

# 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.



Scaling a business requires financial clarity, strategic decision-making, and access to capital, but many leaders lack the expertise or resources to manage complex financial challenges. Amplêo Finance helps companies by providing fractional CFO leadership, financial strategy, and execution to optimize cash flow, improve profitability, and secure funding.

## SYMPTOMS & QUESTIONS

### Are you . . .

- . . . struggling with cash-flow visibility and forecasting?
- . . . unsure how to secure funding or capital for growth?
- . . . facing inefficiencies in financial processes that hold back your business?
- . . . worried about financial risk and compliance?
- . . . unconfident in your long-term financial forecasting and planning?

## SOLUTION

Many businesses struggle with uncertain cash flow, inefficient financial processes, and difficulty raising capital, leading to missed opportunities and financial risk.

### Amplêo Finance bridges that gap by offering the following:

- **Fractional CFO Services** – Executive-level financial leadership without the full-time expense
- **Financial Strategy and Forecasting** – Helping businesses plan ahead, optimize cash flow, and increase profitability
- **Capital Strategy and Fundraising Support** – Securing the right funding for sustainable growth
- **Process and Financial Control Optimization** – Strengthening financial operations and reducing risk
- **Sales Tax Compliance and Risk Mitigation** – Managing audits, tax obligations, and compliance seamlessly

With Amplêo Finance, CEOs and leadership teams gain confidence in their financial decisions, enabling companies to scale efficiently, raise capital, and drive long-term profitability.

## 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:** Slack Jon Allen for a finance partner recommendation.

**Step 2:** Email referral introductions to the recommended Amplêo finance partner and copy [bd@ampleo.com](mailto:bd@ampleo.com).

**Step 3:** The Amplêo partner adds the lead to HubSpot.