

Referral process

what happens when you refer for a compliance service?

Types of referrals that will go into the Contact Centre

Referrals for compliance – Health & Safety or HR & Employment Law. This could be for a new client, new site(s), single to combined or an uplift in full-time employees (FTE). These must be referred via the **Colleague Rewards form**.

What makes a good referral?

The company is expecting a call, there's a need for the service, notes detailing the conversation had as well as a contact telephone number.

What happens if a referral containing both a compliance add-on & an additional service gets submitted?

The BDC will speak to them about the additional service. If the compliance opportunity is unsuccessful, the additional service referral will be passed over to the Additional Services Team (AST) to work.

Process for compliance referrals

The referral gets checked that it's not an existing opportunity, when they are due for renewal and when they originally signed up. The referral is then allocated as below.

New client:

- Inbound BDC then to a BDM.

Existing client:

- If the client signed up more than 120 days ago, it will be allocated to one of the BDA's.
- If they signed within the last 120 days, it will go to an inbound BDC to book into the original BDM's diary.
- Existing client in the last 12 months of their contract (renewal period)
- Closed and sent to Client Relations to work as an early renewal.

These referrals are aimed to be contacted on the day of submission.

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

Compliance referrals are contacted roughly four times per week – via phone, email or by contacting the original referrer – with the aim to book an appointment within 14 days.

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?

Referrals are generally left open for no longer than 3 months, before being closed as unsuccessful.

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.

What is in it for colleagues?

Colleagues can earn up to £400 on breadcard per successful referral.



For additional information about the key features and benefits of our products and services, please visit the [Colleague Rewards Hub](#).