



Asure's Sales & Marketing **Playbook**

Mike Vannoy & Eyal Goldstein



2023 Asure Reseller Partner Conference

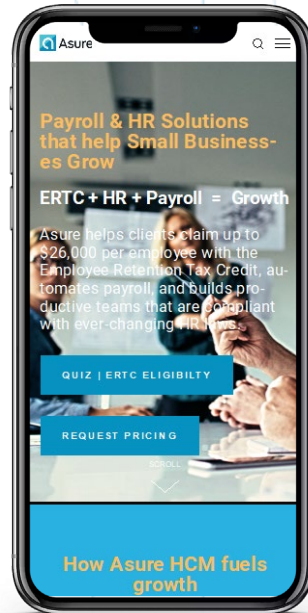


Sharing Our Playbook (Same Products as You)

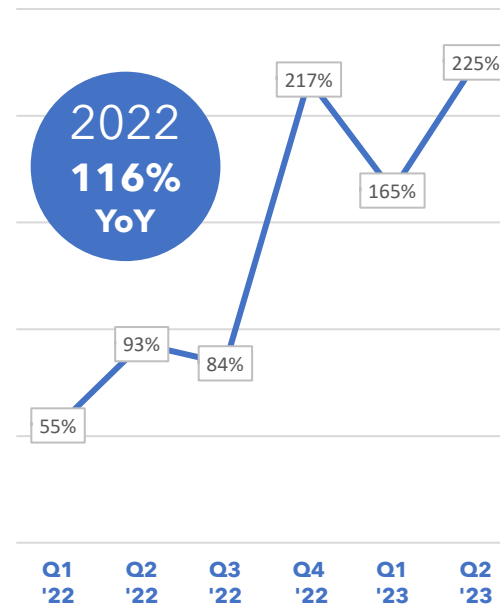
Messaging & Product Bundles

Tax & ERTC
 + HR Compliance
 + Payroll & HR
 = **HCM for Growth**

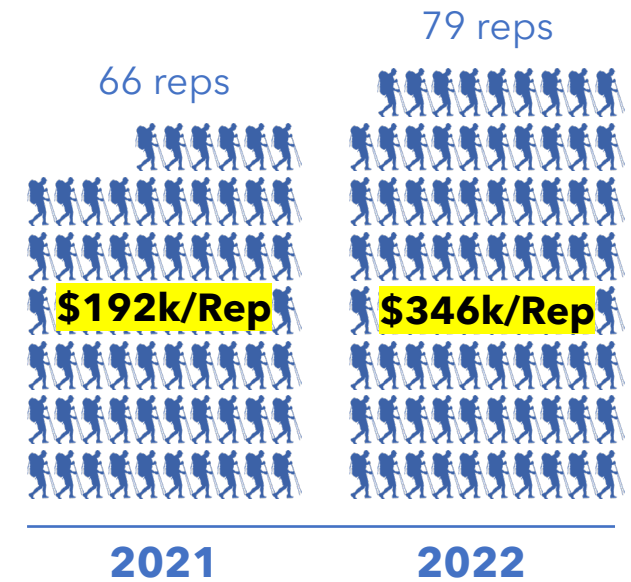
- ERTC demand remains strong; Funds HRC
- HR Compliance 828% ▲ YoY



YoY Bookings Growth



▲ 80% Rep Productivity



Content Creation

Buyer Personas

Company Size	Persona Name	Description	Needs & Challenges	Decision-making Factors
1-10 employees	Small Biz Sally	Owner of a startup or local business. Manages operations hands-on.	<ul style="list-style-type: none"> • Simplified payroll • Affordable pricing • Easy onboarding 	<ul style="list-style-type: none"> • Price • Usability • Scalability
11-25 employees	Growing Greg	Manager of a rapidly growing SME. Beginning to delegate HR tasks.	<ul style="list-style-type: none"> • Integration w/current • Compliance assistance • Efficient onboarding 	<ul style="list-style-type: none"> • Integration • Support • Training
26-50 employees	Mid-size Molly	HR head at a mid-sized company. Oversees a small admin and HR team.	<ul style="list-style-type: none"> • Comprehensive HR • Analytics & reporting • Training 	<ul style="list-style-type: none"> • Features breadth & depth • Security • Reputation
50-100 employees	Corporate Chris	CEO of an established company. Has a dedicated HR department.	<ul style="list-style-type: none"> • Full-suite HR • Integration w/systems • Customization options 	<ul style="list-style-type: none"> • Reliability & reputation • Scalability • Integration depth

Buyer Journey

Journey Stage	Growing Greg's Actions	Information Needs	Potential Content/Service Touchpoints
Awareness	<ul style="list-style-type: none"> • Notices inefficiencies in current payroll/HR processes. • Starts initial research online about possible solutions. 	<ul style="list-style-type: none"> • What are the signs of an inefficient HR system? • Basic features of modern HR systems 	<ul style="list-style-type: none"> • Blogs about HR inefficiencies • Webinars on HR best-practices • Social media ads re. HR benefits
Consideration	<ul style="list-style-type: none"> • Explores payroll/HR solutions • Reads reviews and comparisons • Asks peers for recommendations 	<ul style="list-style-type: none"> • Comparison of top HR systems in the market • Case studies of businesses of a similar size 	<ul style="list-style-type: none"> • Comparison charts and infographics • Customer testimonials • Demo(s) of products • Forums and reviews
Decision	<ul style="list-style-type: none"> • Contacts vendors for demos • Evaluates pricing, features, and integration capabilities • Makes a purchase decision. 	<ul style="list-style-type: none"> • Detailed product specifications • Pricing and terms • Implementation details 	<ul style="list-style-type: none"> • Product demos and trials • Sales consultations • Pricing calculators • Onboarding/integration guides

"Awareness" Content Creation

Webinars

Designed to keep small business owners informed, Asure webinars explore a wide range of HR, compliance, and payroll topics. Register for our upcoming webinars or choose from our library of on-demand webinars to watch now.

- How to Lead Your Business Through Change (1:56)
- Managing Talent Secrets to Small Business Success (4:02)
- How to Fill Out Form I-9 Compliance, Avoid Fines, and E... (1:58)
- Retention and Post-Employment Tips Our Small Busi... (58:35)
- HR Best Practices for Small Business: Talent & Management Tips (3:56)
- HR Best Practices for Small Business: Recruiting & Hiring Tips (1:04)
- HR Best Practices for Small Business: Compensation (3:58)
- HR Best Practices for Small Business: Success (57:15)
- Development and Performance Management Tips Our... (5 views • 7 days ago)
- Onboarding and Compliance Tips Our Small Business... (5 views • 8 days ago)
- Recruiting and Hiring Tips (9 views • 9 days ago)
- NACHA Bank Security Act Money Transmitter Law Wh... (12 views • 13 days ago)
- Avoid Legal Discipline Employees for Conduct Outside... (4:45)
- Avoid Wrongful Termination Lawsuits - What is Const... (11 views • 2 weeks ago)
- 5 Crucial Actions That Build Unity and Foster Perform... (12 views • 2 weeks ago)
- Maximizing ChatGPT for HR Mitigating Risks and Boosting Productivity (8:45)
- Are Pre-Employment Background Checks Worth It? (12 views • 2 weeks ago)
- Payroll Companies Facing New Regulations (8 views • 2 weeks ago)
- How to Interview Candidates for Your Business (9 views • 3 weeks ago)
- 75% OF FAST GROWTH COMPANIES ASSESS CANDIDATES THIS WAY (9:41)
- How to Interview Job Candidates (6 views • 3 weeks ago)
- THE INCREASING REGULATION OF PAYROLL PROVIDERS: WHAT YOU NEED TO KNOW (9:28)
- The Increasing Regulation of Payroll Providers: What You Need to Know (13 views • 3 weeks ago)
- RETENTION AND POST-EMPLOYMENT TIPS: OUR SMALL BUSINESS SURVEY... (46:31)
- Retention and Post-Employment Tips: Our Small Business Survey... (21 views • 3 weeks ago)
- 83% OF FAST GROWTH COMPANIES SEND WRITTEN JOB OFFERS (5:59)
- Are Written Job Offers Important? (10 views • 4 weeks ago)
- 73% OF FAST GROWTH COMPANIES HAVE AN EMPLOYEE REFERRAL PROGRAM (4:51)
- DEVELOPMENT AND PERFORMANCE MANAGEMENT TIPS (1:08:35)
- 25% OF BUSINESSES MAY BE BREAKING JOB POSTING LAWS (8:08)
- 91% OF FAST GROWTH BUSINESSES HAVE WRITTEN JOB DESCRIPTIONS (4:15)
- Are Employee Referral Programs Worth It? (19 views • 4 weeks ago)
- Development and Performance Management Tips: Our Small... (13 views • 1 month ago)
- Job Posting Laws (11 views • 1 month ago)
- Are Written Job Descriptions Worth It? (10 views • 1 month ago)
- What is AI Will Employment Everything a Growing Busi... (50:59)
- FLSA Pay Compliance (18 views • 1 month ago)
- Interviewing Applicants: Avoid These Legal Questions... (5 views • 1 month ago)
- 5 Ways What Employers Must Know (18 views • 1 month ago)
- ONBOARDING AND COMPLIANCE TIPS: OUR SMALL BUSINESS SURVEY RESULT... (13 views • 1 month ago)
- Is Applicant Tracking Software Worth It? (5 views • 1 month ago)
- The Power of Job Boards: How They Drive Growth in Fast-Growing... (18 views • 1 month ago)
- Unleashing the Power of ChatGPT: A Must-Have Productivity Tool for... (756 views • 1 month ago)

YouTube channel page for 'asure software'. The page displays a grid of video thumbnails with titles and view counts. The videos cover topics such as NACHA compliance, data tokenization, HR best practices, and business growth strategies.

HCM Blog

A growth hacker's guide to Human Capital Management

Search blog archives

Search by Tag

- HR compliance (147)
- Federal (86)
- human resources (78)
- compliance (46)
- Payroll Tax Management (43)
- Payroll (29)
- HR (27)
- HCM (26)
- Benefits (22)
- Health and Insurance (20)
- IRS (18)
- ERTC (16)
- COVID-19 (14)
- Compliance (13)
- human capital management (11)
- Announcement (10)
- employee benefits (10)
- payroll (10)
- Mobile Workforce (8)
- Small Business (8)
- State (8)
- SaaS (7)
- ERTC eligibility (6)
- coronavirus (6)
- mobile (6)

Blog posts include:

- Is Your Company Asking Illegal Questions on Job Applications? (Aug 11, 2023)
- DOL Investigation Recovers \$60,000 in Back Wages and Damages From Restaurant for Illegal Tip Sharing (Aug 17, 2023)
- 83% of Fast Growth Companies Send Written Job Offers (Aug 16, 2023)
- \$15,625 in OSHA Penalties for Midsize Business Failing to Improve Worker Safety Procedures (Aug 16, 2023)
- HR Compliance Update | August 15, 2023 (Aug 15, 2023)
- Best Practices for Managing State Registration Compliance (Aug 15, 2023)
- Court Awards \$254,000 in Back Wages, Damages After DOL Investigation Finds Business Misclassified 21 Employees (Aug 15, 2023)
- How to Build a Team for Your Small Business (Aug 15, 2023)
- The Impact of Employee Handbooks on Small Business Growth (Aug 14, 2023)
- Pool Company to Pay \$312,000 in Back Wages to 26 Non-Immigrant Workers (Aug 14, 2023)
- \$58,942 in OSHA Penalties for Construction Business (Aug 14, 2023)
- New NACHA Compliance - Very Tricky for CPA Firms (Aug 15, 2023)

"Consideration" Content Creation



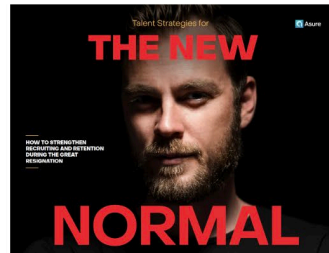
eBooks & Guides

Download one of Asure's free eBooks or guides by clicking on the thumbnail of the topic that you're interested in learning more about.



HR Planning for People, Processes, and Technology

Asure created this guide to help business leaders plan their HR and drive success through HR at their company. People should be the first priority in business transformation, and experts say that processes should be the second priority. This helpful framework forms a foundation for successful business transformation.



Guide to the New Normal in the Wake of the Great Resignation

Asure created this guide to provide business leaders with ideas/insights about what's driving the Great Resignation and how to respond. We examine key areas so you can both attract great candidates and hold onto existing talent: workforce flexibility, employee mental health, employee engagement.



Guide to Employee Retention Tax Credits. *Do you qualify?*

Asure created this guide to help you identify whether your company is eligible to receive the ERTC and how to file for it. A decision tree will help you understand the impact of the ERTC on your business.

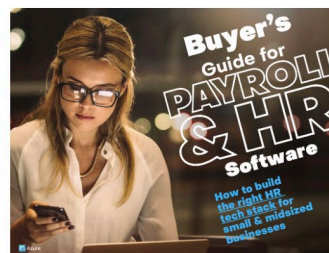


2023 Small Business HR Benchmark Report

A recent survey of more than 2,000 businesses analyzes how companies are embracing HR best practices.



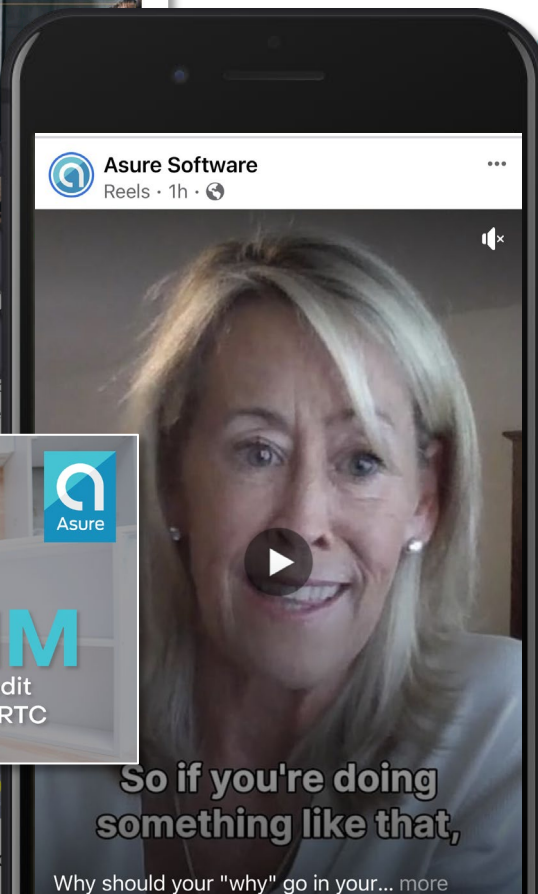
Reimagining Benefits for the Hybrid Workforce



Buyer's Guide for Payroll & HR Software

2021 HR Trends Survey: Business

Small Business Guide to Payroll Compliance



So if you're doing something like that, Why should your "why" go in your... more

“Decision” Content Creation

Check ERTC Eligibility

Find out if your business may be eligible for ERTC in just a few simple steps.

Do You Qualify?

No Obligation. No Upfront Costs.

Did COVID impact your business? If so, you may be eligible to claim the Employee Retention Tax Credit and get a payroll tax refund (up to \$26k per employee) to invest in your business.

Find out if your business may be eligible for ERC in just a few simple steps. Start your application below!

Begin Initial Eligibility*

See if your **business** may qualify for up to \$26,000 per employee with the Employee Retention Tax Credit (ERTC). Start your application below and get immediate results.

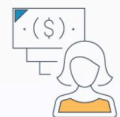
*(please note, ERTC is for businesses only, not individuals)

[Start Application](#) press Enter ↵



Asure Client - Manufacturer, Skokie, IL

"We're getting a **\$689k** tax credit. That's exactly the help we needed to climb out of the downturn."



Asure Client - Restaurant, Galveston, TX

"By filing amended returns for 2020, Asure is helping us get back **\$555k**."

That's a lifesaver for us."

Do you need HR help?

Answer these 5 critical questions to know

[Take Quiz \(<60 second\)](#)



Digital Marketing

Feeding SDRs & Inside Sales Reps

My Pillow®



Will you...

Follow me?



Read emails?



Watch ads?



Omni-Channel Marketing Campaigns



Asure Software
7,482 followers
8h · 🌐

Are you ready for the key to HR success? **Asure Software's** groundbreaking 2023 HR survey has the answers you've been searching for. ...see more

NEW BLOG POST

Key to HR Success Revealed: Survey Data From 2,065 U.S. Businesses

Asure Software
★ Favorites · August 14 at 10:00 AM · 🌐

We surveyed 2,065 companies in 8 critical areas of Human Resource Management. Download **Asure Software's Small Business HR Benchmark Report** to understand why businesses prioritizing HR best practices are much more likely to enjoy fast growth.

<https://hubs.la/Q01-XB6R0>

#asure #hr #smallbusiness #smb #smallbusinesshrbenchmarkreport

Does **HR** Drive Growth? Small Business HR Benchmark Report **OUT NOW!**

2023 Small Business HR Benchmark Report

New Survey Data From Over 2,000 U.S. Businesses With Key Insights and Analysis

Compare Your Business to Others in 8 Essential Areas of HR

Small Business HR Benchmark Report

2023

Small Business HR Benchmark Report

We apologize for technical difficulties if you were unable to access the Small Business HR Benchmark Report. Below you will find a shareable and downloadable link where you can access the report.

GET THE REPORT

Asure, 405 Colorado Street, Suite 1800, Austin, TX 78701, USA, 888-323-8836 | askasure@asuresoftware.com | asuresoftware.com

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Asure

2023 Small Business HR Benchmark Report

New Survey Data from 2,000+ U.S. Businesses with Key Insights & Analysis

Compare Your Business to Others in 8 Essential Areas of HR

Does HR Impact Revenue Growth?

A recent survey of more than 2,000 small businesses analyzes how companies are embracing HR best practices and their corresponding rates of growth, exposing the link between rapid growth and employee-centric best practices.

This report summarizes the survey results across eight areas of HR across the employee lifecycle — Recruiting, Hiring, Onboarding, Compliance, Development, Performance Management, Retention, and Post-Employment — and serves as a playbook on how to apply HR best practices across each of these eight areas to foster growth.

Contrasting the HR practices of survey respondents who identify as Fast Growth, Growth, Down Growth, and No Growth, the Small Business HR Benchmark Report serves as a prescriptive research guide and framework to help understand the impact of HR on growth, a perspective that's especially of value with increasing employee vulnerability trends like quiet quitting to the big stay. These market factors can be strategically invest in employee-centric HR, focusing on training and development to attract stronger talent, experience greater engagement, improve employee retention, and foster growth.

Click here to download a copy of the report.

Webinar Series:

HR Best Practices for Small Business

Our 2023 Small Business HR Benchmark Report reveals the significance of embracing all aspects of HR to support growth. Watch our new webinar series with guest Mary Simmons, SHRM-certified HR expert and Vice President of HR Compliance at Asure. Register below to explore key trends and HR Best practices outlined in the report.

View the full line up of upcoming Webinars in this series below.

DOWNLOAD REPORT

Company Email*

First Name* Last Name*

Company Name*

Phone Number*

GET REPORT

Do you need HR help?
Answer these 5 critical questions to know

Take Quiz (<60 second)

Ad Retargeting

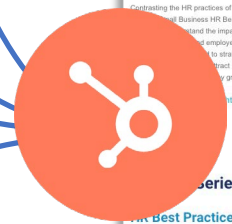
Convert?

No

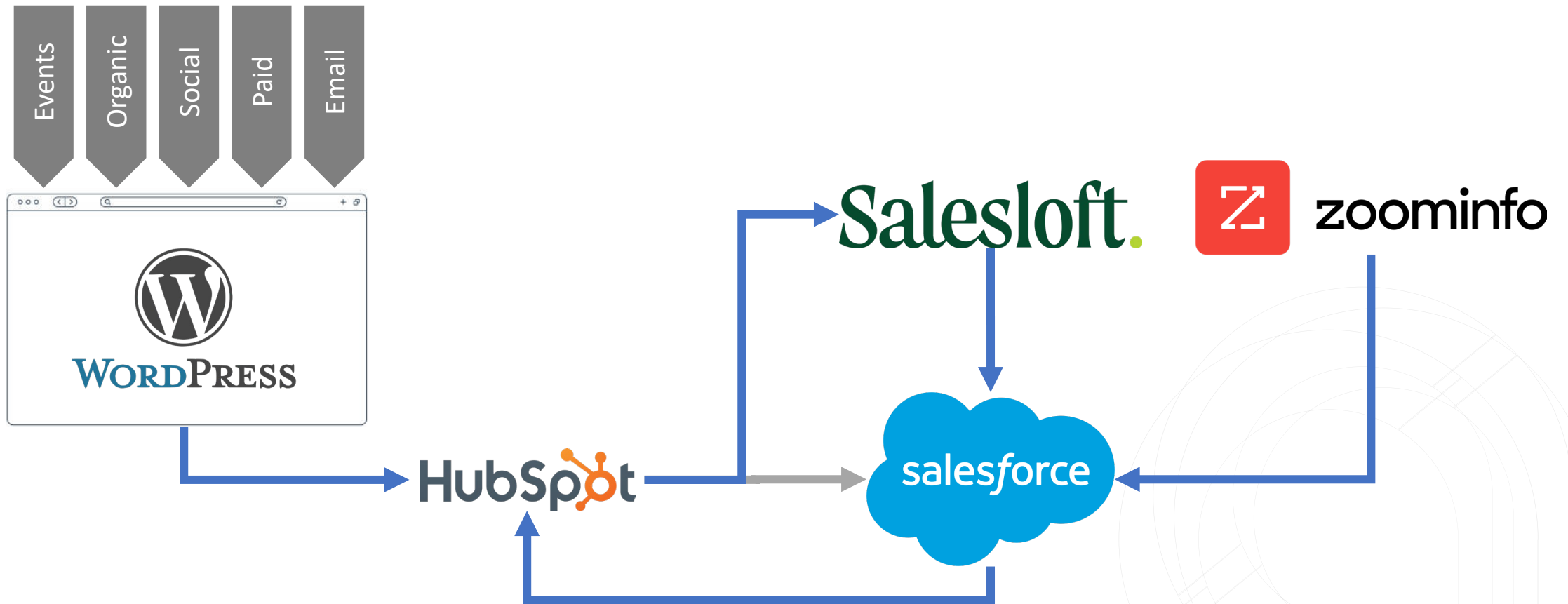
Yes



Asure Sales



Marketing Tech-Stack



Marketing Funnel

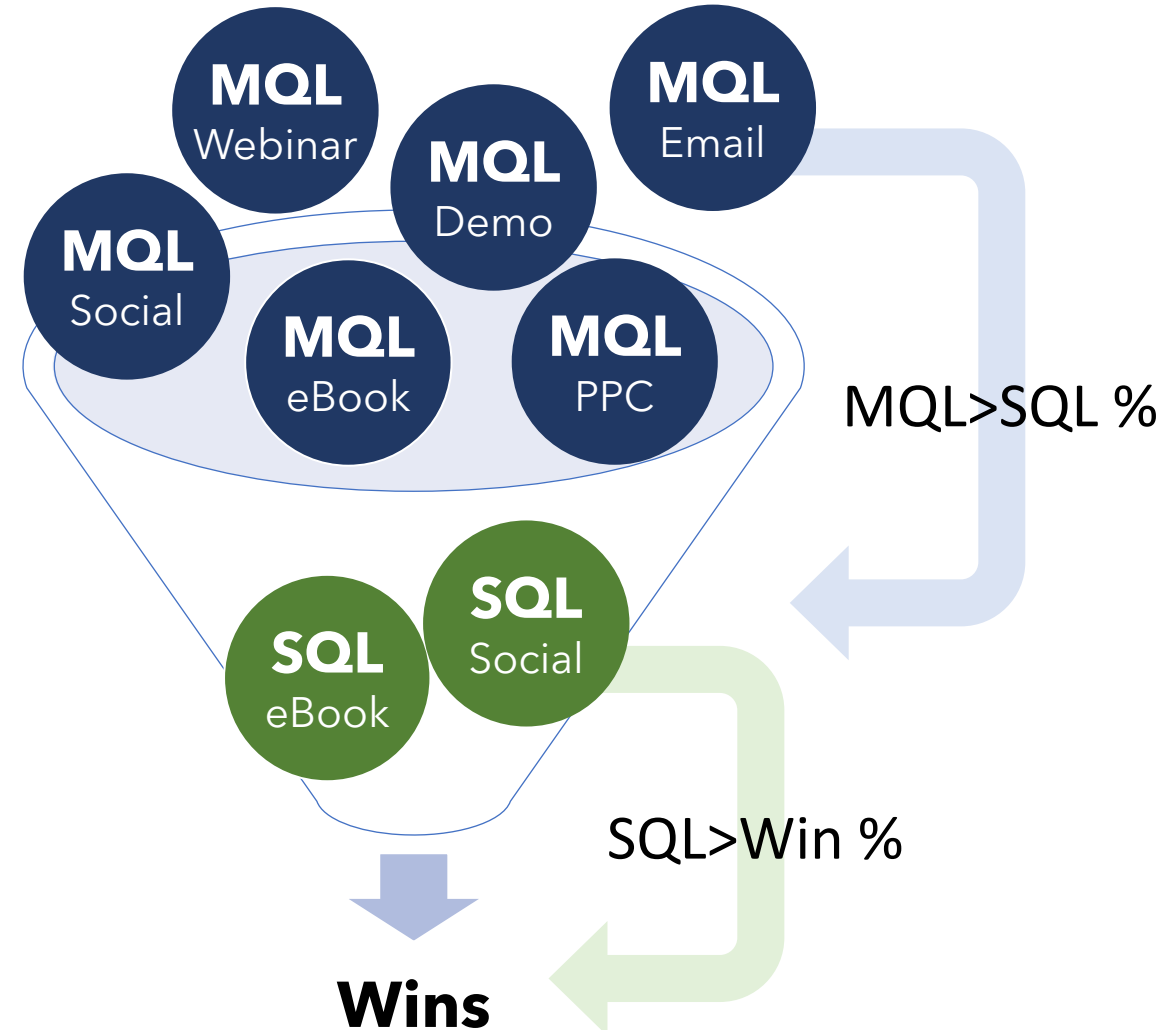
SQLs and MQLs

MARKETING QUALIFIED LEADS

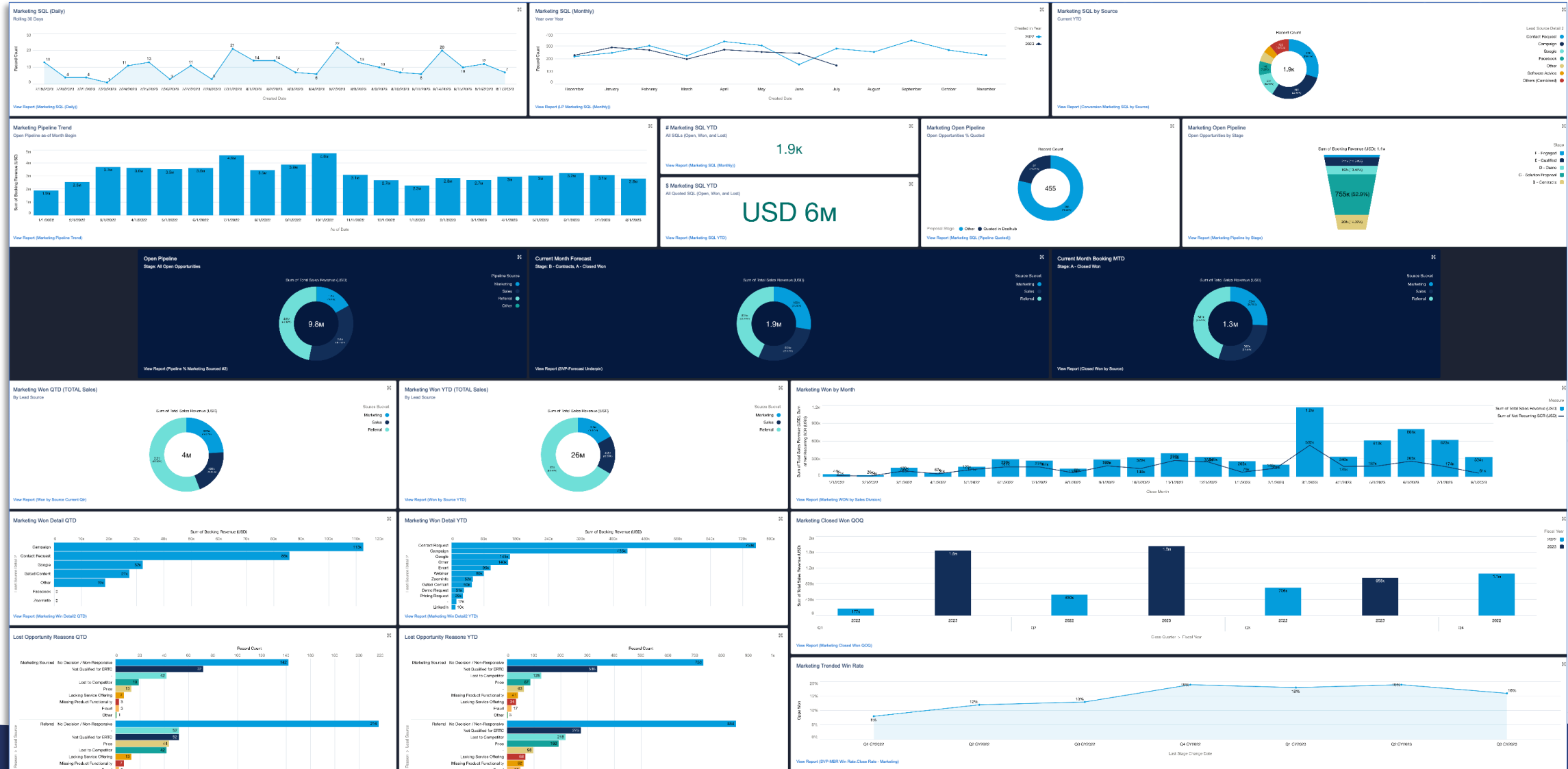
- ✓ Demographic match
- ✓ Digitally engaged

SALES QUALIFIED LEADS

- ✓ Demographic match
- ✓ Digitally engaged
and
- ✓ Agreed to meet with Sales Rep



Measure Every Inflection Point of Funnel



Field Marketing

Feeding F2F Sales Reps

Monthly “Purpose Driven Drops”

Field sales reps curate a community of referral partners (brokers, banks, and CPAs) and have a ‘purpose for dropping in’ to nurture those relationships every month

Monthly, each sales rep:

- 30 printed articles
- 30 printed promo cards
- 30 pieces of Asure swag



ATTACH
BUSINESS CARD HERE

Scan my QR code to learn more about this special offer.



Asure

GET FREE
ERTC FILING

when you add
HR Compliance & Payroll

Your business can get up to
\$26K
per employee!
No obligation, no upfront costs.



Employee Benefits Trends:

Business Owner’s Guide to Attracting and Retaining Talent With a Benefits Plan Strategy

by Mike Vannoy, VP of Marketing & Product at Asure Software



Employees’ Top “Must-Have” Benefits

The 2023 MetLife Employee Benefits Trend Study reports these results:

- Medical / health insurance 79%
- Paid leave 77%
- 401k or other defined contribution retirement plan 75%
- Dental insurance 73%

61% of employees are satisfied with their benefits, the lowest point in the past decade.

42% of employees don’t feel cared for by their employers.

60% of employees express interest in a wider array of non-medical benefits.

61% of employees report that there are benefits they desire but are not currently offered by their employers.

72% of employees rated the affordability of employer-provided benefits as an important factor in their organization’s demonstration of employee care.

Book and Job

businesses in 2023. Last year do not have an interest in this to Fast Growing Handbook in the past 12

HR-certified professional, to employees, such as businesses that the

offers including pay rate, survey revealed that 1 in job offers that include ent. 83% of Fast Growth

handbook and written job offers is essential. By focusing on comprehensive benefits, businesses can attract and retain talented individuals, leading to long-term success. Why? Because it shows you value your team members.

asuresoftware.com/resources/blog

Go-to-Market Sales Model

Recruiting

- Only Industry Experience
- 3 rounds of interviews
 - Hiring Manager
 - Senior Manager
 - Panel interview with "Why Asure"



Onboarding

- 100+ step 3-month curriculum
- Scripted first 2 weeks
- In field/On-phone in week 2-3
- Self guided courses with regular check-in
- Ongoing first year mentorship
- Dashboard first year productivity



Commission

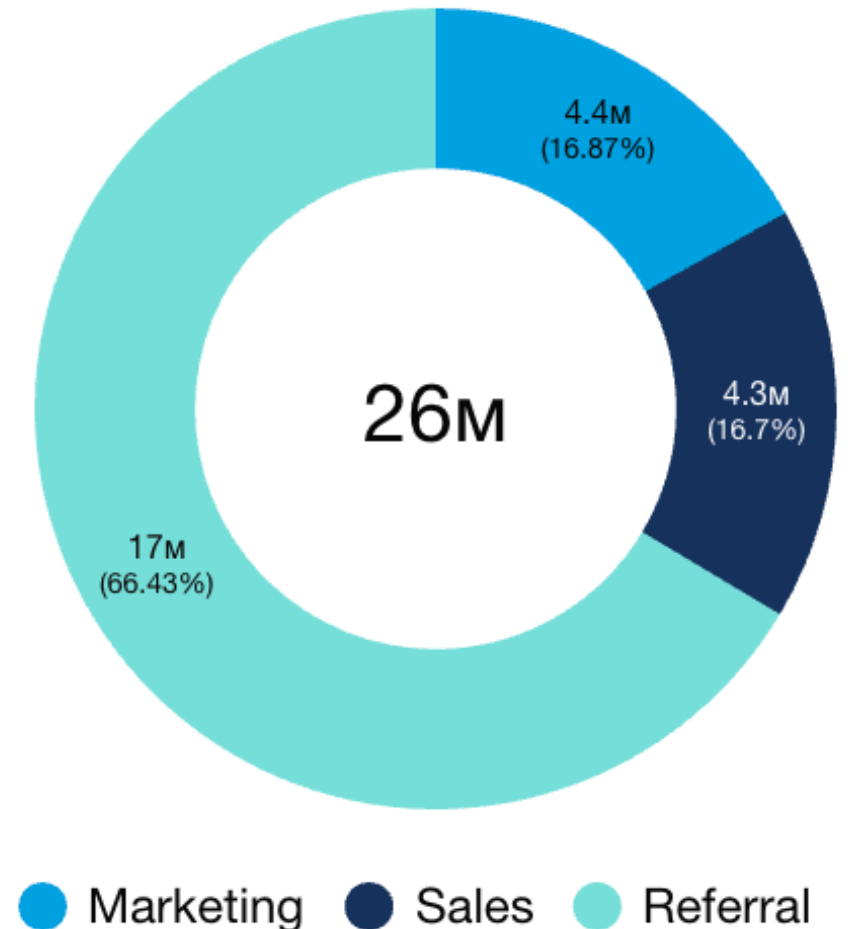
- 50/50 leverage
- Quarterly based accelerators
- ARR driven
- Bookings credit at sale
- Commissions paid at start (no annuity)



Sourcing

- 66% Referrals
 - CPA, Bank, Broker
 - Channel partners
 - Few Payroll/HR demos
- 17% Sales Sourced
 - Strategic, cold outreach
 - Zoominfo
- 17% Marketing Sourced

Booking by Source YTD



Messaging & Bundling



- ERTC Partners leads:
 - ERTC + Payroll
 - ERTC + HR Compliance
- Broker and Bank leads:
 - ERTC + HR Compliance
 - ERTC + Payroll
 - Payroll + AdvHR + HR Compliance
- Payroll customers
 - Add: ERTC + HR Compliance
 - Add: AdvHR + HR Compliance