

autobooks

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ACCELERATE  
2022 VIRTUAL EVENT

**The customers.  
The bankers. Our strategy.**

**PART 2**

#SmallBusinessObsessed



# DERIK SUTTON

Chief Marketing  
Officer, Autobooks

Why would a business owner  
“hire” your financial institution  
to help them get paid?

On-demand marketing content

2023 marketing calendar

We work hard to help  
**small businesses get paid**, and  
your financial institution **stay**  
**ahead of the competition**

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# How do we help small businesses get paid?

**1**

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We talk with businesses regularly

**2**

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We apply those learnings to our product

**3**

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We build marketing assets that can be used by our financial institution partners



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## What situations do small business owners find themselves in that cause them to...

**Struggle**

"The way I'm doing things isn't working for me"

**Shop**

for something new

**Adopt**

"Autobooks will help me make progress in my life"

# Customer interviews

One-on-one, hour long interviews with decision-makers

## CRITERIA



Started using Autobooks between 60 and 200 days prior.



Come from a mix of different industries (public storage, home appraisal, psychologist, landscaper, recruiter, etc).



Have displayed a pattern of regular usage.

# Why do businesses “hire” Autobooks to get paid?



## JOB 1

Add a simple and trackable way to get paid to my existing system



## JOB 2

Help me get back to offering credit cards to my customers



## JOB 3

Make it easy to get started with invoicing and accepting payments



## JOB 4

I'm overwhelmed. Make invoicing and accepting payments simpler

# Staying ahead of the competition

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**Sell online and in person >**

Sell on a website, point of sale, or social media, and book appointments.

**Manage money >**

Take payments, access funds instantly, and get a loan.

**Connect with customers >**

Drive business with marketing, messaging, and loyalty programs.

**Manage and pay teams >**

Run your team efficiently with permissions, timecards, and payroll.

**Extend and develop >**

Connect third-party apps or build custom solutions.

Business debit card

Invoices

Online checkout links

Virtual terminal

Business loans

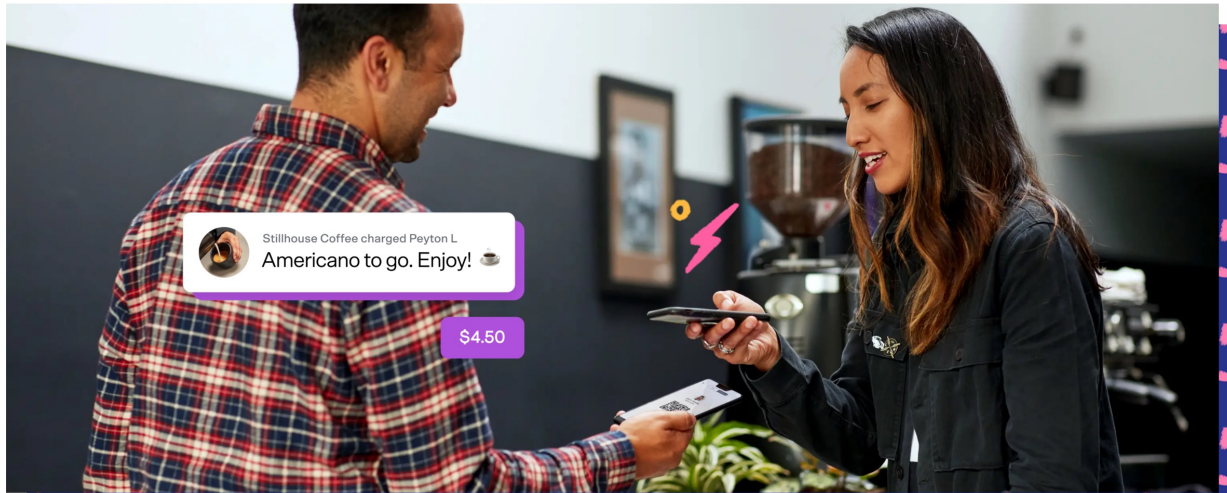
Bank transfers



futu

# Do business with Venmo

Accept Venmo payments in your app, online, or in person and tap into our active community of more than 83 million people.

[Get a business profile](#)



# Chase Business Complete Banking<sup>SM 1</sup>

Get your business up and running with a new kind of bank account. Chase Business Complete Banking has the banking essentials you need.

Open account online



[Product information & pricing](#)

[Get started](#)

[Customer stories](#)

## It's more than a bank account

Chase Business Complete Banking is a checking account that comes with built-in card acceptance, helping you get your business going.

Get the convenience of built-in card acceptance

Explore multiple ways to waive the Monthly Service Fee

Get same-day deposits on card payments at no additional cost<sup>2</sup>

Help protect your account with Fraud Protection Services<sup>3</sup>



## What's included

# Checking and Chase QuickAccept<sup>SM</sup>

### Low to no fee checking<sup>1</sup>

#### Checking

\$15 or \$0 Monthly Service Fee. There's no Monthly Service Fee when any of the following are met each monthly statement period:

- \$2,000 minimum daily balance
- \$2,000 in purchases on your Chase Ink® Business Card(s)
- \$2,000 in deposits from QuickAccept<sup>SM</sup> and/or other eligible Chase Merchant Services transactions
- Link a Chase Private Client Checking<sup>SM</sup> account

### Built-in card acceptance using the Chase Mobile® app

#### QuickAccept<sup>SM</sup>

No hidden fees or monthly contracts.


- 2.6% + 10 cents for tap, dip, or swipe transactions with the purchase of a QuickAccept<sup>SM</sup> contactless mobile card reader
- 3.5% + 10 cents for manual transactions through the Chase Mobile® app<sup>4</sup>

[Learn more about QuickAccept<sup>SM</sup>](#)






# Deliver Compelling User Experience for SMBs



**Invoice**

Green Belle Lawn Care  
817-555-1234  
stephanie@greenbelle.com



Scan the QR code with your phone camera to view and pay this invoice online!

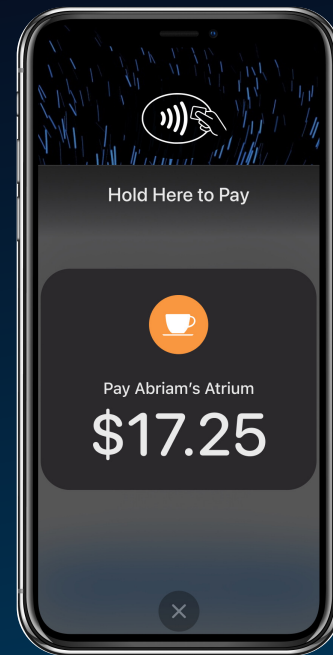
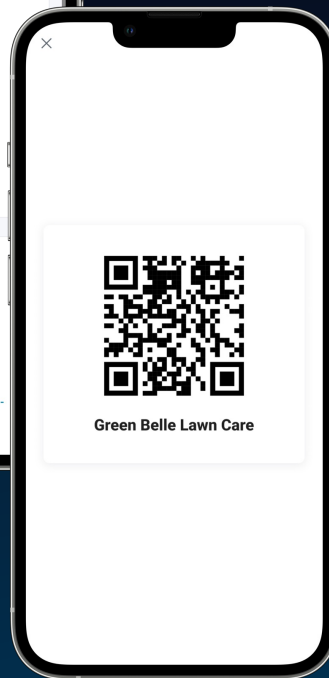
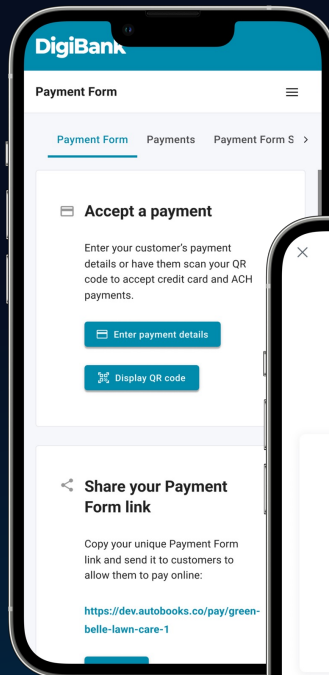
Customer	Created date	Due date
Carol Sanders	10/02/2019	10/03/2019

Product/Service	QTY	Unit Price	Amount
Standard Lawn Trim	1	\$55.00	\$55.00

Description  
Basic cut on front and back lawn

Subtotal:	\$55.00
Discount(20%):	-\$11.00
Sales tax(6%):	\$2.64
<b>Total:</b>	<b>\$41.36</b>

Message  
Some patches in the back yard may need fertilizer



# Leverage banking data for a competitive advantage

Autobooks Hub serves as a direct connection between your small business customers and your financial institution — allowing you to anticipate customer needs, tailor targeted messaging, and provide relevant support.

“Show me how I can do more to help my small business customers invoice and get paid.”

The following SMBs recently enrolled in Autobooks and are approved to process payments. Verify that they have the correct velocity limits set and help them capture their first payment.

SMB ID	SMB NAME	ONBOARD DATE	SUBSCRIPTION TYPE	VELOCITY LIMIT	TAKE ACTION
185852	B To B Home Inspections	12/1/2022	FREE	\$1,066.00	<a href="#">Raise limit</a> <a href="#">Contact customer</a>
185841	Francisco J Marmol	12/1/2022	FULL	\$4,096.00	<a href="#">Raise limit</a> <a href="#">Contact customer</a>
185823	Apex Rarities LLC	12/1/2022	FREE	\$1,090.00	<a href="#">Raise limit</a> <a href="#">Contact customer</a>
185817	Jc Doors Universe Corp	12/1/2022	FULL	\$3,575.00	<a href="#">Raise limit</a> <a href="#">Contact customer</a>
185814	Henriques Firm Pllc	12/1/2022	FULL	\$1,124.00	<a href="#">Raise limit</a> <a href="#">Contact customer</a>
185806	Prismo Business Solutions LLC	12/1/2022	FULL	\$1,242.00	<a href="#">Raise limit</a> <a href="#">Contact customer</a>

CUSTOMER NAME	CUSTOMER TYPE	COMPETITIVE PAYMENT VENDORS	MOST RECENT PAYMENT *	COMPETITIVE DEPOSIT COUNT	COMPETITIVE DEPOSIT
Bartell Inc	Business	<a href="#">VENMO</a> <a href="#">SQUARE</a> <a href="#">PAYPAL</a> <a href="#">ZELLE</a>	11/30/2022	50	\$49,744.83
Mr. Dawn Beatty V	Personal	<a href="#">ZELLE</a> <a href="#">PAYPAL</a> <a href="#">VENMO</a>	11/22/2022	78	\$60,167.88
Becker, Ballistreri and Stamm	Business	<a href="#">ZELLE</a> <a href="#">VENMO</a>	11/21/2022	24	\$7,667.17
Gulgowski Group	Business	<a href="#">PAYPAL</a> <a href="#">VENMO</a> <a href="#">SQUARE</a>	11/21/2022	17	\$47,657.98
Adam Crona III	Person				
Larson and Sons	Busine				
Celia Ullrich	Person				

### Basic Reports

REPORT	MONTH	YEAR	STATUS	DOWNLOAD
Autobooks SMB Report - 11/28/2022	November	2022	Ready	<a href="#">Download</a>
Autobooks Payment Report - 11/28/2022	November	2022	Ready	<a href="#">Download</a>
Autobooks Payment Report - 11/21/2022	November	2022	Ready	<a href="#">Download</a>
Autobooks SMB Report - 11/21/2022	November	2022	Ready	<a href="#">Download</a>
Autobooks SMB Report - 11/14/2022	November	2022	Ready	<a href="#">Download</a>

# Marketing assets for 2023

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#### Subject line:

Now available – Get digital invoicing and payment acceptance, powered by Autobooks.

#### Preview text:

Say goodbye to unreliable (and expensive) third-party payment apps. Autobooks is easy to use, and gives your business everything it needs to get paid.

#### Message body:

[Optional Recipient Name],

Good news: [F1 NAME] now offers **Autobooks**, an easy-to-use solution that includes everything you need to stay on top of your business — digital payment acceptance and invoicing — directly inside online and mobile banking.

Discover the benefit of using your bank to accept customer payments that land directly into your account — not a third-party app. These powerful features, built specifically for your small business needs, are available now.

To get started, log into your [F1 NAME] online and mobile banking. Then simply click on **Send an Invoice** or **Accept a Payment**.

[ADD AN IMAGE THAT SHOWS LOCATION OF SOLUTION OR PAYMENT TOOLS INSIDE YOUR UI – DOWNLOAD PRODUCT IMAGES]

With the **invoicing and payment acceptance** banking, you'll be able to:

- Get paid directly inside your online transfer funds from a third-party app
- Let people easily pay you online with electronic bank transfer (ACH)
- Create and send digital invoices that include our logo, and include our name for extra branding
- Share your secure payment form link on your social media profile, or web page
- View all your transactions inside one app, so you can see who's due

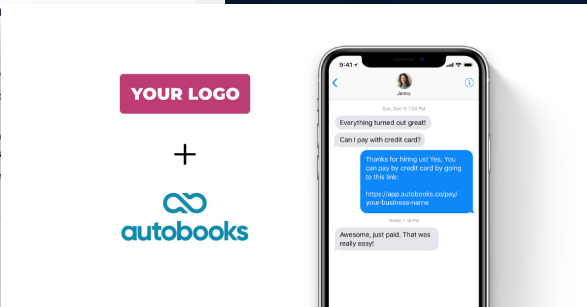
**Give Autobooks a try.** Log into online and mobile banking and send your first payment request.

**Have a question?** Contact an Autobooks small business specialist by phone at **(866) 617-3122** or by email at [support@autobooks.co](mailto:support@autobooks.co).



# Autobooks Marketing Resources

- Customer research
- Emails
- Digital and social ads
- Landing pages
- Campaign kits



# Use alone or integrate within your campaign activity

- Messaging blocks
- Ad creative downloads
- Product image downloads
- Customization package
- Small business checking page sample

Your Bank

You do it all when it comes to your small business

**Isn't it time your account did the same?**



You need to get paid — and customers want to. So why is it so hard to find the right solution?

Existing checking accounts force you to...

- TAKES TOO MUCH TIME
- SUPPORT IS GENERALLY POOR
- GETS TOO COMPLICATED
- TOO RISKY

Manually accept and keep track of payments

Use a third party vendor for credit card acceptance

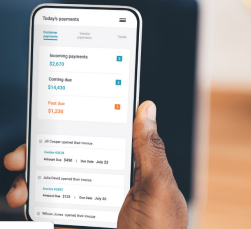
Depend on an app for invoicing or accounting

Use a complex business

YOUR LOGO

+

autobooks



Customer payments Vendor payments

Incoming payments	Coming due	Past due
\$2,670	\$14,430	\$1,790

Payment Form [Learn more about Payment Form](#)

Send this link to customers to allow them to pay online:  
[autobooks.co/pay/your-bank](#) Copy

Andrew Holstead has invoices that are overdue  
Andrew Holstead has paid you \$4,778 over the past 12 months

Kristin Hope has paid you \$75.72  
Invoice #433601  
Kristin Hope has paid you \$1,375 over the past 12 months

Graham Robert has paid you \$21.66 from your Payment Form. [View details](#)  
Description: Services  
Graham Robert has paid you \$1,482 over the past 12 months

What if you could find a checking from the ground up for your sm

AN ACCOUNT THAT:

- COMES WITH Digital Payment Acceptance
- ALLOWS YOU TO Manage & Track Payments

including credit card payments, as well as digital invoicing — all set up and ready for you to get paid faster.

including invoices, deposits, withdrawals, and more — all in one place from your online and mobile banking.


It's here...

**[DigiBank] [Small Business] Checking**

For all your big needs.

Send digital invoices to customers, receive digital payments right into your checking account, manage cash flow, and more — all from inside [DigiBank] online and mobile banking.

Get Started



## Annual Marketing Calendar & Campaigns

Our annual marketing calendar is organized by quarters, to make it easier to organize a campaign at your financial institution. Please note that some campaigns are tied to seasonal events and Holidays, and may span multiple months.



# 2023 GTM calendar

- Themed campaigns
- Quarterly enrollment campaign
- Data-driven messaging

# Overview of our marketing assets

[autobooks.co/marketing](https://autobooks.co/marketing)

[autobooks.co/better-small-business-checking](https://autobooks.co/better-small-business-checking)

**autobooks**

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