LESSON 11

Before You Call It a PEO Win

Fit first. Then the calendar.

1 · Fit signals (tick any that apply)

A signal means it's worth a look. It doesn't mean a PEO is the answer.

High mod	Nonrenewal / cancellation	New venture, no history	Tough class of work	Told no a few times

2 · Bad-fit check

None of the signals? Happy with what they have? Wants every employer job in house? Then say so.

Fits? (Y/N)	If no, what I told them

3 · The calendar (before anybody celebrates)

Wage-base reset · year-to-date deductions · benefit-plan timing. It depends on the arrangement and the state: have a tax pro check the real setup. Sold isn't rolled: the deal's not done till it rolls its first payroll.

Switch date	Wage-base reset cost?	YTD deductions carry over?	Benefit-plan timing?	Client keeps own state unemployment (SUTA) account?

4 · The two worries

Acknowledge · explain the difference · show the actual documents · offer one next step.

Agent worry	Document I'll show	One next step (date)
Lose my client?		
Lose their mod?		

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