

Channel Partner Prospecting & Proposal Process



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*"The goal is not to sail the boat, but rather
to help the boat sail herself."*

John Rousmaniere

"Being a start up company, we've had many issues to deal with including marketing, pricing, customer follow-up, training and employee procedures. This in itself can be overwhelming but using Four Point HR, we were able to concentrate on these things without having worry about procedures for hiring employees, payroll, taxes, worker's comp issues, how to conduct background checks and even how to terminate employees."
Owner-Cleaning Firm



Prospecting Process

Prospecting is simultaneously the most challenging and the most critical process in sales. We support our brokers' prospecting efforts in four ways:

We provide clear definition of those industries that we cannot serve due to insurance carrier limitations. These industries are only roofing and steel erection.

We welcome the opportunity to discuss any prospect with which you may have an opportunity to build a relationship and provide custom marketing pieces for such opportunities. This includes prospects that have adverse loss experience as we've had success working with accounts that committed to a program of safety and loss prevention. We know that closing new business is the lifeblood for any sales professional, and we are not passive in the sales process.

We have unique offerings for Assisted Living, Healthcare, and Staffing industries that can help you differentiate yourself to these groups. In each of these industries, we leverage our affiliate companies – Four Point Staffing and Four Point Capital – for solutions that the competition simply cannot offer.

We provide leads for brokers who produce in excess of \$3 million in payroll. Our internal marketing staff maintains a database of current leads and we pass them on to the brokers who demonstrate a strong commitment to working with Four Point HR.

Partner with Four Point HR for another revenue

Proposal Process

"After meeting to discuss our needs, it was clear that no other PEO could compare to the level of personal service, ease of payroll/ benefits admin, and competitive rates as one can get through Four Point. Being a small organization, finding a low cost and hassle-free option was our primary concern; however, not only are the rates fair, but the comfort in having knowledgeable pros handling the back-end payroll administration is priceless. Four Point HR is what very few other companies are anymore: dedicated, friendly, here to serve customers 24/7. Thank you for helping us better serve our employees!"

SVP – Non-Profit



The key to this process being successful is to be flexible at its inception. Four Point HR understands that you are not always able to pull together all of the information needed to produce a final quote. We regularly provide indications of pricing based on receipt of completed prospect information. Once the prospect is qualified, we can gather the required documentation.

- **Submit RFP with required documentation**

Documents Needed for Comprehensive HR, Payroll and WC Quote:

1. Copy of current Workers Compensation Declaration Page
2. Federal Tax ID Number (EIN)
3. Last 2-3 years Workers Compensation Loss Runs
4. Copy of most recent Quarterly Wage and Tax Report
5. Frequency of Payroll
6. Copy of Current PEO or Payroll Vendor's Monthly Statement and Billings
7. Please provide a brief description of business services and service locations

Documents Needed For Benefit and Medical Quote:

1. Employee Census to include: Date of Birth, Gender, How enrolled in current plans, Marital Status, Status, & Zip Codes. Please see Attached census form.
2. Completed Personal Health Questionnaires completed by all active employees
3. Copy of the current plan description and rates

- **Proposals turned around within 24 hours of receiving the request for proposal.**
- **Four Point HR can assist in meeting process and can coordinate enrollments**