



Referral Bonus Policy

Purpose

A Team Tuition Australia (ATTA) recognises and appreciates the significance of new client referrals and Academic Personal Trainer (APT) employment referrals from stakeholders within our community. This policy outlines the principles and guidelines of the processes and decisions made in determining payment for referrals for both new clients and new APT hires.

Scope

This policy applies to all currently active clients, previously enrolled clients, and currently active Academic Personal Trainers (APTs). It encompasses all ATTA locations, including in person and online tutoring sessions, and any other settings where ATTA tutoring services are provided including school programs. The types of referrals covered by this policy include APT referrals for new APTs, and new client referrals from current and past clients.

Application

1.0 Key Objectives

A Team Tuition Australia (ATTA) recognised the invaluable contribution made by both clients and employees to propel the growth and success of our business. ATTA's Referral Policy underscores our commitment to fostering active engagement in referring potential clients and employees who resonate with our services and values. The key objectives are to:

- Inspire clients to refer qualified leads to ATTA.
- Enhance ATTA's client base through the power of word-of-mouth marketing.
- Acknowledge and reward individuals for their pivotal role in advancing the ATTA's growth.
- Strengthen relationships with existing clients and APTs by incentivising referrals.
- Improve brand visibility and reputation through positive referrals and recommendations.
- Expand market reach and penetration by tapping into existing networks of clients and employees.
- Foster a culture of collaboration and engagement by rewarding contributions to business growth.
- Cultivate long-term loyalty and advocacy among both clients and APTs through mutual benefit and recognition.

2.0 Referral Process

2.1 New Client Referral

Action	Responsible
Prior to changing a new client Opportunity to "Contracted" the details of the referral will be added to the set-up task description. The description will note that it is a referral opportunity and the name and contact details of the referrer.	Sales Team
When setting up an invoice for the new client, add the bonus referral credit product to the Opportunity and Invoice, deducting \$100 from the invoice. Create a task to collect bank details from referrer when Opportunity has been paid and passes cooling-off period successfully.	Admin Team
Task: When the new client Opportunity has been paid and past the cooling-off period: - Contact referring person for bank account details - Create task for CFO to pay referral bonus, include bank account details on this task. - Create task for CEO to email referrer	Admin Team
Confirm referrer set up as Contact in Xero Add Bill to Xero for paying Referral Bonus Pay Bill in next ATTA payments run	CFO
Email referrer thanking them for participating in referral program	CEO

2.2 APT Employment Referral

Action	Responsible
If there is a referring APT listed on the lead in the "Who referred you for this position?" field in the Digital Interview, attach the current APT account to the "referrer" field using the lookup. If they mention a referrer in the Practical Training, attach the current APT account to the "referrer" field on the opportunity using the lookup.	Recruitment Team at DI Review and/or Practical

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At the time of paying the referee their training pay, check the report to see if there are any associated referrer payments needed.	CFO
Confirm referrer is an active APT Add Bill to Xero for paying Referral Bonus Add pay next ATTA payroll run	CFO
Email referrer thanking them for participating in referral program	CEO

3.0 Eligibility Criteria

3.1 New Client Referral

- Referrals must be new leads who have not engaged with ATTA's services previously.
- Referred leads must be genuinely interested in our services and meet the criteria outlined by ATTA.
- All referring individuals are encouraged to refer qualified leads to ATTA through the designated lead channels.
- Referred leads must successfully purchase any ATTA program to qualify for the referral bonus.
- The referral bonus can be applied across both in person and online programs.
- Upon successful conversion of a referred lead into a paid client, both the new client and the referring person may be eligible for a referral bonus.
- Referring clients must be either currently active or having previously engaged ATTA's services, have an account in Salesforce.
- Referring APTs must be currently active and employed by ATTA, as well as not a part of the management team.
- To be eligible for payment, all details must be included for the referrer at the time of enquiry. These details must include name, contact information and any relevant information to assist identification of the referrer.
- The referring person will receive a \$100 bank transfer within 24 hours as a referral bonus for recommending a friend who signs up for a new program with ATTA. This bonus is valid once the new client has made their first payment on their new program and the first session has been completed.

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- The new client will also receive a \$100 discount on their first program fees upon signing up, provided they mention their referrer during the sales process.

3.2 APT Employment Referral

All current APTs are eligible for a referral payment on the successful hire of a new APT. The referring person will receive a \$100 after the referred person has been successfully hired and for more than 30 days. To be eligible for payment, the following conditions must be met:

Referrer Eligibility:

- The referring APT must be currently employed by ATTA at the time the referral payment is due.
- The referring APT must nominate themselves or be nominated as a referrer at the time of application, prior to training.

Referred APT Eligibility:

- The referred APT must successfully complete the training process.
- The referred APT must still be employed by ATTA 30 days after the completion of their training period.

Payment Conditions:

- The referral payment will be processed only if all eligibility criteria are met.
- Payments will be disbursed according ATTA's standard procedures and timelines.

Disqualification:

- Referral payments will not be awarded if the referred APT leaves the company within 30 days of completing their training.
- Referral payments will not be awarded if the referring APT is no longer employed by ATTA at the time of payment processing.

Additional Notes:

- ATTA reserves the right to amend or terminate the referral program at any time without prior notice.
- Referral payments are subject to taxation and other applicable regulations and deductions.
- Any disputes regarding eligibility or payments will be handled by ATTA's Chief Financial Officer and their decision will be final.

By adhering to these eligibility criteria, both the referring APT and the referred APT can ensure their eligibility for the referral payment upon successful hire.

4.0 Administration

The administration of the referral bonus program will be overseen by the Finance department within ATTA. Any enquiries or concerns regarding the referral bonus program should be directed to the Chief Financial Officer for clarification. All referral information will be treated with utmost confidentiality and used solely for the purpose of evaluating the referral.

This policy sets out ATTA's approach to the matters it covers, but is not intended to bind ATTA legally. Accordingly, this policy acknowledges that ATTA may, at its absolute discretion, amend, vary, or terminate the policy at any time and in any individual case, may depart from the policy wholly or in part.

Version Control

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