

2026 Sales Process

from Prospecting to Close

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QUICK LINKS

- [Partner Training Portal](#)
- [Video: Follow Steve Mynhier's 5-9-4-2-25 Formula](#)
- [Top Industries for Dual Pricing](#)
- [Reverse Engineer Your Goals Spreadsheet](#)

I. PROSPECT FOR THE APPOINTMENT

The first 5 seconds you speak to a business owner isn't going to make your deal — but it can break it. Your goal is to get **2 yeses** and start a casual conversation with the business owner or decision-maker.

Say to the business owner:

How are ya doing today? (casual, not "how are you")

Great, my name is [your name], and I'm sorry I don't have time to stay long — I was just down the street talking to ____ and ____.

But I do have a quick question for you... (look for a yes)

You're still accepting debit and credit cards, right? (look for a yes)

Pitch Ideas for Setting the Appointment:

Option 1

The reason I ask is that I am a consultant who helps businesses either save, or eliminate one of their biggest expenses. There is nothing you will pay me — I simply analyze your business and your processing fees and either save you money or eliminate your fees altogether. I wish I had time to sit down with you now, but I have some other business owners I'm working with today. Does Wednesday at 9 work, or Thursday at 1?

Option 2

The reason I ask is because my company has a proprietary program that we are making available to [specific business type] in the [specific city] area. This program is now available to all businesses accepting cards. If I was able to show you how to eliminate up to 100% of all those percentage fees, transaction fees, and other junk fees that are eating up your profits — I'm guessing you would be interested in learning how, RIGHT? (tie down)

Great, could I schedule about 15 minutes of your time — either ____ at ____ o'clock, or ____ at ____ o'clock? Which one works better for you?

Additional Tools to Use:

- [3-Part Email Series — use between drop-in and the discovery appointment](#)
- [Fillable Flyers — All Industries \(personalized flyers available after paperwork is completed — request specific industries from Emma\)](#)
- [Video Brochure Script — refer to this if you are using a video brochure](#)

II. THE APPOINTMENT AND THE PRESENTATION / DISCOVERY

Step 1

Conduct Merchant Discovery

Ask questions about their equipment, what they like/don't like about their current system. Take notes.

→ *Optional: use the Merchant Survey, POS Questionnaire, or go deeper with the Presentation Questionnaire to guide the discovery process.*

[Merchant Survey](#)

[POS Questionnaire](#)

[Presentation Questionnaire](#)

Step 2

Present Your Solution

Have your [Pitch Book](#) and/or your [Demo Unit](#) handy and walk them through the Dual Pricing program (or use select pages).

Step 3

Collect Processing Statement

Leave with one month's processing statement so you can come back with a custom proposal for their business.

→ *Send statements to: office@pcbancard.com | proposals@pcbancard.com*

What to say:

"What I'd like to do is create a custom proposal for your business showing exactly how much money I can put back into your pocket each month. I'll do a side-by-side comparison of Traditional Processing, Surcharging, and Dual Pricing — and I'll include any equipment costs as well. In order to do that, I'll need one month's processing statement."

Step 4**Set a Follow-Up Appointment**

Set an appointment to return with the proposal showing Good, Better, and Best options for their processing program plus equipment recommendation.

Proposal examples:

- [Jason's Comparison](#)
- [Good Better Best](#)
- [Equipment Page](#)

Note: Call Jason or your mentor if you have major questions, or if the merchant wants to close during your first presentation. Otherwise, let them know you'll get their questions answered when you return with the proposal.

III. THE PROPOSAL AND THE CLOSE

Text Jason or your mentor so they can plan to be available to assist in closing your deal.

Step 1**Present Your Proposal**

Come back with your proposal and walk through it with them. Show savings on processing and equipment costs to get started.

Step 2**Close the Deal****What to say:**

"To get you up and running, I'll need a copy of your driver's license and a voided check."

Step 3**Complete the Application**

- [2026 Dual Pricing E-Signature Application](#)
- [2026 Traditional / Surcharge E-Signature Application](#)
 - Need a pre-fill link? Contact emma@pcbancard.com
- [Additional forms → Applications section of the Partner Training Portal](#)
 - Free Equipment Form

Step 4**Post-Approval Process**

Once the deal has been approved, you will be contacted by the office via email. You will be paid your bonus once your merchant is up and processes **\$300.00**.

IV. AFTER THE SALE — ONBOARDING PROCESS

Step 1

Welcome Email & Equipment Deployment

- Merchant receives a welcome email from team@pcbancard.com. [See an example here.](#)
- Rep receives an auto-generated email/helpdesk ticket confirming the account is verified and approved. Kristen or Cori will also send a personal confirmation email. Once that email arrives, you can assume:
 - Welcome email has been sent to the merchant
 - Account is officially approved and verified
 - IT will reach out regarding equipment questions, then equipment will be deployed
- Terminal is shipped via 2-day FedEx. Rep receives a helpdesk ticket.
 - **Note:** Merchant is billed 30 days after the terminal is *deployed* — not 30 days after processing begins.
 - **If processing via Gateway, HotSauce, or a different POS:** Merchant is billed immediately.
- Merchant is enrolled in the email system for instructions on setting up their iPos Pays portal.

Note: The \$64.95 (Dual Pricing) or Traditional processing cost is extracted from the merchant's account during the first week of each month. Terminal billing begins 30 days after approval.

Step 2

Call from IT — Schedule the Install

Schedule an in-person appointment to set up the merchant's terminal — coordinate with IT's schedule.

- Rep receives a helpdesk ticket confirming the terminal has shipped.
- Once equipment arrives, rep calls IT to set a time for the installation (merchant, rep, and IT all available).
- IT closes the helpdesk ticket when setup is complete; rep is notified via email.

Step 3

Terminal Setup & Additional Product Offerings

At this appointment, the rep should:

- **Complete Terminal Setup** — Ensure the merchant is comfortable with their new equipment and answer any questions.
- **Secure PCI Form** (if not already signed) — Get the PCI compliance form signed to protect them from non-compliance fees.
- **Introduce Additional Products & Services** — This is the perfect time to discuss how we can further support their business.

Key Questions to Ask During the 30-Day Follow-Up

- **PCI Compliance:** "Can we handle your PCI compliance for you?"
- **Marketing Audit:** "Can I offer you a marketing audit worth \$1,500 to see how you stack up against your competition?" (*Marketing Audit through VIV*)
- **Payroll Services:** "Would your business benefit from 12 months of free payroll?" (*PCBancard Payroll*)
- **Cash Advance:** "Do you ever need access to capital to help you through a busy season or the holidays?"
- **Referrals:** Once the merchant is set up and happy with our processing, ask for referrals. Find the forms [here](#).
- **Charity Program:** "Are you interested in donating a portion of every swipe to a local charity?" (*Dual Pricing accounts only*)
- "Are you interested in a loyalty program?" (*Dejavoo customers only*)