

## Partnership Guide

Thank you for your interest in partnering with The Summit Path. Before you decide to become a partner you need to understand what it would involve for you. Please take time to read the following information carefully. Feel free to ask any questions if anything you read is not clear or you would like more information.

### **What is the purpose of entering into a partnership with us?**

To establish a positive strategic alliance which serves to support and grow each of our businesses.

### **Why have I been invited?**

You have been invited as we believe that our businesses have the same or similar client bases and each of us stand to mutually benefit from collaborating together, supporting each other and sharing our professional networks to increase the number of referrals we both receive.

### **Do I have to take part?**

Participation in the partnership is entirely voluntary. We will describe the parameters of what is involved and ask you to sign a consent form and referral agreement. You can withdraw at any time in accordance with the termination process outlined in the referral agreement.

### **What will I have to do?**

Each of us will be required to participate in either a monthly or quarterly 60min phone meeting to build the relationship between us. We will also both be required to actively promote the services of each partner to current connections and seek new contacts on behalf of the partner in order to make qualified referrals or introductions. The process is target driven and targets are set in a bespoke, flexible manner which must be mutually agreed upon by each party. Targets are not contractually binding; however accountability is achieved through recording the productivity of the relationship during the monthly or quarterly partner meetings. It is the responsibility of each partner to educate the other on what referrals they are looking for and how best to present their business on their behalf.

### **What are the possible benefits of taking part?**

You will receive an optional 5% referral fee on any payments made by a successful referral that becomes a customer/client of The Summit Path during the agreed partnership period, as well as an exclusive 10% discount on The Summit Path products or services which can be used by you or your team. You will also gain a competitive advantage by being able to leverage our expertise and services within your own business to enhance your own product or service. The relationship is free and there is no financial cost involved with being a partner.

### **What are the possible disadvantages and risks of taking part?**

We have spent considerable time trying to design an arrangement which limits any disadvantages or risks to our partners. Due to there being no financial cost and a relatively small but consistent commitment involved, we believe there aren't really any notable disadvantages or risks for taking part. However, we are always looking to improve what we do so if you feel we could make any changes to the process that would enhance the experience of partnering with us we welcome your feedback openly.

### **What if there is a problem?**

If you have a concern or complaint about any aspect of the partnership, please contact us by email or raise it in one of your partner meetings.

**What will happen if I don't wish to continue being a partner?**

To withdraw from the partnership all you need to do is inform us in writing that you wish to terminate the partnership. There is a 30 day notice period and any outstanding fees that are owed to you will be settled by the end of this period.

**Further information and contact details:**

For any questions or queries relating to partnerships please feel free to contact David Buckley, Founder of The Summit Path at: [david.buckley@thesummitpath.co.uk](mailto:david.buckley@thesummitpath.co.uk).