



# Quick Conversation Guide

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For Renewals & Pricing Updates on January 4, 2021

USD

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# SmartConnect

## For Customers on a Perpetual License

*The goal of this guide is to assist you in having a conversation with your customer who currently uses SmartConnect on the perpetual license model.*

**Partner:** Greeting

**Customer:** Greeting

**Partner:** As I was reviewing your account the other day, one thing caught my attention. Your team has utilized SmartConnect since [X date]. I believe it is a key solution for your team since it provides you with [describe their current use – for example: “it provides you with integrations between GP and CRM” or “all your Excel journal entry integrations” [etc.](#)].

**Customer:** Right, I’d think we need to continue moving forward with that.

**Partner:** The reason this is coming up is because eOne, the creators of SmartConnect, has changed their pricing model, which means there are a few considerations over the next few years. They’re using this word “future-proof” a lot in their messaging. This means they’re vested in enhancing SmartConnect, so that it’s a tool that can handle more scenarios with the systems you own today and also for when you make changes, like move to a new CRM or ERP. They want it to be an integration tool that can evolve with you.

Regarding pricing, eOne has some good options for renewals. There really are two options for you [to consider](#) moving forward.

**Option 1** is to make no changes and renew your AEP at \$1,400. Basically, you stay with SmartConnect in the perpetual license model – which you are on now – and pay the annual enhancement as normal. This is the price you paid last year and while eOne generally bases their renewal prices as 20% of their retail price, they’re protecting the renewal price for two years and you’ll have rights to unlimited connections. After the two years, the renewal price will be based on 20% of their SmartConnect Business Plan 8-Year Site License with unlimited connections. So that’s option 1 – keep using the perpetual license as is.

**Option 2** is to purchase their new SmartConnect Business Monthly Subscription Plan at a reduced price of \$200/month, which is protected for 4 years. [So](#), you’d have a monthly payment or eOne does provide additional discounts available for customers who would like to pre-pay for the annual renewal. The discount increases when you pay for 2 or 3 years. The nice thing with this is that you’d also have unlimited support and a level of training with your plan. Today on your current license plan

support alone would be an additional \$1,950 per year. After the 4 years, you'd revert to their normal price.

**Customer:** Can you explain the differences between the SmartConnect Business Monthly subscription plan and our current SmartConnect Perpetual License?

**Partner:** Absolutely.

In the **SmartConnect Business Monthly Subscription**, one big difference is that you will have access to both SmartConnect.com (eOne's cloud version of SmartConnect) and the SmartConnect on-premise tool that you own and use today. They've done this so that customers are set up licensing-wise for when they'd like to move completely to the cloud. Whether you're using the online version or on-premise version of SmartConnect, you'd be able to connect to all sorts of systems - both cloud and on-premise. They've included 5 connections with this plan level, assuming it will be a good fit for most customers. A connection is really referring to a system/instance and then you can run unlimited integrations with that system.

eOne is offering this promotion for \$200/month on January 4, 2021 – December 31, 2021, and it's normally \$500/month at retail price. With an annual pre-payment for 1 year, your price would be \$2,280.

The other thing that is nice is it comes with unlimited support, so you as a customer or we as a partner, can engage with eOne since we know your systems and integrations well, to work with any tricky scenarios. Support and introduction training are included with the subscription, which is something you don't have access to today.

With the **SmartConnect Annual Enhancement Plan**, like I mentioned, for two years you won't see a change in your renewal price. You'll have access to SmartConnect on-premise, which is a product they're actively enhancing for a lot of different types of integration scenarios and systems. With AEP, you're getting access to the hotfixes, new builds/functional releases, 2 support incidents per year and you can work with eOne's support and services teams. They require customers to be current on their licensing to work with their team since new versions of software are sometimes required to address issues or be able to handle scenarios.

Some things to consider for your current license model is that it does not include unlimited support, training or services like they include with their subscription plans. Also, SmartConnect.com is not included in your current license. While that is not what you're using today, it's a great platform for when you are connecting cloud apps and don't want to have integration installed on a server or local location.

The final thing I'd consider is price protection. You'll receive the \$1,400 price for two years and then the AEP will be based on 20% of the retail price for the SmartConnect Business Plan 8-Year Site

License. Today the AEP for the SmartConnect 8-year Business License would be \$2,200 per year. Something to consider based on your plans for your integrations & systems over the next few years.

**Customer:** That's a lot to consider. Not sure what we'd need. Any ideas?

**Partner:** I'd say with what your team is doing, to move to the SmartConnect subscription plan. Continuing to pay the AEP isn't necessarily gaining you a [lot of value](#), whereas moving to the SmartConnect Business Subscription Plan would meet all your current needs plus give you access to things like the support you need, as well as get you set up for the cloud.

**Customer:** What are the next steps?

**Partner:** Let me put together the invoice for you to move to SmartConnect Business subscription.

**Customer:** Let's do that.

**Partner:** Alright, I'll send an invoice your way now.

OR

**Customer:** From a cash flow perspective, I think we should go with renewing our AEP as we always have.

**Partner:** Not a problem, the nice benefit with waiting is that you'll [still receive](#) the two free support incidents [each year](#) since you're paying under the new plan. I'll get that invoice ready and sent your way.

**Customer:** Perfect.

# SmartConnect

## For Customers on the Essentials Subscription

*The goal of this guide is to assist you in having a conversation with your customer who currently uses SmartConnect on the Essentials Subscription.*

**Partner:** Greeting

**Customer:** Greeting

**Partner:** As I was reviewing your account the other day, one thing caught my attention. Your team has utilized SmartConnect since [X date]. I believe it is a key solution for your team since it provides you with [describe their current use – for example: “it provides you with integrations between GP and CRM” or “all your Excel journal entry integrations” etc.].

**Customer:** Right, I’d think we need to continue moving forward with that.

**Partner:** The reason this is coming up is because eOne, the creators of SmartConnect, has changed their monthly pricing plans. The good news is that the plan you’re being transitioned to, the SmartConnect Basic Subscription plan does not include any change to the renewal price and plan inclusions for what you have rights to today.

They did simplify a few things with their subscription pricing, so if your needs change and you’d like to integrate/automate with more systems than you are today, likely the next plan level, the SmartConnect Business Plan will be the best fit. They increased the number of connections included to 5 with their middle level and also added unlimited support in that plan, which today would be an add-on of \$100/month.

**Customer:** Great. What are the next steps?

**Partner:** I’ll send you the invoice for your monthly [subscription](#) payment [for](#) SmartConnect.

**Customer:** Perfect.

**Commented [MA1]:** Would the customer need to choose? “I think it would make a lot of sense for you to move to the Business Plan. If you agree, I’ll get an invoice to you right away.”

# SmartConnect

## For Customers on the Standard Subscription

*The goal of this guide is to assist you in having a conversation with your customer who currently uses SmartConnect on the SmartConnect Standard Subscription.*

**Partner:** Greeting

**Customer:** Greeting

**Partner:** As I was reviewing your account the other day, one thing caught my attention. Your team has utilized SmartConnect since [X date]. I believe it is a key solution for your team since it provides you with [describe their current use – for example: “it provides you with integrations between GP and CRM” or “all your Excel journal entry integrations” etc.].

**Customer:** Right, I’d think we need to continue moving forward with that.

**Partner:** The reason this is coming up is because eOne, the creators of SmartConnect, has changed their monthly price - so the new plan that you would automatically be transitioned to is called the SmartConnect Business Plan. [Its](#) retail price is slightly increased to \$500/month; [however](#), they’re offering a nice promotion for existing customers who have been on the Standard Subscription. They’re offering a 20% discount for [one](#) year to existing SmartConnect Standard Plan customers, so you’ll essentially be paying the same price you were before (\$400/month) with the added benefits of the SmartConnect Business Plan.

With this, there are a few other benefits too. [Unlimited](#) support is [now](#) included and [you receive](#) an additional connection.

**Customer:** Great. What happens after the discount ends?

**Partner:** Good question. After the 12 months of the 20% discount, you’ll be moved to the retail list price for the SmartConnect Business Plan, which is \$500/month. They wanted to give customers some extra time to budget.

**Customer:** That sounds good. Is there anything else I should consider?

**Partner:** The move to the Business Plan is the automatic transition. However, if you’d prefer to purchase a different plan at list price, you also have that option. Their next level, the Premium Plan is \$850/month. It also includes unlimited support as well as a SmartConnect Bootcamp Pass and 4 hours of professional services per year.

**(Potential Answer 1) Customer:** We have a few more systems we're considering integrating. Can you send me pricing on the Premium Plan? If there is any benefit to pre-payment, please include that too.

**Partner:** Of course, and eOne does offer discounts for annual pre-payment. I'll send you an invoice, so you have the pricing with their annual pre-payment discount.

**(Potential Answer 2) Customer:** That sounds interesting, but right now I think we'll stick with our current plan. It seems like they have a great offer and we'll have a few extra benefits even with our current plan.

**Partner:** Sounds good. I'll send you the invoice for your monthly payment of SmartConnect and provide pricing for their annual pre-payment option, which would give you an extra 5% discount.

**Customer:** Perfect.



# SmartConnect

## For Customers on the Professional Subscription

*The goal of this guide is to assist you in having a conversation with your customer who currently uses SmartConnect on the SmartConnect Professional Subscription.*

**Partner:** Greeting

**Customer:** Greeting

**Partner:** As I was reviewing your account the other day, one thing caught my attention. Your team has utilized SmartConnect since [X date]. I believe it is a key solution for your team since it provides you with [describe their current use – for example: “it provides you with integrations between D365 Business Central and CRM” or “all your Excel journal entry integrations” etc.].

**Customer:** Right, I’d think we need to continue moving forward with that.

**Partner:** The reason this is coming up is because eOne, the creators of SmartConnect, has changed their monthly price – so they are providing options for you. The first option and the new plan that you would automatically be transitioned to is called the SmartConnect Premium Plan for a discounted rate of \$680/month. Its retail price is slightly increased to \$850/month; however, they’re offering a nice promotion for existing customers who have been on the Professional Subscription. They’re offering a 20% discount for one year to existing SmartConnect Professional Plan customers, and with this transition, you’d receive 2 additional connections for systems to integrate with, a SmartConnect bootcamp pass each year (valued at \$1,000), 4 hours of professional services (\$900 value) and unlimited support (\$1,200 value per year).

**Customer:** That’s interesting. What is the other option they’re providing?

**Partner:** The other option is to select a different plan at list price. eOne does offer a SmartConnect Business Plan that includes the use of up to 5 connections for \$550/month. The plan you’re on today includes 6 connections (systems you can integrate with), so we’d want to make sure it’s a fit for your integration requirements.

**Customer:** Great. What happens after the discount ends?

**Partner:** Good question. After the 12 months of the 20% discount, you’ll be moved to the retail list price for the plan that you’re on. eOne Solutions is offering this promotion so that customers have some extra time to budget.

**Customer:** That sounds good. What do you recommend?

**Partner:** My recommendation is to take advantage of the automatic transition to the Premium Plan. With your scenario, we want to ensure [you](#)'re set up well for the way you intend to use the product and are covered with the amount of connections needed. It's a good offer and savings for the next 12 months, especially with other scenarios you've considered [for](#) automating to save costs in your business.

**(Potential Answer 1) Customer:** We have a few more systems we're considering integrating. Can you send me pricing on the Premium Plan? If there is any benefit to pre-payment, please include that too.

**(Potential Answer 1) Partner:** Of course, and eOne does offer discounts for annual pre-payment. I'll send you an invoice, so you have the pricing with their annual pre-payment discount.

**(Potential Answer 2) Customer:** That sounds interesting. What happens if we elect a different plan and decide to upgrade at a later time?

**(Potential Answer 2) Partner:** Good question. If you need to upgrade later, you can. You would just be moving to the Premium Plan at the list price of \$850/month.

**(Potential Answer 2) Customer:** Good to know. I think we'll go with the SmartConnect Business Plan (or the Premium Plan) at this time.

**Partner:** Sounds good. I'll send you the invoice for your monthly payment of SmartConnect and provide pricing for their annual pre-payment option, which would give you an extra 5% discount.

**Customer:** Perfect.

# SmartConnect

## For Customers on the Premium Subscription

*The goal of this guide is to assist you in having a conversation with your customer who currently uses SmartConnect on the Premium Monthly Subscription.*

**Partner:** Greeting

**Customer:** Greeting

**Partner:** As I was reviewing your account the other day, one thing caught my attention. Your team has utilized SmartConnect since [X date]. I believe it is a key solution for your team since it provides you with [describe their current use – for example: “it provides you with integrations between GP and CRM” or “all your Excel journal entry integrations” etc.].

**Customer:** Right, I'd think we need to continue moving forward with that.

**Partner:** The reason this is coming up is because eOne, the creators of SmartConnect, has changed their monthly pricing plans. The good news is that while their plans [have changed](#), the level you're on hasn't increased [in](#) price. Today, you're on the Premium Plan, which is \$850 per month with access to 8 connections (systems you can integrate with). If you need more, you can add connections on for \$100/month/connection.

They did simplify a few things with their subscription pricing that are worth noting and [they](#) updated the benefits included. Starting January 2021, you'll have access to a SmartConnect Bootcamp Pass and have rights to 4 hours of services per year, in addition to your 8 connections and unlimited support. [Previously](#), they included a SmartConnect Bootcamp Pass on-site in Fargo, however given the times, they're now offering bootcamps completely online. It's a great option to learn the tool in-depth and understand other ways you can automate within your business and make the most of your investment.

**Customer:** Great. What are the next steps?

**Partner:** I'll send you the invoice for your monthly payment of SmartConnect.

**Customer:** Perfect.

# Popdock

## Customers Transitioning to the 2021 Plans

*The goal of this guide is to assist you in having a conversation with your customer who currently uses the Popdock Essentials, Standard, Professional or Premium Plan.*

**Partner:** Greeting

**Customer:** Greeting

**Partner [Popdock]:** As I was reviewing your account the other day, one thing caught my attention. Your team has utilized Popdock since [X date]. I believe it is a key solution for your team since you've been able to provide your team with the exact reports and data they need where they work – saving them [estimate time]. It's not something you want to stop using at this point as it is critical for your team.

**Customer:** Right, I'd think we need to continue moving forward with that.

**Partner:** The reason this is coming up is because eOne, the creators of Popdock, has changed their pricing model – so it's better aligned with the way customers are using it. The nice thing is that they never raise their prices without adding a benefit. So, as of January 2021, they've included their most popular feature – Popdock widgets – across all plans, and they've updated considerations around users.

**Customer:** Interesting. What does that mean for my users?

**Partner:** Up to this point, they've had plan pricing + a per user price which considered everyone who accesses Popdock data, whether it's a Popdock app user or someone accessing Popdock data via a widget for data that's embedded somewhere to view. This gets tricky to make sure you're licensed properly.

So, they've simplified some things and put some nice features within all plans. Their new model does not have a separate user price. They've introduced three plans: Popdock Basic, Business and Premium.

In all three plans, they're including unlimited widgets and unlimited widget users (so we can embed data wherever you'd like), their mobile app, web app and Excel add-in. Unlimited support is also included in all [three](#). There are a couple things to consider:

- How many total users would need to access the Popdock application.
- How many queries you'd use. (every time a list is open or a record in your system that has a Popdock widget embedded on it)

- And whether you'd need custom lists and actions. Those are both popular features that would be in the Business and Premium Plans.

**Customer:** Sounds inclusive. We probably have XX users in Popdock. What do I need to consider for queries?

**Partner:** Good question. A query happens when you open a list or when you first open a record in your system that has a Popdock widget embedded. So, for example, if you've embedded Invoices, for example on an account in CRM, you would likely want to consider how many times a user would open an account. If you're thinking of a salesperson who makes 30 calls a day, consider that they'd need at least 30 queries a day when you estimate.

**Customer:** Ok, that's good to know. Is there a way to monitor? Would I be alerted if I'm getting close to my limit?

**Partner:** Yes, eOne Solutions is alerting admins of their Popdock [query use](#) when they reach 80%, 90% and 100% of their query limit. They also have a health dashboard they're adding in early 2021 [so you can](#) monitor usage within app.

**Customer:** Great. What do you recommend?

**Partner:** Based on your scenario, user count and features needed, I'd recommend for you to be on the Popdock...

- Basic Plan for \$99/month – Since you don't have more than 5 Popdock app users and you won't need custom lists, this is a great starter level. Plus, at this point, I anticipate your users will use less than the query limit.
- Business Plan for \$199/month– This is where we anticipate most customers will start out since it includes the ability to use custom lists (lots of flexibility to pull data in across entities from one source or multiple sources) and actions, which allows you to take action on your data. This plan is generous with query limits and sounds like it will fit your total Popdock app user count.
- Premium Plan for \$399/month – This plan accounts for a lot higher volume of users and queries, all the features in the Business Plan with the ability to add on packs of queries for \$99/month or our performance feature, SmartCache for \$99/month.

I'll send you the invoice for what your monthly payment of Popdock will be as of January 2021.

**Customer:** Sounds good. If I need to upgrade or change something, can I do that later on?

**Partner:** Yes, of course. You can upgrade or update your account anytime.

**Customer:** Perfect.

## Content to Reference

on eOne's Partner Resources ([linked here](#))

- ✓ SmartConnect Pricing Guide (Available by Currency)
- ✓ Popdock Pricing guide (Available by Currency)
- ✓ eOne AEP Renewals Guide

## Have Questions?

Email eOne Solutions at [sales@eonesolutions.com](mailto:sales@eonesolutions.com) or give us a call at + 1 888-319-3663.

