

BOLDR's Client Referral Program Terms and Conditions

1. Purpose

The Boldr Client Referral Program ("Program") is designed to incentivize current clients to refer **qualified leads** to Boldr across any of its service lines - **Managed Operations (MO)**, **Global Employment (GE)**, or **CX Transformation Services**.

2. What's Eligible?

- **External Referrals:** Any introduction to a new business entity that is not currently engaged with Boldr.
 - **Internal Referrals:** Referrals within the same organization that lead to new functional relationships (e.g., a MO client referring their HR department to start a GE engagement) **are valid** and qualify under this program.
 - **Service Coverage:** This program applies to **all Boldr services**—MO, GE, and CX Solutions.
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3. Incentives

a. 🎯 Discovery Call Incentive

- For each referred lead who **completes a qualified Discovery Call**, Boldr will:
- Make an **in-kind donation** on behalf of the Referrer to a cause or nonprofit organization of their choosing (must align with Boldr's impact framework).

b. 💰 **Conversion Incentive**

If the referred lead signs a contract (MO, GE, or CX Transformation) and **pays their first invoice**, the Referrer will receive:

- A **\$2,500 reward**, with the choice of:
 - **A one-time invoice credit** applicable to their current service with Boldr (MO or GE), or
 - **A CX Transformation Service credit** applicable toward:
 - AI Implementations
 - AI Migrations
 - Strategy Workshops
 - Process Automation or Optimization
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3. Referral Process

- Registration: Referrer must register each referral by completing the [referral form](#) for the prospective client's company and relevant business and people details.
- Qualification Criteria:
 - The Referred Client must not have a pre-existing relationship with Boldr.
 - The lead must not have been referred by another party.
 - The Referred Client must enter into a minimum 12-month service agreement and hire at least three full-time team members.
- Acceptance Window: Boldr will confirm acceptance or rejection of the referral within 3 business days of submission. If no response is given, the referral is automatically accepted after the 3-day window.

- **Conversion Timeline:** The referral will remain active for up to 6 months from acceptance. If a contract is not signed within this period, the referral expires unless an extension is granted in writing.
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4. Reward Fulfillment

- **Donation Fulfillment:** Boldr will coordinate with the Referrer within **10 business days** of a completed Discovery Call to determine the recipient of the in-kind donation and ensure it aligns with Boldr's impact values.
 - **Credit Issuance:**
Upon successful client conversion, Boldr will notify the Referrer and issue a **credit certificate** to be applied against any CX Transformation Services. Usage of the credit must be confirmed via a Statement of Work.
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5. Confidentiality and Non-Disclosure

Both Parties agree to maintain the confidentiality of any non-public, sensitive, or proprietary information shared during the referral process.

6. Indemnification

Each Party agrees to indemnify and hold harmless the other from any claims, losses, or damages arising from the referral process or any breach of this Agreement.



7. Compliance and Ethical Conduct

The Referrer agrees to act ethically and in accordance with all applicable laws when referring potential clients. No misrepresentations about Boldr's services may be made.

8. Governing Law and Jurisdiction

This Agreement shall be governed by the laws of the State of Delaware. Any disputes shall be resolved through binding arbitration in New Castle County, Delaware.

9. Entire Agreement

This Agreement constitutes the entire understanding between the Parties regarding the Referral Program and supersedes any prior discussions or agreements.