

Referral Partner Introducer Scheme

For Optimal People & Business Services Ltd

The Company will pay an Introducer Fee of £200.00 to any Referral Partner who introduces a new Client to Optimal People & Business Services Ltd, provided that all the terms of this Agreement are satisfied.

The fee will be increased to £300.00 per referral to any Referral Partner who introduces more than 5 new Clients to Optimal People & Business Services Ltd within any 12-month period.

Terms & Conditions

For a Referral Partner to receive an Introducer Fee the following terms must be satisfied:

- The Client being referred by the Referral Partner must have agreed to the referral of business.
- Only one Introducer Fee will be paid for each Client introduced. If more than one eligible Referral Partner refers the same Client, the Introduction Fee will be paid to the colleague whose submitted the Client first, in line with the procedure.
- The total value of the initial work for each Client referred must exceed £1,500 at the point of the agreement being signed.
- The new Client must not have discussed any services with the Company independently prior to the referral being submitted by a Referral Partner.
- The Referral Partner are strictly prohibited from:
 - Holding themselves out as employees of Optimal People & Business Services
 - Attempting to directly sell any services which will be delivered by Optimal People & Business Services
 - Set any fees or timescales for proposed work to be completed between the potential Client and Optimal People & Business Services for any services they are referring
- There is no limit on the number of referrals that Referral Partner can make. However, any referral must be in connection with services the Company currently provide.
- For the avoidance of doubt, the following Departments within the Company where work can be referred to is as follows:
 - Human Resources
 - HR Outsourcing – e.g - HR Administration, Contracts of Employment & Employee Handbooks, Employee Relations issues, Policy reviews etc
 - HR project work – e.g M&A activity, TUPE transfers, Restructures etc

- Recruitment
 - Permanent placements
 - Temporary placements
 - Contractor placements
 - Consultant placements

- Learning & Development
 - E-Learning Programmes
 - Management Development
 - Leadership Development
 - Mental Health Awareness & First Aid workshops
 - Well-Being workshops
 - Customer Service Programmes

Exclusions

The work referred must exceed £1,500 in one referral and into one department named above. Referrals made which cover more than one area but neither area individually achieves £1,500 in fees will not be classed as a referral.

Procedure

The Referral Partner should email the Managing Director with details of the Company which they are referring and what services they require. They should clearly identify the email as a referral email. The Managing Director will contact the potential client and discuss their requirements and submit a proposal to the Client with estimated costs.

Should the proposal be accepted then the Managing Director will validate the referral and confirm with the Referral Partner if it fits the criteria to be eligible for the scheme.

The payment will be paid within 14 days following the Clients payment of the invoice.

The Managing Director’s decision is final should there be any disputes.

I can confirm that I wish to act as a Referral Partner for Optimal People & Business Services Ltd and agree to the Terms and Conditions of the Agreement

Name: Job Title:.....

Company Name:

Signature..... Date.....



Signed by Melanie Stead On behalf of Optimal People & Business Services Ltd

Signature..... Date.....