

Step 2/3: INITIAL CONTACT

PHONE

Hi, I'm Salesperson John from fractional departments. (Thank you for reaching out.) How are things in Vancouver today?

Things are great!

Good! that's good to hear. As you may be aware, we offer affordable staffing solutions in some key areas such as IT support, Accounting and Marketing.

Ok, tell me more.

Do you have needs in these areas but would rather not hire a full time employee?

Actually we do.

We offer:

1. Part time labor with no long term obligation.
2. Zero recruiting fees
3. "Partners" that can start right away.

Awesome! But why would we use you guys?

The biggest benefits are:

1. you don't have to "keep anyone busy" and just have them work for exactly how long you need.
2. Skilled "vetted" individuals will immediately let you take your mind off these tasks.
3. No benefits and full time overhead.

Sounds good to me! I'd like to learn more.

Great! I'm going to set you up with a meeting with my manager so he can walk us through the next steps. Are you available for a meeting on either _____ date or _____ date?

I'm available on the second date.

Great! You'll receive a meeting invitation shortly.

Step 4: MANAGER MEETING

ZOOM CALL

Hi _____. Welcome to the call. So nice to meet you today. How has your day been going so far?

Great! It's a bit rainy over here but other than that it's pretty good.

Good to hear. We'd like to answer any questions and get to know your company a little bit more today. So, Salesperson John, was just telling me that you have some staffing needs.

Customer explains situation.

Great so we do offer those services and they are very competitively priced.

Ok, so we are excited to use your solutions but we have concerns in terms of who we're working for.

Yeah, that is a very common question, thank you for bringing that up.

so the way we work is:

- 1. We have a highly qualified team of professionals vetted and ready to start.**
- 2. After discovery we try to match your needs with a "partner" that has experience and skills that match most closely to your unique needs.**
- 3. I'm sure that you will really like the partner that we will assign but in the event it isn't a perfect fit we will assign a different partner to your organization. Your satisfaction is obviously our top priority.**

So what are we looking at price wise.

Right so that depends on the amount of time that will be needed. We will try to get a careful assessment today of your needs and will send over a quote once we've run it by the department head.

Great! It looks like we're onboard and would like to start right away once we review the quote.

Excellent. You will receive a follow up email within 1 - 2 business days with a quote. But in the meantime please feel free to reach out to Salesperson John or myself at any times if you have any questions.

Step 5: MANAGER SENDING QUOTE

EMAIL

Hey David,

Thank you again for your extended time today! I have attached a proposal that outlines our pricing, deliverables, and what it looks like to work with Fractional Departments. Lastly, below you will find additional information on the services that we discussed today:

With our bookkeeping services key components typically include:

Tailored services, regular meetings, and a commitment to accuracy and expertise. Here's what we provide:

Services Provided

- **Financial Record Keeping:** Accurate tracking of income, expenses, and transactions.
- **Monthly Reconciliation:** Regular reconciliation of bank and credit card statements.
- **Accounts Payable/Receivable:** Efficient management of payments and collections.
- **Financial Reporting:** Preparation of balance sheets, income statements, and cash flow reports.
- **Payroll Processing:** Accurate calculation of wages, deductions, and tax filings.

Scheduled Meetings

- **Initial Setup:** Identify client needs, set up software, and establish communication.
- **Periodical Reviews:** Regular review of status of the financials as determined by the needs of the company.
- **Ad-Hoc:** Address urgent financial issues promptly.

Accuracy and Timeliness

- **High Standards:** Ensure accuracy with regular checks.

- **Error Resolution:** Swift correction of discrepancies.

Skills and Expertise

- **Certified Bookkeepers:** Experienced and certified professionals.
- **Up-to-Date Knowledge:** Current with latest standards, laws, and software.
- **Attention to Detail:** Meticulous record-keeping and reporting.
- **Clear Communication:** Accessible and understandable financial information.

This contract aligns expectations and deliverables, ensuring a productive relationship and supporting your financial health and business success.

Bellow is our recommended start point and pricing.

Recommended Start Point & Pricing

All Services		Totals
PPC Ecommerce \$900-\$6,999 Ad Spend	Paid Social \$800-\$2,999 Ad Spend	Total Due Today \$4,244
Management Fee: \$749	Management Fee: \$749	Total Monthly Recurring \$2,847
6 Month Setup Fee: \$399 (\$200 off)	6 Month Setup Fee: \$399 (\$200 off)	
	Email Basic Management Fee: \$1,349 6 Month Setup Fee: \$599 (\$200 off)	

I hope all this information is helpful and if you need anything else, please don't hesitate to reach out! Otherwise, in the meantime I encourage you to check out our website

Thank you!