



PrismHR Hiring: HRO Sales & Marketing Playbook

**Best practices for selling
success and increasing
adoption**

INTRODUCTION TO PRISMHR HIRING

PrismHR Hiring is a powerful, integrated recruiting platform that streamlines your client's hiring processes so that they have the power to hire better, faster, and smarter. Hiring's platform allows clients to manage their full recruiting processes, facilitating collaboration across entire teams and reducing overall recruiting costs by 30% or more. Hiring helps HROs deliver this recruiting efficiency directly to clients, while closing more deals and retaining more customers.

PURPOSE OF THE PLAYBOOK

This playbook provides:

- Best practices for selling Hiring to new and existing clients
- Strategies for increasing client adoption and usage
- Key messaging opportunities and value proposition statements
- Marketing best practices
- Examples of successful strategies directly from other PEOs & ASOs

THE SALES PROCESS

CONSULTATIVE SALES APPROACH

Consultative selling has proven to be the best sales approach for Hiring. Starting a dialogue with clients to capture key information that will help present Hiring as the best solution is key. We've identified 5 key areas of the sales process for Hiring: the initial call/pre-demo call, the demo, Guided Setup, the close and the client setup process.



STEP 1: INITIAL CALL/PRE-DEMO CALL

Collect information about the client's current hiring process, as well as any existing hiring pain points the client may be experiencing, such as low applicant volume or disjointed communication. This will allow you to tailor the demo to the client's specific needs and highlight Hiring as a direct solution.

Key Questions to ask:

- What is your current hiring workflow?
- What are the major pain points in your current hiring process?
- What are your hiring goals?
- How many open jobs do you currently have?
- How many users will need access to the system?
- Where are you currently posting/advertising your jobs?
- What is your target candidate?

STEP 2: DEMO PROCESS

Schedule the demo and build a demo script based on the information gathered during the initial call. Focus the demo on the aspects of the platform that met the clients hiring goals and are solutions for optimizing the client's hiring process. [Click to download a sample demo script.](#)

Key solution examples:

- Customized applicant forms with pre-screening questions with the use of Form Builder™
- Custom templates that save time and provide consistency
- A mobile-friendly platform for both recruiters and applicants

STEP 3: PITCH A GUIDED SETUP

Pitch the efficiency and effectiveness of Hiring's Guided Setup, which is designed to ensure the highest ROI from day one.

Key Benefits of Guided Setup:

- 1-hour recorded training for every member of the client's hiring team
- Support with the creation and customization of the client's careers page
- Assistance with setting up custom templates and custom application forms

[Click to download the Guided Setup Overview sheet.](#)

STEP 4: THE CLOSE

The next step is to close the deal and receive confirmation of a Guided Setup. Sometimes that is easier said than done. Let's dive a bit deeper into sales communication best practices:

SALES TOUCH CADENCE BEST PRACTICES

Initial outreach: Send an email and call the prospect.

Scheduling the demo: Use a fraction-reducing scheduling tools like Calendly to avoid back-and forth emails and potential scheduling conflicts.

Day of demo: Confirm the demo via an email, ensuring the right stakeholders will be joining and provide a brief outline of what you will cover.

After the demo: Send a thank you email immediately after the demo. Follow up within one to two days, recapping the demo and any major takeaways. Be sure to provide sign-up instructions.

Stay in touch: Follow up with the decision makers every three to five days until a final decision is made.

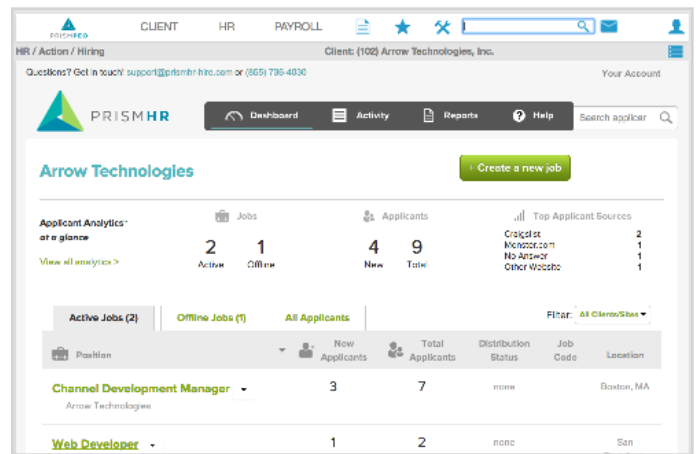
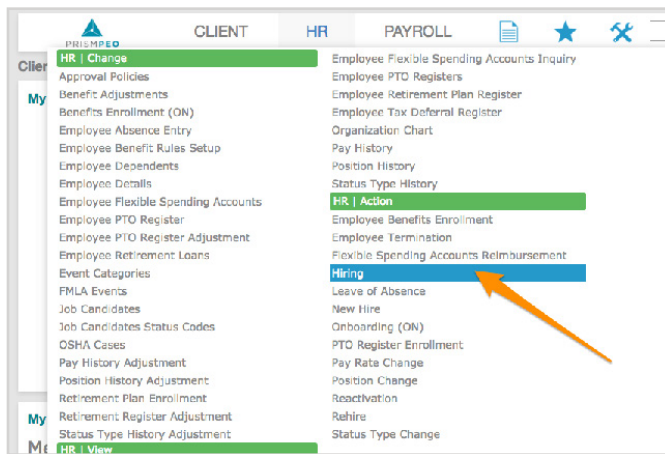
[Click to download example email template.](#)

STEP 5: CLIENT SETUP PROCESS

Hiring is fully integrated with PrismHR and accessible within the system for both HROs and their clients. HRO's can enable Hiring for clients as well as access the PEO Hiring Dashboard within PrismHR.

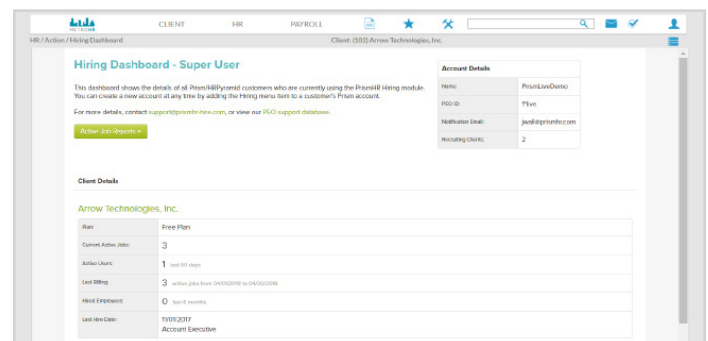
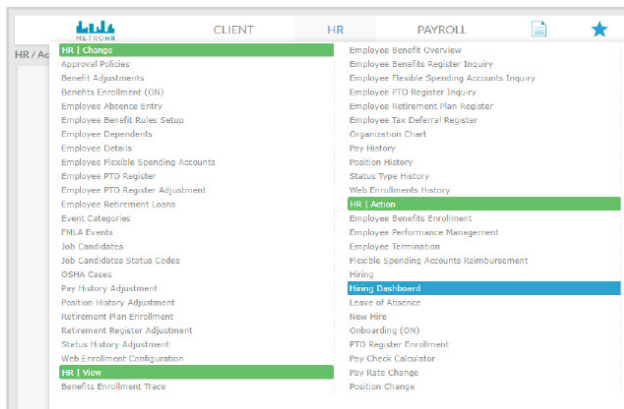
Hiring Menu for Clients

The Hiring menu can be added all worksite managers and service providers. Once enabled clients will be able to access Hiring by navigating to HR/Action > Hiring under the main HR menu. Clients will then be able to sign up and access Hiring directly within their PrismHR account.



The PEO Hiring Dashboard

The PEO Hiring Dashboard provides HROs with information on all client hiring activity. Its central location allow for better support and visibility. The PEO Hiring Dashboard provides the super user team with hiring KPIs and active job reporting across all clients.



For more information on enabling access to PrismHR Hiring in PrismHR, please contact libbyh@prismhr-hire.com.

MARKETING BEST PRACTICES

KEY MESSAGING OPPORTUNITIES & VALUE PROPOSITION

While it advantageous to customize messaging, including feature solutions and value propositions to match the client recruiting needs, there are key solution statements that will resonate with every Hiring prospect. Below are some example statements that can be leveraged:

- ✓ Our **easy-to-use** recruiting software helps you build a talent pool of qualified candidates across your entire organization with every new job that you post.
- ✓ **Pre-screening workflows**, including smart applications and assessments, eliminate hours of time sorting through applicants.
- ✓ **One-click job board posting** makes posting to multiple job boards quick and easy for your hiring managers.
- ✓ Scheduling becomes a breeze for your hiring team — and your candidates, too — thanks to our **integrated calendaring** feature.
- ✓ **Onboarding tools** will transfer your PDF and Word documents to digitally signable forms that take minutes to prepare and send.
- ✓ **Integration** with your HRIS system means saying goodbye to unnecessary data entry and hello to one-click hiring.

MARKETING SUPPORT & CONTENT

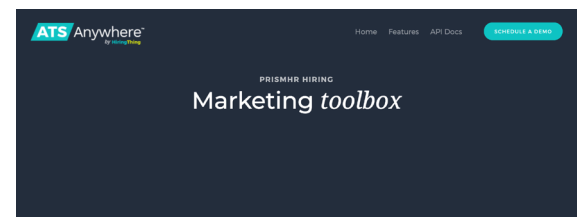
Hiring Marketing Toolkit

The PrismHR Hiring marketing team is available to support HROs by providing content, sales collateral, and marketing resources to help introduce and sell Hiring to new prospects and existing customers. The Marketing Toolkit offers an overview of available support, as well as details.

Email Nurture Campaigns

Personalized email nurture campaigns are designed to help HROs create relationships with clients. Drip campaigns can increase conversions, as well as assist with onboarding new users to the platform.

The PrismHR marketing team is available to assist with the creation of any marketing campaigns or content. To reach the team, please contact marketing@prismhr-hire.com.



Welcome. Thank you for being our *partner*.

Here you'll find everything you need to promote and sell Hiring as a premier applicant tracking solution for your customers.

PEO/HRO Resources

- Global Recruiting Overview and Pricing
- PEO Features Overview
- HRO Sales & Marketing Playbook
- PEO Case Study
- PEO Implementation Overview

DRIVING CLIENT ADOPTION & USAGE

Just as a consultative approach is best for selling, a personal touch has proven successful in driving client adoption. Axcet HR, a Kansas City-based PEO, grew its active client accounts by 64% in just one quarter! They did it by including a personal touch in every step of the implementation process. They have adopted the process of personalizing every demo by gathering key information during the initial outreach and customizing the demo for each client. Axcet also has HR consultants join the demo to walk clients through available customization options. After the demo, an account administrator is assigned to ensure each client's account is set up to meet all the client's needs, including posting jobs on client's behalf and on-site visits. The administrator also helps monitor the overall hiring process to ensure success. This time investment on behalf of Axcet HR has proven extremely beneficial, as, in a very short period of time, they have increased the adoption, stickiness, and overall value they provide to their clients. AxcetHR continues to see steady month-over-month increase in client adoption and active job growth.

*"Our level of support is very similar to a trusted advisor or accountant. When we tell clients "this will make your life easier" — they believe us."
- AxcetHR*

Adoption Rate of Key HROs:

*Optimum reported a **50%** increase in client growth month over month since implementing Hiring.*

*Axcet HR experienced a **400%** increase in client growth in the last 8 months since implementing Hiring.*

For more information on PrismHR Hiring, please contact
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