



Email Template Guide

LAUNCH EMAIL SERIES

Questions? Contact your Relationship Manager or send an email to clientservices@smartdollar.com.



Before getting started, make sure to have your enrollment link handy!

1

Open the Word Document for the email you plan to send.

2

Link the **buttons to your SmartDollar enrollment page.**

- Select the button that you want to link to your SmartDollar enrollment page.
- On the "INSERT" tab along the top of the page, click "HYPERLINK OR LINK"
- In the "INSERT HYPERLINK" box, type or paste your SmartDollar enrollment page link in the "ADDRESS" box.

3

Copy and paste everything from the Word Document into a new email for your employees.

Send a test email to yourself prior to emailing your employees.

WINDOWS

- Select all by pressing the Ctrl key + A.
- Copy by pressing the Ctrl key + C.
- Start a new email to your employees.
- Paste the contents to the body of the email by pressing the Ctrl key + V.

MAC

- Select all by pressing the Command key + A.
- Copy by pressing the Command key + C.
- Start a new email to your employees.
- Paste the contents to the body of the email by pressing the Command key + V.

4

Use the Subject Lines below and press send!

EMAIL	SUBJECT LINE	WHEN TO SEND
0. Teaser Email	COMING SOON: SmartDollar!	7—14 days prior to launch
1. Launch Email	Sign Up for SmartDollar Today!	Launch Day
2. Money Habits Email	What Impact Do Your Money Habits Have?	7—10 days later
3. Debt Email	Kick Debt to the Curb with SmartDollar	7—10 days later
4. Savings Email	Save More Money With SmartDollar	7—10 days later
5. Retirement Email	Picture Your Dream Retirement ...	7—10 days later