

SAN Nurture Program Update



September 26, 2013

SAN Nurture Vision

To conduct all SAN marketing activities under an all-encompassing nurture framework that covers the entire member life-cycle

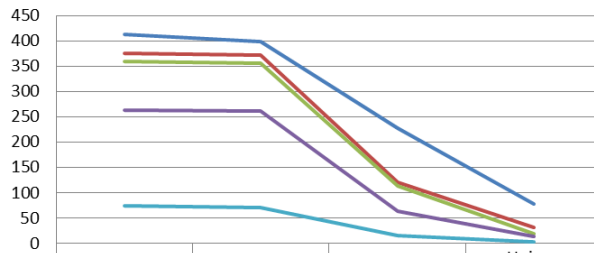
SAN Nurture – To be completed

- CA FR Welcome Nurture (SAN team)
- Develop assets for and launch US and CA Prospect Nurture (Content provided by SAN team - RPC to build and launch)
- Update and segment Prospect Database (RPC?)
- CA FR Trial Nurture for leads from CA French trial (RPC)

SAN Welcome Nurture Program Results

SAN US Welcome Nurture

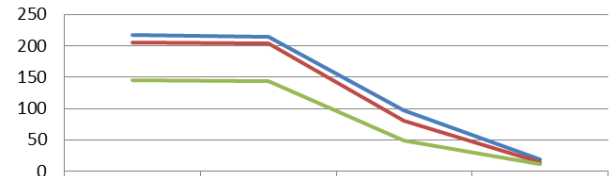
As of 9/23/2013



	Total Sends	Total Delivered	Unique Opens	Unique Clickthroughs
Welcome Email	413	398	227	77
Week 1 Email	375	372	121	32
Month 1 Email	359	355	113	19
Q1 Email	263	261	63	14
Q2 Email	74	70	15	3

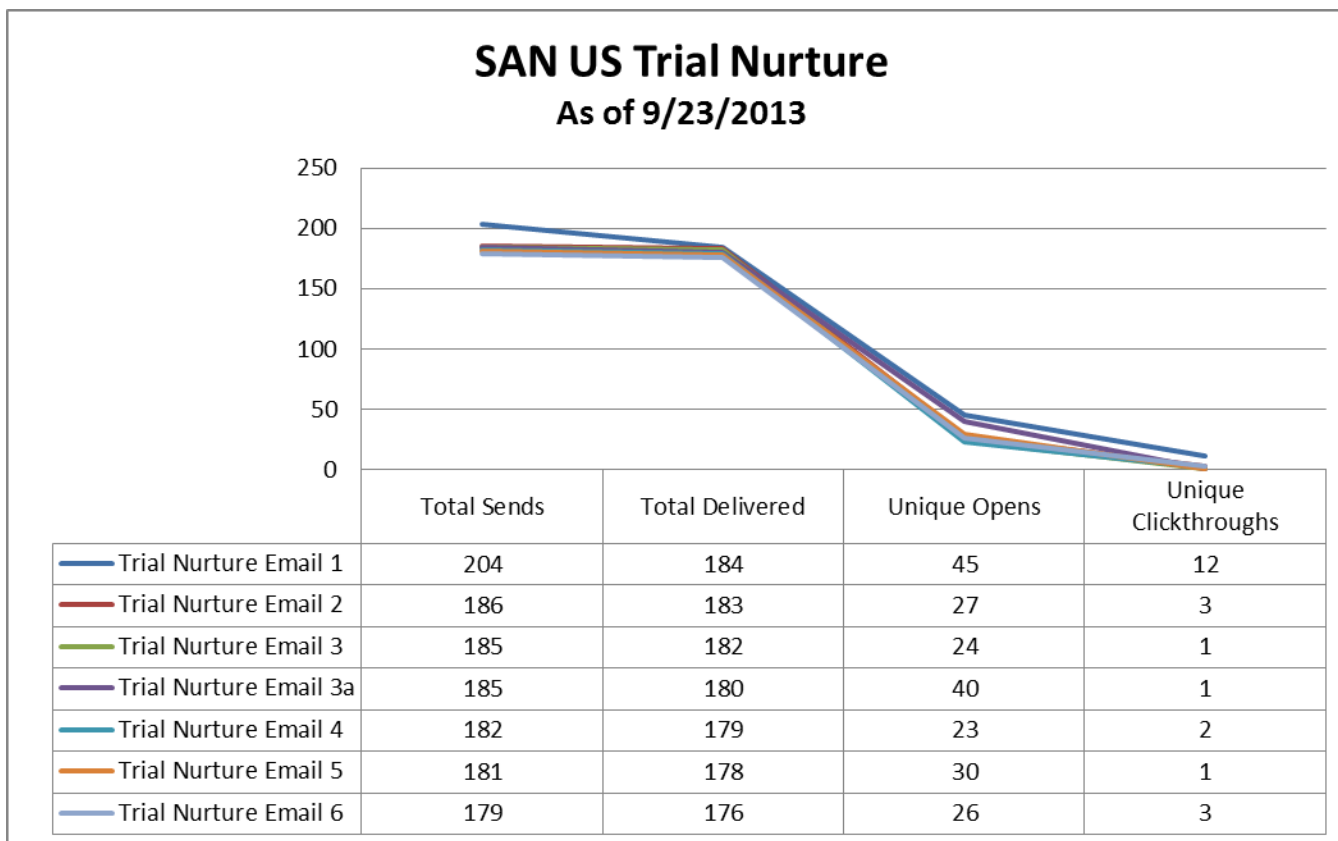
SAN CA Welcome Nurture

As of 9/23/2013



	Total Sends	Total Delivered	Unique Opens	Unique Clickthroughs
Week 1 email	217	215	97	19
Month 1 email	205	203	81	15
Q1 email	145	144	49	11

SAN Trial Nurture Program Results



SAN Nurture Current Activities

- **2013**

- **Renewal Nurture (Launched)**

- Designed to maintain SAN member base by reminding SAN member that their membership is expiring, and laying out the benefits of timely membership renewal

- **Trial Nurture (US launched Q3; CA launched Q4)**

- Nurture programs to engage and attempt to convert SAN-eligible prospects who download Sage 50 trials
 - Focused on “how to” information for using software, but each email will also communicate the benefits of SAN membership

- **Welcome Nurture (US Launched; CA EN Launched; CA FR FY14)**

- Begins when a new member joins SAN
 - Over the course of the first 9 months of membership, provides new Sage 50 SAN member with information on how to use the software, benefits of membership, and other information that will add value to the first year of SAN membership
 - Goal is to improve the SAN member experience, maximizing the value of the SAN program to the member, to lead to higher renewal rates in subsequent years

- **Prospect Nurture (Phase 1 launches FY14 Q1)**

- Prospects will be fed into this stream from the SAN Accountant Database – a database that will, in time, approach all accounting firms in the US and CA
 - Main goal is to provide useful information to SAN-eligible prospects, that will be useful to them whether they join SAN or not; This will establish SAN as a thought-leader and trusted ally in running their firm
 - Each nurture step will include a mention of the SAN program, but will not include hard-sell language in most steps
 - Will eventually include the acquisition program as the first step of this stream

SAN Nurture Future Plans

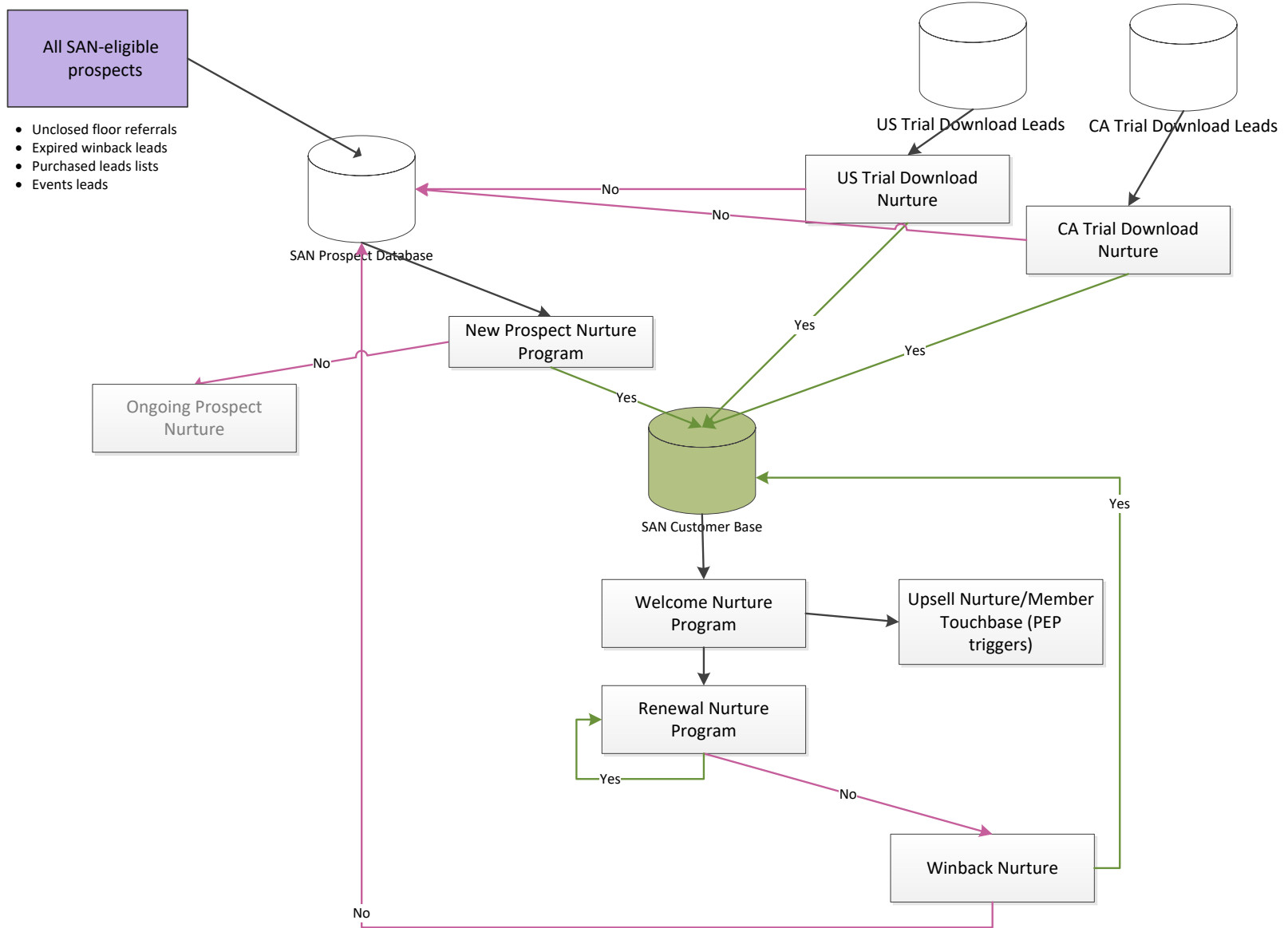
- **2014**

- Add triggered email and scoring capability to programs
- Subsequent Prospect Nurture
 - Additional and more sophisticated Prospect Nurture streams will be added throughout 2014
 - Program will be grown and refined to include all acquisition activity within SAN
- Upsell Nurture
 - Nurture stream will be developed to upsell SAN members on higher levels of SAN (future program feature), training, and certification
- Development of segmented Nurture programs, to address specific needs of bookkeepers vs. accountants

- **2015**

- Fully automated marketing program that covers entire SAN member lifecycle
- New or newly discovered accountants and bookkeepers will be fed into the prospect database, which will launch them into the lifecycle stream
- Coordinated program that includes all marketing touches to SAN members and prospects
- Any new marketing activity to SAN members/prospects will be launched as part of Nurture program; No marketing activity will occur outside of this framework

Overall SAN Nurture Program



Prospect Database



US Metrics as of 6/14/2013 (Companies normalized)

Original List	220,000		
Total Contacts	97,580		
Total Companies	67,732		
Email	24,883		
Email or Phone	48,631		
Address only	18,319		

CA Metrics as of 6/14/2013

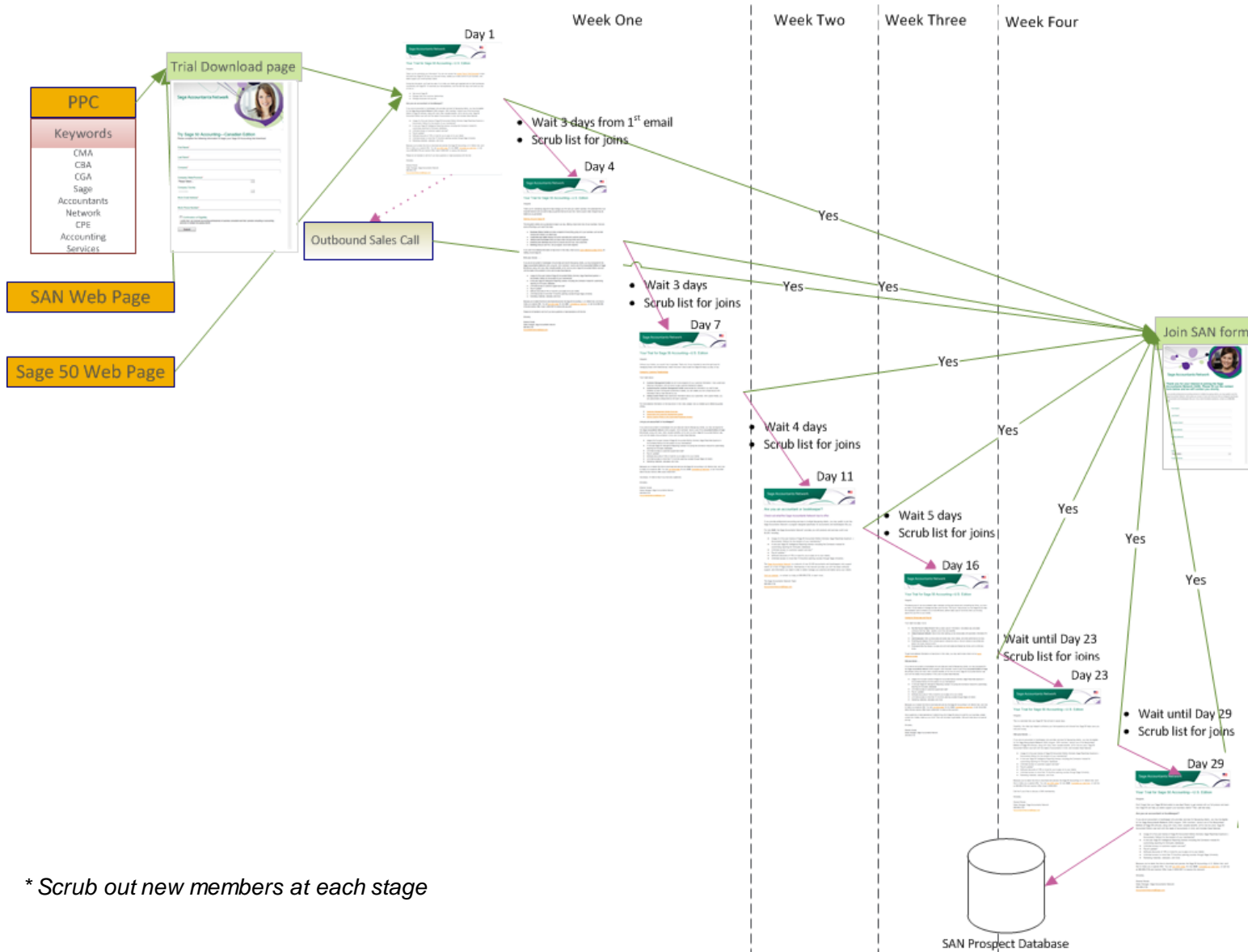
Original List	13,000
Total Contacts	9,646
Total Companies	5,565
Email	2,742
Email or Phone	5,565
Address only	-

Trial Nurture



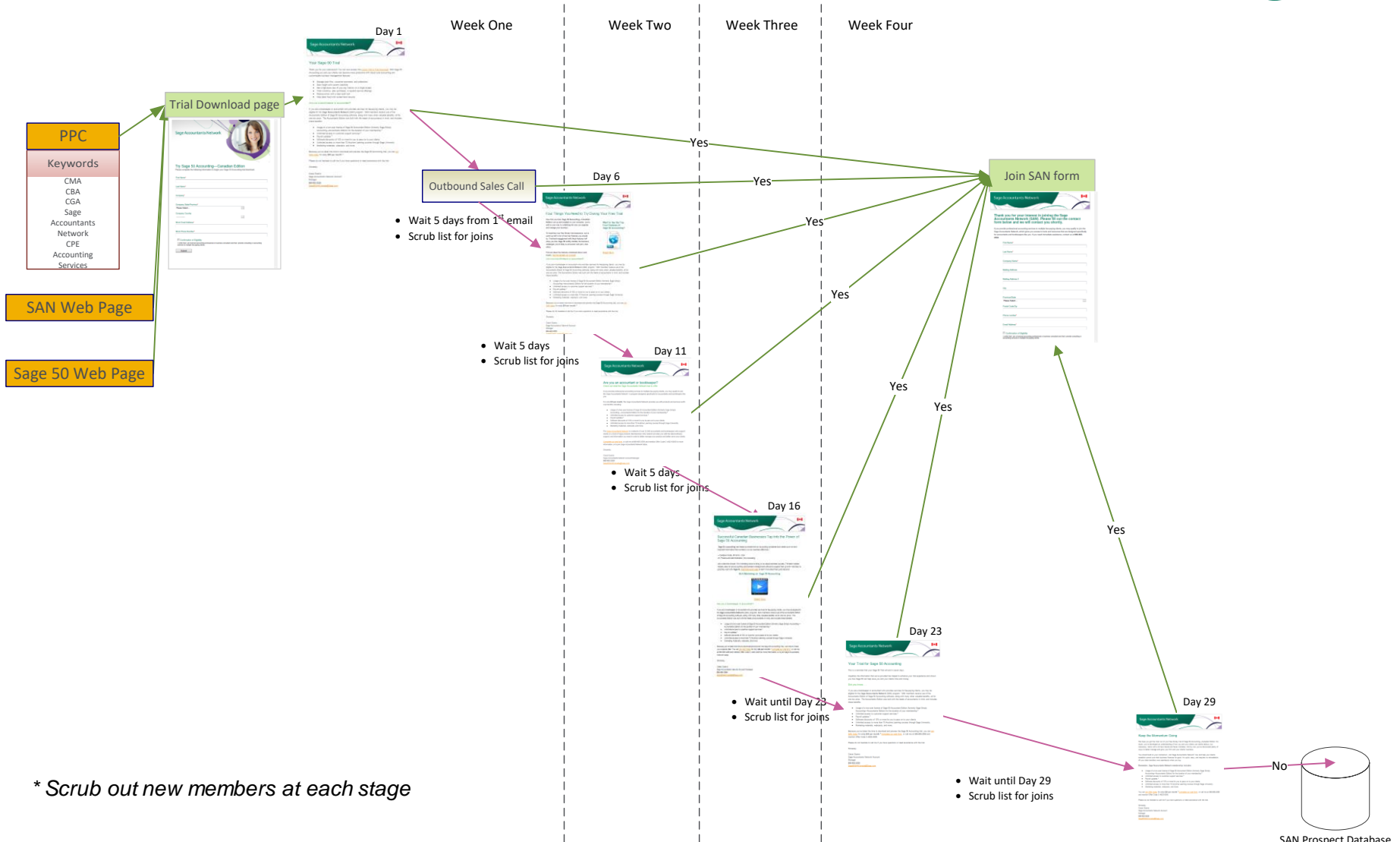
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- SAN Trial Nurture will begin with single path for Trial Download and Test Drive, and will treat Responders and Non-Responders the same – Future iterations will add split paths
 - Emails will appear to come directly from the sales rep or sales manager
 - All trial leads will now go to same place and receive consistent treatment
 - Previously US and CAN leads, and leads from various programs, were going into separate buckets (see below)
 - Campaign code will be added to form data “behind the scenes”, to provide necessary identification info to sales team
 - Current Trial Nurture lead sources:
 - Sage 50 US Web page
 - Prospect who indicates they are SAN-eligible (Primary Role = Outside Accountant or What is Your Industry = Accounting Services)
 - Previously included in Sage 50 Product Nurture and leads passed to SAN Sales team
 - SAN US Web page, including PPC
 - Prospects who register for Sage 50 trial through SAN US web page
 - Previously leads passed to SAN Sales team, but did not flow into any nurture stream
 - Sage 50 Canada Web page
 - Prospect who indicates they are SAN-eligible
 - Previously leads were sent to SAN Sales team to call, but did not flow into any nurture stream
 - SAN Canada Web page
 - Prospects who register for Sage 50 trial through SAN US web page
 - Previously leads passed to SAN Sales team, but did not flow into any nurture stream

SAN US Trial Nurture



* Scrub out new members at each stage

SAN CA Trial Nurture



SAN Prospect Nurture



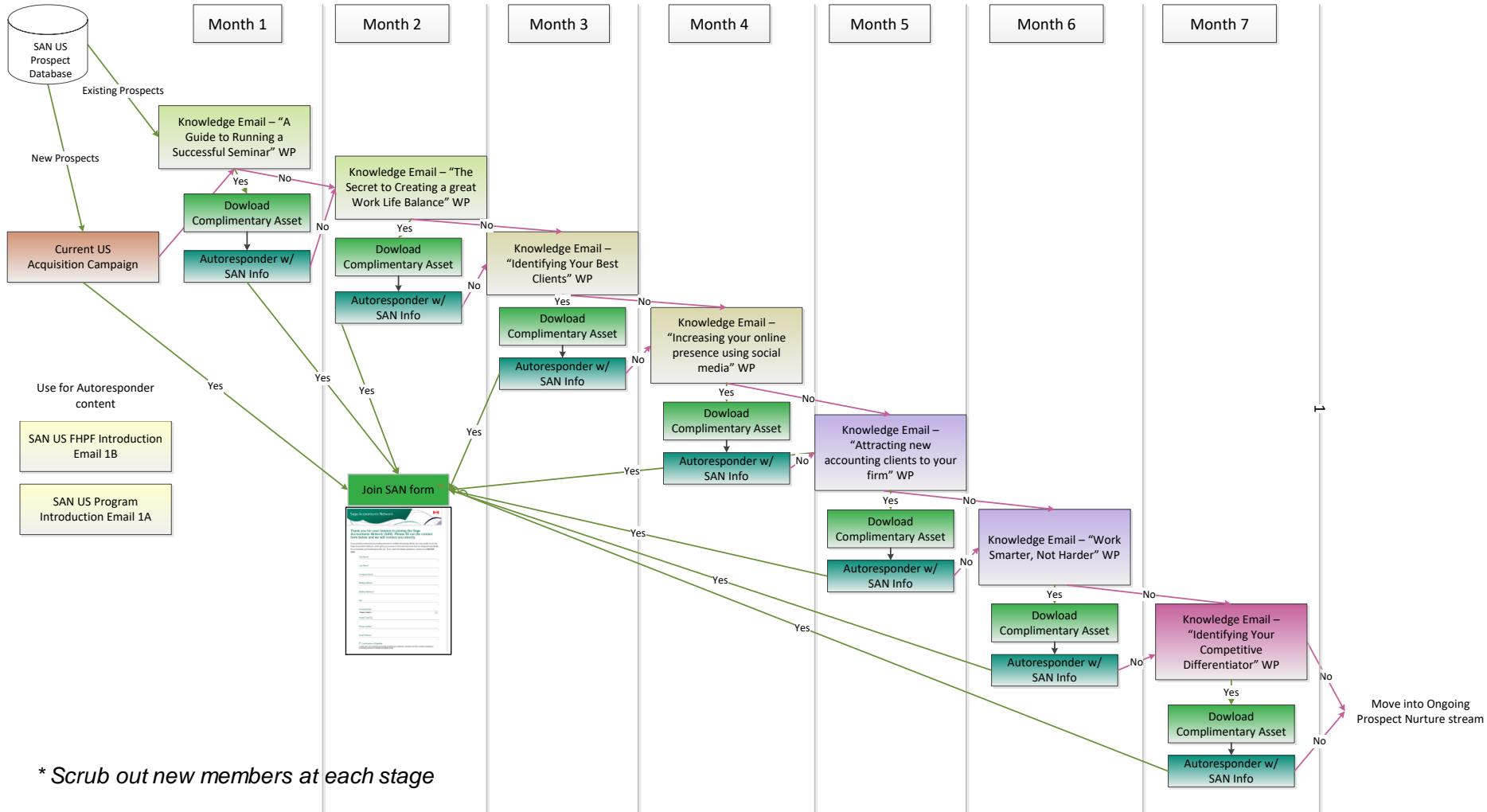
Prospect Database:

- Will initially consist of data already owned by SAN team, with additional contact information being added as it becomes available
- Database will cover US and CAN
- Goal is to approach inclusion of every SAN-eligible firm in US and CAN
- Currently, the SAN team has approximately 110k US contacts and 10k CA contacts
 - Data has been cleaned and de-duped
 - Approximately 1/3 of records contain email address
 - We will include all records in database, with goal of filling in missing info (especially email address) as it becomes available
 - Working with new OneSource initiative, fill in data and segmentation fields

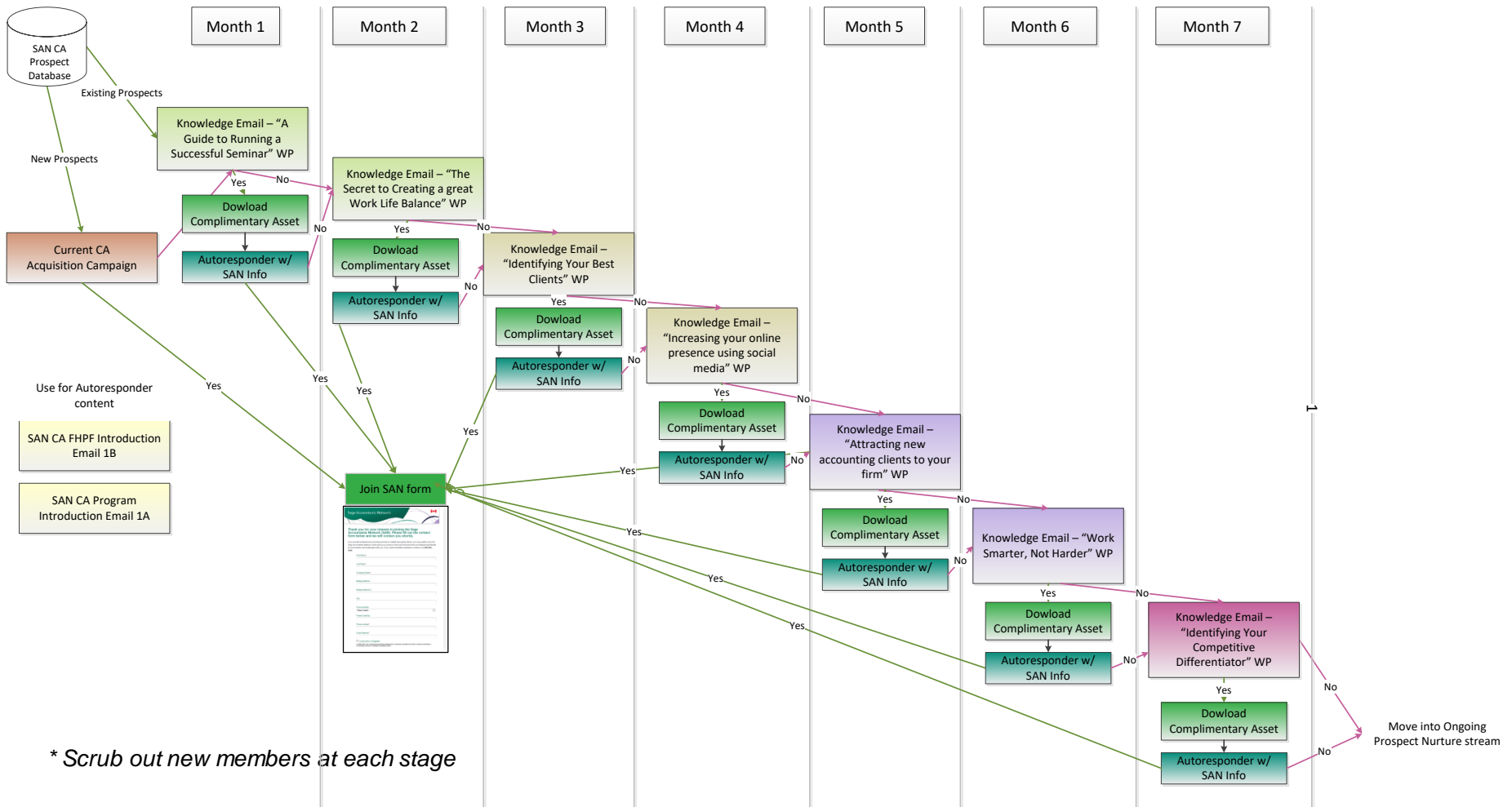
Prospect Nurture:

- Knowledge Leader position for SAN with accountants and bookkeepers
 - Periodic touches with info that will help make life easier for the accountant and bookkeeper
 - Tips on running their firm
 - Compliance information
 - Any other information of interest to prospective SAN members
 - Each email will provide contact information for SAN – won't actually discuss SAN membership
 - Auto-responder emails after any asset download will also contain SAN info
 - All prospect nurture information provided to prospects should be just as valuable to recipient if they never join SAN
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SAN US New Prospect Nurture

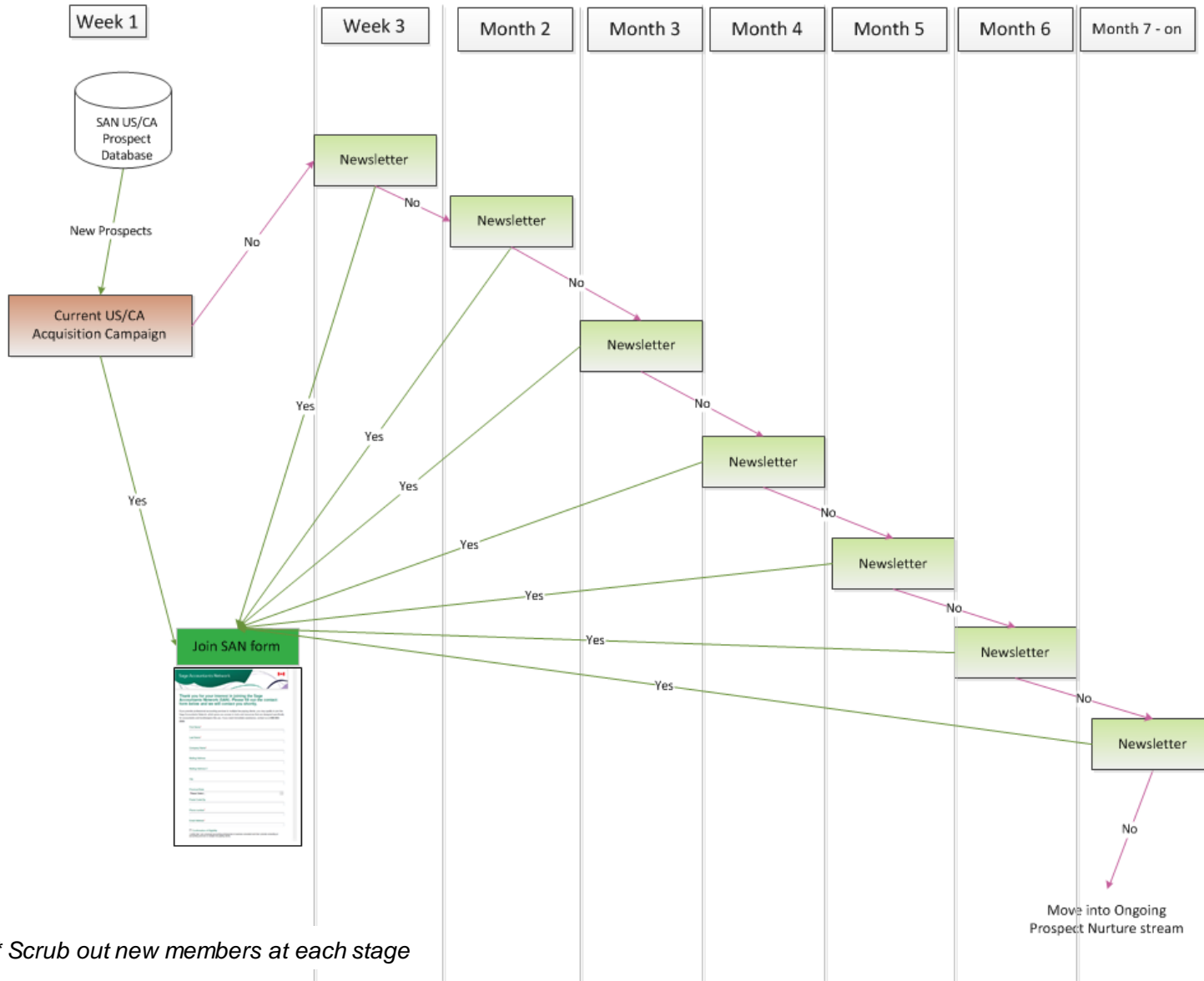



SAN CA New Prospect Nurture



Sage Accountants Network

SAN NA Outsourced New Prospect Nurture



* Scrub out new members at each stage

Welcome Nurture



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- U.S. Welcome Nurture – Completed 2/15/13
 - 69 U.S. SAN members have started the 9 month program
 - 30.4% unique open rate
 - 10.1% unique click-through rate
 - Canadian English Welcome Nurture
 - Canadian French Welcome Nurture
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Previous SAN Welcome

- One email sent to new member with all information on program
- Welcome webinar held periodically in CA; Discontinued in US due to lack of resources

Sage Accountants Network

Welcome to the Sage Accountants Network!

Below is some information for your interest including contact information, training resources and special offers available to Simply Accounting business partners. You'll receive a separate email with the confirmation of your order for the Simply Accounting Business Partner Program. For your convenience, your membership is set up for automatic renewal. However, if you plan to make any changes in the meantime, please let us know before the expiry date of your membership.

The serial number and activation codes will be emailed to you separately. A physical CD will be shipped to you today. In the meantime you can **download the full version of the Accountants' Edition 2012** by clicking on the link below.

As a Simply Accounting **Premier Advisor** you can now keep up on the latest advances in technology, increase your business referral network and deliver value-added services. Below is your **Partner ID number**, which will easily identify you as a Business Partner. Please use this ID in any communication with Simply Accounting.

Partner ID: [REDACTED]

SA Accountants Edition 2012

Link to download: [SA AE 2012 download link](#)

Please use these activation codes when installing the software:

Serial number:

Keycode: [REDACTED]

Payroll id: [REDACTED]

Important note: Please note that this license is only for your business and you are not allowed to install the software in any of your customer's computers. Infringement of this clause will terminate the license and membership to the Sage Accountants Network.

This Membership fee is not refundable.

You are going to receive via priority mail the full Accountants' Edition 2012 as well as the information about the Business Partner Program. With this Accountants' Edition, you are going to be able to open and create any file from the Simply Accounting product range (First Step, Pro, Premium and Enterprise).

Your annual subscription also gives you access to the following advantages :

- Unlimited and priority access to technical support
- Payroll tax updates and product upgrade
- Trial CD's for your clients
- Discount (10%) for your clients when purchasing our products
- Free online training sessions
- Web listing referral in the section « Find a consultant »

SAN Priority Phone Line:

Simply Partners have an exclusive phone number, it's the only number you need to quickly reach the Simply Business Partner Team, access customer service or priority technical support.

1-866-665-2559 (Option 1 for English)

- Option 1 – Membership Renewal or Sales for new or existing clients
- Option 2 – Prioritized Technical Support
- Option 3 – Customer Service
- Option 4 – Relationship Manager

For any inquiries regarding the SAN Program or any specific need related to your account please contact the SAN Team at simplyaccountingpartners@sage.com

Training:

Anytime Learning: Simply Accounting Partners can now learn about various product features using our new interactive training sessions for free! You can access these sessions at [Sage University - Simply Accounting 100% Partner Discount Link for Premier Advisors](#)

Free Anytime Learning Tutorials: You can learn about various product features using our additional pre-recorded training webinars. With these pre-recorded sessions, you can learn at your own pace and when it's convenient for you. To view these sessions please visit <http://sageu.com/simply06.html>

Technical support tips: You can also find technical support tips, including videos on year end procedures and how to change your tax rate at <http://www.simplyaccounting.com/support/tips/>.

Classroom training: We also offer classroom training Canada-wide for all Simply Accounting users. Please visit our website for more information <http://www.simplyaccounting.com/support/training/training>

Cheques & Forms Referral Program:

You may now take advantage of the Simply Accounting Cheques & Forms Business Partner Referral Program. Your clients will receive a 25% discount for their cheque orders or you can receive a commission for each client order. Please see the enclosed document for more details.

Partner Portal:

Here you will find great information about our programs and resources available to you.

Step 1

Log in the Partner Portal and change your password

Please find below your login information for our new Partner Portal, here you can visit the partner discussion forum, view the graphics library or research the other Simply Accounting resources available to you.

Your login information is:

Temporary password is [REDACTED]

(The first time you log in you will be prompted to change it to a permanent one) Please see email attached for more information.

The link to log in is <https://partners.sagenorthamerica.com/>

Step 2

Change your web listing profile

Please log in to make changes in your profile using your user login information (email address) and the password you just created. Please note that we can't make any changes to this profile.

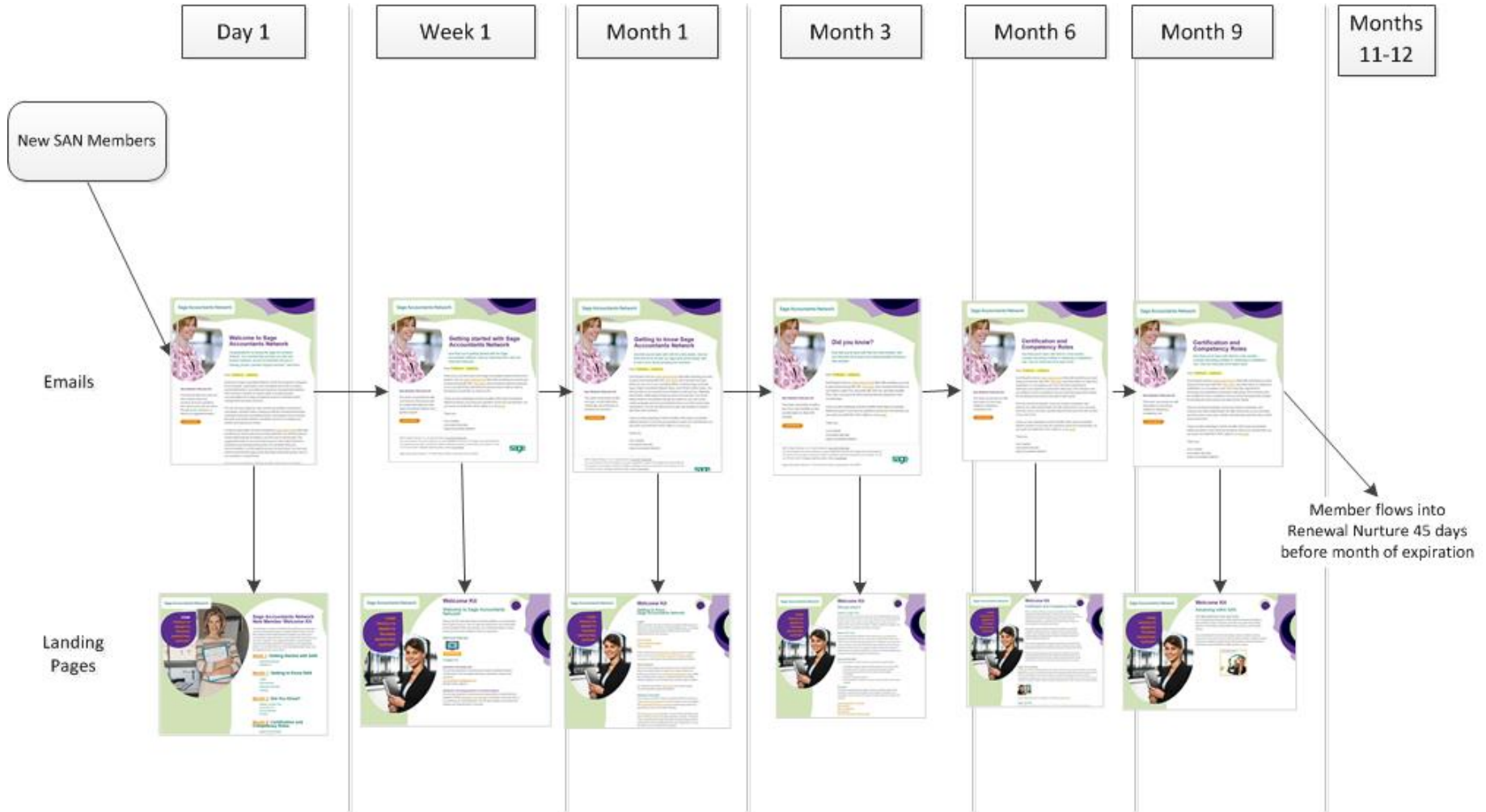
The link is <http://refinery.sage.com/partners/> (Choose Simply Accounting by Sage Partners)

Please allow 24-48 hrs. for your web profile to be uploaded into the site.

Thanks and have a nice day!

On behalf of the Sage Accountants Network,

SAN Welcome Nurture

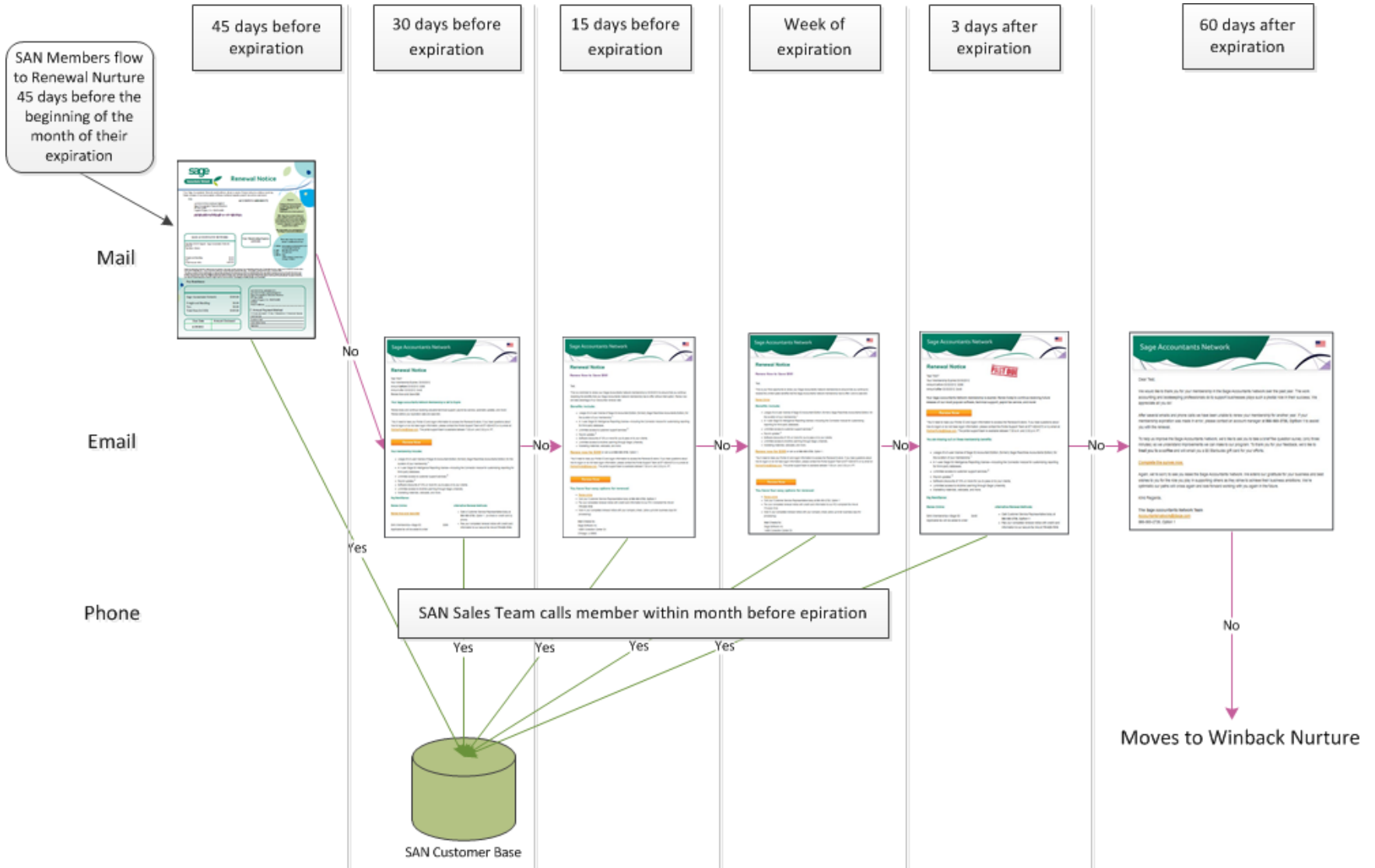


Renewal Nurture



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- U.S. Renewal Nurture
 - Launched 3/6/13
 - Canadian English Renewal Nurture
 - Launched 4/5/13
 - Canadian French Renewal Nurture
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Renewal Nurture



Winback Nurture



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- Targeted at past SAN members who have been expired for 3 months or more
 - Will focus on reminding member how valuable a SAN membership can be
 - Lead is fed into stream upon 3 months after expiration, and stays in stream for 5 months
 - If lead does not convert as a result of the Winback Nurture effort, will flow to Prospect database, to be nurtured further there
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SAN Winback Nurture

