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## Partner Co-Marketing Toolkit

# Sending a great email about Gusto

## Advise your clients about Gusto

As a Gusto partner, you've got experience with Gusto's easy-to-use, integrated platform. But it's possible not all your clients are in the know!

Emailing your clients about Gusto is a great way to show you can anticipate client needs and offer valuable advice about payroll, HR, and benefits – based on your expert knowledge of each client's financial statements. Good emails are less about marketing, and more about advising small businesses to achieve their strategic goals.

Here's a simple guide to talking about Gusto in an email to your clients. Check out the [Partner Co-Marketing Email Messages](#) for examples you can use as-is, or even better, customize them to your clients' business needs.

## What makes a good email?

**Choose your audience.** First, define the audience for your email. Individualized emails are always best, so you can call out each client's team-related need, like hiring employees for the first time or expanding to a new location. But often, writing individualized emails to many clients can be impractical.

Instead, think about grouping your clients into audiences with common characteristics, and sending one email that's relevant to each group. Some audiences could be: businesses planning to hire employees, clients curious about offering benefits to boost retention, or businesses struggling with inefficient payroll tools.

**Define the goal.** Next, define what you want the email to accomplish. Are you advising clients to switch their payroll platform to Gusto? Are you recommending offering health benefits? Usually, the more focused the goal, the clearer (and more successful) the email will be.

After you define the goal, decide how you want your clients to follow through. Here are two recommended ways:

- ✓ **Contact your firm.** If you want people to call you, let them know clearly in the email – consider bolding your phone number so it's easy to find.
- ✓ **Join your firm on Gusto.** If you want your clients to sign up for Gusto online, tell them! We've already designed a customized page for your firm, where clients can provide simple information so you can add them to Gusto quickly. Linking to this page from your email is a great way to add more clients to Gusto faster. It also helps you get to a higher tier in our partner program. Find the link to this page on your Partner Dashboard in the 'Firm Details' section, under 'Client Invitation Link'.

**Find the right time.** You're an expert on the rhythm of each client's business: when they file taxes, enroll in benefits, or experience seasonal ups and downs. Use this insight to send emails that help your clients take action at the right time. For example, consider sending a benefits-related email in September, so clients can be up and running by the first day of the new year.

## How do you create the email?

**Content.** After you've defined the goal, audience, and timing, you're ready to create the email. To help you, we've provided the following resources. Use them to create straightforward, text-driven emails by yourself, or leverage the components to make full-featured emails that have images and logos, with the help of a marketing platform like Mailchimp, or a developer.

- ✓ **Partner co-marketing email messages.** We've drafted five sample messages based on key audiences and goals. Feel free to tailor them as needed, for even bigger impact.

Message	Audience	Goal
A	New businesses running payroll for the first time	Tell clients about how to use Gusto to start off on the right foot
B	Clients who run their own payroll, but not with Gusto	Advise clients about how Gusto payroll saves time and supports teams
C	Clients whose payroll you manage, but not with Gusto	Inform clients about how switching to Gusto payroll can help improve accuracy, compliance, and efficiency
D	Clients who use Gusto for payroll but not benefits	Advise clients about integrating payroll and benefits, with Gusto
E	Clients who use Gusto for payroll but not for HR tools	Educate clients about how Gusto's payroll and HR tools work together to build strong teams

- ✓ *High-resolution product images.* We've included a library of product images that you can place in your emails to show your clients what Gusto looks like.
- ✓ *Custom, co-branded logo.* Our designers will give you a customized logo featuring your firm's name and the Gusto logo, designed together. To request a co-branded logo, ask your partner advisor. We're happy to help.