

# PEO University



## 39 Lessons Learned in 39 Years of Selling HRO and Leading HRO Sales Teams

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# Poll: Have you been in a session with Clay before?

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- In this session we will cover lessons learned in both
  - Sales Lessons 1-22
  - Sales Leadership Lessons 23-39
- We move fast to get to your questions ASAP!

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# 39 for 39

- Lesson 1

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- Stop “predatory” sales practices.
- Predatory: Pursuing clients that are happy with their existing PEO with promises of better services or lower prices.
- You will grow broke “quoting” incumbent business, the sale is not easier because the client is already in a PEO relationship.

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- Lesson 2

# 39 for 39

- The PEO sale is complex and takes time.
- PEO salespeople should be business advisors.
- Business advisors possess business intelligence.
- Business intelligence is achieved through continuous learning, gaining certifications and constant improvement.

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- Lesson 3



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The 4 Cs:

- **C**ompetency leads to
- **C**onfidence which leads to
- **C**reativity which leads to
- **C**lients

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- Lesson 4

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- Knowledge is NOT power.
- Applied knowledge is NOT power.
- Knowledge applied at the right time with the right people...making them think it's their idea is POWER!
- Get your ego out of your selling.

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- Lesson 5

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- Time block each week and commit to prospecting!
- Don't ask me how many prospecting calls are required
- It takes what it takes

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- Lesson 6

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- Sending a letter, an email, a LinkedIn request or any type of correspondence to a prospect **stating the date and time** that you will contact them – will increase your contact success.

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- Lesson 7



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- Failure to commit to CRM is robbing you of future opportunities.

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- Lesson 8

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- Qualify! Qualify! Qualify! Qualify! Qualify!

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- Qualify Your Prospects

- You are meeting with **everyone** who has decision-making authority and a stake in the future of your relationship.
- They are operating ethically, and they respect their employees.
- They can meet your PEOs underwriting criteria; you must understand the risks a prospect poses to your company.
- They have needs, wants, goals and that your firm has the capabilities to meet their expectations.
- Want your solutions on a reasonable time frame.
- They are willing to part ways with current relationships.
- They are willing to invest in your solution.

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- Lesson 9

# 39 for 39

- The ABCs of selling?
- The ABCs of selling PEO: The **A**uthentic **B**usiness **C**onversation
- You must have **authentic** rapport and trust to get prospects to share their needs, wants, issues, goals and costs!

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# 39 for 39

- Lesson 10

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- Commit to a Solid Discovery Process
  1. Be prepared
  2. Build authentic rapport: Opening statement
  3. Ask effective questions to build the business case
  4. The Five Statements
  5. Set the next meeting
  6. Verify the decision-making process



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- Lesson 11

# 39 for 39

- You must own your opening statement.

“Thank you for blocking out the time for our meeting. I’m here to find out the needs of your business, share with you how we may help you, and see if there is a fit. If it’s not a fit...that’s fine; we’ll part friends.

**When we agree** it’s a fit, we’ll go to the next step and put together a proposal. Is that fair?”

“I did some research and looked at your website; that gave me great insight...every business has a story...would you share with me your story?”

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“For 39 years we’ve been working with CEOs and companies with 12 to 1200 employees to solve problems in human resources, worker’s compensation, risk management, benefits and payroll. I don’t know how you handle these areas now, but I know this... if you have employees, you’ve had issues...”

“Our goal is to solve your issues, increase your profitability, by maximizing employee productivity, save your team time in dealing with transactional HR, reduce liability and cost. Does that make sense?”

“May I ask you some questions?”

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- Build the business case.
- Great salespeople ask effective questions to discover the client's needs, wants, issues, goals, costs and timeframe.
- The difference between great salespeople and weak salespeople are the questions they ask.
- Ask a question and shut up!

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- Lesson 12

# 39 for 39

- Five Statements
  1. You are already outsourcing
  2. You shared with me (restate all issues, wants, goals, etc)
  3. Outsource to us.
  4. We'll bring you one team of professionals, one group of experts, one advisor. Instead X vendors
  5. Our clients will tell that help them increase profitability, productivity, and reduce time, liability and costs

Does that make sense?

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- Lesson 13

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- Ask for the Proposal
- “Does this make business sense?” (YES)
- “The question is...does it make financial sense?  
And the only way we can determine that...  
is to provide you with a proposal.
- “Would you like to continue the conversation to see what that  
would like for you?”



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- Lesson 14

# 39 for 39

- When the client agrees they want to see a proposal, provide a list of the documents you need to prepare the proposal.
  - Census
  - SUI Reports
  - Workers' Comp policy
  - Workers' Comp loss runs
  - Benefit providers, plans, invoices
  - Recent payroll reports
- If the client will not provide you the documents - they are telling you “no”!

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- Lesson 15

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- Build the **financial** business case.

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- Lesson 16

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- Delete closing from your vocabulary.
- It is about gaining the client relationship!

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- Lesson 17

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- **Never** leave a meeting without setting the next meeting.

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- Lesson 18

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- Hold proposal meetings at your office; it is the ultimate home turf.
- Begin every proposal meeting with reviewing your business case; every issue, every need, every want and every goal and their current costs.

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- Lesson 19

# 39 for 39

- There are only three authentic objections.
- Everything else is failure to qualify or failure to build trust and rapport.
  - Cost
  - Timing\*
  - The Richy Harder Objection\*
    - \*Uncovered in the discovery process

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# 39 for 39





# 39 for 39



# 39 for 39

- Lesson 20



# 39 for 39

- When you gain the client relationship, set the expectation that you will earn and expect their referrals.
  - *“We want to ensure we always meet and exceed your expectations...so you will have the confidence to refer us to other companies we can help.”*

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- Lesson 21

# 39 for 39

- Conduct regular client care meetings to ensure you are meeting their expectations; ask for referrals and **raving fan letters** of recommendation.

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- Lesson 22

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- Stay in regular contact with CFOs, controllers!

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## Lessons in Leading Sales Teams

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- Building a team of successful salespeople takes time.
- Developing a salesperson from hire to a consistent level of production is a 9 to 18 month process.

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- Lesson 24



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- Know what you want in a salesperson.
  - Integrity
  - Fearless prospector
  - Played competitive sports or activities
  - Has the ability to gain the trust of C Level decision makers
  - Excellent discovery skills
  - Willingness to learn
  - Excellent communication skills

# 39 for 39

- Lesson 25

# 39 for 39

- Establish realistic minimum quarterly expectations.
  - Revenue
  - Sales
  - Proposal appointments
  - Proposals
  - RFPs/Proposal request
  - Data gathering appointments
  - First appointments
  - Prospecting activities

# 39 for 39

- Lesson 26

# 39 for 39

- Go deep in developing internal training programs.
  - 499 document; 499+ questions about your company.
  - Email me 499 to at [clay@claykelley.com](mailto:clay@claykelley.com)

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- Lesson 27

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- Recruiting never stops.

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- Lesson 28



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- Develop a Standardized Recruitment & Selection Process.
- Hire Slow – Hire Fast.
- Minimum six (6) interviews
  1. Telephone/Video interview; be honest!
  2. Face to face: Initial screen, culture fit, role play how they sell their current product of service
  3. Second face to face: Skills and “sales fit”, expectations, compensation
  4. Third face to face: Role play
  5. Fourth face to face: Two Presentations – get everyone in the room
  6. Fifth face to face: Offer

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- Two heads are better than one
  - Whenever possible have at least two people in the interview.
- Your top performing sales team members should be involved in the selection process.

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- Lesson 29

# 39 for 39

- Require candidates to perform projects with each interview.
  - Bring a list of current contacts
  - Bring a current commission report
  - Create a one-page business plan
  - Complete written interview questions
  - Complete a sales competency profile
  - Prepare presentations
    - Why outsource to us?
    - Why hire me?

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- Lesson 30

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- Weed out bad actors

At some point in the recruitment process, tell candidates:

“If we come to agreement to be in business together, it is our protocol to contact your former employer and let them know that we have hired you and that we do not intend to interfere in any of their client relationships.”

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- Lesson 31

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- Opt for non-solicitation agreements rather than non-compete agreements.
- Require an “expectations agreement” to be executed upon hire.



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- Lesson 32

# 39 for 39

- Train, role play, repeat.
- Train, role play, repeat.
- Train, role play, repeat.
- Train, role play, repeat.
- Train, role play, repeat.
- Train, role play, repeat.
- Train, role play, repeat.
- Train, role play, repeat.
- Train, role play, repeat.

# 39 for 39

- Lesson 33

# 39 for 39

- New sales team members have 2 responsibilities for their first 3 months
  - Learn the business
  - Prospect for appointments and accompany senior sales team members on appointments

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- Lesson 34

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- Mentorship programs with senior sales team members work!

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- Communicate sales and activity results weekly.

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- Lesson 36

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- Conduct performance appraisals every quarter, the 3rd Wednesday after each quarter.
- Always have sales team members complete a self review.
  - 1<sup>st</sup> question: Did you miss, make or exceed your expectations last quarter?

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- Lesson 37

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- Failure to meet minimum expectations two quarters in a row:
  - Automatic performance improvement plan
  - Termination

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- Lesson 38

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- Fire with Grace; Give Them An Out
  - Establish that expectations are not being met
  - Give them two days off to consider their future with the company
  - Let them decide
    - Leave the company with severance
    - Remain with the company under a PIP, that they help create
      - They must meet and continue to meet or exceed expectations

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- Lesson 39

# 39 for 39

- Get involved and give back
  - Your community
  - NAPEO

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- “Only the weak sell on price”  
Clay Kelley

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- “Only the weak sell on price”  
Clay Kelley (stolen from Pat Cleary)

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- “Only the weak sell on price”  
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Questions?

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