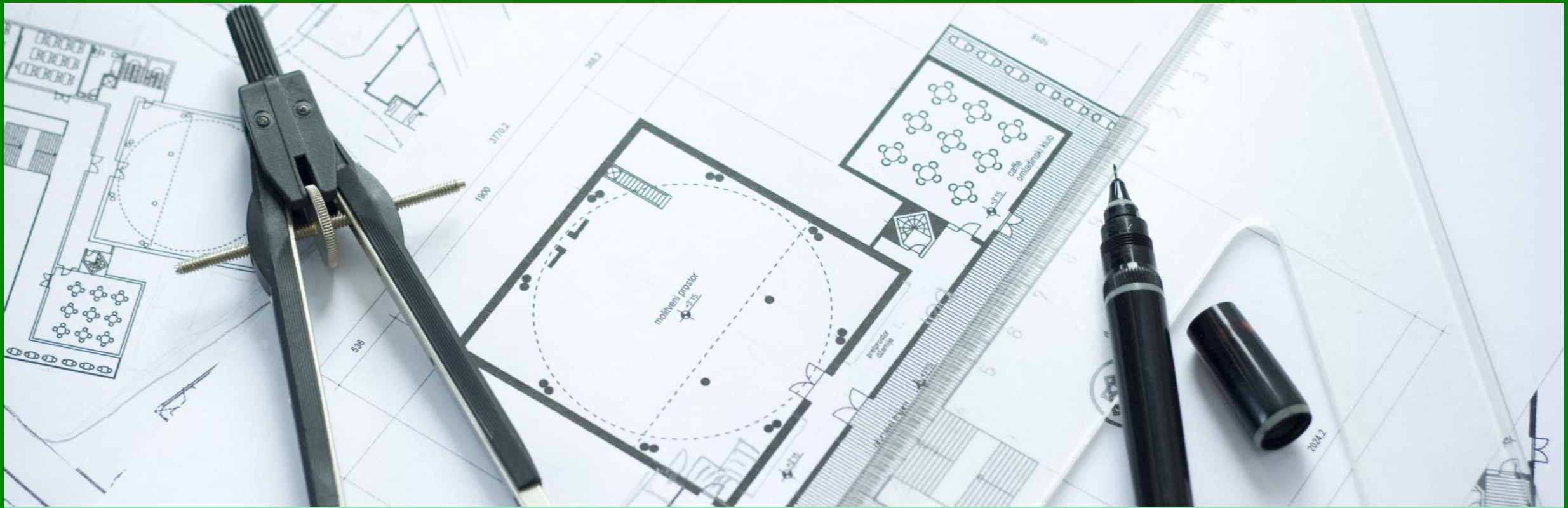


CARET PORTFOLIO

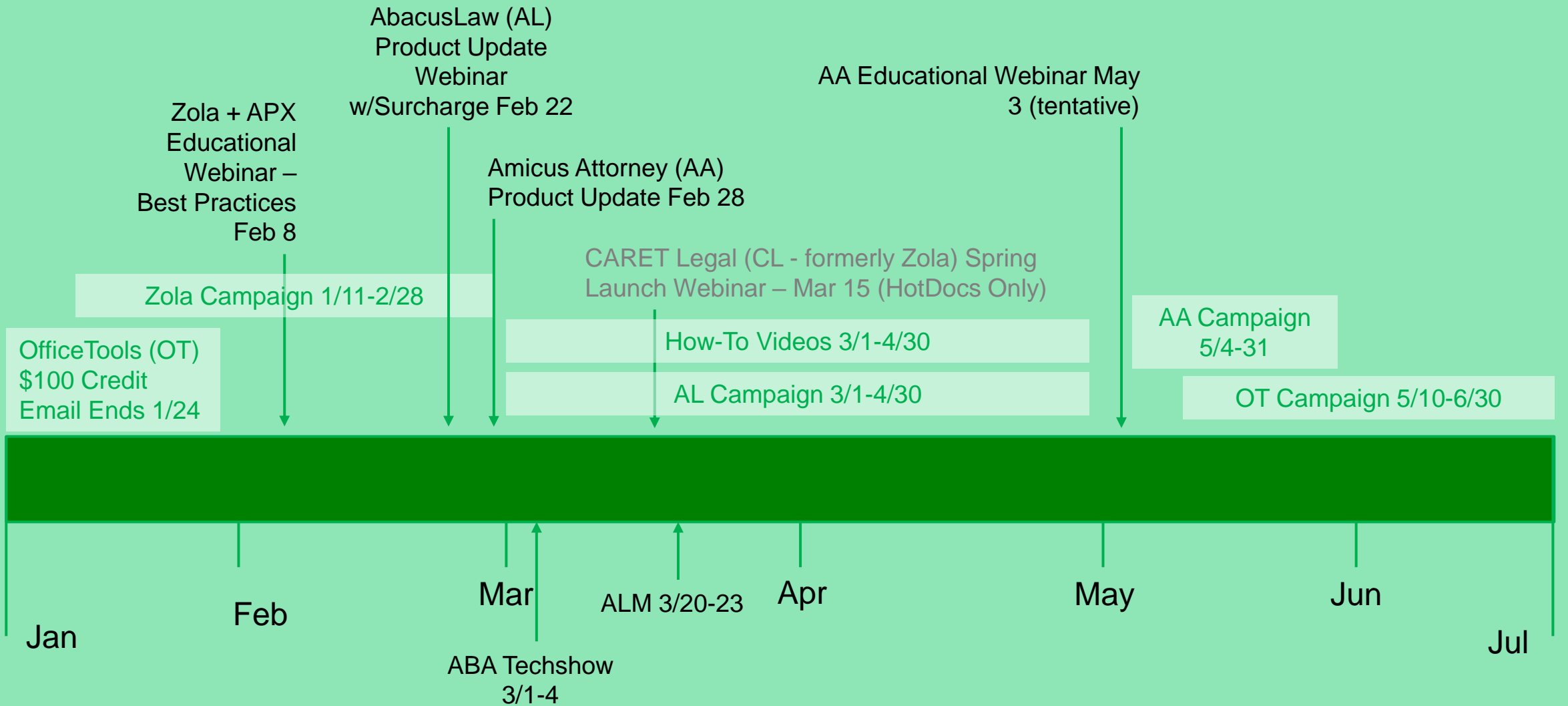
Myrna Baker



SAMPLE PAGES

APX H1 2023 Plan

APX H1 2023 Marketing Plan Overview



APX Free Cost Analysis for Zola Users Campaign January 11-February 20

Opportunity: In October, LawPay increased their rates from 1.95% - 2.95%.

Objective: To reveal cost savings and convert Zola LawPay customers to APX!

Strategy: Integrated campaign – get a free cost analysis/merchant statement check-up on processing fees for Zola customers. We will not call out LawPay. Which would prevent any legal repercussions.

Tactics:

1. (4x) Emails starting 1/12
 - Email #1: Free Cost Analysis; Address Simon & Kucher Findings
 - Email #2: Infographic
 - Email #3: Bonin and Kaster Case Study
 - Email #4: Newman & Lickstein Case Study – NEW
2. In-App Promotion – Leverage Pendo to include messages to Zola customers to check their fees if they don't use APX
3. Social Media




Now more than ever, we can beat LawPay on pricing!

APX Free Cost Analysis for Zola Users Campaign Samples

CARET
36,778 followers
6mo • 🌐

Lately, many Zola customers are shocked to discover they are paying more for credit card processing with an outside payments provider. Get a free cost analysis from our team of experts and find out what you are really paying and how you can save with APX! Learn more - fill out the form on <https://hubs.li/Q01yjb8d0>.



15 2 reposts

Like Comment Repost Send

Free Cost Analysis Campaign Post

APX vs. Competitor


On average, APX firms can save \$2,100 based on \$300K of annual volume!

| | APX | Competitor |
|---------------------|--------|---|
| Visa/MasterCard | 3.0% | 2.97% - 3.01% 2.95% + Assessments + Per Trx |
| American Express | 3.0% | 3.67% - 3.97% 3.50% + Assessments + Per Trx |
| Per Transaction Fee | \$0.00 | \$0.20 |
| ACH / eCheck | \$1.00 | 1.0% (Max of \$10) |
| Monthly Fee | \$0 | \$20 |

Monthly Cost Based on Payment Split of: Card 75% and ACH 25%*

| | APX | Competitor | Competitor-APX |
|---------------------------|--------------|--------------|----------------|
| Card Fees | \$563 | \$765 | \$212 |
| Assessments | \$0 | \$35 | \$35 |
| ACH Fees | \$4 | n/a† | (\$4) |
| Monthly | \$0 | \$20 | \$20 |
| Total Monthly Cost | \$567 | \$820 | \$263 |
| Payment Volume | \$25,000 | \$25,000 | |
| Effective Cost | 2.27% | 3.28% | 1.01% |

* Average ticket of \$1,408 with 4 ACH (e-check) transactions. Costs are based on average APX portfolio payment mix.
† Zola Integrated with Competitor is 100% card, no ACH option.



Comparison Grid

CARET
36,773 followers
2mo • 🌐

Payment processing statements are complicated. Let us uncover your true cost and ensure you get the best rate with APX. <https://hubs.li/Q01Nvv4f0>

APX vs. LawPay


On average, APX firms can save \$2,100 based on \$300K of annual volume!

| | APX | LawPay |
|---------------------|--------|---|
| Visa/MasterCard | 3.0% | 3.03% - 3.11% 2.95% + Assessments + Per Trx |
| American Express | 3.0% | 3.92% 3.75% + Assessments + Per Trx |
| Corporate/Business | 3.3% | 3.02% - 3.11% 2.95% + Assessments + Per Trx |
| Per Transaction Fee | \$0.00 | \$0.20 |
| ACH / eCheck | \$2.00 | 1.0% (Max of \$10) |
| Monthly Fee | \$0 | \$20 |

Monthly Cost Based on Payment Split of: Card 75% and ACH 25%*

| | APX | LawPay | LawPay-APX |
|---------------------------|--------------|--------------|--------------|
| Card Fees | \$568 | \$778 | \$210 |
| Assessments | \$0 | \$23 | \$23 |
| ACH Fees | \$4 | n/a† | (\$4) |
| Monthly | \$0 | \$20 | \$20 |
| Total Monthly Cost | \$572 | \$821 | \$249 |
| Payment Volume | \$25,000 | \$25,000 | |
| Effective Cost | 2.28% | 3.28% | 0.99% |

* Average ticket of \$1,408 with 4 ACH (e-check) transactions. Costs are based on average APX portfolio payment mix.
† CARET Legal Integrated with competitor is 100% card, no ACH option.



APX vs. LawPay Post

Zola + APX Webinars

Join forces with the Zola/CARET Legal product and marketing team to produce an engaging webinar that includes APX. Contingent on the content and timing of the Zola – CARET Legal Spring Launch Webinar, we propose to have an alternative educational webinar. If possible, we'd like to try to get our new case study customer to talk about Zola + APX during one of the webinars.

APX + Zola Educational Webinar II – Best Practices

Timing: February 8.

Agenda:

- General Zola tips and tricks
- Payment tip: Check your merchant statements – mention Simon Kucher study that revealed people think LawPay (will not mention name) is lower in rates
- Saving time and money with a built-in payment function in Zola (includes APX demo)
- Feature: Newman & Lickstein (tentative)
- Q & A

and
/ or

Zola – CARET Legal Launch & Update Webinar

Timing: March 15

Overview: Name change and features update; customer testimonial touting Zola + APX, if not promote case study.

Agenda:

- CARET Legal Name Change
- Features Update
- APX Free Cost Analysis Promotion
- Featured Customer: Newman & Lickstein (tentative)
- Q&A

Continue to piggyback on product activities for maximum impact.

2023 Early Results

OfficeTools January Campaign Jan 6-23

Final push with 2 tailored emails from APX reps.

- Target: 501 users without APX
- Emails: 27.19% avg open rate | 0.20% avg click rate
- Results: **22 deals** out of the 60 days won Dec-Jan

Zola Free Cost Analysis Campaign Jan 12-Feb 23

Win over LawPay via email, social media, comparison chart & webinar

- Target: 8,500 users without APX
- Emails: 23.23% avg open rate | 1.12% avg click rate
- Jan Results: **18 deals; 12 deals converted** over from LawPay

Zola Best Practices Webinar Feb 8

Content: APX, new features, FAQs demos, sneak peak & brand update

- Target: 1,285 all Zola users
- Emails: 27.6% avg open rate | 1.73% avg click rate
- Results: 27 APX inquiries; **65 interested to learn more**; 2nd most popular feature

Up Next:

- AbacusLaw Webinar & Campaign – starts February 22
- OfficeTools Monthly Emails – starts February 23
- Amicus Attorney Product Webinar Support – February 28
- Amicus Attorney Educational Webinar & Campaign – starts May 3
- OfficeTools Summer Campaign – starts May 15

Collaboration with Sales & Product Teams = Success!

APX Surcharge in AbacusLaw

Available January | Webinar Announcement 2/22

Opportunity: Surcharge will be available in AbacusLaw (AL) next release in January. Anecdotally, surcharge is a key feature for AL customers in order to start accepting credit cards. In fact, the product team has heard from a few customers that are requesting 100% of the cost covered with surcharge.

Objective: To convince AL customers that using APX will be beneficial for their bottom line. Additionally, we need to simplify the process since they need integrated AL Accounting to get APX.

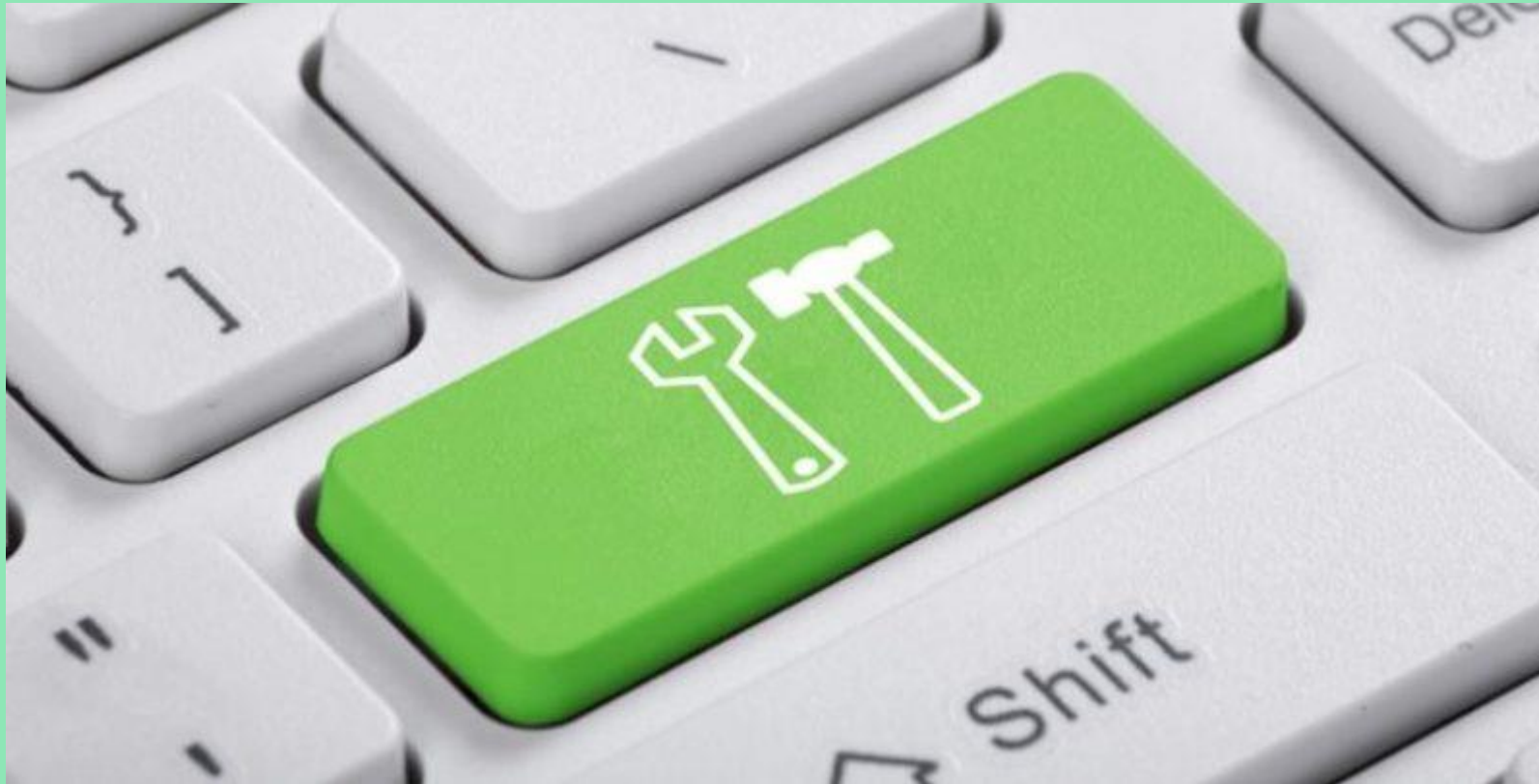
Strategy: Duplicate tools used for the OfficeTools surcharge launch. We will promote surcharge during the webinar since many are asking for it and our adoption for APX with AL customers has been the smallest

Tactics:

1. AL Product Update Webinar – 2/22
2. Surcharge tools: messaging, email template, video, customer support site, and training
3. Surcharge & Cost Saving Email Outreach – 4x emails starting 3/8
4. Infographic – Cost Savings (same one as Zola)
5. Infographic – AL APX Process that includes AL Accounting



Leverage surcharge and convince AL Users on APX cost savings.



SAMPLE SALES TOOLS

Tracking Sheet, Rate Sheet, Presentation Graphic

Feb-Apr: OfficeTools – Monthly Outreach Emails

List Criteria: All active OfficeTools (OT) users without APX accounts. Divided evenly between the 3 APX reps.

TEAM TRACKING SHEET - INTERNAL

Legend: ● On Track | ● Needs Attention | ● In Jeopardy

| Date | Deliverable | Activity | Owner | Content & Support | Status | Update |
|-----------------|--------------------------|---|--------------|---|--------|---|
| 2/9-23: W-W | OT Monthly APX list #1 | List of OT users without APX divided between 3 APX reps | Myrna Baker | Tanya Tom – list Sheila Grant – load list Jim Maddon – review | ● | 2/15: Modification emailed – now diving it among 3 reps |
| 2/23: Th | OT email #1 | Make a splash with OfficeTools | Myrna Baker | Sheila Grant | ● | |
| 2/24: F | Open OT email list #1 | Open email list to help reps prioritize follow-up | Sheila Grant | Myrna Baker or Sheila Grant | ● | |
| 3/8-15: W-W | OT Monthly APX list #2 | Refreshed list of OT users without APX divided between 3 APX reps | Myrna Baker | Tanya Tom – list Sheila Grant – load list Jim Maddon – review | ● | |
| 3/16: Th | OT email #2 | OfficeTools Users – Surviving Tax Season? We'd Love to Help. | Myrna Baker | Sheila Grant | ● | |
| 3/17: F | Open OT email list #2 | Open email list to help reps prioritize follow-up | Sheila Grant | Myrna Baker or Sheila Grant | ● | |
| 4/12-19: W-W | OT Monthly APX list #3 | Refreshed list of OT users without APX divided between 3 APX reps | Myrna Baker | Tanya Tom – list Sheila Grant – load list Jim Maddon – review | ● | |
| 4/20: Th | OT email #3 | OfficeTools Users – It's Time to Get Paid! | Myrna Baker | Sheila Grant | ● | |
| 4/21: F | Open OT email list #3 | Open email list to help reps prioritize follow-up | Sheila Grant | Myrna Baker or Sheila Grant | | |

C^RET

APX Rate Sheet

| | Effective April 1, 2023* |
|---|-----------------------------|
| Visa / Mastercard / Discover Cards Rate (per transaction) | 3.0% Fixed |
| Corporate/Business Cards & American Express Rate (per transaction) | 3.5% Fixed |
| All International Transactions (applies to international credit and debit cards) | Additional 1.5% |
| eChecks / ACH | \$2.00 |
| Additional Processing Fees | None |
| Payments to Trust Accounts | Yes |
| Settlement Time for Cards and ACH / eChecks | 2 Business Days |
| PCI Compliance Integrated into CARET software | Yes |

* Additional fees only apply to international credit and debit cards. ACH maximum transaction size is \$20,000.

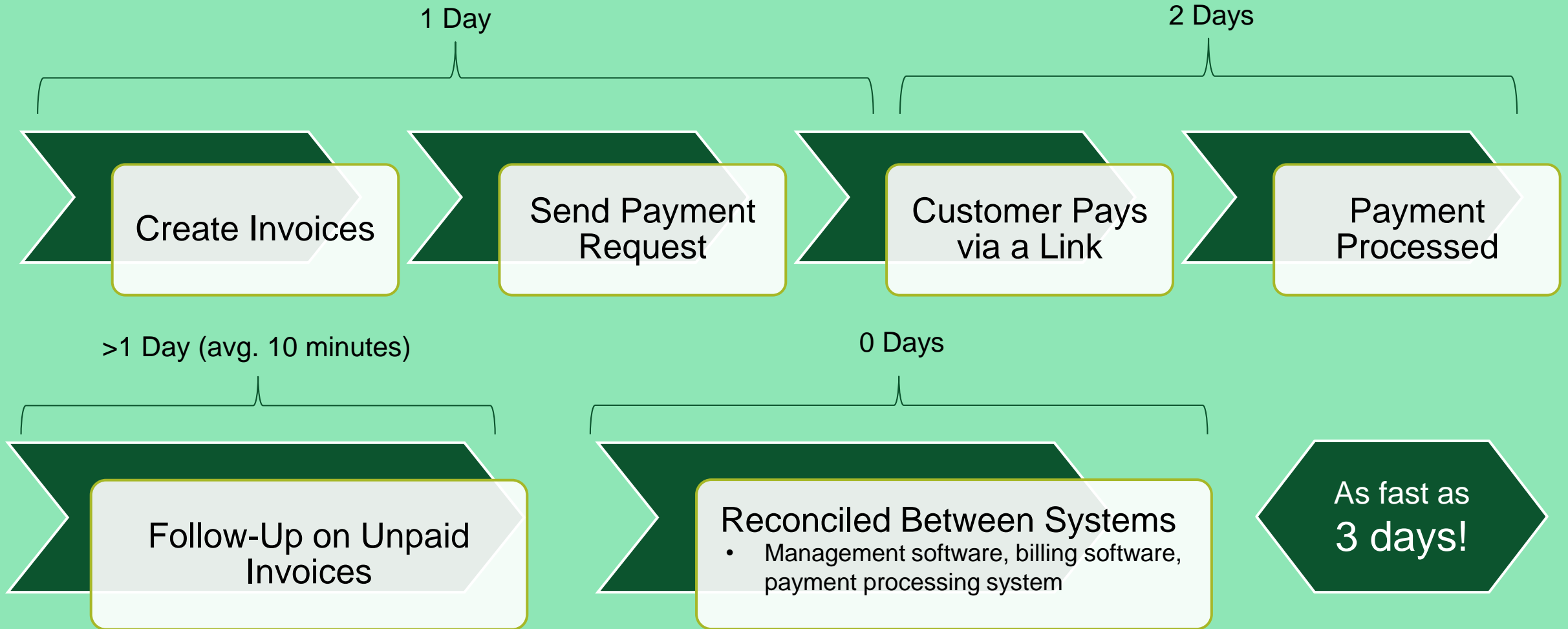
\$20 non-processing monthly transaction fee. Does not apply to customers who have already processed transactions through APX. If you do not process a transaction through APX after the first full month from the APX Account Approval Date or when you are provided access to the applicable CARET software, whichever is the later (the "Initial Period"), you will be assessed a \$20 monthly fee. In no event will the initial period be less than 30 days. This fee will continue monthly until you process your first transaction. Upon processing, your first transaction, you will no longer be charged the fee for the life of your APX account.

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External Sales Tool To be added to Product Data Sheets

Presentation Graphic

Integrated Payments with APX





MISCELLANEOUS CONTENT

Webinars, Video, Case Studies, Social Media and More

Webinars

Please note that you will need to sign up to see the recordings.

Webinar

CARET Legal Update and Best Practices

Join us to learn more about the latest CARET Legal update, how to leverage Abacus Payment Exchange (APX) and learn tips and tricks to get the most out of CARET Legal's newest features.

CARET Legal Update and Best Practices

CARET Legal Update and Best Practices

Introducing the Newest Features and Improvements in OfficeTools (Part II)

Join us to learn more about the latest OfficeTools update, how to leverage Abacus Payment Exchange (APX), and learn tips and tricks to get the most out of OfficeTools before tax season.

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Get the Webinar

OfficeTools Product Update Webinar with APX

Blogs/Case Studies

Blog

Customer Spotlight: CARET Legal's Task Management Keeps Tectonic Law Firm on Track

Customer Spotlight
CARET Legal
Creating Space for What Matters

Blog/Case Study – Tectonic Law Firm

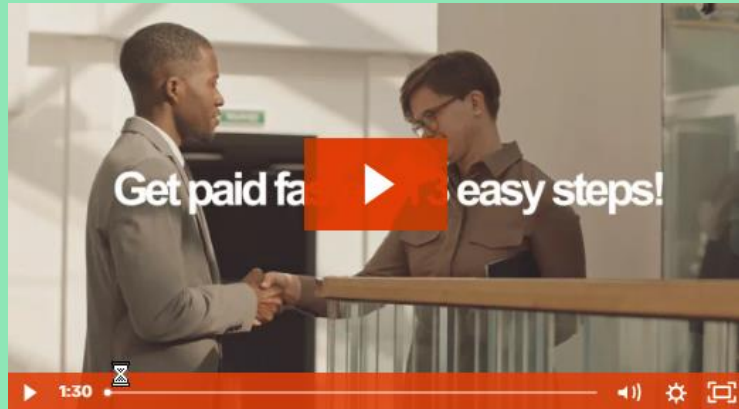
Blog

Customer Spotlight: Regional Law Firm Consolidates in the Cloud with CARET Legal

Customer Spotlight
CARET Legal
Creating Space for What Matters

Blog/Case Study – Newman & Lickstein

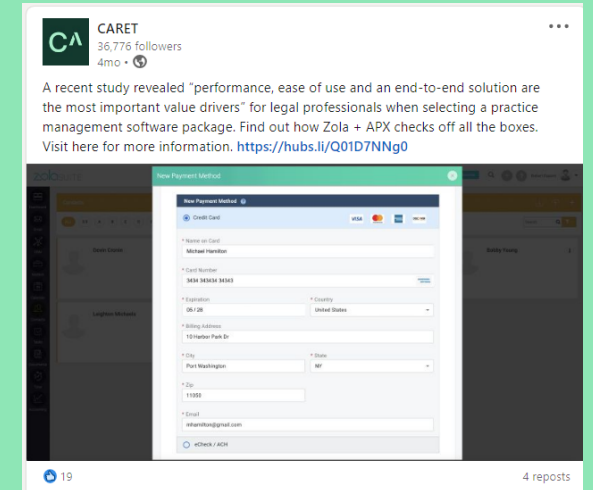
Marketing Assets



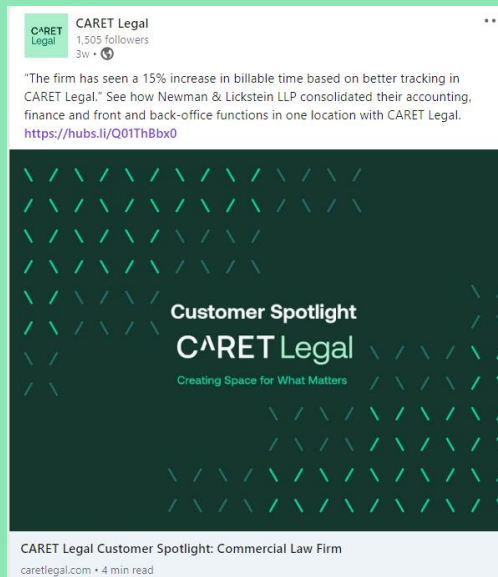
APX Video



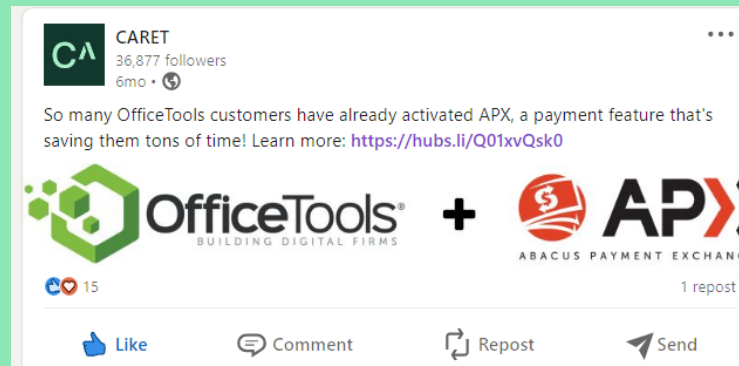
Blog Article Highlighting APX



CARET Legal + APX Post



Simon & Lickstein Post



OfficeTools + APX Post #1



OfficeTools + APX Post #2