



## REFERRAL PROGRAM

### Refer a Client “Sales Program”

#### A. Eligibility

Effective for all new referrals on or after July 1, 2018.

The Refer a Client Program is designed to reward associates for generating qualified leads that result in new full service or management rehabilitation contracts or consulting engagements for HealthPRO® Heritage.

Associates Regional Vice President level or above will not be eligible for this Program.

#### B. Program Guidelines

##### Qualified Client

A qualified skilled nursing facility (SNF), continuing care retirement community (CCRC), assisted/independent living (AL/IL), Home Health Agency (HHA), school district, or Hospital that needs to contract for therapy services.

##### Qualified Leads

To qualify as a lead, the decision-maker must be willing to meet with a HealthPRO® Heritage Vice President of Business Development to discuss services and be legitimately interested in making a change. Referrals do not qualify if the associate does not verify that the potential customer has a need for services. In other words, leads must be qualified through some type of communication with the prospective client, not merely a suggestion based on opinion. The lead must include information that is not otherwise readily available or already known by the sales team.

Examples:

- A PRN employee who works at a nearby facility knows that the current provider is struggling and the facility administration is considering a change.
- A therapist has a colleague from their OT program who works at a school where they have numerous open positions that they have been unable to fill and are looking for an outside firm to staff.
- A therapist is employed by an HHA who is looking for additional therapy staffing or considering outsourcing.

## **Therapy Services Agreement**

Management and Full Service (PT, OT & SLP) therapy services agreements, as well as consulting engagements with minimum fees of \$5,000 are eligible. Temporary and PRN contracts are excluded. Services must start at the designated facility within 120 days of the initial meeting.

## **Refer a Client Bonus**

Associate will be paid a refer a client bonus in the amounts listed for each referral once the contract or engagement has commenced, less applicable taxes and withholding:

Qualified SNF, CCRC, Hospital:	\$1,000.00
AL/IL, Consulting, HHA, School:	\$ 500.00

Referral bonus will be paid in the paycheck at the end of the month following 30 days from the start of the contract.

## **Shared Bonuses**

Only one referral bonus (\$1,000 or \$500) will be paid for each “signed and started contract”. If more than one associate collaborates for the same referral, each will receive an equal amount of the bonus amount (less applicable taxes).

## **Multiple Referrals**

Any associate who refers two qualified referrals within a calendar year and both referrals lead to “signed and started” contracts within that same calendar year will be paid a bonus of \$500 in addition to the regular bonuses.

## **Procedure for Referring a SNF, CCRC, AL/IL or Hospital**

- Step 1:** Associate identifies a prospective client.
- Step 2:** Associate completes the Refer a Client Referral Form or completes the Refer a Client Form online via the website; with particular emphasis on the reason the referral is a good lead. (Note: The referral form must be filled out completely in order to be processed).
- Step 3:** Associate e-mails completed form to Crista Stark ([cstark@healthpro-heritage.com](mailto:cstark@healthpro-heritage.com)) (unless completed online). Crista will provide it to the Vice President of Business Development (VPBD).
- Step 4:** VPBD will contact associate to discuss referral.

- Step 5:** Within 24 hours of talking with the referring associate, the VPBD gathers all other relevant information and contacts the qualified prospect to schedule a meeting for discussing therapy opportunities.
- Step 6:** VPBD will keep associate up-to-date with progress via e-mail.
- Step 7:** If the meeting results in a contract being “signed and started,” the VPBD communicates outcome to referring associate who requests bonus for HR approval.
- Step 8:** HR gets approval to process. Payment will be made at the end of the first month after the contract starts.

**REFER A CLIENT  
Referral Form**

**Associate Name:** \_\_\_\_\_

**Date of Referral:** \_\_\_\_\_

**Client Being Referred for Potential Contract:**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Contact Name

**How did you find out about the lead?** \_\_\_\_\_

\_\_\_\_\_

**Have you contacted anyone at the facility? If so, whom and what was discussed?** \_\_\_\_\_

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