



# Guiding your customers to Payroll and HR services.

## Sales Tools & Resources

- Payroll Referral Services WAG Page
- Payroll Referral Services Video Tutorial – for internal use only
- Payroll Referral Services Product Page with online demonstration video — for internal & external use
- Still have questions? No worries, please contact the [asksmallbusinessproduct@td.com](mailto:asksmallbusinessproduct@td.com) mailbox for more information
- Payroll Product Page – [tdbank.com/payrollservices](http://tdbank.com/payrollservices)
- Paycor information – [paycor.com/td](http://paycor.com/td)

At TD Bank, America's Most Convenient Bank®, we are committed to serving the broad range of our Small Business & Commercial Banking Customers. That's why I'm proud to introduce Paycor as our preferred payroll & HR services referral partner. Today, about 54% of our Business Customers have more than one employee; we realize many of them have been asking you for recommendations on a reliable partner to meet their payroll & HR needs. **Starting September 6th, TD Bank can refer Business Customers for Payroll and HR Services!**

Here are the benefits for our Customers:

- **EARN Opportunities for TD Employees:** 54% of TD Bank Business Customers have 1+ more employees! This also presents great share of wallet opportunities for Business Checking & Savings, Lines of Credit, Bank@Work and even Wealth referrals.
- **Concierge Set-Up and Dedicated Service:** Paycor takes care of all the set-up and helps review employee paperwork to ensure they are set-up right the first time. Going forward, Business Owners are assigned a dedicated Payroll Implementation Specialist to personally support any new or ongoing needs that need to be addressed, matching the same dedication to legendary service as TD Bank.
- **Savings for TD Bank Customers:** Paycor provides a sizeable discount for payroll processing when a Business Customer processes their payroll from a TD Bank Business Checking Account.

Here are the benefits for TD Bank Employees and our Shareholders:

- **Exclusivity:** Paycor doesn't serve any other bank partner in our footprint, so our front-line staff never have to worry about Business Customer referrals landing up in the hands of another financial institution.
- **Field Engagement on-demand:** No more unannounced Store visits by aggressive payroll reps. Store referrals can be submitted by Sales Revenue and will be followed-up on by an Inside "High Velocity Sales" team at Paycor; Commercial Referrals can be submitted by Salesforce and will be handled by an in-field Paycor Sales Professional (PSP). Paycor provides instant email updates as the referral status changes and both sales teams are available to participate on pipeline calls as you want (monthly is recommended).

We are committed to ensuring that you can best meet our Business Customer needs. Please take a moment to review the marketing collateral, Business Customer Conversation Guide and also our giveaway items to help you surprise and delight our Customers on your next call.

Thanks,

**Jay DesMarteau**  
Head of  
Regional Commercial  
Specialty Segments

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# Business Customer Conversation Guide

## How is it going to work?

Target Size	Sales Channel	Referral Method?	How does Paycor follow-up?	Incentive?
Less than 25 Employees	TD Store Locations	Sales Revenue – Web Form (instant referral)	<ul style="list-style-type: none"> <li>Dedicated Inside Sales Team will follow-up</li> <li>Will be sent weekly emails regarding the status of leads</li> <li>SR will be updated with sold deals for incentive</li> <li>NO in-Store visits or unscheduled solicitations!</li> </ul>	\$500 SR for Sold Deals
	Small Business Banking Contact Center			
25+ Employees	Commercial Channel	SalesForce – Email Referral (instant referral)	<ul style="list-style-type: none"> <li>Dedicated in-field Sales Representatives who specialize in Commercial Customers; can visit Customers &amp; Prospects</li> <li>Will be sent weekly emails regarding the status of leads</li> <li>SalesForce will be updated with sold deals for incentive</li> </ul>	Fee Revenue reported in Share of Wallet Reporting
Varies	Public Site (tdbank.com)	Link for Customer self-referral on Paycor's site	Follow up will be based on number of employees	No incentive for self-referrals

## Getting Started – How to EARN your Customer Relationship:

<b>Pre-Plan: Who is a good prospect?</b>	<ul style="list-style-type: none"> <li>Any business with employees (full-time, part-time or seasonal)</li> <li>Business Owners who are outsourcing their payroll already (look in the past 30 days of transactions for keywords like ADP, Paychex or Intuit)</li> <li>Business Owners who use employees to drop off cash deposits in-store</li> </ul>
<b>Engage</b>	<ul style="list-style-type: none"> <li>Does your business have employees? Either full-time, part-time or seasonal?</li> <li>How are you keeping up with all the changing laws around employees and payroll taxes?</li> </ul>
<b>Assess</b>	<ul style="list-style-type: none"> <li>How are you managing payroll and HR for your employees?</li> <li>Do you receive any relationship discounts or other pricing perks on your payroll?</li> <li>How are you managing payroll and HR for your employees?</li> </ul>
<b>Respond</b>	<ul style="list-style-type: none"> <li><b>Concierge Set-Up with Dedicated Ongoing Service</b> Paycor takes care of all the set-up and helps review employee paperwork to get you set-up right the first time. Going forward you will have a dedicated Payroll Implementation Specialist to personally support you with new needs</li> <li><b>Easy to Use</b> Put an end to managing multiple spreadsheets with Paycor's easy-to-use solution that gives immediate and secure access to all of your payroll, HR, timekeeping and reporting information. Your payroll will be automatically update with changing city, state and federal guidelines to always keep you compliant</li> <li><b>Savings for TD Bank Customers</b> Receive pricing when you process your payroll from a TD Business Checking Account</li> </ul>
<b>Nurture</b>	<ul style="list-style-type: none"> <li><b>Business Checking</b> Do you need an additional account to separate payables from operating cash?</li> <li><b>Business Savings</b> Keep aside excess cash for quarterly payroll taxes?</li> <li><b>Line of Credit</b> Can you ensure payroll can always go through no matter what your cash flow situation?</li> <li><b>Bank@Work</b> Do you or your employees have any Personal Checking needs?</li> <li><b>Wealth</b> Do you or your employees have any insurance or retirement planning needs?</li> </ul>

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## How to make a referral in Sales Revenue

- Log into Sales Revenue
  - Select Referrals on the top navigation bar
  - Select "US Payroll Referral"
- The "US Payroll Referral" option will open a new window for you to make an instant referral to Paycor directly
  - Fill-in information
- If customer approves receiving follow-up from Paycor by phone and/or email,
  - Press "Submit"

If consent box is not checked the referral will not be sent!

Business customer will receive follow-up either same day or next by Paycor Sales Rep.

Reconciliation Process:

- TD Employees receive sold deal credit when the Customer pays their first payroll processing bill with Paycor.
- Every 30 days Paycor provides "Sales Report" to SR in mandated SR template
- TD Employee receives \$500 SR for sold deals

## How to make a Paycor referral in Salesforce

- Log into Salesforce
    - Navigate to the account you want to create the Paycor referral on
    - Click "New Referral"
  - You will be directed to the "New Opportunity" Page
    - Business Line Referred to: TD Paycor
    - Click to "SAVE" Referral
  - On the Opportunity Page, click "Submit Referral"
  - This will open the referral to edit and complete:
    - Enter the number of employees in Amount
    - Click on the magnifying glass next to the referral contact and search and select the contact from the account you want to refer
    - Enter any comments you want to include
    - If the Customer has consented to being contacted by Paycor, then check the Paycor Consent Receive box
- If consent box is not checked the referral will not be sent!
- Click "SAVE"
- Here is a referral after saving:
    - All Referral Contact information is pulled from the contact record
    - If fields are blank, you will need to update the contact to show properly on the referral
- If consent box is not checked the referral will not be sent!

Once the referral has been submitted, you will receive an email copy of the referral!