



# PrismHR SEEDS

ACCELERATE YOUR SALES AND MARKETING

## SELLING SMART HR TECHNOLOGY

In-depth questions to enhance your sales process.



## ABOUT THIS DOCUMENT

The PrismHR SEEDS program is designed to help you market and sell both your HR services and PrismHR technology together more effectively. To aid in that goal, SEEDS offers training sessions on a variety of sales and marketing topics. As part of the training session, [Selling Smart HR Technology](#), Ray Dile, Principal at Pathway Strategies, shared key insight into how to build powerful questions to surface the real business issues which will ultimately help you win more business. The below list of questions are designed to help you get started doing just that. These questions are categorized based on sales stage and HRO component.

## OPPORTUNITY QUESTIONS

- It looks like there is a lot of growth in your industry, how hard is it to find good people? Is this impacting the quality of your service?
- Your industry is growing at a rate of 10% per year, how does your growth rate compare?
- It seems like there is a great deal of compliance work for companies like yours, how well do you handle the compliance issues?
- How important is HR to your organization?
- How important is culture to your organization? Is this something you manage? If so, how?
- Insurance and the cost of insurance is more and more important to companies, how important is it to yours?
- How important is developing people or do you hire fully skilled / qualified employees?
- Your business is successful – care to share what makes your company so successful?
- What are the top two things that you see as concerns / impediments in the coming year – that impact your business?
- What prompted you to start looking at solutions like a PEO?
  - What are you attempting to solve or achieve?
  - If you solve “it” how does that impact your business both in the short term and the long term?
  - If you could design the perfect solution what would it look like?
- How has business been over the past 12 months – statistics say business is getting better and the confidence surveys are increasingly positive – what is your experience?
- What can you tell me about your priorities in the 3, 6, 12 months?
  - What are some of your distractions or challenges?
- Do you have a sense of how business will be for you in the coming year?
- In the coming year, what is the most important thing for you to accomplish?
  - How important is it that you accomplish it?

- In the coming year or two, what is the one/two things that worry you the most?
- Who are your primary customers?
  - How is that industry fairing in today's economy?
- If you don't mind me asking, what is your organization really good at?
- Is there a lot of competition in your business?
- I'm always curious, and you may not know, but do you have any idea what would your competitors say about you?
- What other options are you looking at?
- If with a PEO
  - What was the reason you chose XYZ PEO?
  - What do you like about them / what do they do well?
  - What you like them to do better or how could they improve?

## LIABILITY

### HR AND REGULATORY COMPLIANCE

- Have you / your organization been the unfortunate target of a discrimination claim or some other employment related claims?
  - If so, do you mind sharing the circumstances that led up to the claim and what happened?
  - How many claims have you had to deal with these types of employee issues?
    - If none - Are you good at managing the risk or are have you been lucky?
- What, if anything, do you do to prevent employment related claims?
- How strong are your managers at dealing with employee issues?
- Do you ever wonder if you have exposure to employee law suits?
- I'm curious, what do the employees like most about working here?
- If we brought in two exceptionally talented HR people for 6 months, and you could direct them to do anything you wanted, what are the first two things you would have them focus on or accomplish?

## INSURANCE

### HEALTH INSURANCE

- Are employee benefits important to you and the organization?
  - How important?
  - What is most important about your health benefits?
    - Why?
- How do your employees feel about the benefits
- Have you had any issues with participation in the benefits?

- If yes, why do you think that is the case?
- What kind of renewals have you had in the past few years?
- Most companies have progressively lowered the contribution and lowered the benefits in order to manage costs, what have you had to do to manage the increases?
- Mercifully, the employer mandate was delayed for a year. How was the new law going to impact you?
  - Was there a significant difference in cost for you?
  - Do you know how you are going to handle the compliance with the ACA?
  - Does the 9.5% contribution mandate impact how much you have to contribute?
- Do you feel you are getting great advice on how to manage the cost of health care?
- What would you like to be enhanced or improved?
- Are there benefits you would like to offer but don't?

## **BENEFITS ADMINISTRATION**

- How comfortable are you with the organizations ability to manage compliance with ACA?
- Have you educated your employees about their ACA obligations and potential penalties
- In general is managing all the paperwork, enrollments and compliance with benefits simple and relatively painless process or is it a cause of frustration for you and the organization?
- How much of benefits enrollment is done online vs paper?
- If on paper, do you think it would make the enrollment process easier if employee could see all their options as well as the impact to their paychecks?
- Penalties for not managing COBRA properly are very steep so, most companies outsource it - how are you handling COBRA?
- Who has the job of managing all the benefits enrollments, answering the employee's questions, helping them with issues?
- Most of our clients were tracing benefits eligibility on a spreadsheet somewhere, how are you doing it?
- Who has the job of entering employee changes in the insurance company's systems?
  - A lot of my clients found that they were entering employee information into, the time system, payroll system, 2-4 insurance companies systems, tracking eligibility on a spreadsheet – in some case they were entering the same person's name into as many as 12 different places... are all of your systems integrated or do you have a similar duplicate entry process?

## 401K

- Do you offer a retirement plan?
  - If not, would you like to offer a plan
  - Would offering a plan make a difference to the current employees or impact your ability to attract better candidates?
- Does the company contribute to the plan?
- Just curious, do you know how much does the testing and 5500 preparation cost you annually?

## WORKERS' COMPENSATION / RISK AND SAFETY

- Are you a subscriber or a non-subscriber to WC?
- My other clients are telling me the market is getting harder and the rates are going up, what kind of renewals have you had over the past year or two?
  - If they went up - was the increase due to your claims history?
- Do you believe your WC costs are below market, too high, or you just about right?
- What kind of injury claims have you had in the last few years?
  - Were they legit claims?
  - If only a few claims, are you good at managing work injuries or have you been a bit lucky?
- How comfortable are you that the claims, when they do occur, are being managed well?
- What, if anything, could you improve to help prevent or manage injury claims?
- When there is a claim does the insurance company manage them well or are they just paying the claims and sticking you with the experience?

## PEOPLE

### HUMAN RESOURCES

- Who is responsible for compliance in the company?
  - How much education do they have in managing compliance / risk?
  - How strong is their background?
  - What are the other responsibilities this person has?
- Do you use outside HR consultants or labor attorneys on occasion?
  - When was the last time you consulted with them
  - Do you mind sharing the circumstances that necessitated the call?
- When you have a question about an employment issue or a regulatory issue who do you call to bounce things off of?
  - What are the types of questions you typically ask?

- Do you get the information you need in order to make a decision?

## **SAFETY**

- Who handles safety for the company?
- Who handles claims management for the company?

## **PAYROLL**

- How well does your payroll process work?
- What would the employees say about how payroll is done?
- How involved are you in the process?
- What if anything would you improve or change about the way payroll is done?
- If you were going to design a payroll system, what you make sure was included and what would be different from the one you currently have?
- Are there special reports that you produce today?
- Are there any reports that you would like to produce that you currently can't get
  - What is the report used for?
  - How would it help if you started receiving the information?
- I'm assuming you have never had to pay a penalty for an improper tax filing, is that correct?

## **SYSTEMS**

- Most owners don't think much about TAS, HR, Payroll and benefits administration but if you could reduce the time it takes for your staff to manage it, would that have an impact on the business over the next year?
- How much online interaction (HR Automation) will your company culture and people really accept? Would it make it easier for them?
- If you could connect all the information into one place, make it easy for the employees and managers to use and you were able to pull useful data from the system... Would that have an impact on the business? If so, what impact would it have?
- For most companies there is operational and financial value in eliminating all the redundant entry, giving employees access to maintain and update certain information and to get better labor cost reporting.... What would it take to get your organization there or is it even possible?
- How consistent is the onboarding process for all the employees?
- If not consistent – do you think the way in which EEs come onboard with the company is important?

- Have you ever had an employee complain or be dissatisfied on how they were brought on to the company (we often hear employees say “the company seems disorganized”)?
- When someone gets hired, how many times does someone have to write/key information into separate systems or spreadsheets (*i.e. TAS, Everify, Background checks, Payroll Benefits Health, life, dental, vision, 401k (eligibility racking spreadsheets), COBRA*)?
- If you are keying in the same information so many times does that mean there are mistakes that impact the employees?
- Many owners get frustrated because it is hard to get good employee data. Are you able to quickly get all the information about employees and labor cost in order to make the best decisions about wages, benefits and your overall spend on employees?
- How easy and /or how fast is it for you to get information about:
  - Pay history
  - Benefits expenses
  - Benefits enrollments / utilization
  - WC expenses
  - Tenure of employees, birthdays etc.
  - Labor cost
- If you were able to get better reporting / information on labor costs or employees, do think you would be able to make better or faster decisions?
- How fast and efficient are employee changes? Are you using paper forms? If so, do the forms get lost?
- If you had an easy online way for employees to request time off or make address / phone number changes would that meaningfully reduce the amount of time spent by your payroll and HR people on these tasks?
- If you had an easy online way and for managers to request changes to pay rates (as long as you still got to control it all by approving it) would that speed up the process and give you better control than you do now?
- How often do employees ask about stuff they could see online (which would be faster, easier and probably more accurate)?
- How do you currently keep track of time
  - If, electronic time clocks
    - Does the information from the time clock sync with the payroll system or is the information entered manually
    - How long have you had the current system?
    - How well does it work?
    - Is there anything you would like it to do that it doesn't?

- Does your payroll system generate file that can be imported into the GL?

## **CLEAR VISION QUESTIONS**

### **(Summarize what you learned and what they want)**

- Clearly you are looking options to “XXXXX” and you could probably stay where you are and just manage through it – do you have an idea of what you would need to see (or be convinced of) in order for you to move to a company like ours?
- How will you know when you find the right solution?
- Can you share with me the process you are going to go through to make a decision?
- Do you have a timeframe for making a decision?
  - Is there something that is causing you to decide by then?
- My guess is that there perhaps a few people who will have input into any final selection/decision, do you mind telling me who those people are?
  - What are their roles?
  - How do you they think they will react to this concept?
  - In order make sure we get a great understanding what you do and what you need, would it be okay if we connected with those people during the discovery phase? It doesn't take much time but it certainly and make a big difference in what we recommend to you and how well our program works with your organization – If we are the right partner, of course.
- What is most important to you in choosing a company to partner with?