



## **Refer-a-Customer Program**

### A. Eligibility

Effective for all new referrals received between June 1 and September 30<sup>th</sup> 2020

The Refer-A-Customer Program is designed to reward employees for generating qualified leads that result in new full service or management rehabilitation contracts for HealthPRO-Heritage.

### B. Program Guidelines

#### **Qualified Facility**

A qualified skilled nursing facility (SNF), continuing care retirement community (CCRC), or Hospital that needs to contract for therapy services. Locations in current operating markets are preferred.

#### **Qualified Leads**

To qualify as a lead, the decision-maker must be willing to meet with HealthPRO/Heritage Healthcare Business Development to discuss services and be legitimately interested. Referrals 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 to include contact information.

#### **Therapy services agreement**

Management and full service (PT, OT, & SLP) therapy services agreements are eligible. Services must be started at the designated facility within 12 months of the initial meeting.

#### **Refer a Facility Bonus**

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

Qualified SNF, CCRC, hospital Full Service & Management Contracts: \$3,000.00/ea.

Bonus will be paid in the paycheck at the end of the month within 60 days from the start of the contract.

### **Shared bonuses**

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

### **Multiple referrals**

Any employee who refers two qualified referrals within a calendar year-and both referrals lead to “signed and started” contracts-will be paid an additional bonus of \$1,000.

### **Procedure for Referring a SNF, CCRC or Hospital**

**Step 1:** Employee identifies a prospective client.

**Step 2:** The employee completes the Refer-A-Client Program referral form with particular emphasis on the reason the referral is a good lead.

**Step 3:** The employee e-mails the completed form to Crista Stark at [cstark@healthpro-heritage.com](mailto:cstark@healthpro-heritage.com).

**Step 4: Vice President of Business Development** will contact employee to discuss referral.

**Step 5:** Within 24 hours of talking with the referring employee, 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 employee 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 employee who requests bonus from HR approval.

**Step 8:** Crista Stark will provide approval to Finance to pay the referral bonus.

## Customer Referral

Employee Name: \_\_\_\_\_

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

Facility to be referred for potential therapy contract:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

Facility Details Surrounding Referral, including Contact Information for Decision Maker:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please email to [cstark@healthpro-heritage.com](mailto:cstark@healthpro-heritage.com).