



CROSS-SELLING GUIDE

Cross-selling at Amplēo is about helping our clients unlock their full potential by providing the right expertise at the right time. Many businesses face challenges beyond their initial engagement—whether it’s financial strategy, marketing leadership, tax compliance, valuation insights, or business restructuring. By proactively identifying client needs and introducing them to our specialized teams, we create more value, strengthen relationships, and drive better outcomes. A simple conversation can reveal gaps that our experts can fill, making referrals seamless and ensuring that clients receive comprehensive support tailored to their growth and stability.

This guide is designed to provide a simple way to (1) identify whether your clients need additional services and (2) make those introductions. In addition to building Amplēo and supporting clients, you will be eligible for referral commissions for 12 months.



Amplēo HR partners with small business owners and operators to manage their HR, recruiting, benefits, and payroll. We provide outsourced and embedded solutions that allow them to focus on what they do best while we build the HR foundation they need to grow, succeed, and keep their business running smoothly.

SYMPTOMS & QUESTIONS

Are you . . .

- . . . struggling to hire and retain your best people?
- . . . worried about HR compliance and legal risks?
- . . . dealing with low team morale, poor communication, or high turnover?
- . . . overwhelmed with HR tasks and projects?
- . . . stressed because of the lack of HR processes?

SOLUTION

For growing companies, weak HR infrastructure leads to compliance risks, costly turnover, and hiring inefficiencies that stunt business growth.

We bridge that gap by offering the following:

- **HR Compliance and Risk Management** – Reducing legal exposure and ensuring that businesses operate with confidence
- **Retention and Engagement Strategies** – Keeping employees motivated, productive, and invested in the company's success
- **Talent Acquisition and Recruiting** – Filling critical roles efficiently with top-tier candidates
- **Scalable HR Infrastructure** – Ensuring that businesses have the right processes and technology to scale
- **HR for VC and PE-Backed Companies** – Aligning HR strategies with investment and growth goals

INCENTIVE

- \$200 for referring a **qualified** lead
- Up to 5% of billed revenue for 12 months when the deal is closed
- Amplifier Club trip for top goal makers, sales leaders, and cross-sellers

NEXT STEPS

- Step 1:** Email referral introductions to AmpleoHR@ampleo.com and copy bd@ampleo.com.
- Step 2:** The Amplēo partner adds the lead to HubSpot.