

Renewals

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Caselle Accounts

Renew them on their current products with a \$0 opportunity. Submit to finance right away

New York Life Renewals

[Click here to go to New York Life renewal information](#)

Rubex Hosted

Growth team: use "Generic" sequence in Outreach

- Build quote
- Send DocuSign
- Follow through to Closed Won

Rubex Private Cloud

We are trying to move all RPC clients to Rubex Hosted

- Build quote
- Send DocuSign with RPC information
- Start the discussion about moving to Rubex Hosted
- Follow through to Closed Won

SecureDrawer

SMB group: use "EFCO to Rubex" sequence

- CSM will create a "migrate to Rubex" quote for SecureDrawer clients and manage all communication
- Add to Opportunity name
 - SecureDrawer to Rubex & Renewal 2022
- Which package to choose?
 - 5 users or less - Ignite.
 - 6 users or more - Growth.
- Uplift
 - 9 or less user - \$100 more per user
 - 10 or more users - consult with CAE on uplift amount
- Add a \$0 migration line item for SecureDrawer to Rubex

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