

Valcourt One Source Cross-Sell Referral Incentive Program

OVERVIEW & OBJECTIVES

Our vision is to be the “Undisputed National Leader in Specialty Building Services with the Highest Reputation for Technical Expertise, Safety, and Client Service.” One way to achieve this vision is through organic growth by referring cross-sell leads for our expanded service offerings with our new and existing client relationships. Our ultimate goals are to:

- Build greater value and trusted client relationships
- Drive organic growth
- Create a cross-selling culture and ‘one team’ atmosphere
- Provide recognition and rewards for employees who help solve client issues or concerns

CROSS-SELL LEAD DEFINITION

This cross-sell program is specific to the promotion and sales of services provided in the service lines by an individual that is not currently employed in that service line OR for a lead made in the same division but in a different geography. For example, this means our:

- Window Cleaning Team Promoting Safety Systems and Waterproofing Services
- Waterproofing Team Promoting Window Cleaning & Safety Systems Services
- Safety Systems Team Promoting Window Cleaning & Waterproofing Services
- Window Cleaning Team in NC Promoting Window Cleaning Services in TX

ELIGIBILITY & MONETARY INCENTIVES

ALL employees can participate in the program and most employees below VP/Officer level are eligible to receive a monetary incentive for a qualified lead that converts into a sale under this program. The monetary incentive will be equivalent to 1% of the total value of the job (up to a \$5,000 max incentive payout per contract sold). This includes a minimum payout of \$50 per contract sold.

In addition to the monetary incentive for every qualified lead, there will be a company-wide competition with four quarterly awards and four annual awards for the following:

- Highest number of contracts sold
- Largest single project sold
- Total \$ amount sold
- Most qualified leads submitted

The prize for each quarterly award will be a \$3,000 bonus and the winners will be announced and recognized at the all-team meeting. You are only eligible to win one award per quarter.

STEPS OF THE PROCESS

The general process is outlined below. Please note that the detailed process may vary slightly by branch. If so, your GM will send out follow-up clarifications. [Click here](#) to view the step by step manual.

1. Identify a cross-sell opportunity – either through a series of questions that you have asked a client or through observations while at a client site.
2. Fill out the online lead generation form as www.valcourt.net/one-source
3. A salesperson will review the form and have a follow-up conversation with the client with the goal of booking the work
4. After the work is contracted, you will receive a check with the incentive amount

PROGRAM GUIDELINES

Participation in the Program:

- All employees can participate in the program and most employees below VP/Officer level are eligible for monetary rewards. The executive leadership of each division will make all final decisions regarding participation.
- In order to help make this program successful, training will be provided to equip everyone with broader awareness of our service offerings and client talking points.
- Participation in this program can in no way interfere with an employee's primary operational role. The intent of this program is for participants to identify referrals with new or existing clients but not play a significant role in approving, developing, creating the proposed solution, or "selling" the job.
- This program does not replace or change compensation policies for sales staff or employees already compensated or recognized for multiservice selling activities.
- This program is additive and will not affect any current incentive program.
- This cross-selling program does not include the promotion and sales of services that are provided from within the same division that an individual is employed. For example, this does not include a Window Cleaning employee promoting other Window Cleaning services, such as stain removals. This would be commonly known as "Upselling", and not "Cross Selling". Any programs in place at the local branches for "Upselling" of services remain in place and are not affected by this program requirements.

Eligible/Qualified Referrals:

- All referrals must be submitted through the website link with the required information. If the referral is not submitted, no payments will be made – no exceptions.
- The referral must be sent prior to the job being awarded. Any referral sent after the referral is awarded will not be compensated – no exceptions.
- All referrals are subject to review by the One Source Program Review Board (PRB) prior to funding and recognition under this program. The decision of the executive leadership is final.
- The purpose of this program is to generate Net New leads that would not be an opportunity if not for the lead generator.
 - a. If a referral is made on a job that the other division is already bidding or already in the other division's pipeline, or we are simply following up on the status of a job, the referral may not be eligible for incentive compensation.

- b. However, an example of a referral that would likely be eligible for incentive compensation is if we have submitted a proposal that has gone cold over several months, and someone with a good client relationship reaches out to follow up and 'revives' the opportunity.

Detailed Workflow/Process:

The generic workflow / process steps are outlined below. These will be updated in 2-3 months once Salesforce is rolled out. Given the current state where we have different systems and tracking mechanisms in each market, there might be slight variations to the below steps that your GM will clarify where needed.

Salesperson & Office Staff

1. You have a conversation with a client and gauge interest on potential follow-up work that another Valcourt branch or division can do. The client agrees to be contacted by a salesperson for a follow-up.
2. You fill out the online lead generation form, and that information is automatically uploaded into a program tracker.
3. A sales leader / branch administrator in the noted branch receives the lead and assigns a salesperson to follow up with the client.
4. A statement of work is agreed upon with the client, and the work is scheduled for a particular date.
5. Once the work is contracted, a sales leader / branch administrator updates the tracker with the completed job amount and notifies you that the qualified lead has been successfully contracted. It is the responsibility of the receiving branch to update the tracker. All updates need to be completed by the first day of the month. The sales leader / branch administrator will also notify you of the sale amount and expected commission that you will be receiving.
6. You are paid for providing the lead. Payment should be expected (through bi-weekly payroll) 30-45 days upon contract.
7. The salesperson who closed the sale is also paid their normal commission.

Field Supervisors & Technicians

1. You notice a condition / issue on a building and take a picture of it.

Scenario A: You have an existing client relationship and discuss the building condition with them directly. The client agrees to be contacted by a salesperson for a follow-up.

2. You fill out the online lead generation form, and that information is automatically uploaded into a program tracker.
3. A sales leader / branch administrator in the noted branch receives the lead and assigns a salesperson to follow up with the client.
4. A scope of work is agreed upon with the client, and the work is scheduled for a particular date.
5. Once the work is contracted, a sales leader / branch administrator updates the tracker with the completed job amount and notifies you that the qualified lead has been successfully contracted. It is the responsibility of the receiving branch to update the tracker. All updates need to be completed by the first day of the month. The sales leader / branch administrator will also notify you of the sale amount and expected commission that you will be receiving.
6. In this case, you would be eligible for the full 1% of revenue commission.

Scenario B: You share details with your Operations Manager/Project Manager/Salesperson

2. You let your Operations Manager/Project Manager/Salesperson within your branch know (follow branch reporting structure / will vary by branch depending on who has direct communication with the client).

3. That Operations Manager/Project Manager/Salesperson follows up with the client to gauge interest on the identified work that the other Valcourt branch or division can do. The client agrees to be contacted by a salesperson for a follow-up.
4. The Operations Manager/Project Manager/Salesperson fills out the online lead generation form.
5. In this case, you would be eligible for a 50/50 split of the 1% cross-sell referral commission with the Operations Manager/Project Manager/Salesperson in your division.

TERMS & CONDITIONS

The terms and conditions contained in this referral program may not describe or address all situations that may arise in the structuring of a referral incentive award. As a result, the One Source Program Review Board (PRB), in its sole discretion, retains the right to interpret, narrow, expand, or otherwise determine whether or how an incentive payment is or is not owed to a referral originator. The One Source PRB is comprised of senior executives from the organization. The One Source PRB has the right to amend or modify any component of the Referral Program in any respect, at any time.