

Purpose: To provide actionable information for the Independent Sales team to engage clients and begin the selling process.

ISD Introduction & Setting an Appointment

- A. **Research employers and brokers** to target and implement a push campaign. Establish a cadence with periodic out reaches of emails and calls (LinkedIn is an option). Send short, targeted emails to bring value and/or address client needs. Follow-up the emails with phone calls. Have your speaking points available when calling.
 - Optional: In emails, include a calendar link the employer/broker can use to schedule a meeting. ([Calendly](#) / [Acuity](#))
- B. **Sample Introduction:**
 - Hello, my name is John Smith and I represent TASC benefit account and compliance administration offerings, I would like to talk with you about your employee benefit programs? Is now a good time? When would be a good time for you?
 - Hello, my name is Jane Smith and I represent TASC, the nation’s largest privately held provider of Third-Party benefits. TASC offers more than 50 benefit accounts and over a dozen compliance services. May I speak with you about your employee benefits in order to share more of how TASC can help your company attract and retain talented employees, realize tax advantaged savings and alleviate administrative burden? Is now a good time? When would be a good time for you?
- C. **Ask for referrals/introductions** from employers/brokers and/or personal networks.
 - Is there anyone else in your company/agency who would benefit from understanding what TASC can do for them or their clients? Are you aware of any other companies with benefit account or compliance service needs? Can I use your name? Can you introduce me?
 - Use your centers of influence: Personal references, SHRM (Society for Human Resource Management); NAHU (Nat’l Assoc. of Health Underwriters); CPA’s; networking groups, Linked in, payroll companies, etc.

Build Rapport

- A. **Do your homework** to learn about the prospect personally and their company before you contact them.
- B. **When engaged, ask questions** to learn more about them, their business and their clients.
- C. **Listen for their needs**, ask questions about the ones you can address with a solution.
- D. **Suggest a specific time** to meet to address identified needs. Talk about what’s in it for their employees.
 - [Three Simple Techniques for Building Rapport with Buyers](#)

Why TASC’s Universal Benefit Account

- A. **Use visuals** to present with and leave behind: [The Cube](#) ; Product flyers
- B. **Use resources to guide presentations:** [Flipbook](#) ; [The Cube](#) (Practice with these beforehand)
- C. **Ask employers/brokers:** “Are you interested in.....”
 - retaining and attracting talented employees? Differentiating your organization from other employers?
 - potential tax advantaged benefit plans for your employees and your organization?
 - addressing the varying benefit needs of your multigenerational workforce?
 - avoiding complexity, and administrative time and costs associated with offering multiple benefits?
 - learning about one simple, smart and connected system to address all of your benefits needs?

Why TASC's Compliance and Continuation Offerings

- A. **Provide recent articles/links** to compliance violations, court cases, legislation and their costs (search online or as provided from TASC).
- B. **Share** "Compliance It's the Law" flyer (Go [here](#) to download: > Product Flyers > Compliance and Continuation)
- How would your company do in a Department of Labor Audit? Would there be fines to pay?
 - Do you know where your company may be at risk? (Which specific compliance areas; FMLA, COBRA, etc.?)
 - Would helping to alleviate administrative burden be of value to you?
 - Do you have interest in learning more about TASC's Hold Harmless Audit Guarantee?
 - Can you estimate the dollar amount of your company's Compliance risk?
 - Would it help your company to have all their Compliance concerns handled by one company?

Vaccination Verification: Time Sensitive Opportunity / Short Sales Cycle

- On January 13, 2022 the United States Supreme Court blocked the Occupational Safety and Health Administration's (OSHA) vaccine-or-test mandate. However, the court upheld the vaccine mandate for healthcare workers at facilities receiving federal funding (Centers for Medicare & Medicaid Services). There also remains many other vaccination mandates in place by State and local governments. Employers may also choose to implement a vaccination and testing program for their employees and vendors.
- How can TASC help to ease the compliance burden and possible liabilities? Solution: Vaccination Verification offering makes it easy for employers to ensure all individuals (employees, vendors, contractors, visitors, etc.) meet the vaccination and/or testing requirements based on their business practices or to meet federal or state requirements.

Questions to ask:

- Are you affiliated with the Centers for Medicare & Medicaid Services (CMS) and if so are you aware of the Healthcare Workers Vaccination mandate for all eligible staff? Are you aware of the penalties for non-compliance?
- Does your state or city have a vaccine mandate in place? What is your plan to meet those state/city requirements and comply with the mandate?
- Is your organization interested in putting in place a vaccination or testing program for employees and vendors?