



PCBancard

Sales Process from Prospecting to Close

Jason: avar@pcbancard.com - (317) 750-9108 sales support

Mac: Mac@pcbancard.com (650) 219-4485 - sales support | [Mac's Booking Link](#) (for ridealongs and appointments)

Emma: emma@pcbancard.com - (973) 768-2231 marketing support

Kenny: kenny@pcbancard.com - sales/equipment support

Tina: tina@pcbancard.com - sales/equipment support

Kristen: kristen@pcbancard.com - merchant application support

Cori: cori@pcbancard.com - application support

PCBancard Office Open 9:30 am to 6 pm EST: (973) 324-2251

- [Partner Training Portal Link](#)
- [Live Price Sheet](#)
- [Master Spreadsheet: Circle of Influence Spreadsheet](#) (Go to File/Make a Copy, share with emma@pcbancard.com)
- [P Series Industry Guide](#) (to start out)

1. Prospect For the Appointment

a. Drop in with the [flyers](#) or [merchant survey](#) or drop off the [credit card processing ebook](#) and set an appointment:

- i. Jason's drop-in-the-door-pitch: *Hi my name is _____. I'm sorry I don't have time to stay long. I'm working with local business owners helping them eliminate one of their biggest expenses. I just*

wanted to drop in and see if I could schedule about 15 minutes of your time either ___ at ___ o'clock or ___ at ___ o'clock, which one would work better for you?

- ii. (Additional Selling Scripts from the How to Sell Dual Pricing course: [Selling Dual Pricing Script](#))

- b. Does your prospect want you to send some information via email? [Use this guide to select an email](#), then copy/paste and edit the email to fit your prospect. Be sure to review / follow-up from the email at your appointment. Don't expect them to respond. Set the appointment regardless of the email.

2. The Appointment and the Presentation/Discovery

- a. Use your [Agent Presentation Book](#) and walk them through the Dual Pricing program
- b. Ask questions about equipment, what they like/don't like about their current system. This is your merchant discovery process. Take notes. You can use the [Merchant Survey](#) or [POS Questionnaire](#) or the [Presentation Questionnaire](#) to assist discovery process.
- c. Leave with one month statement (picture is fine) so you can come back with a proposal for their business
 - i. Say: *"What I would like to do is create a custom proposal for your business showing exactly how much money I can put back into your business. I'll do a side-by-side comparison of Traditional Processing and Dual Pricing, and I'll include any equipment costs as well. In order to do that I will need one-month processing statement."*
- d. Set an appointment to return with the proposal
 - i. Ex 1: [Quick Proposal Example](#)

- ii. Ex 2: [Custom Proposal Example](#) (24-hour lead time)
- e. If you would like a proposal, please follow these steps:
Email proposals@pcbancard.com and cc mac@pcbancard.com and kenny@pcbancard.com and tina@pcbancard.com for equipment questions and pricing.
 - i. Didn't get a statement but still have questions? Use the [Facebook Group](#) to post your questions after your appointment. Tag @Kenny Neou and/or @Tina Brunner for equipment-related questions.

** Call Jason or Mac if you have major questions or merchant wants to close during your presentation. Otherwise, tell them you will get their questions answered when you come back with their proposal.*

3. The Proposal and the Close - *[schedule an appointment to have Mac available](#) or [Jason available](#) to assist in closing your deal

- a. Come back with your proposal for savings on processing and equipment costs to get started.
 - i. Close the deal by saying Mac's closing line: *"To get you up and running, I will need a copy of your driver's license, business license, voided check, and processing statements."*
 - ii. (Additional Closing Scripts from the How to Sell Dual Pricing course: [Closing Dual Pricing Script](#))
- b. Use the forms at the end of your [Agent Equipment Book for closing](#). Need the online app? Get the [Jot Form here](#).
 - i. (required) Fill out the Quick App

- ii. (required) Fill out the Equipment Purchase agreement and get the merchant's signature
- iii. Take pictures to scan or upload directly to OneHub the DL, BL, Voided Check, and Processing statements.
 - 1. (optional) Fill out the Charity form if the merchant is on Dual Pricing and would like to donate a portion of their fees to charity (remember needs to be over \$50K volume, or you need to pool your merchants together)
 - 2. (optional) If they are ready to cancel their previous service, you can have them fill out the cancellation form so they can send to their processor
- iv. Drop the Quick App, supporting documents, equipment purchase agreement and completed download sheet (plus any other forms into your OneHub folder)
- v. When your application is ready for signature, either Kristen or Cori will send the e-sign directly to your merchant and cc you. Once your merchant signs it is sent directly to underwriting for approval.
 - 1. View an example of the e-sign your merchant receives [here](#).
 - 2. Jason reviews exactly what your merchant receives in their inbox—watch minute 1:00 - 7:00 [here](#) so you know how to answer any questions.
- vi. After the account is approved, the merchant will be charged for the equipment and it will be shipped to them

vii. You will be paid your bonus once your merchant is up and processes \$300.00

** Additional resources for helping with your close: Refer to Jason's tips doc for [Tips to closing more deals quicker](#).

**Study up on Jason's [Overcoming Objections Doc](#)

4. After the Sale