PrismHR SEEDS

ACCELERATE YOUR SALES AND MARKETING

QUICK-START GUIDE TO DEMOING PRISMHR

Before you demo, follow this checklist and preparation guide.

ABOUT THIS DOCUMENT

Showing the value and the right functionality of software that connects with your buyer is critical to a successful sale. In order to accomplish this, you must take the time to prepare for each demo. This guide will show you the necessary steps on how to prepare your demo environment and tips for delivering a successful demo. Be sure to check out Do's and Don'ts for Demos that Win Business for best practices to help you deliver a successful demo and win the deal.

DEMO ACCOUNT VS. PRODUCTION ACCOUNT

- Production accounts will have the latest OB/BE setup & you can use the insurance plans you already have in place … and the rates should be in sync.
- If you vary medical rates for your clients …be careful what plans you show them. You may be better off setting up some random plans. Generally, you only show employee contributions, but you should just be aware. For ASO, it doesn't matter.
- Set up dummy EIN and bank accounts so it doesn't cause problems for you operations team.
- Ensure your demo account is clean and separate, but sometimes your security roles and Onboarding workflows can get stale. For example, when you add a new acknowledgement or change a security setting or upgrade a look and feel.
- Demo accounts may not have all of your ancillary products installed on it. Hiring, Onboarding, Benefits, etc. You want to have all at your disposal.

DEMO CUSTOMER SETUP AND PREP

- You should have at least ONE customer **Per Rep**
  - Depending on your vertical market(s), you may want to have a few
    - I have a general client, a restaurant and a construction company (certified)

    - If you use both **bundled and unbundled** formats, you may want to set up at least two different clients
    - You can show a client how they can access multiple accounts from the same login
- Pick a generic name and come up with a logo. Something better than "Demo Customer"
    - Brand the ESS
- Have some decent positions/job titles
- Setup some departments/divisions/projects
- Locations: where you do business
    - You want the client to see tax forms based on their location
- Create a nice benefit offering
- A couple pay groups
- Client Accounting
- Payroll Import?

EMPLOYEE SETUP – ABOUT 20

- Use real names
    - Not everyone loves to see members from the Rolling Stones or your favorite celebrities
- Disburse them across the cost centers you created
- Add phone numbers, email addresses, etc. This will show up in your dashboard
- Use the "reports to" field on the employee details and setup a hierarchy to show the org chart features
- Add some pay history
    - Go back at least one year
    - Not ever pay period, just enough so you can show an old year
    - You will build more history over time

KEEP EVERYONE'S HANDS OFF YOUR DEMO CLIENT

WHEN YOU DEMO

UNDERSTAND YOUR PROSPECT

- Gather as much information as possible on the prospective company

- Small company – you will know
- Larger company – talk to the sales rep OR develop a profile form

- Industry
- Size of company
- What state(s) – not all, just enough. Multi-state?
- Find out who is their current provider
    - Other PEO system = $ is a big factor
    - ADP/Paychex – there is a reason they are talking to you
    - Ultimate
- Pain?
- Sophistication?

PREP YOUR ACCOUNT

- Set up an employee to onboard
    - A state the client is in (or a neighboring state)
    - In a pay group other than the one you will run
- Get a payroll ready
    - Make sure it will calculate
    - Give control to the manager

JUST BEFORE DEMO

- Multiple sessions
    - Manager
    - Onboard
    - Client hiring page?
    - Service provider user

SHOWTIME

- Tell a story
- Engage the prospect
    - Ask questions to keep them involved
    - Prompt for their responses throughout the demo
    - Pause throughout to check in and open for questions