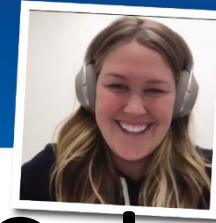




Town Hall Series



Generating PEO Sales in Era of Uncertainty Part II

Clay Kelley, claykelley.com

John Ferguson, [simplicityHR](http://simplicityHR.com) by ALTRES

Colby Davis, Employer Advantage

“Where there is chaos...there is opportunity”

Sun Tzu

NAPEO Town Hall

Introductions

Robin Schlensinger, NAPEO

Pat Cleary, NAPEO

Clay Kelley, claykelley.com

John Ferguson, simplicityHR by ALTRES

Colby Davis, Employer Advantage

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What We Are Going to Cover Today

- **Quick Review: What We Learned in Last Week's Town Hall**
- **Answer Your Questions**

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What We Learned in Last Week's Town Hall

If you missed last week, login to your NAPEO member portal and search for Town Hall

NAPEO Town Hall

What We Learned in Last Week's Town Hall

- **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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What We Learned in Last Week's Town Hall

- **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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What We Learned in Last Week's Town Hall

- **Protect Existing Relationships**
- **Re-engage and be the Resource!**
 - Call every client
 - Focus on them – do not sell!
 - How are you doing?
 - How are you are preparing for
 - Employees continuing to work remotely
 - Employees returning to the worksite
 - Push out content
 - PPP, PPP Loan Forgiveness, EIDL

NAPEO Town Hall

What We Learned in Last Week's Town Hall

- **Optimize Your Pipeline**

- Call every business in your pipeline prioritize based on rapport level; ABC
 - Focus on them – do not sell!
 - How are you doing?
 - How are you are preparing for
 - Employees continuing to work remotely
 - Employees returning to the worksite
- Push out content
 - PPP, PPP Loan Forgiveness, EIDL

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What We Learned in Last Week's Town Hall

- **Optimize Your Pipeline**

- Contact former clients and every business you did not gain as a client
 - Focus on them – do not sell!
 - How are you doing?
 - How are you are preparing for
 - Employees continuing to work remotely
 - Employees returning to the worksite
- Push out content
 - PPP, PPP Loan Forgiveness, EIDL

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What We Learned in Last Week's Town Hall

- **Conducting Effective Online Meetings**

- Digital brochures, online presentations; PPT, Prezi, Google Slides
 - Opening/Qualifying/Discovery Probing Questions
 - Building the Financial Business Case
 - Proposal: Focused on their issues – your solutions
 - Practice, practice, practice, practice
- Dress for success in your video online meetings
- Minimize distractions
 - Avoid funky backgrounds

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What We Learned in Last Week's Town Hall

- **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
 - Be dedicated to CRM
 - Keep track of every prospect that does not become a client
 - And FOLLOW UP!

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What We Learned in Last Week's Town Hall

- **Expansion Opportunities**
 - Client referrals
 - CPAs
 - Attorneys
 - Bankers
 - Wealth managers
 - Community service
 - Chambers
 - Business associations
 - Social media; targeted ads, content

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20 Questions

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20 Questions

- Prospecting
 - Everyone knows increased call count will lead to more decision-makers. Are there any additional methods to help increase the decision maker contact ratio during this time?

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20 Questions

- Prospecting
 - Have you found LinkedIn to be effective to connect with prospects?
What messaging are you using to connect?

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20 Questions

- Prospecting
 - What is your game plan moving forward into the summer as far as developing new business? On both a micro and a macro level?

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20 Questions

- Prospecting
 - What are some strategies for getting prospects to consider shopping and potentially moving their business?

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20 Questions

- Marketing and Lead Generation
 - Do you recommend local advertising in business publications?

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20 Questions

- Marketing and Lead Generation
 - Can you tell me more about how you are developing leads during Coronavirus? Our SEO and PPP leads have dried up and they don't seem to be coming back.

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20 Questions

- Marketing and Lead Generation
 - How to gain interest when an owner gets all kinds of "free" information to rely on?

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20 Questions

- Marketing and Lead Generation
 - What support are you looking for from benefit carriers? What can insurance carriers do to help you have conversations with prospects about open enrollment?

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20 Questions

- How COVID-19 is Changing Our Work
 - Does it make sense now more than ever to focus on being an industry specific expert?

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20 Questions

- How COVID-19 is Changing Our Work
 - How do you see the value proposition for PEOs shifting during these new and unique times?

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20 Questions

- How COVID-19 is Changing Our Work
 - How do you feel the PEO industry will be positioned once things start to open back up?

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20 Questions

- How COVID-19 is Changing Our Work
 - Have you created any new service lines to assist clients during this COVID-19 time?

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20 Questions

- COVID-19 Objections
 - “We see the value in your PEO but can’t make any moves during this time until the smoke clears”?

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20 Questions

- COVID-19 Objections

- How do you engage in a "challenger sale" for a prospect who you perceive needs to be challenged while also maintaining compassion and empathy for all they're going as a business right now?

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20 Questions

- COVID-19 Objections
 - What are the new decision times? Are people making decisions to use a PEO quicker or slower than before COVID-19?

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20 Questions

- COVID-19 Objections

- I've had great connections with current clients; however, I also am seeing prospects tightening up the purse strings. How do you handle this objection?

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20 Questions

- Working in a Virtual World
 - What resources are you using for digital sales proposals/presentations?
PowerPoint, Prezi, Google Slides, something else?

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20 Questions

- Working in a Virtual World
 - What is the sales tactic for online meetings that you've seen consistently work with your teams?

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20 Questions

- Working in a Virtual World
 - What tools do you recommend to monitor remote team's calls & activity?

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Additional Questions?

Thank you for attending!

clay@claykelley.com

john.ferguson@altres.com

colby.davis@employeradvantage.com