



Client Referral Program Rules of Engagement



What is the Vensure Client Referral Program?

The Vensure Client Referral Program is geared toward our Vensure clients. They can submit a referral for a prospect interested in our services and receive credit for simply helping other businesses. Referrals can be submitted through a form on our website (vensure.com/referrals) or internal Vensure employees.

Please note that when using the submission form on our website, one form needs to be submitted for each referred business. So, if the referring party knows multiple businesses interested in Vensure's services, a form must be submitted for each business. Indicate all services of interest to the business on a single submission form.

Whether a referral is submitted through the form online or an internal Vensure employee, all required fields must be completed. The more details provided, the more likely that the business will sign on to start services with Vensure, and the referring party will get paid.

What Services are Eligible for this Program?

The services that can be referred do not require the referred business to already be a client of Vensure. The following services are eligible for the Vensure Client Referral Program:

- › PEO
- › HCM (or Administrative Services Only)
- › Payroll Only
- › EOR (Employer of Record)
- › HRO (Human Resources Only)
- › Recruiting
- › Alternative Workforce Solutions: SOLVO
- › Accounting Services
- › Tax Services
- › Technology (IT) Services
- › Online Marketing
- › Commercial Insurance Lines

If You're an Employee at Vensure....

If you're a Vensure employee, you may see referrals come through you from your clients. The payout structure was noted previously, but here are a few guidelines to consider:

- › Bonus Board Eligibility – If a client referrers a deal through an internal Vensure employee, that employee can submit this through our Engage program to receive payout. In this case, if the referral is for any eligible service for the contest season's Engage Bonus Board, the internal employee can get their name on the Bonus Board for the submission. To summarize, any referral that is submitted through Engage will be eligible for the Bonus Board (depending on the service interest).
- › Business Consultants – If a client comes to you with a referral, you are welcome to submit via Engage. However, if the referral is for a service you can sell and earn commission on, you will not earn the referral payout. The client will still receive their payout, but you will receive your commissions from the sell.
- › Payouts are only paid to internal employees when the referral comes through Engage. If a client submits a referral through our Vensure Referral webpage, but you assisted and it was never submitted through Engage, you will not receive a payout. **The referral must go through Engage in order for an internal employee to qualify for a payout of any kind.**

What are the Payouts Associated with Each Service?

Each service has the opportunity to provide various payouts. This program can pay anywhere from \$50 to \$4,000 for bringing new business to Vensure. If the client referral is submitted through an internal Vensure employee, both parties will receive a referral payout. However, the client will receive a payout of the total amount listed below, and the internal employee will receive a payout of half the amount. For example, if a client refers a prospect through an internal employee for Technology Services and a payout is given upon start, the client will receive \$500, and the internal employee will receive \$250.

Note: Once a business is referred, the payout is not guaranteed, and the business must start services with Vensure for a payout to be tracked. Once the business starts services, the payout tracking begins. All payouts are issued after 90-days post-start. For example, if a referred services begin with Vensure on March 15, they will hit their 90-day mark on June 15, making the referring party eligible for their referral payout.

Service Offering	Referral Payout
PEO	\$50/FTE Worksite Employees (\$4,000 cap)
HCM (or Administrative Services Only)	\$25/FTE Worksite Employees (\$2,000 cap)
Payroll Only	\$10/FTE Worksite Employees (\$1,000 cap)
Employer of Record (EOR)	\$500
Human Resources Only (HRO)	\$50
Recruiting	\$250 per Placement
Alternative Workforce Solutions: SOLVO	\$100/Hire with \$1,000 cap
Accounting Services	\$500
Tax Services	\$50
Technology (IT) Services	\$500
Online Marketing	\$500
Commercial Insurance Lines	\$0

What is a Qualified Client Referral?

A qualified referral is one in which the referred prospect has shown interest in a service offering or moving forward with a service offering through Vensure. When a qualified referral is submitted, it should be a warm lead for the Vensure team to reach out to. Any client can refer a business, but the business must have shown interest for it to be a qualified referral. Only qualified referrals will lead to a payout.

If there are any questions regarding the Vensure Client Referral Program, please contact the referral team at vensurereferrals@vensure.com.

Payroll + Benefits + Risk Management + Human Resources

