

## Partner Co-Marketing Toolkit

# Partner co-marketing email messages

## How do I tell my clients about Gusto?

To help you advise your clients about Gusto, we've drafted five sample email messages you can send to your clients. Each sample message has a specific audience and goal. Feel free to use them as is, or customize them to your clients' specific business needs.

## Sample emails

### Sample A.

**Audience.** New businesses running payroll for the first time

**Goal.** Tell clients about how to use Gusto to start off on the right foot

Subject line: Start running payroll on the right foot

Body:

Dear [Client Name],

We heard that you're getting ready to hire your first employee[s]. Congratulations! Building a team is a huge step in the life of every small business, and we want to share a tip on how to get started on the right foot.

*[For clients running payroll themselves:*

For businesses running payroll for the first time, we recommend a platform called Gusto. Their platform simplifies payroll by making many things automatic, like calculating and filing payroll taxes, so you can spend less time on payroll while being more confident about compliance. ]

*[For clients whose payroll you will manage:*

Our preferred platform for managing your payroll is Gusto. Its technology-driven tools save you money, offer an easy-to-use platform for your team, and enable us to advise you as efficiently and accurately as possible.]

Plus, Gusto provides a suite of services to help small businesses as they grow – from employee benefits to HR tools. As experienced Gusto partners, we can advise you on the right time to consider each one.

Getting started with Gusto is easy – we can take care of the details in just a few days. **Give us a call at [phone number] to talk about next steps.**



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Here are just a few more reasons why we recommend Gusto: *[Select any of the following]*

1. **Finish payroll in minutes.** Payroll typically takes just over 10 minutes, according to Gusto users.<sup>1</sup>
  - a. **Accuracy & compliance.** Gusto helps us advise you and protect your business more effectively
2. **Transparent pricing.** No hidden fees. Gusto delivers big-company service at a price small businesses can afford
3. **Designed for you and your team.** Gusto's easy-to-use dashboard makes finding payroll and tax documents a snap
4. **So much more than payroll.** Support your team with health insurance, 401(k), workers' comp, an employee dashboard, plus powerful integrations – all in one place
5. **Unlimited monthly payrolls.** You can pay your team every week, or use different pay schedules for different employees – with no extra charge
6. **Integrated time tracking.** PTO reporting and time-off requests are integrated with payroll

We're proud to support you on this exciting step of your business, and look forward to hearing from you.

Best,

[Partner name]

### Sample B.

**Audience.** Clients who run their own payroll, but not with Gusto

**Goal.** Advise clients about how Gusto payroll saves time and supports teams

Subject line: Tip: A smart way to save time on payroll

Body:

Dear [Client Name],

We're always on the lookout for tools to make your life easier.

Running payroll can be a headache for many small businesses, but there are ways to reduce the amount of time you spend doing it.

Many of our clients use Gusto. This platform simplifies payroll by making many things automatic, like calculating and filing payroll taxes. Plus, Gusto does a lot more than payroll, offering ways to support your team and protect your business – all on one integrated platform. That's why we think Gusto might be a great fit for you.



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Switching to Gusto is easy – we can take care of the details in about a week. **If you're interested, call us at [phone number].**

Here are just a few reasons why we recommend Gusto: *[Select any of the following]*

1. **Finish payroll in minutes.** Payroll typically takes just over 10 minutes, according to Gusto users.<sup>1</sup>
2. **Transparent pricing.** No hidden fees. Gusto delivers big-company service at a price small businesses can afford
3. **Designed for you and your team.** Gusto's easy-to-use dashboard makes finding payroll and tax documents a snap
4. **So much more than payroll.** Support your team with health insurance, 401(k), workers' comp, an employee dashboard, plus powerful integrations – all in one place.

Let us know if you have any questions! It's an honor to work with you, and we look forward to being in touch.

Best,

[Partner name]

### Sample C.

**Audience.** Clients whose accountants run their payroll, but not with Gusto

**Goal.** Inform clients about how Gusto payroll can help improve accuracy, compliance, and efficiency

Subject line: We'd like to improve your payroll process

Body:

Dear [Client Name],

We're always looking for better ways to serve you. We recently reviewed the technology we're using to support your business, and found an opportunity to save you time and money, as well as improve the level of service we can offer.

That's why we're recommending that you switch to Gusto as your payroll platform. Moving to Gusto is easy – we'll take care of the details in about a week, working with Gusto to ensure a seamless transition.

Going forward, here are a few benefits you can expect with Gusto: *[Select any of the following]*

1. **No hidden fees.** Gusto's pricing is transparent
2. **Accuracy & compliance.** Gusto helps us advise you and protect your business more effectively
3. **Great experience for your team.** Finding payroll and tax documents is faster with Gusto's easy-to-use employee dashboard



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4. **Unlimited monthly payrolls.** You can pay your team every week, or use different pay schedules for different employees – with no extra charge
  5. **Integrated time tracking.** PTO reporting and time-off requests are integrated with payroll
  6. **Much more than payroll.** Support your team with health insurance, 401(k), workers' comp, an employee dashboard, plus powerful integrations, all with Gusto.

**If you have any questions about the transition, don't hesitate to reach out to us at [phone number].**

Best,

[Partner name]

#### Sample D.

**Audience:** For Clients who use Gusto for payroll, but not benefits

**Goal:** Advise clients about integrating payroll and benefits, with Gusto

Subject line: Tip: A smart way to offer benefits

Body:

Dear [Client Name],

Dependable, hardworking employees are mission-critical to small businesses (but you already knew that).

What you might not know is that small businesses can offer big-company benefits like health insurance, 401(k), and workers' comp in a cost-effective way, with minimal overhead – so that talented team members will stick around even in today's competitive labor market.

Many of our clients do this with Gusto, which offers health benefits in 26 states\* and DC. Since you already use Gusto for payroll, we think this approach would be a great fit for you.

With benefits and payroll under one roof, deductions happen automatically to maintain compliance without extra overhead, and your team can access tax and insurance documents on one familiar platform. If you already offer benefits, Gusto will migrate your plan with no interruption in coverage. If you're offering benefits for the first time, we'll work with Gusto to find you the right package.

Getting started is easy. We'll be here to guide you, together with Gusto's licensed benefits advisors. **If you're interested, call us at [phone number].**

Here are a few reasons why using Gusto for benefits might make sense for you. *[Select any of the following]*

1. **Medical, dental and vision coverage.** Gusto also offers 401(k), HSA, FSA, commuter benefits, and 529 college savings plans



2. **Expert support.** Gusto provides a team of licensed benefits advisors and support for no extra charge
3. **Less paperwork, more time.** 94% of customers say Gusto streamlines health benefits and payroll<sup>2</sup>
4. **Simplify benefits management.** 9 out of 10 Gusto customers say they spend 15 minutes or less managing benefits through Gusto each month<sup>2</sup>

Let us know if you have any questions! We look forward to being in touch.

Best,

[Partner name]

\*Including Arizona, California, Colorado, Florida, Georgia, Illinois, Indiana, Maryland, Massachusetts, Michigan, Minnesota, Missouri, Nevada, New Jersey, New York, North Carolina, Ohio, Oregon, Pennsylvania, South Carolina, Tennessee, Texas, Utah, Virginia, Washington, and Wisconsin

### Sample E.

**Audience:** For clients who use Gusto for payroll, but not for HR tools

**Goal:** Educate clients about how Gusto's payroll and HR tools work together to build strong teams

Subject line: Tip: Smart HR tools for your small businesses

Preheader: Managing HR and payroll together can save time and help your team

Body:

Dear [Client Name],

As a small business owner, managing HR probably isn't what gets you out of bed in the morning. But there's a way to streamline things like new-hire paperwork, time tracking, and understanding regulations, so they don't keep you up at night.

You can do this by leveraging a familiar platform: Gusto. Many of our clients have added HR tools to their payroll platform on Gusto, and we think this strategy might be a great fit for you.

With HR and payroll under one roof, time tracking and payroll sync automatically to save you time, and your team can e-sign and access their documents quickly on one familiar platform. Plus, Gusto provides HR advice on demand, to help you support your team and protect your business.

Signing up for Gusto's HR tools is easy, and we're here to help. **If you're interested, call us at [phone number].**

Here are a few reasons why Gusto's HR offerings might make sense for you. *[Select any of the following]*

1. **Simple time tracking and time off requests.** Automatically synced with payroll



2. **Streamlined compliance.** Gusto automatically files your new-hire paperwork with the state and helps with federal W-4s and I-9s
3. **Alerts about new regulations.** Stay on top of changing HR laws
4. **Workers' comp insurance.** With integrated workers' comp, you'll pay only what you owe each payroll
5. **Anonymous employee surveys.** Get actionable feedback each month
6. **Employee handbook builder.** Access templates and guides designed by professionals

Let us know if you have any questions! We look forward to being in touch.

Best,

[Partner name]

## Notes

1. Source: 2018 TechValidate survey of Gusto customers
2. Source: 2019 TechValidate survey of Gusto customers