



Town Hall Series



Generating PEO Sales in Era of Uncertainty

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Colby Davis, [Employer Advantage](http://EmployerAdvantage.com)

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Introductions

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Clay Kelley, claykelley.com

John Ferguson, [simplicityHR](#) by ALTRES

Colby Davis, [Employer Advantage](#)

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Where there is chaos...there is opportunity

Sun Tzu

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- **Keep Your Mindset Positive!**
 - **We were built for such a time as this!**
 - **We are helping people now more than ever before**
 - **We are the true TRUSTED business advisor!**

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- **We have to**
 - **Be innovative**
 - **Be disciplined**
 - **Be focused**
- **We have to remember**
 - **Priorities are changing**
 - **Rapport, trust and integrity are most important to your clients right now**

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- **Protect existing relationships**
 - **Re-engage**
 - **Be the resource!**
 - Call every client; CEO, CFO, POC/Admin
 - Focus on them – do not sell!
 - How are you doing?
 - Be careful about labeling the current situation
 - How is business going?
 - Dig as deep as you can

Remember this is affecting them, their families, their employees

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- **Protect existing relationships**
- Push out content
 - PPP, EIDL
 - PPP Loan Forgiveness
- Ask: “How are you are preparing for”
 - Employees continuing to work remotely
 - Employees returning to the worksite
 - If you believe the rapport is high, ask for referrals to their clients, vendors, advisors

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- **Optimize your pipeline**

- Contact everyone of your pipeline of existing opportunities
 - Prioritize based on rapport level; ABC
- How are you doing?
 - Push out content
 - PPP/EIDL
 - PPP Loan Forgiveness
 - How are you are preparing for
 - Employees continuing to work remotely
 - Employees returning to the worksite

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- **Optimize your pipeline**

- Contact everyone of your dormant prospects that you have a high level of rapport
 - How are you doing?
 - Push out content
 - PPP/EIDL
 - PPP Loan Forgiveness
 - How are you are preparing for
 - Employees continuing to work remotely
 - Employees returning to the worksite

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- **Conducting Effective Online Meetings**

- What you need for selling now
 - Digital brochures
 - Online presentations
 - Opening/Qualifying/Discovery
 - Building the Financial Business Case
 - Proposal in PPT or Prezi
 - Focused on their issues – your solutions

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- **Conducting Effective Online Meetings**

- Dress for success in your video online meetings
 - What is in your background?
 - Eliminate distractions
 - Don't go too funky; or fake

Collaborate with your team!

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- **Drive Long Term Performance**
- **Prepare for the future**
 - Train, train, train, train
 - Drill for skill
 - Capture Advisors: CPA, Attorney, Banker, Wealth Advisor
 - Capture renewal dates for workers' comp and health

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- **Drive Long Term Performance**
- **Prepare for the future**
 - Be dedicated to CRM
 - Keep track of every prospect that does not become a client

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Questions

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Questions

- How has COVID-19 impacted your sales so far?
- How are you moving your stalled pre-COVID-19 pipeline to closed accounts?
- How has your sales approach changed?
- How are you changing or adjusting your metrics during this time?

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Questions

- How have you changed your prospecting activities to get in front of business owners?
- What additional qualifying questions are you asking, and why are they important?
- How are you leveraging existing clients to move your sales team forward?

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Questions

- How are you coordinating sales and marketing in response to COVID-19?
- What data are you tracking through your marketing efforts and how can you use that information in the future?

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Questions

- How would you respond to this question from a prospect, if it was raised:
“I made it through COVID without an HR company, so why would I need one now?”

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Questions

- What are your most successful referral channels in this environment and what do you anticipate they will be moving forward?

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Additional Questions

- Social Media; Everyone talks about the importance of LinkedIn, Twitter, Instagram, Facebook
 - Do you view this as a supplement to sales activity?
 - How highly do you rank this effort?

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Additional Questions

- I've always seen selling HRO as very much a relationship sale.
 - Will this change, especially with more and more online meetings?
 - How can we build relationships moving to more of an online platform?

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Additional Questions?

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Thank you for attending!