



GO-TO-MARKET PROJECT PLAN FOR FINANCIAL INSTITUTIONS

In Partnership With Autobooks

April 2022



GREAT NEWS!

Your digital banking channels now include two new features that are highly coveted by small businesses (SMBs) and non-profits. Two features that will help them accept online or in-app payments directly from their customers — without having to use a third-party app.

Business owners can now enroll online in minutes and:

Send an Invoice: easily create and send electronic invoices that can be paid online.

Accept a Payment: directly accept online or in-app payments.

It's important that your financial institution is prepared to help make businesses and non-profits — as well as your internal team — aware of these new capabilities.

What are your next steps?

It's time to communicate to your organization and market to your customers. To do this, we outlined your next steps in two phases. Typically, financial institutions complete both phases in about four weeks.

Within the following phases, you'll find easy-to-follow guides and pre-built resources designed to help your institution support the ever-evolving needs of your small business and non-profit customers.

For a deeper dive into the following information about Go-To-Market best practices, please reference our [Go-to-Market Guide \(PDF\)](#).

PHASE 1 INTERNAL AWARENESS

Step 1: Train Your Team

Any customer-facing team members will benefit from attending team training. Your entire staff can attend team training webinars, or the content can be used to design your own training curriculum.

[🔗 Register for a Training Webinar](#)

Step 2: Upgrade Your Website

Create Landing Page

We provide a plug-and-play solution to easily launch a page on your website. Requiring no coding or design from your team, this landing page describes the full Autobooks solution and overviews its benefits. It even allows a user to send themselves a test invoice and book a tour of the product.

[🔗 Download the Landing Page Details \(PDF\)](#)

Update Existing Website

Make sure to incorporate this new feature into your existing website.

For example, add "send electronic invoices" and "accept digital payments" as core features of your business and commercial checking accounts. Hyperlink to your new receivables landing page and add hero images announcing the modules throughout your website as appropriate.



Step 3: Send an Internal Email

Getting your staff on the same page requires great communication. We wrote the announcement email copy to get you started. Whether you use our words as inspiration or as the total source material, this step is critical.

[View the Internal Announcement Email](#)

Step 4: Make Reference Materials Available to Your Organization

[General Accept Online Payments Flier \(PDF\)](#)

This includes information for both sending and invoice and accepting a payment. It is often used when financial institutions only want one flier at the branch level.

[Send an Invoice Flier \(PDF\)](#)

[Accept a Payment Flier \(PDF\)](#)

[Common Customer Questions \(PDF\)](#)

[Product Comparison Chart \(PDF\)](#)

[Customer Follow Up Email Template](#)

PHASE 2

CUSTOMER AWARENESS

Email Your Customers

Send least three marketing emails to your customers to raise awareness of the Embedded Finance tools and announce its availability.

Below, you'll find professionally written launch and conversion emails for your use. Designed to drive awareness, interest, and adoption, this content is informed by the customer research conducted by Autobooks on an ongoing basis.

[!\[\]\(e2376d476d06eb31946dc01a69a4403a_img.jpg\) Go-To-Market Emails](#)

Post on Social Media

In line with the marketing email timeline, we recommend posting at least three times on your financial institution's social media channels to increase awareness and drive adoption.

Advertise

Want to place ads too? We built sample digital ads formatted for common ad placement size. Your team can use the ads as they come or edit them to reflect your unique branding. These can also be used for social media posts.

[!\[\]\(8bba887393ca45b761e5cb49e755e762_img.jpg\) Download Digital Ads](#)

Send a Notification

If you have the capability, distribute a pop-up message or alert to your customers within your internet banking modules.

Questions?

Email us at fisembedded@autobooks.co