



## Step 1:

### Identify a Lead Opportunity

Look for businesses facing payroll and workforce management challenges such as inefficient manual processes, limited growth, compliance concerns from data errors, and lack of integration between payroll and accounting/ERP systems.



## Step 2:

### Qualify the Opportunity

Ask the potential lead key questions to determine fit, such as:

- What are you currently using for payroll?
- What system are you using to manage your work workforce?
- What accounting/ERP system do you use, and does it integrate with your payroll?
- How many employees and locations does your business have?



## Step 3:

### Submit the Lead to WFGO

Once a qualified lead is identified, submit the lead using one of these methods:

**Customer Submission:** Submit through the customer's Marketplace Hub

**FI Submission:** Submit through the Workforce Go Partner Portal at [myworkforcego.com/partner-portal](https://myworkforcego.com/partner-portal)

**Email Submission:** Submit details directly to [sales@myworkforcego.com](mailto:sales@myworkforcego.com)



## Step 4:

### Regional Sales Manager (RSM) Review & Discovery

A Workforce Go Regional Sales Manager (RSM) will review the lead and follow up with the Financial Institution (FI) or prospect to determine the next steps. The Workforce Go RSM will then schedule a discovery call with the FI and/or prospect to gather additional details on business needs, challenges, and goals. If the FI indicates that they prefer the RSM to contact the prospect directly, the FI does not need to be present during discovery.



## Step 5:

### Demonstration & Pricing Proposal

The RSM will deliver a tailored product demonstration based on the discovery call insights. Pricing will be provided upon request following the demo.



Workforce Go finalizes the agreement and collects payment from the client. Workforce Go then submits payment to Q2, Q2 compensates the FI, and together, we'll celebrate our new mutual client!