



The Agent Experience Unfiltered:

Real Talk about Retention, Referrals & Lessons Learned



Meet the Biz Dev Team!



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01

Attrition

The top 3 manageable reasons a merchant leaves, and tips on how to reduce them.

02

Retention & Referrals

Discuss the best tactics for retaining merchant accounts and ways to successfully gain referrals.

03

Lessons Learned

The good, the bad, the ugly. Share successes, things you wish you would've done differently, turning points, and lessons learned along the way.

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ATTRITION, RETENTION, REFERRALS & LESSONS LEARNED.

The Agent Experience Unfiltered



ICE BREAKER

If you were a superhero,
what would your superpower be?

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01

They Don't Like the Technology

Or they weren't trained properly. Make sure you're asking the right questions to place the right solutions. Take the time to teach merchants how to use the technology properly.

02

The Agent Disappears

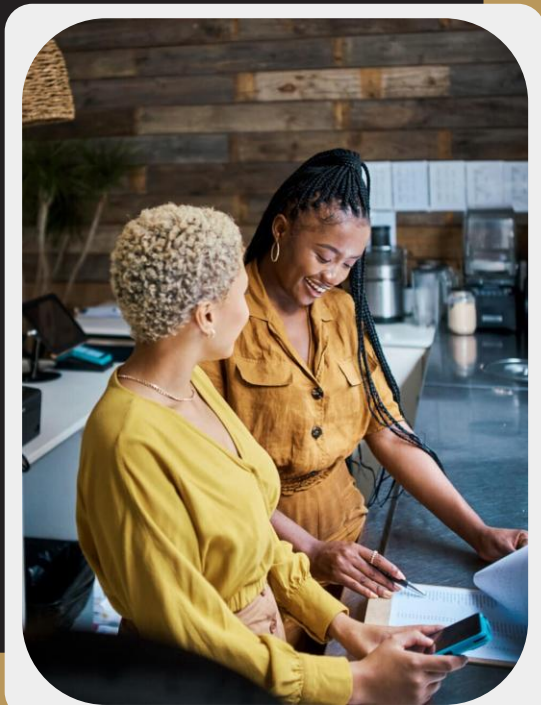
Ghosted! Don't be an agent who disappears. Make sure merchants have the proper contact information. Patron their business, send them tokens of appreciation, and provide education and updates on new products.

03

They Get Another Offer

Educate merchants on the proper questions to ask when a sales rep comes knocking. Make sure they know they can bring other offers to you for review. Move the conversation to technology and service vs. pricing.

TOP 3 REASONS MERCHANTS LEAVE.



RETENTION

- What methods do you use to find the right solution for merchants?
- What are some small gestures you use to build relationships with your merchants?
- What have you found to be the best way to retain your merchants?

REFERRALS

- How do you ask your merchants for referrals?
- If you don't rely on referrals, what way do you obtain new merchants?
- Are there verticals that yield better referrals than others?

01

If you could go back to when you first started, what would you tell yourself?
Would you do something different?

02

What are some of your biggest challenges you face in the field and how do you overcome them?

03

What is the most valuable lesson you have learned in this industry?

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LESSONS LEARNED

How do you separate yourself from the competition?



Explore these questions and topics with each other over the next few days:

- How do you treat your business and how do you want to grow?
- What tools and software are out there to help you organize and grow your business?
- What methods do you use to find new merchants?
- How effective is your communication with your merchants? Are you providing purposeful content? Too much, too little?
- What are some of your favorite verticals to focus on?
- How would you rate yourself and what are you doing to be successful in the topics discussed today?

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THANK YOU!