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YOUR LOGO

PARTNER KIT · v1.0

THE KONNECT REFERRAL PROGRAM

Refer a company that needs better HR. We'll take it from here.

A field guide for benefits brokers, employment attorneys, fractional CFOs, HRIS partners, and current Konnect clients who refer business to us.

Most of our clients

come from referral.

Average client tenure

is 4+ years.

Time to first reward

is 6 months active.

01 · WHAT KONNECT IS

An HR services company that built AI.

Konnect is a Modern HR firm headquartered in Irvine, California, founded by Jamie Viramontes, a CHRO with 20+ years of experience at Forever 21, Chipotle, UCI Health, and JPMorgan. We deliver outsourced HR services to companies in the 20 to 250 employee band, layered with an AI HR assistant called Sophie, a self-service compliance platform for smaller teams, an LMS, and managed payroll where appropriate.

We are not an HRIS, a benefits broker, an insurance agent, or a law firm. We don't replace the technology your client already has. We make it work.

Our products

Service	What it is
Konnect HR Services	Outsourced HR for 20 to 250 EE companies. Three tiers (Standard, Advanced, Elite) ranging from pooled advisory to a fully embedded HR team. Every tier includes Sophie, our AI HR assistant.
Konnect AI	Sophie, an AI HR assistant that handles 40 to 60 percent of routine employee questions (PTO, benefits, policy, payroll basics). Reduces HR ticket load. White-labeled to the client.
Konnect ER	Self-service employment law and policy compliance platform for under-20-EE companies. Multi-state policy library, document drafting, alerts. The bridge before they need a real HR partner.
Konnect Ed	LMS for compliance training, onboarding, and internal upskilling. Add-on to any HR engagement.
Managed Payroll	For clients without a payroll system or with a broken one. Pass-through with markup, system-agnostic.
The Konnect Audit	Free, structured HR assessment across 8 categories. The starting point for almost every client engagement. Our highest-converting first step.

02 · WHO TO REFER

The signals that mean "send this one to Konnect".

If your client is saying any of the following, they're a fit. Most partners can identify a referral in a single conversation.

- ◆ **"My HR person just quit."** Sudden HR vacancy at a 20 to 250 person company. They need coverage now and a long-term answer next quarter. Fractional HR leadership is our wheelhouse.
- ◆ **"We just got hit with a complaint."** DOL audit, EEOC charge, harassment complaint, wage and hour issue. They need someone who knows what they are doing in the room with them.
- ◆ **"Our handbook is from 2019."** Stale policies, multi-state mess, no real compliance posture. The Konnect Audit catches what is exposed and the Konnect HR team fixes it.
- ◆ **"We are trying to figure out AI for HR."** They are either buying tools and watching them fail or they are frozen. Konnect AI plus the change management to actually roll it out is the only thing on the market that does both.
- ◆ **"We are growing too fast for the HR we have."** Headcount tripled in 18 months, the office manager is doing HR on the side, the founder is signing employee files.
- ◆ **"Our payroll system isn't enough."** They bought Paylocity, ADP, or Paychex and discovered software does not run HR for them. We are the people side of the platform they already pay for.

Sweet spot

Companies between 20 and 250 employees, in the United States, with no in-house CHRO or with a recent gap. The most common conversion path is the free Konnect Audit followed by a Konnect HR Services engagement.

03 · PARTNER PROTECTION

We don't compete with you. In writing.

Every partner type Konnect refers from has a specific set of protections. These are baked into the Referral Agreement. The summary:

Benefits & insurance brokers

- ◆ Konnect does not quote, sell, or advise on employee benefits, insurance, or related products.
- ◆ Konnect does not accept BOR (Broker of Record) letters from any client referred by a benefits broker.
- ◆ When a Konnect client needs a broker, the referring broker goes on our short list.
- ◆ During open enrollment, Konnect collaborates with the broker on employee communications and education, never around them.

Employment attorneys

- ◆ Konnect does not practice law, give legal advice, or represent clients in legal proceedings.
- ◆ Konnect provides HR operational support that complements legal counsel: investigations, documentation, policy work, training.
- ◆ When clients need legal counsel, the referring attorney is recommended first.

Fractional CFO firms & accounting partners

- ◆ Konnect does not provide accounting, tax, audit, or financial advisory services.
- ◆ Konnect handles the people-side workstream while the CFO firm continues running finance and accounting.
- ◆ Payroll work is system-agnostic; the CFO firm's preferred platform stays in place.

HRIS & payroll partners (Paylocity, ADP, Paychex, etc.)

- ◆ Konnect is system-agnostic and does not sell or resell HRIS or payroll software.
- ◆ We are the human services layer on top of the system you sold them.
- ◆ Joint client engagement makes both relationships stickier.

04 · HOW IT WORKS

From "I know someone who needs you" to closed deal.

01 Submit the referral

Use the form at refer.hrconnect.com or email partners@hrconnect.com directly. Tell us who they are, what you think they need, and how you want us to introduce ourselves (warm intro mentioning you, cold outreach without your name, or you'll do the intro yourself). You'll get a confirmation email with a reference ID immediately.

02 We reach out within 1 business day

Either Jamie (our CEO) or one of our HR Leaders reaches out personally. We mention you sent us (unless you asked otherwise), ask a few questions, and offer a free Konnect Audit as the no-pressure first step.

03 Status updates at 30, 60, 90 days

You always know where the deal stands. If they sign before 30 days, you'll hear within a week of contract execution. If they pass on Konnect, you'll know why so you can keep your relationship clean.

04 Reward paid 30 days after their 6th active month

When the referred client has been an active, paying Konnect client for 6 full months, the partner reward pays out 30 days later. Tiered by client size. Reported on Form 1099. Direct deposit or check.

05 · REWARD STRUCTURE

Tiered by client size. Paid out clean.

Konnect's trusted advisor reward is a one-time cash bonus paid when a referred client has been an active, paying Konnect customer for 6 full months. Tier amounts are finalized in your Referral Agreement. The structure:

Client size at signing	Trusted advisor reward
10 to 25 employees	Tier 1 cash bonus
26 to 50 employees	Tier 2 cash bonus
51 to 100 employees	Tier 3 cash bonus
101+ employees	Tier 4 cash bonus + ongoing residual option

Current Konnect clients

Existing Konnect clients earn service credit applied directly to their next invoice when a referred company becomes an active client (30 days, not 6 months). Stack them, no cap on referrals. Some of our clients have eliminated their monthly invoice entirely with three or four good referrals.

Payment terms

- ◆ **Trusted advisor cash bonus:** direct deposit or check, your preference. Reported on Form 1099. Paid 30 days after the referred client's 6th month active.
- ◆ **Current client service credit:** applied automatically to your next Konnect invoice. No invoicing on your end, no follow-up needed.
- ◆ **Clawback:** if a deal that triggered a reward is cancelled or disputed within 90 days of payout, Konnect reserves the right to recover proportionally. Rarely invoked, only applies to fraud or chargeback scenarios.

06 · FAQ

The questions partners ask before they refer.

Will you ever try to take my client relationship?

No. It's contractually prohibited in our Referral Agreement. The HR services we sell are complementary to what brokers, attorneys, fractional CFOs, and HRIS partners sell. There is no overlap.

What if my client already uses Paylocity, ADP, or Paychex?

Great. We work alongside all the major HRIS and payroll systems. Most of our clients keep what they already have. We make the system work better.

How long until I know if it closed?

30 days for the first update, 60 and 90 if still active, and within a week if they sign. If they decline, you'll hear why.

What happens if the deal closes but doesn't last 6 months?

No reward. The 6-month gate ensures the relationship is real. If a referred deal churns, we'll talk to you about it directly.

Can I be on a Konnect channel partner list publicly?

Yes, if you want. We're building a Channel Partner directory on hrconnect.com that listed partners can use as a credibility marker with their clients.

How do I co-brand this kit?

The cover has a marked logo placeholder. Open this PDF in any editor (Acrobat, Preview, Adobe Express) and drop your firm's logo there. Or email partners@hrconnect.com and we'll build you a fully co-branded version.

07 · GET STARTED

Three ways to send your first referral.

Option 1 · Use the online form

Go to refer.hrconnect.com and submit the referral form. Two minutes. You'll get a confirmation email with a reference ID immediately. The fastest path.

Option 2 · Email Jamie directly

Send an email to partners@hrconnect.com with the company name, your contact's name and email, and a few sentences on what they need. Slower than the form but works fine if you're already in your inbox.

Option 3 · Forward this kit

If you'd rather not introduce us directly, drop your firm's logo on the cover and forward this PDF to your client. They can read about us, decide on their own, and reach out to partners@hrconnect.com if they want to talk. Your name stays attached because the file came from you.

Questions?

Email partners@hrconnect.com or call **949-535-0445** and ask for Jamie. Real human, real answer, no automated funnel.

Konnect · HR Expertise. Human Connection.

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