



Sample Email Templates

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 emailing your customer who currently uses SmartConnect on the perpetual license model.

(Attach the SmartConnect Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and 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.].

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: Make no changes and renew your Annual Enhancement Plan. Since they’d made pricing changes in 2019 & given current situations for many customers, they’re offering a protected enhancement plan price of \$1,400 (what you paid last year) for two years.

The consideration with this option is that after two years, while you’d be able to continue to be able to use unlimited connections, your annual enhancement will be 20% of the new SmartConnect Business Plan (In 2021, that AEP price is \$2,200). Also all support is an add-on price.

Option 2: Your other option is to move to their SmartConnect Business Subscription Plan for \$200/month, which would be protected for 4 years. You’d be covered to still use the SmartConnect version you’re on (of on-premise) and would also have rights to access the cloud version, SmartConnect.com with 5 active system connections per deployment and unlimited support (\$1,200 value). This option will be offered January 4 – December 31, 2021.

With all your business is looking to accomplish this year, I'd recommend moving to the SmartConnect Business Plan. It would meet all your needs and set you up for the cloud.

Attached are two quotes for your review - one to move to the SmartConnect Business Plan and the other to renew as usual. I'd like you to take a look at each and join me on a quick call toward the end of the week.

Please let me know your availability and I can send a meeting invite your way.

[Personal Closing Greeting and Signature]

SmartConnect

For Customers on the Essentials Subscription

The goal of this guide is to assist you in emailing your customer who currently uses SmartConnect on the Essentials Subscription.

(Attach the SmartConnect Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and 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.].

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 (\$250/month) 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, their next plan level, the SmartConnect Business Plan will be the best fit. eOne Solutions increased the number of connections included to 5 with their middle-level plan and also added unlimited support in that plan, which today would be an add-on of \$100/month.

As a next step, I've attached the invoice for your monthly payment of SmartConnect for January 2021.

Please let me know if you have questions at all!

[Personal Closing Greeting and Signature]

SmartConnect

For Customers on the Standard Subscription

The goal of this guide is to assist you in emailing your customer who currently uses SmartConnect on the SmartConnect Standard Subscription.

(Attach the SmartConnect Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and 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.].

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 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.

Two additional benefits you'll receive starting January 2021 are:

- The use of up to 5 active system connections (today you have rights to 4 connections).
- Unlimited Support

This is the offer they'll grandfather you into and of course, if you'd prefer to opt into a different plan level at list price, that is an option for you, too.

Based on your needs, I'd highly recommend proceeding with the offer and I've attached the invoice for your monthly payment of SmartConnect for January 2021. If you'd prefer to pre-pay for the annual amount, they do offer an extra 5% discount.

Please let me know if you have any questions at all and if you'd like me provide an invoice for the annual amount, I can do that too.

[Personal Closing Greeting and Signature]

SmartConnect

For Customers on the Professional Subscription

The goal of this guide is to assist you in emailing your customer who currently uses SmartConnect on the SmartConnect Professional Subscription.

(Attach the SmartConnect Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and 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.].

The reason this is coming up is because eOne, the creators of SmartConnect, has changed their monthly plans - so there will be a transition for customers who are currently on the SmartConnect Professional Plan to the SmartConnect Premium Monthly Subscription, which is \$850/month. The good news is you will have a few added benefits and they’re offering a nice promotion for you.

They’re offering a 20% discount for one year to existing SmartConnect Professional Plan customers, so you’ll receive a discounted rate of \$680/month for a year with the added benefits of the SmartConnect Premium Plan.

Additional benefits you’ll receive starting January 2021:

- The use of up to 8 active system connections (today you have rights to 6 connections).
- A SmartConnect Bootcamp Pass (\$1,000 value)
- 4 complimentary hours of Professional Services from eOne (\$900 value)

This is the offer they’ll grandfather you into and, of course, if you’d prefer to opt into a different plan level at list price, that is an option for you too.

Based on your needs, I’d highly recommend proceeding with the offer and I’ve attached the invoice for your monthly payment of SmartConnect for January 2021. If you’d prefer to pre-pay for the annual amount, they do offer an extra 5% discount.

Please let me know if you have any questions and if you’d like me provide an invoice for the annual amount, I can do that too.

[Personal Closing Greeting and Signature]

SmartConnect

For Customers on the Premium Subscription

The goal of this guide is to assist you in emailing your customer who currently uses SmartConnect on the Premium Monthly Subscription.

(Attach the SmartConnect Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and 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.].

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 Premium Subscription plan does not include any change to the renewal price (\$850/month) and plan inclusions for what you have rights to today.

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.

As a next step, I’ve attached the invoice for your monthly payment of SmartConnect for January 2021. If you’d prefer to pre-pay for the annual amount, they do offer an extra 5% discount.

Please let me know if you have questions at all!

[Personal Closing Greeting and Signature]

Popdock

Customers Transitioning to the Basic Subscription

The goal of this guide is to assist you in emailing your customer who uses Popdock and recommending the new Popdock Basic Plan.

(Attach the Popdock Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and one thing caught my attention. Your team has utilized Popdock 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 consolidated multi-company reporting” “the ability to view ERP data in your CRM” or “user-friendly search and reporting between your historical data and current system” etc.].

The reason this is coming up is because eOne, the creators of Popdock, has changed their monthly plans. Generally, what’s changed?

- The Popdock Plans all now include one of their most popular features – the ability to embed Popdock data in other applications, where you work.
- There is no per user charge. There is a limit of Popdock app users per plan included with the plan price.
- All Popdock plans include unlimited widget users, so they aren’t counting users who view data embedded in other apps.
- There is a query limit by plan. It’s pretty generous, but we’ll want to consider that. (A query happens when you open a list or Popdock data in an app).

Based on your needs and what you’re looking to accomplish, I’ve consulted with eOne and they’re recommending that you move to the Popdock Basic Plan (\$99/month at list price) and as an existing customer, they’re offering a nice promotion for you to stay at your current list price until the end of June.

Here are a few benefits within the Popdock Basic Plan that you will receive in January 2021:

- Up to 5 Popdock app users
- Up to 1,000 queries/month
- The Popdock web client, mobile app, & Excel add-in
- Unlimited Popdock Widgets & Widget Users
- Unlimited Email & Phone Support

As a next step, I’ve attached the invoice for your monthly payment of Popdock for January 2021, as well as the Popdock Pricing Guide for your review.

Please let me know if you have questions at all!

[Personal Closing Greeting and Signature]

Popdock

Customers Transitioning to the Business Subscription

The goal of this guide is to assist you in emailing your customer who uses Popdock and recommending the new Popdock Business Plan.

(Attach the Popdock Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and one thing caught my attention. Your team has utilized Popdock 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 consolidated multi-company reporting” “the ability to view ERP data in your CRM” or “user-friendly search and reporting between your historical data and current system” etc.].

The reason this is coming up is because eOne, the creators of Popdock, has changed their monthly plans. Generally, what’s changed?

- The Popdock Plans all now include one of their most popular features – the ability to embed Popdock data in other applications, where you work.
- There is no per user charge. There is a limit of Popdock app users per plan included with the plan price.
- All Popdock plans include unlimited widget users, so they aren’t counting users who view data embedded in other apps.
- There is a query limit by plan. It’s pretty generous, but we’ll want to consider that. (A query happens when you open a list or Popdock data in an app).

Based on your needs and what you’re looking to accomplish, I’ve consulted with eOne and they’re recommending that you move to the Popdock Business Plan (\$199/month at list price) and as an existing customer, they’re offering a nice promotion for you to stay at your current list price until the end of June.

Here are a few benefits within the Popdock Basic Plan that you will receive in January 2021:

- Up to 20 Popdock app users
- Up to 10,000 queries/month
- The Popdock web client, mobile app, & Excel add-in
- Unlimited Popdock Widgets & Widget Users

- Custom & Standard Actions
- Custom Lists
- Unlimited Email & Phone Support

As a next step, I've attached the invoice for your monthly payment of Popdock for January 2021, as well as the Popdock Pricing Guide for your review.

Please let me know if you have questions at all!

[Personal Closing Greeting and Signature]

Popdock

Customers Transitioning to the Premium Subscription

The goal of this guide is to assist you in emailing your customer who uses Popdock and recommending the new Popdock Premium Plan.

(Attach the Popdock Pricing Guide & Invoice)

Hi [Customer Name] –

I recently reviewed your account and one thing caught my attention. Your team has utilized Popdock 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 consolidated multi-company reporting” “the ability to view ERP data in your CRM” or “user-friendly search and reporting between your historical data and current system” etc.].

The reason this is coming up is because eOne, the creators of Popdock, has changed their monthly plans. Generally, what's changed?

- The Popdock Plans all now include one of their most popular features – the ability to embed Popdock data in other applications, where you work.
- There is no per user charge. There is a limit of Popdock app users per plan included with the plan price.
- All Popdock plans include unlimited widget users, so they aren't counting users who view data embedded in other apps.
- There is a query limit by plan. It's pretty generous, but we'll want to consider that. (A query happens when you open a list or Popdock data in an app).

Based on your needs and what you're looking to accomplish, I've consulted with eOne and they're recommending that you move to the Popdock Premium Plan (\$399/month at list price) and as an

existing customer, they're offering a nice promotion for you to stay at your current list price until the end of June.

Here are a few benefits within the Popdock Basic Plan that you will receive in January 2021:

- Up to 300 Popdock app users
- Up to 50,000 queries/month
- Add-on additional 10,000 queries/month at \$99/month
- Add-on SmartCache (Performance Feature) for \$99/month
- The Popdock web client, mobile app, & Excel add-in
- Unlimited Popdock Widgets & Widget Users
- Custom & Standard Actions
- Custom Lists
- Unlimited Email & Phone Support

As a next step, I've attached the invoice for your monthly payment of Popdock for January 2021, as well as the Popdock Pricing Guide for your review.

Please let me know if you have questions at all!

[Personal Closing Greeting and Signature]

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 or give us a call at + 1 888-319-3663.

