

# Referral

This page covers the Referral Bonus Program at Crowned Credit — how to collect referrals, track bonuses, process payouts, and communicate with referring clients.

## 1. Objective

To encourage client referrals by providing incentives while ensuring proper tracking, verification, and processing of all referred leads.

## 2. Referral Bonus Structure

Plan Type	Bonus Amount	Payout Methods
Essential / Accelerated clients	\$50 per successful sign-up	Zelle, Cash App, or bill credit (active clients only)
Momentum Plan clients	\$75 per successful referral	Zelle or Cash App
Inactive clients	\$50 per successful sign-up	Zelle or Cash App

“ **Note:** Bonuses are available to claim one month after the referral signs up.

## 3. Qualification Criteria

- **Completed Payment:** Referred person signs up and completes payment.
- **New Lead:** Referral is new — not an existing or past lead.
- **Verified Referrer:** Referring client is properly identified in the system.

## 4. Collecting Referral Info

Collect the following from the referring client: **Full Name**, **Phone Number**, and (Optional) **Email**.

### ☐ Referral Collection Script

"Hi {{contact.first\_name}}. Thank you for referring someone to us! May I please get their full name and best contact number so we can reach out and assist them?"

## 5. Tagging & Documentation (Discord)

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Post **referrer name, referral name + phone** to the "**General**" **GC** in **Discord**. Tag the appropriate **closer** or **Sales Team**.

## 6. Bonus Processing

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1. **Verify Eligibility:** Confirm referral meets all qualification criteria.
2. **Confirm Payout Method:** Ask referring client for preferred method (Zelle, Cash App, or bill credit).
3. **Process Payment:** Send via **Zelle / Cash App**, or apply as bill credit. Note: bonus applied to bill is reflected in the following month. Zelle/Cash App allow **3-5 business days**.
4. **Notify Billing:** Notify **Billing Department (Khryzza)** and leave a note in **GHL / Closed List Tracker**.

## 7. Communication to Referrer

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### ☐ Essential/Accelerated — Bonus Approved

"Thank you for your referral {{contact.first\_name}}! Your \$50 bonus has been approved. Please let us know if you'd like to receive it via Zelle, Cash App, or as a credit toward your next bill."

### ☐ Momentum/Inactive — Bonus Approved

"Thank you for your referral {{contact.first\_name}}! Your \$50 bonus has been approved. Please let us know if you'd like to receive it via Zelle or Cash App?"

# 8. Compliance

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Ensure **legitimate referrals** only. Maintain full documentation of all referrals and payouts. All bonuses are subject to policy.

# 9. SMS Scripts (Billing Dept)

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## ☐ Active Client (Essential/Accelerated) — Option A

"Hi {{contact.first\_name}}, Thank you for sending your referral! We truly appreciate your support. We're happy to confirm that we have successfully received the individual you referred. As a thank you, you will be receiving a \$50 referral bonus. Please let us know how you would like to receive it via Zelle or Cash App and send your preferred payment details through this message. Alternatively, we can apply the \$50 as a credit toward your next month's bill. Once we receive your details, we'll process the referral bonus promptly. Thank you again for trusting and supporting Crowned Credit. Keep those referrals coming! Best regards, Crowned Credit Team"

## ☐ Active Client — Option B (Applied to Bill)

"Hi {{contact.first\_name}}, good day! Thank you so much for sending in referrals! We're happy to confirm that we've received the following referral(s): [Referral Name(s)]. As a result, \$50 will be deducted from your [Month] bill! We truly appreciate your support, keep those referrals coming! Thank you again, Crowned Credit Team"

## ☐ Momentum/Inactive Client

"Hi {{contact.first\_name}}, Thank you for sending your referral! ...receiving a \$50 referral bonus. Please let us know how you would like to receive it via Zelle or Cash App... Best regards, Crowned Credit Team"

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