

# Sales Flow Chart

Do Demonstration to Potential Customer



First do a presentation to a client remotely or face to face. Do not sell on price alone! Sell the benefits of our Employer & Employee platform & how our cloud based systems will enable the client to manage their staff better, increase efficiency and productivity.

Send Customer Agreement for Signing



Send client Letter of Engagement for their records & Customer Agreement for client to sign, scan & return OR post back. Use Email 1 below flow chart.

Setup Direct Debit Payment using Go Cardless



Setup Direct Debit with client using GoCardless. This is the best way to collect payment. However, you can accept payment by cheque or cash even!

Add Client to YOUR Licensee Control Panel



Add client to YOUR licensee control panel & email them their login details using Email 2 below flow chart. Make sure you attach Employer & Employee manuals when sending this email

Get Client to Add Their Employees



Get customer to login to Employer Control Panel & Add their Employees. Ask customer to email Employee manual to each of their employees.

HQ will Make Initial Contact with your Client



Once done, we will personally contact company within a day or two to get further information & schedule with the company, a date & time to teach them how to use our control panels..

HQ will do ALL the Payroll Work & Deal with Queries



It's now time to find your NEXT customer

Payrolls Direct.com

## Email to Send out With Agreement & Letter of Engagement

Subject: Payrolls Direct Customer Agreement

Dear <insert name>,

I hope you are keeping well & thank you for trusting us with your payroll.

Please find attached, letter of engagement & customer agreement.

The letter of engagement is for your record only and does not need to be signed or returned.

Please sign customer agreement, scan, & email back to me, or, alternatively, post it back to me.

If you are posting, my address is:

<insert address>

If you need any further help, please call me on the mobile number in my email signature.

Speak soon,

## Email to Company with Their Login Details

Subject: Payrolls Direct Employer Control Panel Login

Dear <insert company name>,

You can now login to your employer control panel using the details below:

Login Web Address: <https://payrollsdirect.com/client-login/>

Business Name:

Login Email:

Login Password:

Please login & add your employees.

I have **attached our Employer & Employee manuals** for your reference.

Please email the Employee Manual to each of your employees.

Somebody from head office will make contact with you in the next day or two, & schedule a date & time to teach you how to use our control panels.

If you need any further help, you can contact head office on our freephone number: 0800 193 1964.

Speak soon,