



Katy Oakley &lt;katy@smallwavemarketing.com&gt;

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## Contract Generation Doc - for FPA Business Hub Portal

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Aleksandra Weil &lt;aleksandra@rooksdm.com&gt;

Thu, Jul 6, 2023 at 2:28 PM

To: Morgan Sears <morgan@rooksdm.com>, Katy Oakley <katy@smallwavemarketing.com>, "jennifer.jengwa" <jennifer.jengwa@gmail.com>

Hi all,

My thoughts are below.

@Morgan Sears - just FYI, at today's marketing meeting we had discussed that if the changes are really minor - then we can go ahead and make them on our own rather than asking Smallwave.

### Changes I made:

1. **Logo Location. Not a change but a response to Morgan's question** - I'm okay with the logo moving around depending on the asset. I think it's nice to have some variation and keep things fresh/not look identical 😊
2. **Page 2** - I changed "agreement" to "contract" so it's consistent since the solution is contract generation.
3. I made the word "introduction" bigger and aligned it.
4. I added "Microsoft" before "Power Automate". A lot of people still don't know what Power Automate is so this will give it more familiarity.

### Changes for Smallwave:

1. The text font sizes are different on almost every page. Can we make the font size the same across the board? It was visually distracting.
2. Page 4 - very copy-heavy. Can we lighten the text load?

### Also:

1. Can we make sure that when we describe RooksDM we always say: **"technology consulting firm"**? I updated this in the white paper copy
2. Our services from now on should be: **advising, solutions, support**. I updated this in the copy.
3. Our email should be: [info@rooksdm.com](mailto:info@rooksdm.com). I updated this.

Thanks!

With regards,



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**From:** Morgan Sears <[morgan@rooksdm.com](mailto:morgan@rooksdm.com)>

**Sent:** Friday, June 30, 2023 3:52 PM

**To:** Katy Oakley <[katy@smallwavemarketing.com](mailto:katy@smallwavemarketing.com)>; Aleksandra Weil <[aleksandra@rooksdm.com](mailto:aleksandra@rooksdm.com)>

**Subject:** Contract Generation Doc - for FPA Business Hub Portal

Hey ladies!

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