

Call Outline & Goals

- 1) Build rapport
GOAL: Warm them up a little bit if possible
- 2) Get the "Why?"
GOAL: Find out what motivated them to agree to have the conversation with you. Getting this information may help you understand what types of questions to ask during qualifying and how to present your online payroll offering.
- 3) Set an agenda for the conversation
GOAL: Set an expectation of how the conversation will unfold. This will provide structure for you and them and enable you to control the flow. Setting an agenda also gives you something to reference in order to smoothly transition from one part of the conversation to the next.

The agenda should include the following elements:

- a. Talk about their business, how they view payroll, current and previous payroll methods/providers, what types of customers they serve and their experience with other services
 - b. Based on that information, let them know if, at a base level, your online payroll solutions would be a good fit for them
 - c. More about your payroll offering...who you are, what makes you different than other providers
 - d. *They'll have a decision to make as to whether they think your online payroll offering would be a good fit for their business*
 - e. Now discuss next steps
- 4) Get an upfront agreement to the agenda
GOAL: Get buy-in to the agenda so you're both on the same page. Set an expectation that they'll have a decision to make at the end of the call.
 - 5) Qualify
GOALS: See if they fit in your box. Understand their view of payroll. Define (for yourself) what the opportunity presents to you in the future.

- a. How many employees do they process payroll for?
 - i. How often?
- b. Will you have them enter payroll information through your service or will you run it entirely yourself?
 - i. Do they need reports?
- c. Will they use direct deposit?
 - i. Any reason for special payroll runs like bonuses?
- d. How were they processing payroll before?
 - i. Manually
 - ii. Competitive

6) Present and differentiate

GOAL: Let them know who you are, why you're different and what types of clients benefit most from your service

- a. Who are you (30-second commercial) as a business
 - i. When were you founded
 - ii. How large are you
 - iii. Who do you serve
- b. What makes your offering different?
 - i. **Your process**- Designed to be fast, secure and accurate.
 1. Preview payroll online before its processed, so it's accurate
 2. Use our fully searchable online help engine or talk to a friendly, U.S.-based payroll expert
 3. The option for direct deposit or manual checks
 4. Email notices to let them know when they've been paid
 5. Secure online access to their individual pay stubs and payroll history
 - ii. Walk them through how the payroll process will work with your solution.
 1. With one easy click, you're ready to enter payroll.
 2. Employees are grouped as either hourly or salaried employees for your convenience.
 3. Simply check the box next to an employee's name and enter the hours for the pay period.
 4. Salary information will always be pre-populated, making your job easier.
 5. You can also add any extra pay requirements, apply one-time deductions or turn off direct deposit, if necessary.
 6. Click Preview Payroll to review for accuracy. Submit and it's done.
 - i. Customer Care
 1. Customers only need to call if they have questions about the system or about a payroll run
 2. Open from 7:00 AM CT to 8:00 PM CT (adjust for their time zone)
 3. Online help available
 4. Email help available for less urgent issues
 - ii. HRAdvisor
 1. Affordable labor law poster compliance solution for small businesses
 2. Business forms library (with some pre-populated)
 3. How-to guides

7) Close

GOAL: Gain a clear understanding of where the relationship is headed

- a. Determine if they think you'd be a good fit. (Use the comments they gave you during the payroll walkthrough to illustrate your benefits!)
- b. Be ready to discuss and calculate pricing if they are ready
- c. Let them know about any current promotions or offers
- d. Schedule a follow up