Generating PEO Sales in Era of Uncertainty

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Introductions
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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 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
• **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
• **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?
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?
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?
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?”
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!