
- 130 Pleasant Street, Attleboro, MA 02703*

► **Target:** Micro and Small Business with between \$100k and \$5million. (Sweet spot is \$3-\$5 million)

► **Potential Prospect Populations:** Based on early counts using D&B and InfoUSA, BKM estimates around 50k businesses are operating within the target revenue and geography guidelines

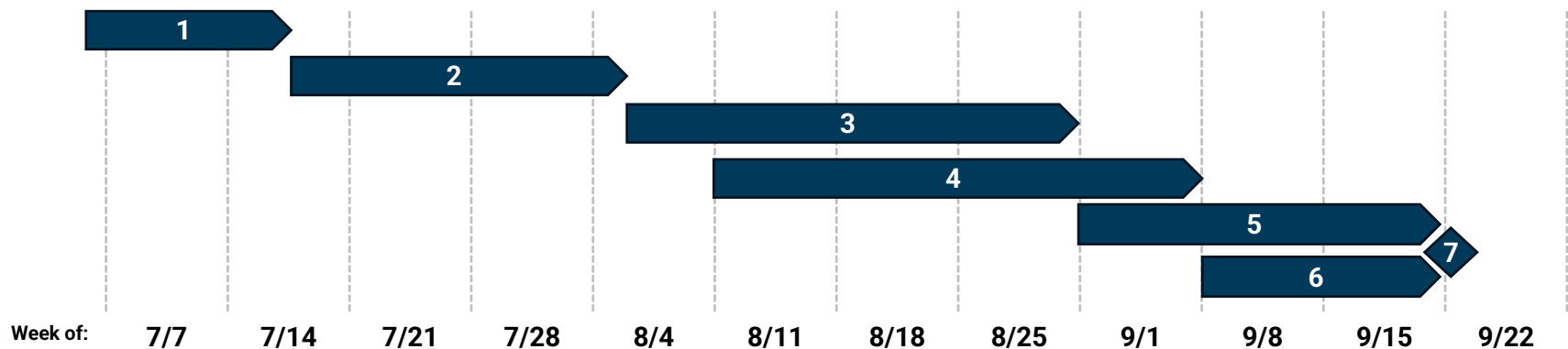
► **Outreach Approach:** Blended outreach using direct mail and phone/email outreach from each market. Due to the high ratio of potential businesses to staff, BKM has recommended mailing all prospective businesses in waves, every other week and leveraging a subset of the mailing lists for direct outreach. This will enable measurement of the outreach channel efficacy.

► **Timing:** Current timing is targeted for mid-September to begin outreach with creative assets finalized by the end of August.

Draft Timelines

BCSB: SMB Campaign - Direct Mail Creative Development Timeline (target waved drops: September 22, 2025)

Deliverable	Start	Finish	Status
1. Campaign Strategy	Thursday, July 3, 2025	Wednesday, July 16, 2025	Not Started
2. Creative Concepting	Wednesday, July 16, 2025	Tuesday, August 5, 2025	Not Started
3. Creative Development	Wednesday, August 6, 2025	Friday, August 29, 2025	Not Started
4. List Development	Monday, August 11, 2025	Friday, September 5, 2025	Not Started
5. Production	Tuesday, September 2, 2025	Friday, September 19, 2025	Not Started
6. Data/Mail Services	Monday, September 8, 2025	Friday, September 19, 2025	Not Started
7. Campaign Drops Start	Monday, September 22, 2025	Every 2 Weeks	Not Started



Creative Development Next Steps

- Develop the creative strategy to direct the content and format of materials to be used for the program.
- Following the strategy, creative concepts will be developed to present to BCSB.

Open Discussion and Questions?