Agent Success Guide – Quick Reference

This handout provides a framework, but make sure to watch the full video for detailed explanations and examples.

Introduction to Your Role

- **Build Your Business**: Identify businesses needing payment solutions, present NationalLink's offerings, and assist with smooth provider transitions.
- **Key Responsibilities**:
  - Identify and qualify leads.
  - Present NationalLink's solutions.
  - Close sales and support onboarding.

Key Resources

- **CRM System**: Track your leads and progress.
- **Marketing Materials**: Brochures, email templates, etc.
- **Training**: Online modules, support team, and peer resources.

Sales Goals & Metrics

- **Weekly Sales Goal**: Close 1–3 sales (contract signed or application completed).
- **Daily Prospecting**:
  - 30 calls or emails to set 2–3 appointments.
  - 3–5 in-person visits to initiate contacts.
- **Weekly Prospecting**: Visit 20 businesses, collect 1–3 merchant statements.

Tips for Success

- **Plan Ahead**: Set weekly targets for prospecting, meetings, and follow-ups.
- **Follow-Up**: Connect with leads within 24 hours.

Lead Generation & Prospecting

- **Finding Leads**:
  - Business clusters (downtown, shopping centers).
  - Online (LinkedIn, Yelp, Google Maps).
- **Networking**: Attend local events, follow up with new contacts.
- **Prospecting Tips**:
  - **Research** each business beforehand.
  - **Personalize Your Approach**: Highlight benefits specific to their business type.

Initial Calls: Qualifying Leads

- **Key Questions**: Ask about current processing setup, transaction size, and fee preferences.
- **Choosing the Right Pricing Model**:
  - **Dual Pricing**: Good for businesses that want to offset fees.
  - **Interchange Plus**: For reducing costs; request a processing statement for analysis.

Statement Analysis

- **Purpose**: Show concrete savings and value based on the business's current fees.
- **Steps**:
  - **Request Statement**: Explain confidentiality and purpose.
  - **Submit & Review**: Send statement to bankcard@nationallink.com and review before the meeting.

Sales Meetings & Proposals

- **Preparation**: Research the business and prepare a focused pitch.
- **Meeting Structure**:
    - **Build Rapport** with the client.
    - **Identify Pain Points** and present NationalLink's solutions.
- **Common Objections**: Offer reassurances about easy transitions and better service.

Closing the Deal & Onboarding

- **Closing Techniques**: Create urgency and use assumptive language.
- **Application Checklist**: Have necessary documents ready.
- **Onboarding**:
    - Ensure equipment delivery and training.
    - Follow up post-onboarding for satisfaction and referrals.

Tracking & Monitoring

- **Using CRM**: Log interactions, set reminders, and manage your pipeline.
- **Weekly Performance Review**: Assess your activity, identify gaps, and adjust strategies as needed.
- **Support**: Regular check-ins with support team or coach.
