STUDENT REFERRAL AND LEAD OWNERSHIP POLICY

Academy of Learning Career College (AOLCC) – Mississauga West Campus

1. Core Principle of Student Choice

The primary goal of AOLCC Mississauga West is to ensure a seamless experience for prospective students. While internal CRM systems may automatically assign a lead to the first advisor who makes contact, the student's preference for a specific advisor—due to a direct referral from an existing student or an established relationship with a sub-agent—shall always take precedence.

2. Strict Referral Eligibility & CRM Compliance

To maintain institutional standards and financial accountability, all referrals must be strictly verified and documented within the CRM before any referral lead can be processed.

- **Referrer Verification:** The original referrer must already exist as a lead or active student in our Mississauga West CRM system.
- **Milestone Requirement:** The referrer's profile must be marked with an **Initial Appointment status of "Show."**
- **Mandatory Notes:** The advisor must log clear, detailed notes in the referrer's CRM profile outlining exactly what was discussed with them.
- **Referral Lead Logging:** A new referral lead can only be uploaded to the CRM *after* the original referrer's profile satisfies the conditions above.
- **Traceability Data:** The lead source for the new referral must explicitly include the original referrer's **Full Name** and their unique **CRM Lead ID** (or their verified mobile phone number/email address) to trace the connection accurately.

3. Exclusions & Unverified Referral Restrictions

Advisors must exercise extreme caution. Under no circumstances will referral payments or lead source modifications be permitted for unverified or outside sources.

- **Unknown Outside Referrals:** If a prospect claims they were referred by someone from another college or a different AOLCC campus, but that referrer does not exist in our specific campus CRM system, **no referral payment will be allowed.**
- **Scripts for Advisors:** Advisors must actively dissuade and clarify this policy to students who bring up external campuses. Inform them directly that **all AOLCC campuses are independently owned and operated.**

- **System Integrity:** If a referrer cannot be found in our CRM, their name cannot be entered. The original lead source automatically captured by the system **cannot and will not be edited or changed**, as doing so violates campus compliance policy.
- **No Mutual/Dual Payments:** To prevent exploitation of the program, dual payments are strictly forbidden in mutual reference cases within households. For example, if a husband enrolls his wife, he receives the referral bonus. If the husband later enrolls himself, the wife cannot claim a referral bonus for him. Only one referral direction per household link is eligible.

4. Learning Coach & Graduate Referrals

Special routing protocols apply when graduates return for subsequent programs or are referred back to admissions by a Learning Coach.

- **Active Advisor Ownership:** If a graduate of a current Admissions Advisor decides to return for a next or advanced program, that graduate will directly be taken care of by the same original Admissions Advisor.
- **Inactive Advisor Protocol:** If the original Admissions Advisor is no longer working at the campus, the information and CRM record for that graduate lead must be immediately passed on to the **Lead Admissions Advisor**.
- **Reassignment:** The Lead Admissions Advisor will then review the file and officially pass the lead on to an active Admissions Advisor.

5. Conflict Resolution: The "Prior Relationship" Rule

In cases where a lead is already being handled by one advisor (Advisor A), but a second advisor (Advisor B) identifies that the lead was referred specifically to them via a personal connection or a sub-agent they work with, the following must occur:

- **The Lead Transfer:** Advisor A must "let the lead go" and officially transfer all records and communication rights to Advisor B.
- **Immediate Action:** This transfer should happen as soon as the conflict is identified and verified to prevent confusing the prospective student.

6. Required Proof for Lead Transfer

To initiate a transfer, Advisor B must provide sufficient evidence to the Campus Director. Accepted forms of proof include:

- **Written Communication:** An email or text message from the student/sub-agent explicitly stating they intended to work with Advisor B.

- **Verbal Confirmation:** A phone recording or transcript where the student confirms their referral source was Advisor B or Advisor B's contact.
- **Student/Sub-Agent Statement:** A brief written note from the referring student or sub-agent clarifying the referral was intended for Advisor B.

7. Additional Referral Scenarios & Decision Rules

- **Lookback Period:** If a lead mentions a specific referral source within the first 48 hours or during the first interview, ownership shall shift to the advisor associated with that source, regardless of who made the initial system contact.
- **Multi-Source Referrals:** Under the "Primary Influence" rule, if a student has multiple referrers, the advisor linked to the person the student identifies as their "main influence" shall own the lead.
- **Double Bonus Claims:** Only one referral bonus is paid per enrollment. The student must nominate the single reward recipient on a Referral Confirmation Form during registration.
- **Expiration Clause:** Leads inactive in the CRM for more than 6 months are considered "Fair Game." A new referral takes priority over old, inactive advisor relationships.
- **Family & Household Referrals:** To maintain clean data, Family Bundles should generally stay with the same advisor unless a change is explicitly requested by the new family member in writing.

8. Dispute Resolution Process

1. **Notification:** Advisor B informs Advisor A of the conflict and presents the proof.
2. **Review:** If Advisor A agrees, the lead is transferred immediately in the CRM.
3. **Escalation:** If a dispute persists, the case will be reviewed by the Campus Director, whose decision will be final.

9. Accountability & Enforcement

We as an institute must uphold our standards. It is our collective responsibility to ensure we maintain and strictly follow these referral policy guidelines. All advisors must maintain professional civility. It is the sole responsibility of the receiving advisor (Advisor B) to ensure Referral Bonuses or Sub-Agent Commissions are correctly attributed and meet all CRM criteria before submission.