

Referral process

what happens when you refer for an additional service?

Types of referrals that will go to the Additional Services Team (AST)

All referrals submitted via the Colleague Rewards form (that do not include a compliance product), Atlas or Service 360.

What makes a good referral?

The client is expecting a call and knows there's an additional cost, there's a need for the service, notes detailing the conversation had as well as a contact telephone number.

How often will you try to call someone before you close down a referral as non-successful?

For a non-ISO referral the client will be called 4 times over a 4-week period – for ISO this can be slightly longer, as it is a more complex product which is sold less.

Process for additional service referrals

If referred via the Colleague Rewards form, Sales Support will check the referred products vs. what the client already has, before passing across to the AST.

When a referral is submitted via Atlas or Service 360, this will automatically be picked up by the AST.

These referrals are aimed to be contacted within 48 hours of submission.

What happens if a referral containing both ISO & an additional service gets submitted?

The ISO team would pick the referral up first and pass on the other products to AST –the client will then be contacted to discuss further.

How long will you keep a referral opportunity open before it is closed down as a non-successful one; for example: how long do you wait for a decision maker to let you know if they're going ahead or not?

For a non-ISO referral the AST will keep it open for 3 months. If there are clear buying signals and reasons not to buy at that point it would be kept open for longer. For ISO referrals, this time period is extended as contract lengths can be up to 10 years – there's often a longer decision-making time for a client.

Closing a referral – how do you let colleagues know?

When a referral is closed, the relevant BDC/BDM/BDA will complete the necessary fields within Salesforce to explain why the referral did not progress – this will be shown on the automated email colleagues receive.

How do clients benefit from being referred for additional services?

Our additional services can provide clients with a solution to a problem or need as well as help them to stay compliant, grow their business, look after employees, improve efficiency and more. Plus, clients don't have to spend time researching for another supplier who they trust as they already work with us.

What is in it for colleagues?

Colleagues can earn between £10 and £400 on breadcard for every successful referral.

