

The "PLAY" Book

Intro

We know you love to win, so we will provide you with crucial insight to become a winning agent, who can generate passive residual commissions for relationship referral and intentional networking.

Here's how you can spot prospects with a good fit for our services:

1

Who Do You Know?

Begin by thinking about the people in your life. Consider those who run their own businesses or are connected to business in some way. These are who could benefit from CSG Forte services.



2

Everyday Interactions

In your daily life, pay attention to service providers. See if they still rely on paper checks or need paperwork for payments. Notice if they lack online payment options.

3

The Internet

Use a search engine to look up local businesses in different fields. Check if they offer online payment methods or if they still ask for forms to be mailed. See if they require customers to write down credit card or ACH information and send it by mail.



What Types of Companies Should I Keep an Eye Out For?

ACH Sweet Spot:

Businesses with a lot of monthly transactions and lower dollar amounts.

Industries with a Track Record of High Success:

- Landlords
 - Lawn care/landscaping services
 - Pest control/removal services
 - Storage units
 - Gym memberships
 - Preschools
- Places that still only accept paper checks or cash
 - Mobile businesses like food trucks or mobile dog grooming
 - Home improvement or local contractors
 - HVAC plumbers
 - Anyone accepting payments via Venmo or Zelle QR code

Other things to notice while out: Consider places with memberships or recurring monthly payments. Also, be on the lookout for:

Pay attention to your own experiences as well. Think about the services you receive and how you pay for them. Could these payments be made in a simpler or more user-friendly way? Did something seem off with the fees or how the payment was processed? Did it feel like you were stuck in the past when making the payment?

