

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.



When businesses face financial distress, Amplēo provides expert turnaround and restructuring services to stabilize operations, restore profitability, and manage debt for long-term viability and success. When recovery isn't feasible, we also assist business owners in gracefully closing their businesses, ensuring asset management and protection of equity interests.

SYMPTOMS & QUESTIONS

Are you . . .

- . . . experiencing declining revenue and profitability?
- . . . struggling with operational inefficiencies and financial mismanagement?
- . . . worried about serious cash-flow challenges or creditor pressure?
- . . . in need of restructuring but unsure where to start?

SOLUTION

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

Amplēo Finance bridges that gap by offering the following:

- **Financial Restructuring** – Developing cash-flow plans, managing debt, and optimizing capital structure
- **Operational Turnaround** – Improving efficiency, eliminating waste, and restructuring workflows
- **Interim Leadership** – Providing experienced CFOs, COOs, and turnaround specialists
- **Strategic Repositioning** – Identifying new revenue opportunities and market positioning
- **Stakeholder Negotiations** – Managing lender and investor relations to ensure sustainable restructuring

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 the referral introductions to Matt McKinlay at mmckinlay@ampleo.com and copy bd@ampleo.com.

Step 2: The Amplēo partner adds the lead to HubSpot.