



REFERRAL & HYBRID PARTNER

SALES PROCESS

Warm Up a Prospect on GoTab



PARTNERS

Leverage [sales material](#) and collateral to demonstrate how GoTab can drive actionable ROI. Use a lead submission form which will provide a lead to their Relationship Manager's and dictate the demo time.



HYBRID PARTNER

Leverage sales material as well as the pre-built demo account to showcase GoTab's platform. Use a lead submission form which will book a demo into their Relationship Manager's schedule.



RESELLER PARTNER

Sell GoTab using your demo account. Register the merchant against their deal registration link, which will log the prospect in Hubspot, telling GoTab you're working on the customer.

Do a Demo

GoTab's Relationship Manager will spend 45min to an hour with the customer demo'ing GoTab. The Relationship Manager will work in tandem with the partner to win the customer.

Sending The Quote

The customer is ready to move forward!

A deployment engineer will be introduced via the onboarding manager to complete the deployment questionnaire and do a virtual/in-person site survey to understand all hardware and IT needs. The partner will help book time with the customer to get the site survey done.

Afterwards, either GoTab can send the quote or the partner themselves

GOTAB QUOTE

GoTab will send a quote from Hubspot with pricing for software, payments and hardware.

PARTNER QUOTE

GoTab can send pricing to the partner. The partner can then use [GoTab's proposal template](#) to outline their services.



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Once The Quote Is Signed

The customer will move to the [Onboarding stage](#).

There will be a dedicated onboarding manager who will help the customer go live with GoTab. The manager will build the customer's menu, QR codes and ensure all paperwork is completed. A 30 minute call to walk customers through each document is available if needed.

*Resellers will complete the merchant application, location form and any additional onboarding forms.

Going Live



INSTALLATION

The hardware will get delivered, ready to take the customer live. Either the partner or GoTab will onboard the customer directly by walking them through the setup process.

*GoTab is available to come onsite when necessary.



TRAINING

The onboarding manager will train the GM and staff on GoTab. They will then set up subsequent training sessions and manage the processing of going live.



CUSTOMER SUCCESS

Once setup is complete, the customer will be assigned to a customer success representative. The Customer Success manager is there to help grow the relationship and provide as much support as necessary.