

2019 IPPA Sales & Marketing

Developing Your Payroll Sales Playbook

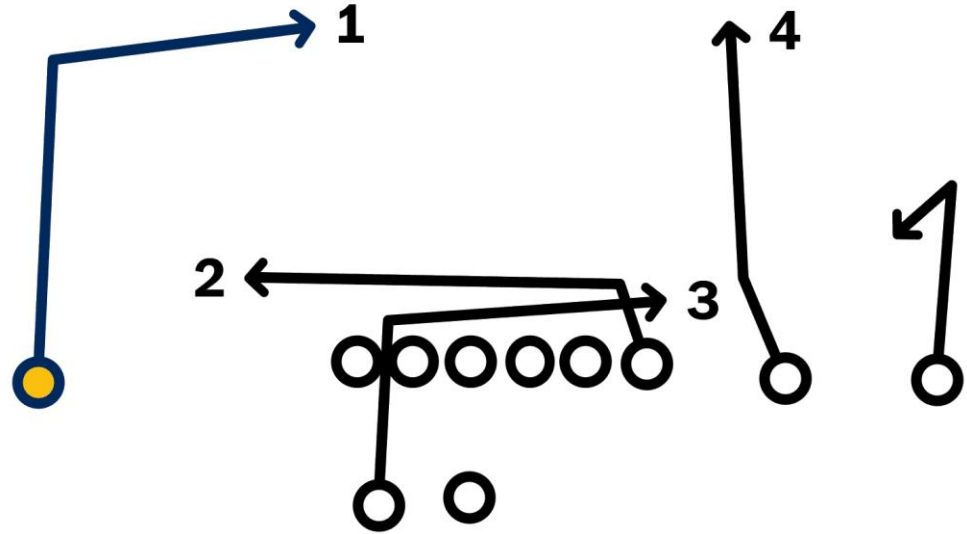
Josh Davis
Chief Rainmaker
Marketing All Day



The Game Plan Today

Leverage Sales Plays To Help You Accomplish YOUR Biggest Challenges:

- **Generate and Qualify More Leads**
- **Build More Pipeline**
- **Win More Deals and Revenue**



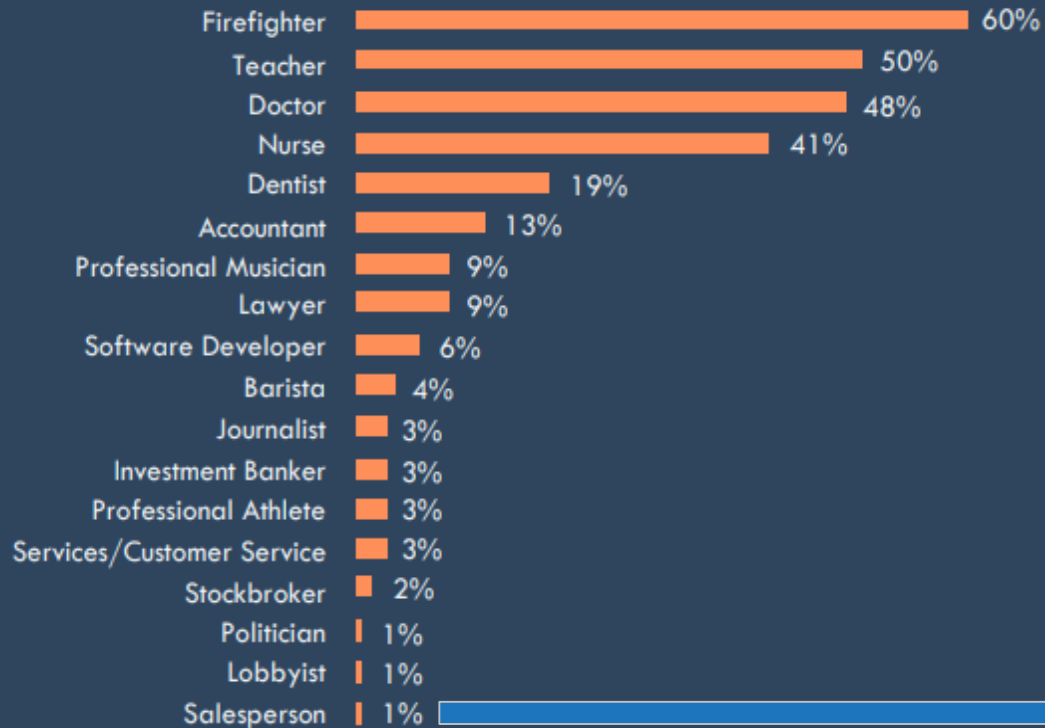
...or at least develop some new plays

Let's Talk About The Elephant in the Room

AP



Trusted Professionals in North America



Doh...



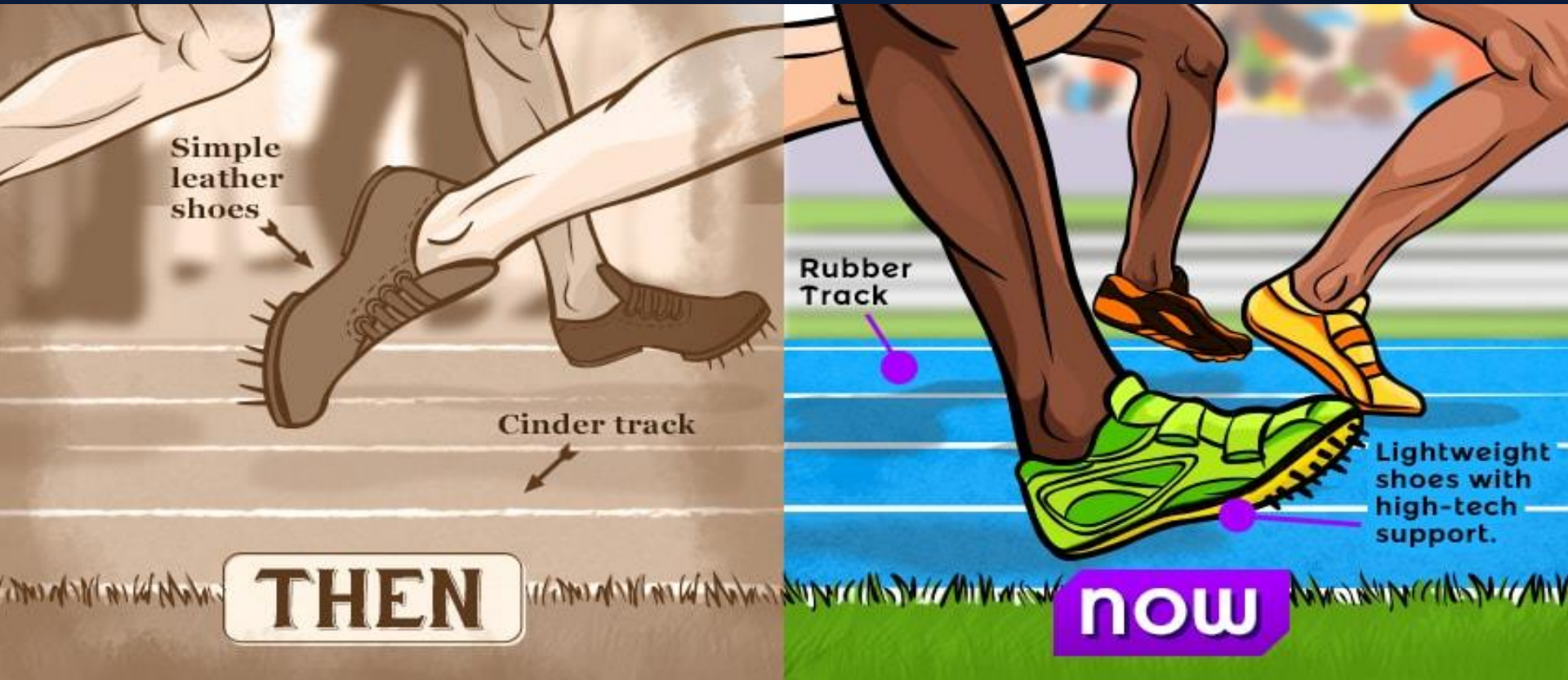
Your Mission:

Provide a helpful, human, and holistic experience to anyone who interacts with your company in any way.



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Payroll Sales Is Changing



The traditional sales approach won't always score with prospects

The Old Vs. New Sales Methodology

Old Sales Methodology

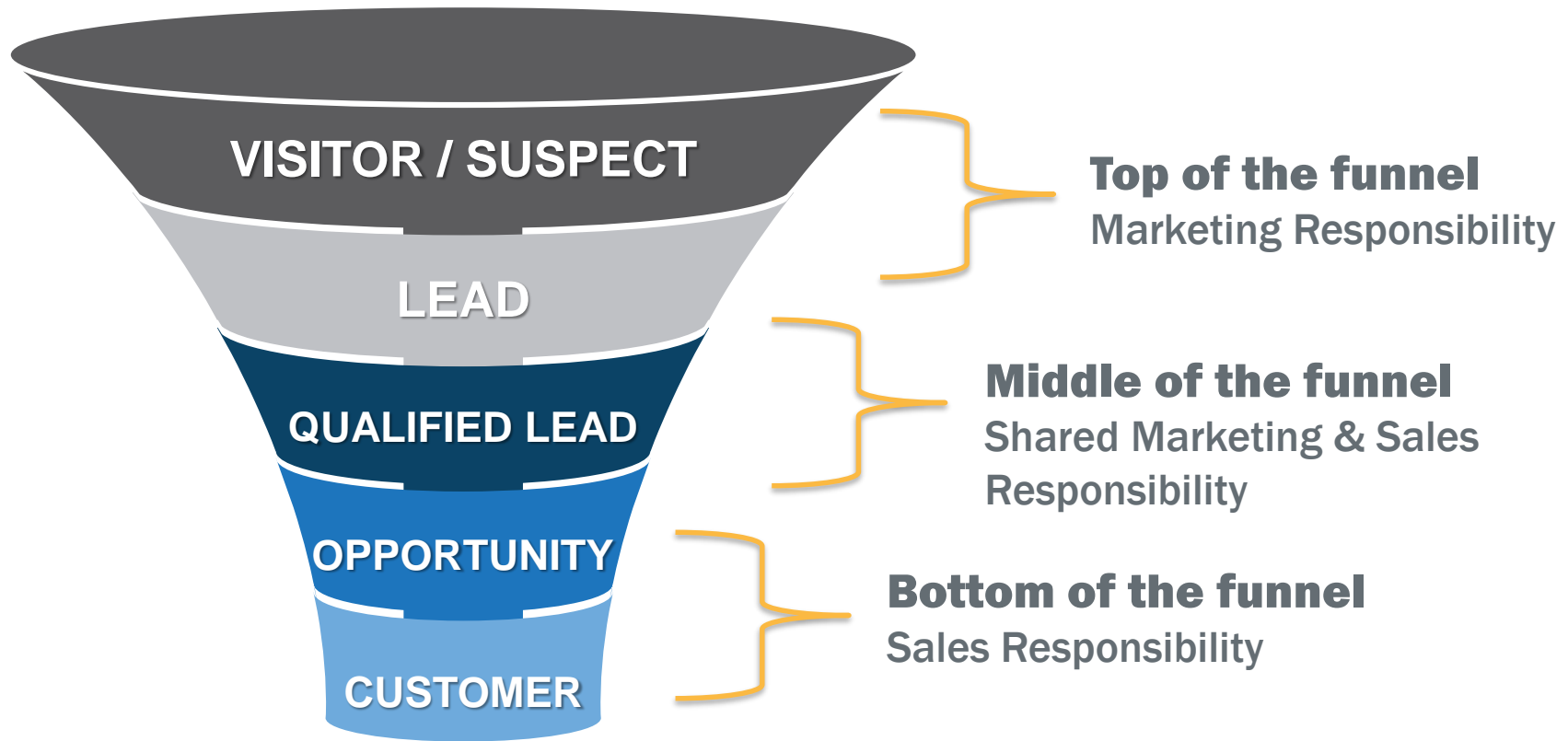
- Sales rep-centric
- Sell when rep wants to sell
- Guards service / solution data needed for decision
- Follows sales rep's process
- Goal is selling product
- Traditional Toolset

New Sales Methodology

- Buyer-centric
- Sell when buyer wants to buy
- Internet allows buyers to access the data freely
- Follows buyer's journey
- Goal is solving buyer's needs
- Technology Toolset

The traditional sales approach won't keep scoring with prospects

Using The “Funnel” Concept To Frame Sales Plays



Sales Plays For Every Stage in the Funnel

Merging the Funnel New Sales Methodologies



Understand the Game and Become a Champion



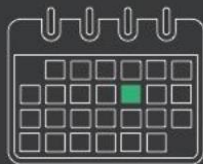
How Do We Solve Prospects' Biggest Challenges?



Better Technology is Often the Answer

The average annual spend on sales technology: **\$3,894 per rep per year or \$324.50 per month**

Systems



\$324.50
on sales technologies
(per rep per month)

4.8 categories of sales tools per sales rep

Source: [InsideSales.com Labs Study](https://www.insidesales.com/labs-study)



Sales development reps use on average 5.8 sales tools in 4.8 categories

Top of the Funnel Demand Creation: 101



Prospects May Be Flocking To Your Site, But Not Converting

Sales Play #1

**Interact With
Website Visitors
in Real-Time**

Business Buyers



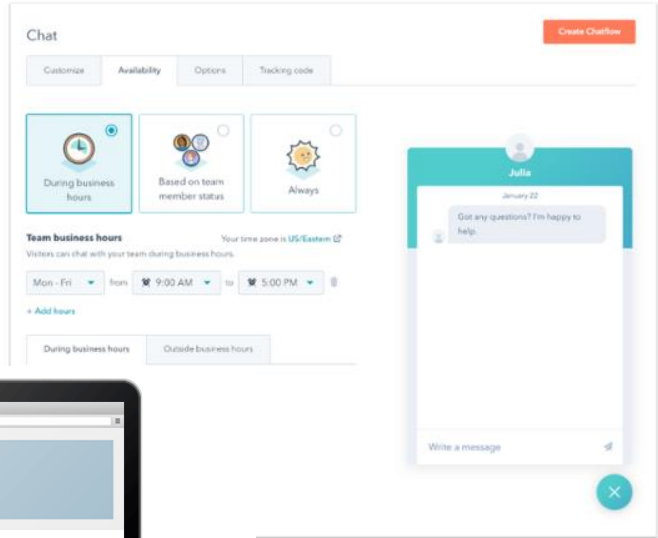
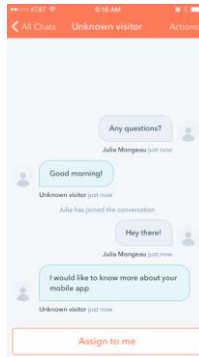
Consumers



Live Chat With Website Visitors

Variety of Technology Allows You To:

- **Determine Your Initial Message**
- **Customize The Initial Message Per Page**
- **Chat Live On Your Laptop or Mobile Device**
- **Pre-Configure Chat “Bots” When You’re Not Available**



Difficulty to Implement:



Sales Play #2

**Stop Website
Visitors in their
Tracks With
Useful Offers**



**If You Knew a Prospect Was Exploring a Particular
Product and You Could Give Them ANYTHING...**

What Would It Be?

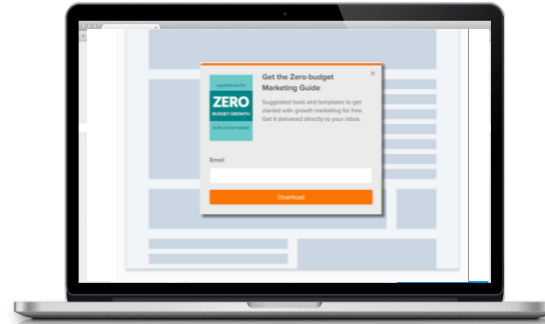
Relevant Website Popups

Anticipate Your Buyers' Next Steps

- Add An Offer On What They May Want to See Next
- Set Different Popups Per Page
- Determine When Popups Come In*
- Configure Next Steps

See how hundreds have improved their payroll processes with us

Your company name... Your email address... **Show Me**



Difficulty to Implement:



Lead Conversion Form: Type

Choose a flow type



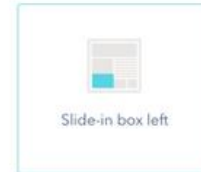
Pop-up box

Pop-up boxes are bold and assertive. Use them to promote your most active social channels, add to your email subscriber list, and highlight your most valuable content.



Dropdown banner

Dropdown banners are timely and helpful. Use them to promote time-sensitive offers (like a sale or a webinar) or to encourage new subscriptions to your frequently updated blog.



Slide-in box left

Slide-in boxes are subtle and friendly. Use them to promote your content or add to your blog subscriber list.



Slide-in box right

Slide-in boxes are subtle and friendly. Use them to promote your content or add to your blog subscriber list.

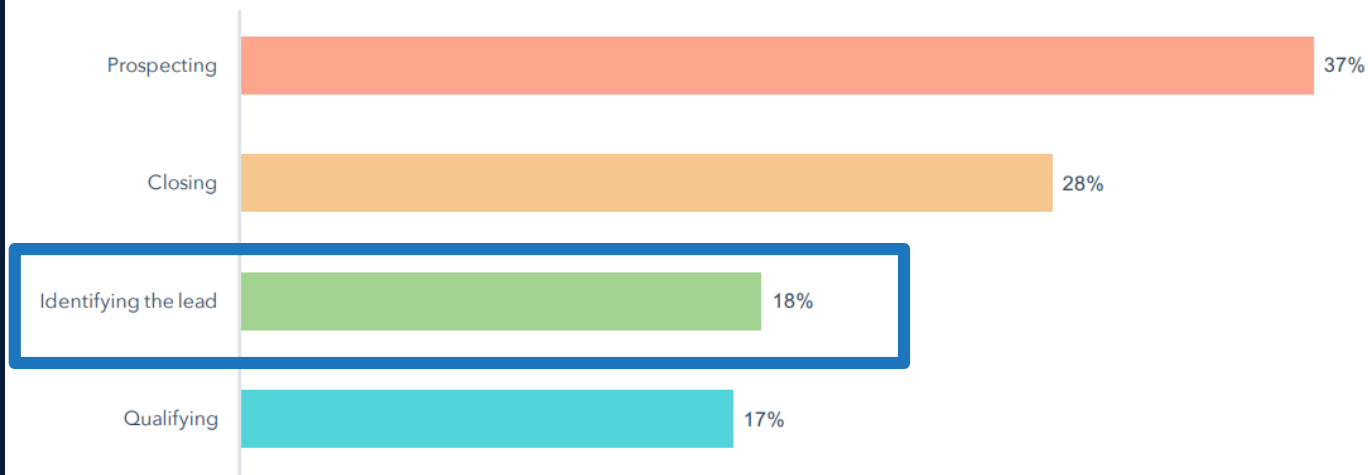
Don't Have Great Content? Offer 1-On-1 Consultations.

Sales Play #3

Identify Leads On Your Website

***Even If They Don't Convert**

What part of the sales process do reps struggle with most?



Identify Website Visitors' Companies

Tools Provide Everything BUT The Contact:

- Source of Lead
- Pages They Visited
- Date / Time of Visits
- Time On Site

Difficulty to Implement:



The top screenshot shows a 'Visits' table with the following data:

Company	URL	Count	Time
Edgewell Personal Care	http://edgewell.com	3	Yesterday at 4:07 PM
Niantic, Inc.	http://ingress.com	1	Yesterday at 3:06 PM
Symantec Corporation	http://message.labs.com	6	Yesterday at 1:39 PM
WAYPORT	http://wayport.com	69	Yesterday at 12:13 PM
Town of Colebrook	http://colebrooktownhall.org	3	Yesterday at 12:11 PM
Stonewall College	http://stonewall.edu	49	Yesterday at 10:45 AM
Geisinger Health System	http://geisinger.edu	2	Yesterday at 10:42 AM
Mohegan Sun	http://mohegansun.com	10	Yesterday at 10:13 AM
washpost.com	http://washpost.com	1	Yesterday at 9:58 AM
Infonet AS	http://inforet.net	1	Yesterday at 9:35 AM
Moran	http://morantug.com	26	8 Jan 31 2017
Barclays Capital Inc.	http://barcap.com	4	3 Jan 31 2017
Hardford Public Schools			
ScarfSafe			

The middle screenshot shows a 'Website' analytics dashboard with a table of visitor activity:

Date	Source	Type	Site Action	Goal
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page
01-Aug-2017	Infonet AS	Direct	1937:18 Landing Page	1937:18 Landing Page

The bottom screenshot shows a detailed view of a visitor's session on 'visuaalvisitor.com' with the following data:

Session ID	Date / Time	Visitor ID	Pages Viewed	Time Spent
81122016124428 PM	9/7/2016 9:23:41 AM	4DWjCOjBRNTf4Mq5d5tXkIjGmdeP	12 Unique Visitors	Free Visitors
81122016103921 AM		4DWjCOjBRNTf4Mq5d5tXkIjGmdeP	Pages Viewed	Time Spent
			http://www.visuaalvisitor.com/	-- seconds
			http://www.visuaalvisitor.com/pricing/	688 seconds
			http://www.visuaalvisitor.com/	129 seconds
			http://www.visuaalvisitor.com/	-- seconds

But What Happens Next?

Identify Website Visitors' Companies (Continued)

Hi, this is Carol.



Hi Carol, This is Josh from Payroll Palace. How are You?

Okay...



Great, hey listen we received a few inquiries from people at your company for information on streamlining payroll processes and reducing errors.





Really? From who?



That's what I was hoping you could help me with. They didn't leave their name. Is there someone in your organization that might be focused on that issue?

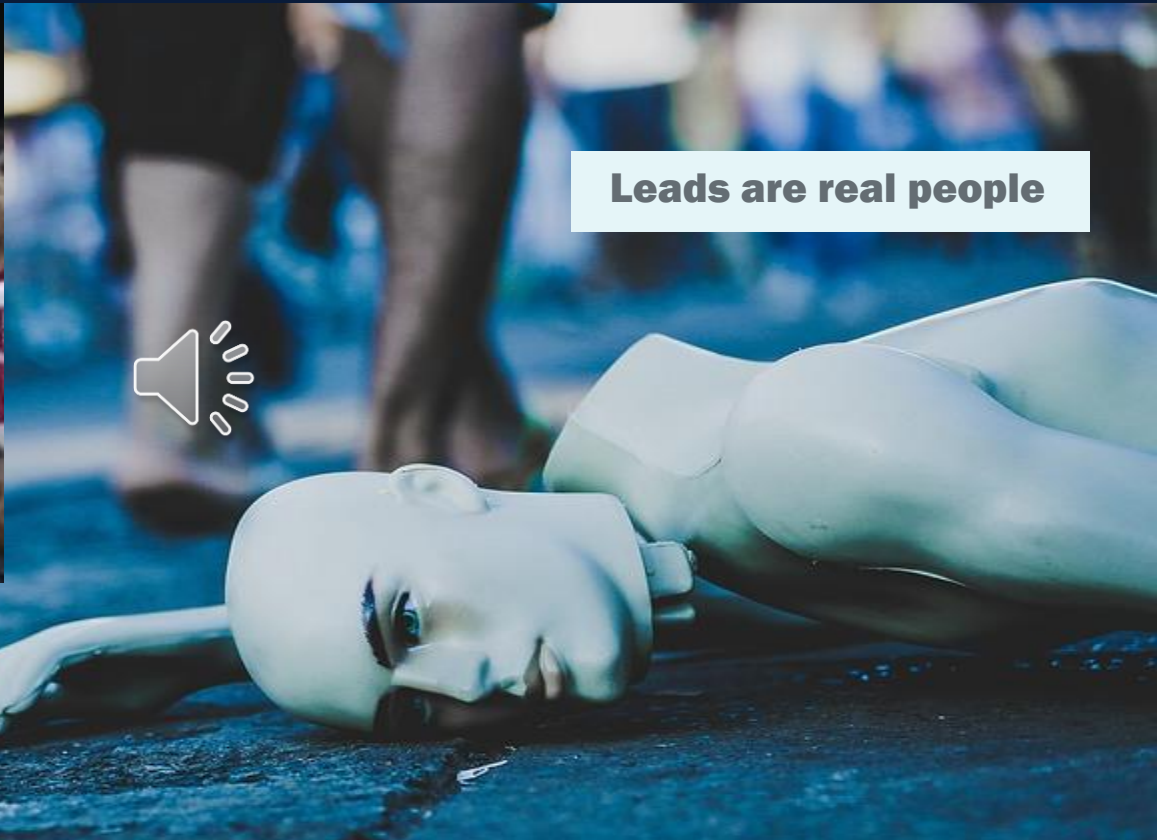
How Do We Qualify Them?

Identify Website Visitors' Companies (Continued)

	Maybe Bob in Accounting?	
	Do you know why he may be looking for more information on payroll accuracy?	
	We've had some issues there.	
	Issues?	

How Do We Qualify Them?

Middle of the Funnel Lead Qualification: 101



Leads are real people

Personalization is at the heart of inbound sales.

Sales Play #4

Develop Your Ideal Client Profiles

(Reconfirm Your Target
Market)



Develop Your Ideal Client Profile

Reconfirm Who You/Your Company Wants to Sell:

- **Look At Your Existing Clients**
- **Create Your Top 2-3 ICPs**
- **Focus On Becoming an Industry Expert Prospects WANT To Talk With**
- **Bonus: Break Down Buyer Profiles / Personas (Job Titles)**

Difficulty to Implement:



Industry / Vertical	Manufacturing
Company Size (EEs)	20-500
Geography / Location	New Jersey
Challenges (3-5)	Overtime, Calculating Piece Cost, Increasing Margins

How Do We Personalize Our Message and Prospecting Strategy?

Sales Play #5

Leverage CRM
for... Everything

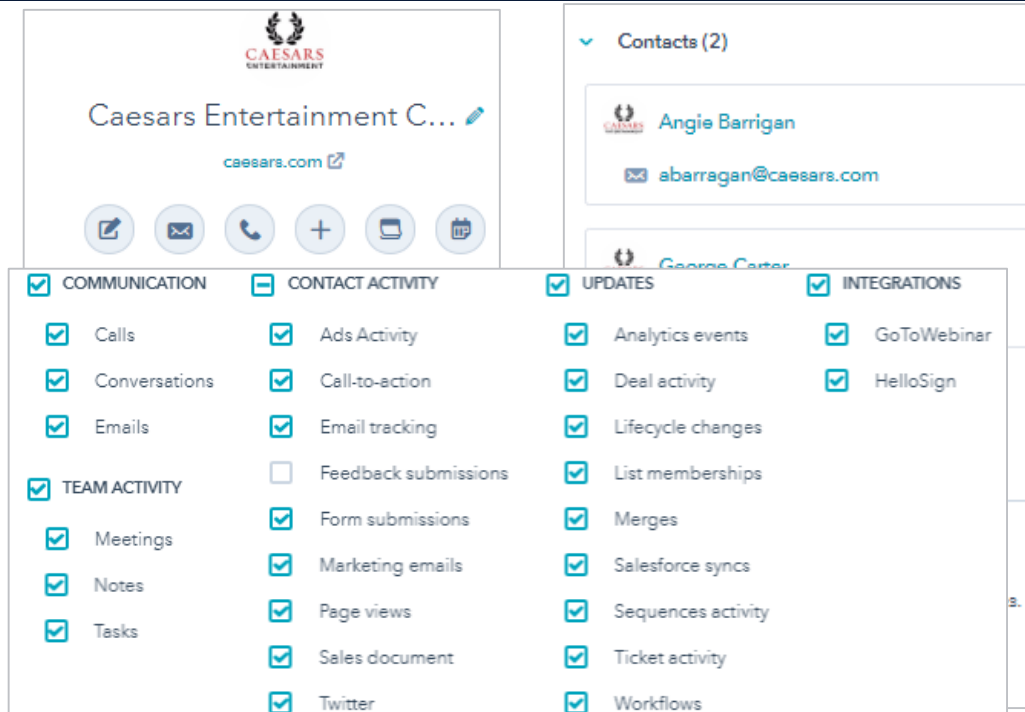


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Make Your CRM The Heart of Your Sales Efforts

CRM Your Control Panel For All Things Sales

- **Segment Prospects (ICPs) into Reports / Lists**
- **Integrate It With ALL Your Other Tools**
- **Log and Report On Your Activity**
- **Monitor Prospect Buying Signals**



Difficulty to Implement:



It Will Give You More Insight Than You Knew Was Ever Possible

Sales Play #6

Develop
Templates,
Tracks, and Sales
Sequences

Pipeline



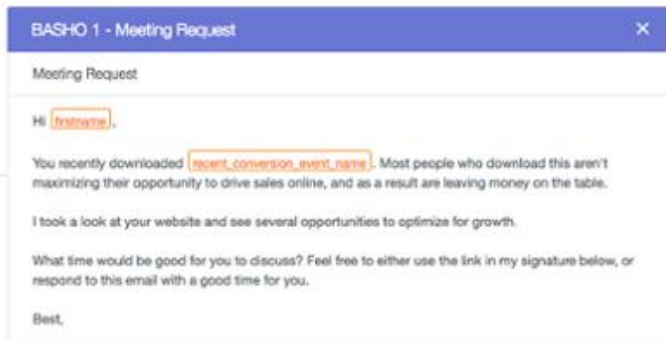
*Daily
**Monthly

Reps spend only 32% of their time selling – the rest is spent on administration and content

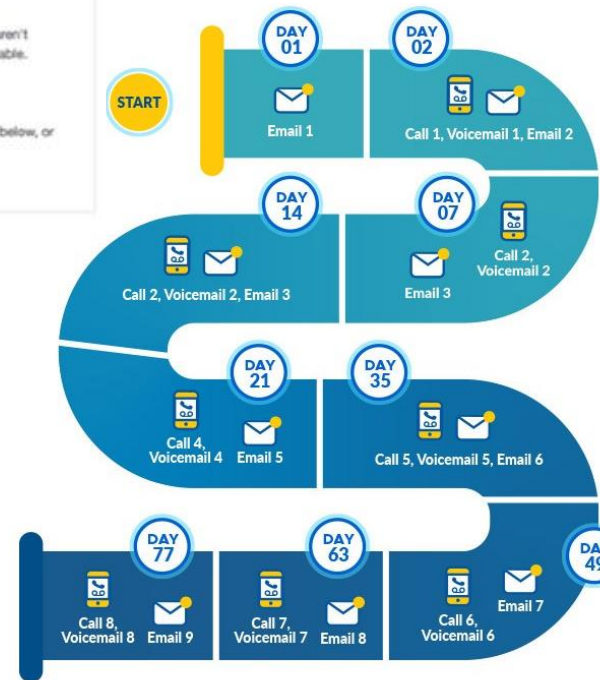
Leverage Sales Templates and Cadences

General Sequences Personalized for Prospects

- Identify Your Trigger(s)
- Develop The “Touches”
- Determine The Schedule / Frequency
- Add Personalization Fields
- Select Recipients, Customize Message and Send



Call contact to follow up
Call contact and leave voicemail
Change lead status
Connect on LinkedIn
Check engagement on emails
Contact completed sequence



With So Many Touchpoints, Automate What You Can

Leverage Sales Templates and Cadences (Cont'd)

Most Effective Emails:

- **Subject lines with 3-4 words get more responses than shorter or longer**
- **Messages written at a third-grade reading level are 36% more likely to get a reply**
- **Avoid too long or too brief, between 50 and 125 words is most effective**
- **Emails that contain one to three questions are 50% likelier to get replies**

Based on Study of 5 Million Emails, Subject Line:

WORDS TO USE	WORDS NOT TO USE
Apply	Confirm
Opportunity	Join
Demo	Assistance
Connect	Speaker
Payments	Press
Conference	Social
Cancellation	Invite



Tips On Writing Emails

Leverage Sales Templates and Cadences (Cont'd)

The Sales Truths

- **48% of sales people never follow up with a prospect**
- **25% of sales people make a second contact and stop**
- **12% of sales people only make three contacts and stop**
- **Only 10% of sales people make more than three contacts**










- **2% of sales are made on the first contact**
- **3% of sales are made on the second contact**
- **5% of sales are made on the third contact**
- **10% of sales are made on the fourth contact**
- **80% of sales are made on the fifth to twelfth contact**



Study lead inquiries showed only 7% of sales reps responded in the first 5 minutes, more than half didn't respond within 5 business days

Sales Play #7

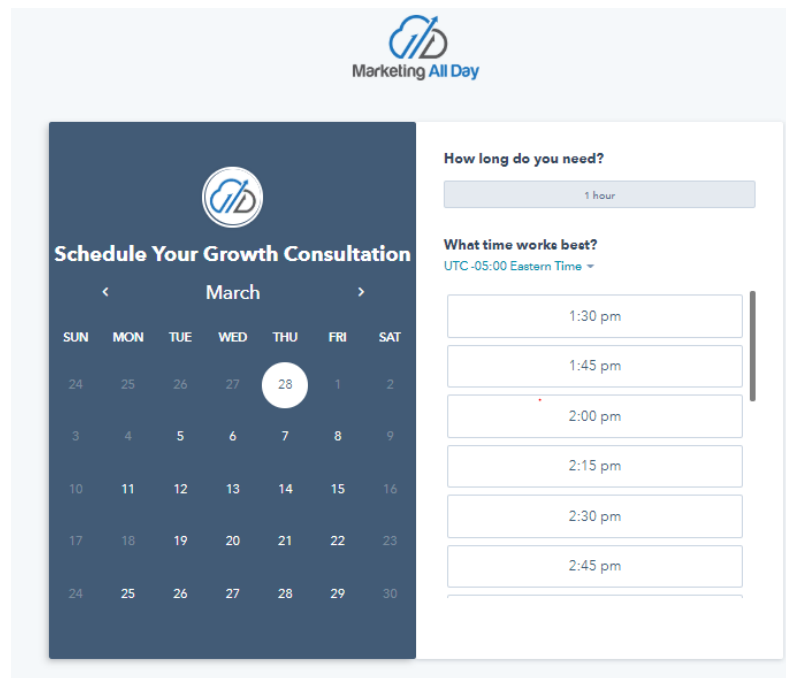
Leverage a Scheduling Tool

5  vs. Braves 1:05 pm EST 	6  vs. Cardinals 1:05 pm EST 	7  @ Phillies (SS) 1:05 pm EST 	8  vs. Tigers 6:35 pm EST 	9  @ Orioles (SS) 6:05 pm EST 
12  vs. Orioles 6:35 pm EDT 	13  vs. Phillies 6:35 pm EDT 	14  @ Blue Jays 1:07 pm EDT 	15  vs. Red Sox 1:05 pm EDT 	16  vs. Blue Jays (SS) 1:05 pm EDT 
19  vs. Rays 1:05 pm EDT 	20  @ Astros 1:05 pm EDT 	21  @ Cardinals (SS) 1:05 pm EDT 	22  vs. Phillies 6:35 pm EDT 	23  vs. Blue Jays (SS) 1:05 pm EDT 

Integrate a Scheduling Tool With Your Calendar

Don't Waste Time On Administration

- **Configure Different Meeting Types**
- **Set Availability Preferences**
- **Request Prospect Custom Information (i.e. Current Provider, Biggest Challenge, etc.)**
- **Create Customized Invites**
- **Wake Up To New Meetings**



The screenshot shows the 'Marketing All Day' scheduling interface. At the top right is the logo and name 'Marketing All Day'. The main content area is divided into two sections. On the left, a dark blue calendar titled 'Schedule Your Growth Consultation' shows the month of March. The date '28' is highlighted in a white circle. The calendar grid includes days of the week (SUN to SAT) and dates from 24 to 30. On the right, there are two sections: 'How long do you need?' with a slider set to '1 hour', and 'What time works best?' with a dropdown menu set to 'UTC -05:00 Eastern Time'. Below the dropdown is a vertical list of time slots: 1:30 pm, 1:45 pm, 2:00 pm, 2:15 pm, 2:30 pm, and 2:45 pm.

Difficulty to Implement:



So Easy, Your Prospects Can Do It

Bottom of The Funnel Closing: 101



You Play To Win The Game

Being a Champion is a Long Road

EAST REGION

- 1 DUKE
- 16 TEXAS SOUTHERN/WAGNER
- 8 KANSAS STATE
- 9 LSU
- 5 INDIANA
- 12 WOFFORD
- 4 MARQUETTE
- 13 NEW MEXICO STATE
- 6 LOUISVILLE
- 11 MINNESOTA
- 3 TEXAS TECH
- 14 GEORGIA STATE
- 7 SETON HALL
- 10 CLEMSON
- 2 MICHIGAN STATE
- 15 VERMONT

2019 NCAA TOURNAMENT BRACKET WATCH

MIDWEST REGION

- KANSAS 1
- ABILENE CHRISTIAN/MORGAN ST 16
- NEBRASKA 8
- VILLANOVA 9
- HOUSTON 5
- WASHINGTON/OLE MISS 12
- WISCONSIN 4
- OLD DOMINION 13
- NC STATE 6
- TEXAS 11
- KENTUCKY 3
- MONTANA 14
- ST. JOHN'S 7
- PURDUE 10
- NEVADA 2
- RADFORD 15

SOUTH REGION

- 1 MICHIGAN
- 16 HOLY CROSS
- 8 IOWA STATE
- 9 FLORIDA
- 5 MISSISSIPPI STATE
- 12 LIPSCOMB
- 4 NORTH CAROLINA
- 13 SOUTH DAKOTA ST.
- 6 BUFFALO
- 11 UCF/BUTLER
- 3 FLORIDA STATE
- 14 LOYOLA-CHICAGO
- 7 ARIZONA STATE
- 10 MARYLAND
- 2 GONZAGA
- 15 NORTHERN KENTUCKY

WEST REGION

- TENNESSEE 1
- RIDER 16
- IOWA 8
- TCU 9
- VIRGINIA TECH 5
- MURRAY STATE 12
- OKLAHOMA 4
- CHARLESTON 13
- AUBURN 6
- VCU 11
- OHIO STATE 3
- UC-IRVINE 14
- CINCINNATI 7
- CREIGHTON 10
- VIRGINIA 2
- YALE 15

**Sports
Illustrated**

And These Sales Plays Will NOT Matter If....

Prudential Center

1ST PERIOD



8 Hours In A Day

40 Hours In A Week

~173 Hours In A Month

520 Hours In A Quarter

YOU Don't Put in the Time and Work

Sales Play #8

Customize Your Discovery & Demo

(Do Your Homework)



Marketing All Day

Create a Deck Template For Exploring Needs

Customize Your Exploration:

- **Make It About Them, Not You**
- **Add Their Logo. Relevant Industry Or Company-Specific Questions or Insights**
- **Do Your Homework**
- **Schedule Your Demo Before The Call Ends**



- "There is always an issue with pay."
- "Either they don't pay on time or the amount is wrong"
- "Weekly payroll is a disaster."
- "Their alleged next day pay is false."
- "You have to call them and stay on top of their staff, otherwise you wont get paid."
- "My status of employment was accidentally terminated."



Studies Show 11-14 Questions is Ideal

Demo Their Post-Implementation Build

Show Them Their Experience:

- Add A Quick Deck Recap To Reconfirm Problems/Goals
- Make Solution Totally Theirs, Minus Their Real Employee Data (Add In Main Contacts Though)
- Configure The Modules Based on Their Policies
- Work in ROI Analyses
- Schedule Your Proposal Review Before The Call Ends



Your Logo Here



Some Tips For Phone Conversations

WORST Words On Calls

- **Top performers 10 times less likely to use "you," "I," "me," and "your."**
- **Using "Did I catch you at a bad time" makes you 40% less likely to book a meeting**
- **"Show you how": Drops close rates by 13% when used more than four times during a single call**
- **"Discount": Decreases close rates by 17%**
- **"Contract": Hurts close rates by 7%**
- **"Free trial": Lowers likelihood of securing next steps by 5%**
- **Your company's name: Harms close rates by 14% when used four-plus times in one call**
- **"Competitor": Makes you less likely to get next steps or close**
- **"Million," "billion," "trillion": Large quantities are too abstract, so they harm close rates**

BEST Words On Calls

- **Top performing salespeople are up to 10 times likelier to use collaborative words and phrases "we," "us," "our," and "together"**
 - **Increases success rates by 35%**
- **Asking "How are you?" increases your likelihood of booking a meeting by 3.4X**
- **The most successful reps use terms that inspire confidence, such as "certainly," "definitely," and "absolutely," five times more often than low performers.**

Sent My Proposal 2 Weeks Ago. No Response...

Sales Play #9

**Implement an
Email Tracker or
Proposal
Software**

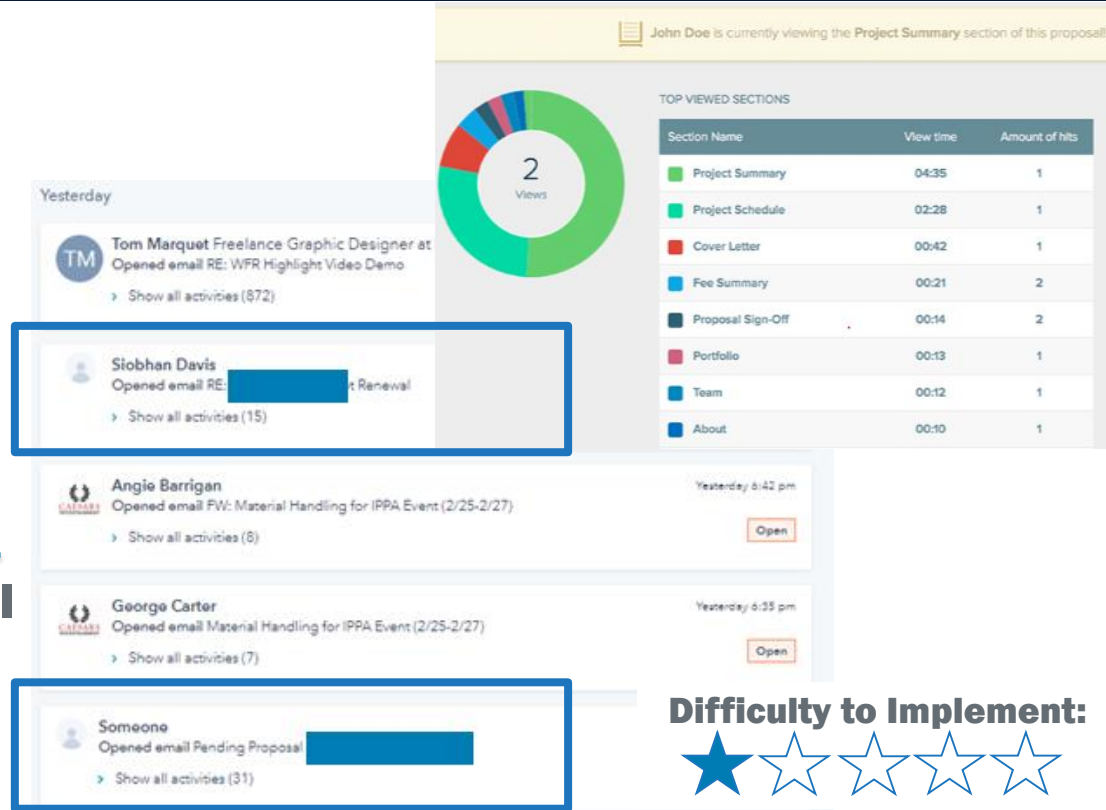


Have They Seen It? Why Won't They Call Me Back?

Get An Email Tracking And/Or Proposal Software

Sell When The Buyer Is Considering Buying

- Email Trackers Work With Gmail and Outlook
- Get Alerts On Activity As It Happens
- Make Your Existing Proposal a Configurable Template
- See What Was Interacted With and For How Long



Sales Play #10

Start Your Day At
The End of The
Sales Process

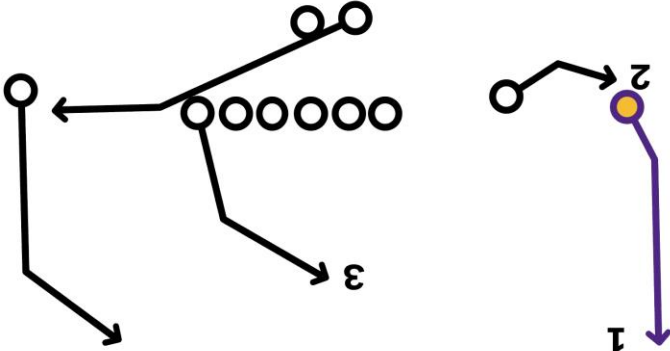


Leads Management		Pipeline Management				Account Management
1. Demand Creation	2. Lead Qualification	3. Discovery Call	4. Demo Meeting	5. Proposal Phase	6. Contract Stage	7. Delivery Stage
Objective of Sales Stage						
<ul style="list-style-type: none">Research market and generate leads	<ul style="list-style-type: none">Contact and qualify ideal prospects	<ul style="list-style-type: none">Understand business issues, current solution / processes, etc.	<ul style="list-style-type: none">Define solution to solve prospect's challenges	<ul style="list-style-type: none">Provide formal proposal based on desired solutions	<ul style="list-style-type: none">Negotiate and agree on pricing and terms	<ul style="list-style-type: none">Implement, train, and delight client; create referrals





Build Your Own Plays



Contact Us If You
Need Help



Next Steps?



Marketing All Day

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f t in