Introduction to the Autobooks Launch Emails

June 2021

Designed to Deliver Results

To make it simple to announce the availability of Autobooks to your small businesses, we have included a set of six emails your team can copy, paste and send. The sample emails included in this document come from a suite of emails that we offer as part of our go-to-market services.

How to Use This Document

Our go-to-market services help financial institutions effectively drive product adoption and utilization. The emails included in this document were written by professional conversion copywriters and are built to drive awareness, interest and ultimately adoption of Autobooks.

The email language and content is rooted in our ongoing conversations with small businesses. They are written to help small businesses make progress on a problem they are trying to solve.

Share in Any Order

The emails in this set are designed to be standalone emails, as opposed to sequenced emails. A business owner does not need the context of earlier emails in the set in order to understand each email. Each email begins in solution aware and ends in product aware instead of moving the prospect from solution to product aware through several emails.

Note: The first two emails in the following pages (emails one and two) are more specific to the Banno plugins for small business, powered by Autobooks. You can start with those if you wish, since there's no prescribed order to worry about.

Regarding the Copy Length

We've had the opportunity to guide talented marketers like you into the world of conversion copywriting, and we've heard concerns that you're likely to feel as you read through conversion copy for the first time:

· "These emails are too long!" It's true that they look extra long in this document format, and it's also true that they're longer than other messages. But our data shows that our audience reads them eagerly, opens them again and again, and activates solely off of these messages.

· "The voice in these emails is too raw, too specific." It's true that we don't often hear the raw voice of our customers in our copy, but that's what it is — and the raw, unfiltered language we use is one of our most powerful tools.

· "I don't like this part." It's easy to pick apart any email and apply our personal

preferences — the things we like and the things we don't. However, we should keep in mind that we are not the primary audience. All that matters is whether we're effective in our efforts to help our business banking customers become Autobooks customers. Our data shows that yes, we are.

Before You Make Changes

So as you read, as you consider this copy, you may find yourself having one of the aforementioned concerns. You might find yourself wanting to make a change. Before you do that, there are a few other things to consider before you make your decision to change the emails or deploy as-is:

- FIs that deploy the emails with slight modifications see activation rates plateau at 44% (compared to 60% with no modifications)

- FIs that deploy emails at launch and then turn them off due to a fear of emailing customers see activation plateau and then fall

- FIs that launch Autobooks without using any of our emails see activation as low as 1%

Need Help?

If you have questions, or would like to learn more about our full suite of go-to-market-services, please email us at letstalk@autobooks.co.

The Autobooks Emails

Email One

Subject: Send an Invoice, from the same place you do your checking

Description/Overview: This email will introduce small business customers to the Banno small business Plugins solution, powered by Autobooks. It describes how Autobooks is the most user-friendly way for a smal business owner to send an invoice (via the Banno dashboard card), and what life would be like when they don't have to spend so much time worrying about how to manage their back office.

Email Two

Subject: We agree, it shouldn't be hard to get paid

Description/Overview: This email introduces the small business customer to the Autobooks Payment Form, accessed by clicking the 'Accept Payment Now' card on the main online banking dashboard. This email gives the reader an in-depth look into what the Payment Form is and how it can be shared. The CTA focuses on taking them into their digital banking, so the user can accept a payment now.

Email Three

Subject: What if you could finish work an hour earlier?

Description/Overview: This email will introduce small business customers to the full Autobooks Enterprise solution. By detailing how Autobooks is the most

customer-friendly way for customers to pay them electronically, they get a snapshot into what life would be like when they don't have to spend so much time worrying about how to manage their back office.

Email Four

Subject: There's a gift inside your checking account

Description/Overview: This is the first in a pair of emails introducing the small business customer to the Autobooks Payment Form. This first email gives the reader an in-depth look into what the Payment Form is and how it can be shared. The CTA focuses on booking a tour of the product.

Email Five

Subject: I didn't want collecting payments to be brain surgery

Description/Overview: This email focuses on the pain point that many small business owners experience in trying to accept payments online, specifically credit card payments. It also focuses on the slow speed with which non-bank providers such as Square and PayPal settle funds into the bank account.

Email Six

Subject: When $3,000 disappears

Description/Overview: This email highlights the story of an Autobooks user, Nick, who had his trust betrayed by a few non-bank payment providers. It solidifies the relationship between Autobooks and financial institution and highlights the benefits of the partnership. It also introduces the Autobooks team and makes it clear that we are here to help them whenever issues arise.