



Payrolls Direct

Payroll & HR Management

Using Join.me for Remote Presentations

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Doing a Presentation Using Join.me

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Getting Customers Using Join.Me

Assuming you joined Payrolls Direct, as we are going to be processing the payrolls for you, all you need to do, is to roll up your sleeves and get on with the task in hand, which is to get new clients.

Sales and Marketing is the one area that concerns many people. However, this is not as complicated as it seems and becomes much simpler, when broken down into 5 key components which are:

1. Identify the name of the decision maker
2. Call the company and ask to speak to the decision maker, preferably asking for them by their first name.
3. Very simply explain our business proposition. If client is interested he / she will ask you how much you charge for “x” number of employees. You now know how many employees the client has.
4. Do an online presentation & arrange a meeting. If client has time, ask them to go to join.me to do an online presentation of our cutting edge cloud based payroll solution. If not, then make an appointment to talk at a later date or meet the client in their premises.
5. Converting the potential into a client

1) Before calling anybody, have the following 4 tabs open:

- a) Home Page
- b) Price List
- c) Client Area – with dummy employer login details prefilled – clear employee login
- d) Client Area – with dummy employee login details prefilled

The main reason for this is that you are not messing about finding login details and therefore your presentation is slick.

Now open join.me desktop app and have number ready for giving to a potential customer when doing a presentation.

2) Identifying the name of the decision maker

When it comes to pitching a deal, it is important that you are talking to a decision maker. In a small business to medium size business, employing less than 50 people, the decision maker is usually the owner of the business if it is a sole trader, or the financial director / managing director if it is a Limited company.

So how do we find out who the ultimate decision maker is for our payroll service? When going after a new lead it is important to do your homework to identify the key decision maker.

Start with your lead’s company website if they have one. There is generally a page that lists the staff and Owners / Directors. You can often get the name and title of the person that would be responsible for the department that you need to speak with. The website will also provide you with email addresses and telephone numbers.

Another good second source of information is Google. Often just by typing the companies name and doing a Google search, you will be able to find the name of the decision maker.

Another good source of information is your local chamber of commerce. It is worth joining just for the access to all their business data and list of members. However, there are many additional benefits to joining. You can attend their regular networking meetings, and other functions, and meet business owners face to face. Call them and ask to speak to one of their Business Development Managers and go from there.

Facebook and LinkedIn are also good sources of information. Many businesses have profiles on both and it is easy to find out who you should be asking for when you call.

Use Experian

3) Call the company and ask to speak to the decision maker

Before you make the first call, make sure you are ready. Remember, your objective is to find out if the business is a possible candidate for our payroll services in a very short time.

Let us assume you are calling a company called Nexxus and the decision makers name is Grant Clarke.

Call the company and in a clear and confident tone say the following: *"Hello can you put through to Grant please."*

By asking for the first name, you are indicating that you know the person. If there is more than 1 Grant working there the receptionist will ask for the surname and at that point you can give it.

Now at this point you might get put through straight away. However, many receptionists will ask what the call is in connection with. Your answer would be short and straight to the point: *"It is regarding your payroll."*

4) Very simply explain our business proposition

At this point you are likely to get put through if the decision maker is available. Let us now assume you get put through to the decision maker. This is what you would say: *"Hello I am calling from Payrolls Direct. We can save your business a lot of money if you outsource your payroll to us. As an example, if you have 20 employees, we would charge you only £138 per month to manage your payroll"*

5) Do an online presentation & arrange a meeting

Pause for a second. At this point, if the decision maker is interested, he will ask you how much you charge for "x" number of employees, and now you know how many employees the owner has and you can give him a quote and ask him *"do you have time for me to do an online presentation? It will only take 5 minutes."*

Then you can do an online presentation using join.me and show all the extra features our cloud based platform has. After which, you can arrange to meet the client at his premises to answer any further questions and acquire their business.

If the business owner does not ask you a question or speak when you pause, you may continue with your presentation: *"If you are using an accountant to manage your payroll, he is probably billing you at least £300 to £400 for the same service that we would charge you £138 for. If you are employing a payroll clerk, your savings will be much higher".*

Pause for a second. At this point, if the decision maker is interested, he will now ask you how much you charge for "x" number of employees and you can give him a quote. If he is busy but still interested, arrange another time to call him or ask him if he would like you to go to his premises and do a presentation face to face.

If the decision maker does ask you to call him at a later time or gives you an appointment, then from then on, you must make sure that all your communications are handled quickly and efficiently as from this point onwards, your chances of securing the business are very high IF you deal with all queries in a timely manner.

6) Converting the potential into a client

This is actually the easiest part of the process if handled well. The client has agreed to see you so **the interest in our services is already there**. You now have to persuade the client that it is in their interest to let us manage their payroll.

a) Do a presentation, on the laptop. Stop and listen to your client and answer his/her queries whenever he/she interrupts, before continuing with the presentation.

b) Show them how easy it is for them to upload and access their information online.

c) Demonstrate how you are actually saving them money AND time

Now that you have done your presentation, **you must ask for the business**.

Here are a few different ways to ask for the business:

- 1. Now that you know what I can do for you, should we sort out the paperwork?*
- 2. If you have no more questions, there's just one left for me to ask: When do we start?*
- 3. I'd really like to manage your payroll. When can we get started?*
- 4. Would you like to go ahead, now that you know I can save you money?*

Remember, asking for the business is the natural conclusion of any successful presentation.

Download our new franchise brochure here: <http://payrolldirect.com/franchise/brochure.pdf>

You can also view our price list here: <http://payrolldirect.com/pricelist.pdf>

We can save businesses a lot of money if they outsource their payroll to us. Our cloud based platform is cutting edge and definitely superior to anything businesses are currently using.