

1. Prepare for a great discovery dialogue.

- Use outside research tools like Google, industry research reports and conversations with trusted advisors to uncover as much information as you can about the prospect and their industry prior to your meeting.
- Gather ThinkHR resources like industry reports and training course lists.
- Consider using pre-meeting questionnaires and surveys.
 - **Partner tip:** ThinkHR partners can access audits, calculators and other tools in the Partner Admin area of Workplace.
 - Sending an **audit** prior to your meeting will provide concrete pain and discussion points that will help to open a meaningful conversation about *something other than insurance*.

On the audit, ask yes/no questions about common compliance and risk topics such as hiring, complaint handling and employee classification.

8-10 questions is sufficient to ensure prospects complete the audit and to provide enough information for a great dialogue.

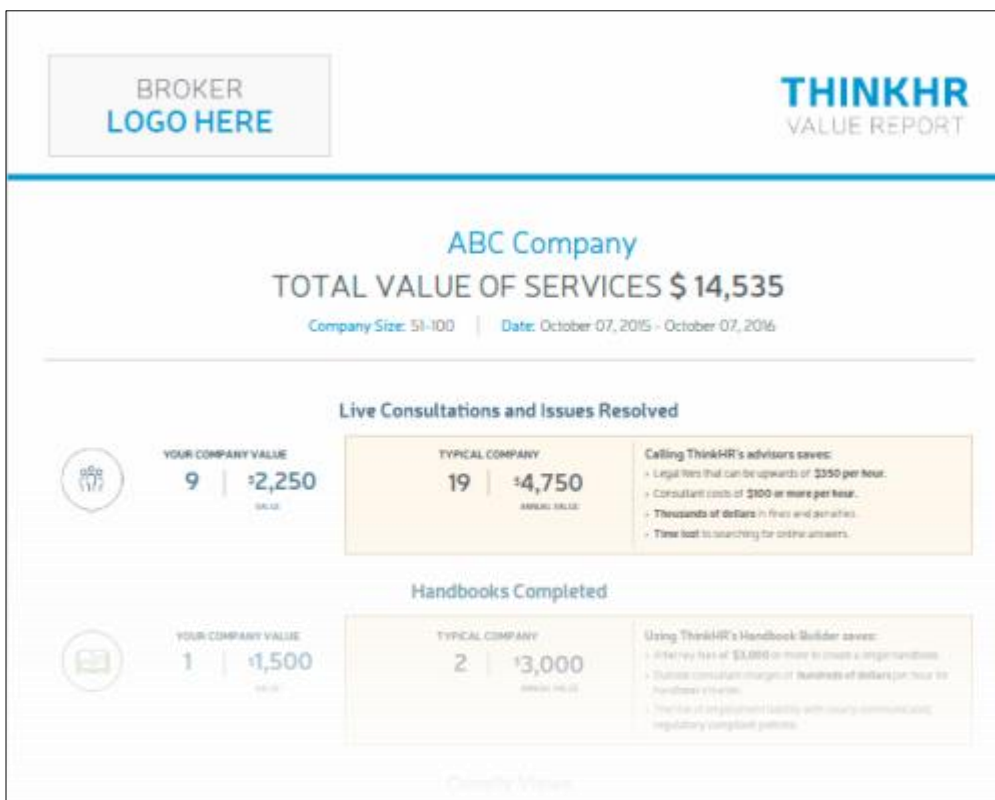


2. Execute a great discovery dialogue.

- Ask guided questions.
- Don't forget your MOM:
 - How **m**uch?
 - How **o**ften?
 - How **m**any?
- Consider creating a tool like a cost calculator for a more concrete discussion.

3. Conduct an effective discovery meeting.

- Restate the challenge.
- Review the cost of doing nothing.
- Present a solution.
- Provide proof.
 - **Partner tip:** ThinkHR Workplace Pro partners can show a sample Client Value Report that provides details on specific tools and the cost savings and value associated with them.



- **Partner tip:** Give your prospects access to ThinkHR for a specified period of time so that they can discover the value for themselves.