

Your Guide to Referring Clients to **assimil8** & **Bundle**



assimil8



Bundle



#Dreamteam

A photograph of four business professionals in an office setting. On the left, an older man with glasses and a younger man with a beard are looking towards the right. In the center, a woman with long dark hair is smiling and looking at another woman on the right. The woman on the right is holding a clipboard and shaking hands with the man in the center. The background is a blurred office environment with large windows.

Introduction

Welcome to the assimil8 & Bundle Global Referral Scheme Guide! We're thrilled to have you as a part of our extended team. This guide is designed to help you understand the process of referring potential clients to us, how you'll be rewarded, and how to spot the perfect referral opportunity. Let's grow together!



The Referral Process



Step-by-Step Guide:



1. Identify a Referral Opportunity:

Spot a business or individual who could benefit from our services.



2. Visit Our Website:

Head over to assimil8.com/referral or getbundle.co.uk/referral



3. Complete the Referral Form:

Fill in all the necessary details about the referral.



4. Review by assimil8/Bundle:

We'll take a look at the submission and assess the fit.



5. Discovery Call:

We'll reach out to the potential client for an initial discussion.



6. Client Onboarding:

If all goes well, we'll bring them into the fold.



7. Invoice & Payment:

The client settles their invoice.



8. Your Reward:

You'll receive your referral fee within 30 days of the payment clearing.





When and How You're Paid

Your reward for a successful referral is 10% of the first year's invoice from the new client. The timing and structure of your payment will depend on how the client chooses to settle their invoice with us:

01

Lump Sum Payment

If the client pays their first year's invoice upfront, you'll receive your 10% reward as a lump sum within 30 days of the payment clearing.

02

Monthly Payments

If the client opts to spread their payments over the course of the year, you'll receive your 10% reward in instalments. Each instalment will be paid within 30 days of each of the client's payments clearing.



The standard method of payment is via bank transfer. However, if you prefer another payment method, these options can be discussed and arranged to suit your convenience.

Feel free to reach out to us if you have any specific payment preferences or questions.

How to Identify a Referral

Identifying a potential referral doesn't have to be a daunting task. Whether you're a team member or a partner, there are various avenues and strategies you can employ to spot opportunities. Here's how:



Friends and Family

You'd be surprised how many people in your personal circle might need our services. Casual conversations about work challenges can often lead to referral opportunities.



LinkedIn Connections

Browse through your LinkedIn network. Do any of your connections work in industries that could benefit from our services?



Ex-Colleagues

People you've worked with in the past know your professional background and are more likely to trust your recommendations.



Industry Events

Whether it's a webinar, conference, or casual industry meetup, these events are ripe for finding potential referrals.

Questions to Ask

01

"What reporting tools are you using? Are they working for you?"

02

"How do you manage your data analytics?"

03

"How are you managing cashflow? We're speaking to some people at the minute struggling with it using Excel."

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Networking Events

These are excellent places to meet potential clients who might express pain points that Bundle or assimil8 could solve.



Client Meetings

Sometimes during discussions, clients or prospects will mention challenges they're facing that we typically solve for our clients.



Industry Forums

Online platforms related to your industry often have discussions about challenges that we can solve.



Vendor Partnerships

If you work closely with other vendors, they might come across clients who need our services and aren't in direct competition.

Questions to Ask

01

"I'm struggling a bit with Excel. How are you getting on with it?"

02

"What are you using to visualise your data?"

03

"How do you get on with reporting?"

Remember, the key is to listen actively and identify the challenges that people are facing. Once you spot a potential lead, the next step is to refer them and let us do the rest!

+ Much more!

The Ideal Referral

When it comes to identifying the perfect referral for assimil8 and Bundle, it's essential to consider various factors such as sectors, industries, and even specific departments within a company. Here's a breakdown to help you pinpoint those golden opportunities:

Sectors



Healthcare

With the increasing need for data analytics in patient care and hospital management, healthcare institutions make for excellent referrals.



Finance

Banks, investment firms, and insurance companies are always in need of robust financial planning and data analytics solutions.



Retail

E-commerce and brick-and-mortar stores alike can benefit from improved data visualisation and customer analytics.



Manufacturing

Companies in this sector often struggle with supply chain management and could benefit from our solutions.

Departments



Marketing

Our solutions can help marketing teams with customer segmentation, ROI tracking, and campaign analytics.



HR

Human Resources can benefit from analytics in talent acquisition, employee engagement, and workforce planning.



Finance

Financial departments can use our services for budgeting, forecasting, financial reporting and management. Healthcare institutions make for excellent referrals.



Operations

Our solutions can streamline inventory management, quality assurance, and overall operational efficiencies.

Industries



Technology

Tech companies are data-rich and often require advanced analytics and data engineering services.



Education

Educational institutions are increasingly relying on data to improve student outcomes and operational efficiencies.



Hospitality

Hotels, restaurants, and travel companies can use data analytics for customer satisfaction and operational improvements.



Who Within These Departments

C-Suite Executives

They're the decision-makers and would be interested in solutions that improve the bottom line.

Managers and Team Leads

These individuals often feel the pain points directly and are looking for solutions to make their teams more efficient.

Data Analysts and Scientists

These are the people who work with data daily and understand the value of robust analytics tools.

Challenges They're Facing

Data Silos

Discovering, curating and providing governed access to data is a very manual and time consuming process.

Inefficient Reporting

Wasting too much time generating reports manually.

Budget Overruns

Struggling with financial planning and keeping projects within budget.



By keeping these factors in mind, you'll be better equipped to identify the ideal referrals that would most benefit from our services.



Bundle Specific Tips

Bundle's Referral Guide: How to Find & Engage Prospects for 10% Rewards! Finding the Right Client

Understand the Pain Points:

Look for businesses struggling with data management, forecasting, and reporting. If they're drowning in spreadsheets or manual processes, they're perfect for Bundle.

Spot the Innovators:

Target businesses that show a tendency for adopting new technologies. They are more likely to be open to AI-driven solutions.

Business Size Matters:

Bundle is perfect for businesses of all sizes. Whether it's a startup in need of scalability or a large corporation looking to streamline, we can help.

Industry Agnostic:

Don't limit yourself to one sector. From marketing to finance, HR, and customer service, Bundle's offerings are versatile. Remember, it doesn't have to be on the website for us to offer a Bundle for it. We offer lots of bespoke and tailored solutions to fit any industry, sector, or department.

Network at Industry Events:

Webinars, trade shows, and industry events are great places to meet potential referrals.

It's Bundle's time to shine now



Starting the Conversation



01

Highlight Immediate Value:

Open the conversation by highlighting how Bundle can solve specific problems they are currently facing. Speak to the pain points.



02

Leverage Current Events:

Use relevant business trends or news to show the urgency and importance of adopting data-driven strategies. "Are you guys doing anything with gen AI?"



03

Use Bundle's Language:

Be personable and light-hearted. Bundle is a solution to serious problems, but we talk about it in an approachable way. Show them we're a brand they'd enjoy working with.



Bonus

Keep the Conversation Going

Follow-up: Always follow up after the initial conversation. Whether it's sharing a piece of content from Bundle's resource-rich blog or another success story, keep the dialogue open.

Who knew a simple change of how I visualise my charts would make me more money?

Duh! I saw that on Bundle's blog and saw progress straight away



Who to Target & What to Listen For

Your Bundle Referral Cheat Sheet

01.

Marketing Agencies & Marketing Teams

Challenges

Struggling to prove ROI, difficulty in tracking multiple campaigns, data silos, "marketing blindness" from too much data

Bundle Solutions

Simplified dashboard for tracking all KPIs, automated insights to improve campaign strategies

Hooks to Listen For:

"We're not sure which campaigns are really working"

"Our reports take ages to compile"

02.

Finance Teams & Financial Advisors

Challenges

Inaccurate forecasting, manual entry errors, difficulty in compliance reporting

Bundle Solutions

Accurate, real-time budget analysis and forecasting, error-free compliance documentation

Hooks to Listen For:

"We missed our quarterly budget"

"These spreadsheets are a nightmare"

03.

Retail & Ecommerce

Challenges

Inventory management, customer behaviour prediction, tracking multiple sales channels

Bundle Solutions

AI-powered insights into consumer behaviour, real-time inventory status

Hooks to Listen For:

"We're overstocked on some items"

"Sales are down but I don't know why"

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04.

Healthcare

Challenges

Patient data management, scheduling, compliance with healthcare regulations

Bundle Solutions

Secure, compliant data management, operational efficiencies through predictive analysis

Hooks to Listen For:

"It's hard to make sense of all this patient data"

"We're always either overstaffed or understaffed"

05.

Manufacturing & Supply Chain

Challenges

Resource allocation, predicting maintenance, supplier management

Bundle Solutions

Predictive maintenance schedules, streamlined supplier data

Hooks to Listen For:

"Our downtime costs are skyrocketing"

"Our supplier management is disorganised"

06.

HR Departments

Challenges

Employee retention, performance appraisals, recruitment

Bundle Solutions

Data-driven performance metrics, predictive employee satisfaction scores

Hooks to Listen For:

"The recruitment process is a shot in the dark"

"We've got a high employee turnover rate"

Who to Target & What to Listen For

Your Bundle Referral Cheat Sheet

Education Sector: Schools & Educational Institutes

07.

Challenges

Student performance tracking, resource allocation, curriculum planning

Bundle Solutions

AI-generated insights into student performance, resource optimisation

Hooks to Listen For:

"We don't know how to allocate our budget"

"We wish we could understand student needs better"



FAQs

Thank you for being a part of our journey and helping us grow. Your referrals are not just business transactions; they're the highest compliment we can receive. Let's achieve great things together! Happy referring!



Q: How many referrals can I make?

As many as you want! We have no limits on the number of times you use the referral scheme. Although, if you're really good at it, we may end up offering you a job instead!



Q: How will I get paid?

Once your referral becomes a paying customer, we'll contact you to sort out payment details. You'll see the money hit your account quicker than you can say "Bundle is awesome!"



Q: Do I only get paid on one invoice in the first 12 months?

Nope! Every time we raise an invoice for the referral in that first 12 months you will receive 10% back as a thank you!



Q: What types of companies or teams should I refer?

Got friends in marketing, finance, healthcare, education, or another industry? Know someone pulling their hair out because of messy data? Send them our way! Bundle can help out in many sectors.



Q: If I make an introduction in person or by email, can that work as a referral?

The easiest way to refer is through the website, but introduce them however you want. We'll make a note and if it goes anywhere you'll receive your payment in the usual method.



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Q: How long does it take to get approved for a referral?

Approval typically takes a few weeks, as we have to ensure the fit is just right. We wouldn't want to start a relationship on the wrong foot, would we?



Q: What happens if my referral doesn't convert to a paying customer?

A: No worries! While you won't get a referral fee, you'll have our eternal gratitude for trying. Plus, there's always next time.



Q: Can I refer someone who's already in talks with assimil8 or Bundle?

As much as we'd love to give you credit for that, if they're already chatting with us, the referral won't be valid. But keep those other names coming!



Q: Are international referrals accepted?

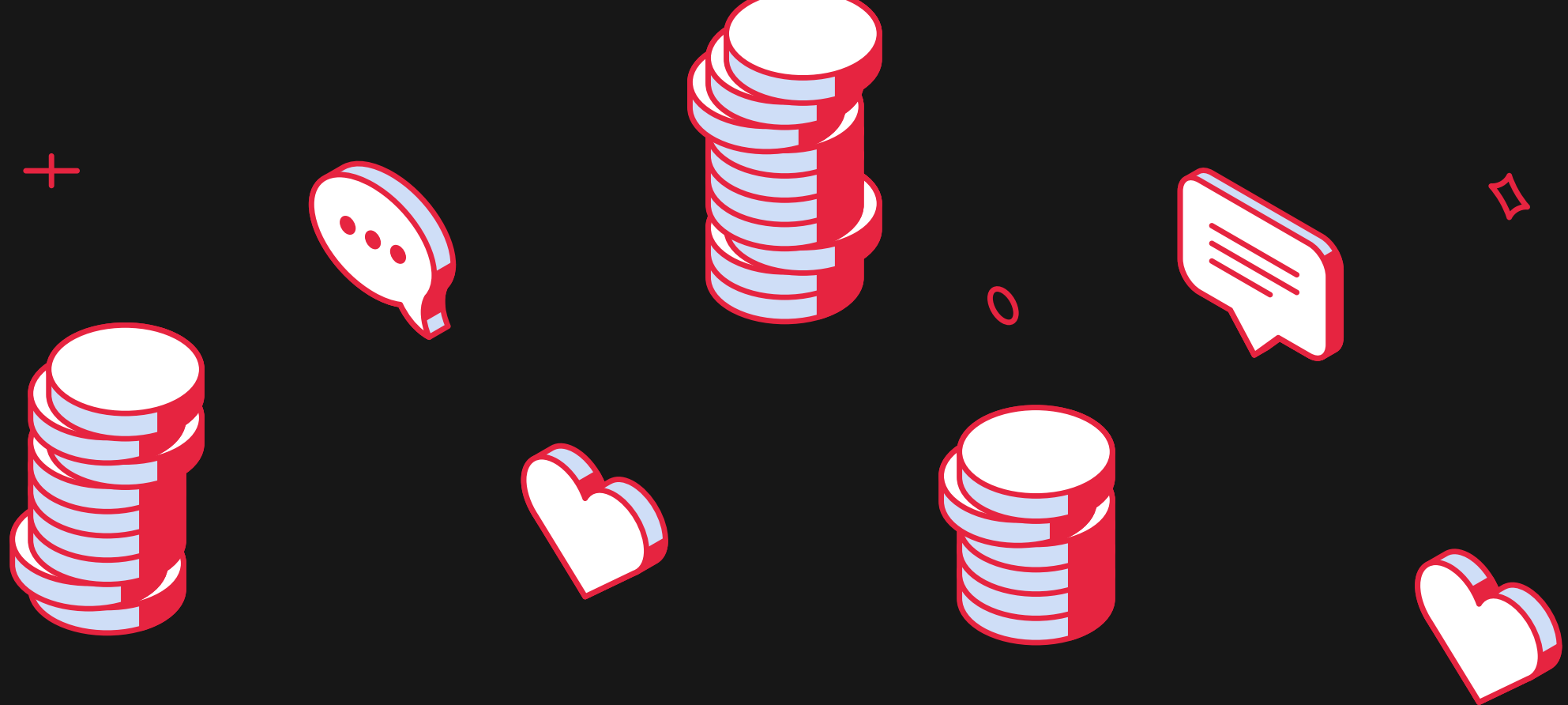
Absolutely! We love making friends from all over the world. Distance isn't a barrier for us; it's an invitation.



Q: What should I do if I have more questions?

A: Drop us a line! We're always happy to chat and answer any questions you might have. You can also visit our referral page for a comprehensive list of FAQs and T&Cs.





Happy Referring!

