



Partner referral pack

How you can help
Citation and your
members team up to
get ready for anything



We get on pretty well, don't we? We're partners; a team. So we'd love your help teaming us up with the great businesses in your network, so we can help them work smarter, not harder.

People are far more likely to choose services following a recommendation from someone they trust – like you! And we hope you'd be happy to do that. But just in case you've got some questions, here's how it works, why you should refer Citation, and what's in it for you.

Why refer?



Help members to build safer, happier, healthier, more productive workplaces



Help them save time and focus on their business



Promote your member benefits, as we provide preferential rates*



Support the growth of your organisation, as you'll get a kick-back from anyone you refer who becomes a Citation client**

How to make a referral

To refer a member to Citation, follow these three simple steps:

1. Visit www.citation.co.uk/partner-referral
2. Leave the details of the person you're referring
3. Leave your details and some background information

We'll sort the rest. Our team knows our partnerships and your industry inside out, so your members are in safe hands.

*Discounts vary dependent on the partnership agreement and services taken.

**Dependent upon specific partnership arrangement in place.



About Citation?

Hopefully you know a bit about us already, but here's a quick reminder of what we do. Citation empowers over 50,000 growing businesses to be ready for anything by turning the complicated parts of running a business into clarity.

For almost 30 years, our mission has been to create a world where businesses and the people in them are set up to own the future.

Starting from our home in Cheshire, we've grown to empower thousands of small to medium-sized businesses across the country to embrace risk and stay one step ahead with our hands-on HR, Health & Safety, Wellbeing, E-Learning, ISO Certification andSSIP Accreditation services.

Why Citation?



Partner, not provider

Think of us as the ultimate business pit crew. We're not cold authority figures – we genuinely back the businesses we work with and want to power them toward their goals.



Guaranteed advice

Citation's advice is guaranteed up to £1.5m. As long as you follow their advice, we'll pay the costs. This isn't an expensive additional insurance policy, with hidden exclusions. We believe what we do truly helps businesses, so when we make a commitment, we stand by it.



Beyond the basics

HR and Health & Safety are our bread and butter, but we've grown to offer so much more to give small businesses all the tools they need to succeed.



ISO 27001 certified

You're in safe hands. We understand that you want confidence in how we handle your data, which is why we're proudly ISO 27001 certified.



There for you across the UK

With over 160 consultants based across the UK, you can rely on us to be there whenever you need us. And with our 24/7 advice line, you'll never be on your own.

Citation clients are:

- 47x less likely to receive a Health & Safety enforcement notice*
- 7x less likely to have a major injury in the workplace*
- 75% less likely to have a reportable accident in the workplace*
- 13x less likely to face an employment tribunal claim*



HR & Employment Law and Health & Safety



24-hour expert HR and Health & Safety advice lines – backed up by our advice guarantee



Full legal documentation – including a detailed Health & Safety policy, staff handbooks and policies, and contracts of employment – and guidance creating and updating risk assessments



Access to Atlas, our online HR, Health & Safety and ISO management hub – perfect for managing your people and your paperwork



Dedicated local consultant and annual site inspections and HR check-ins

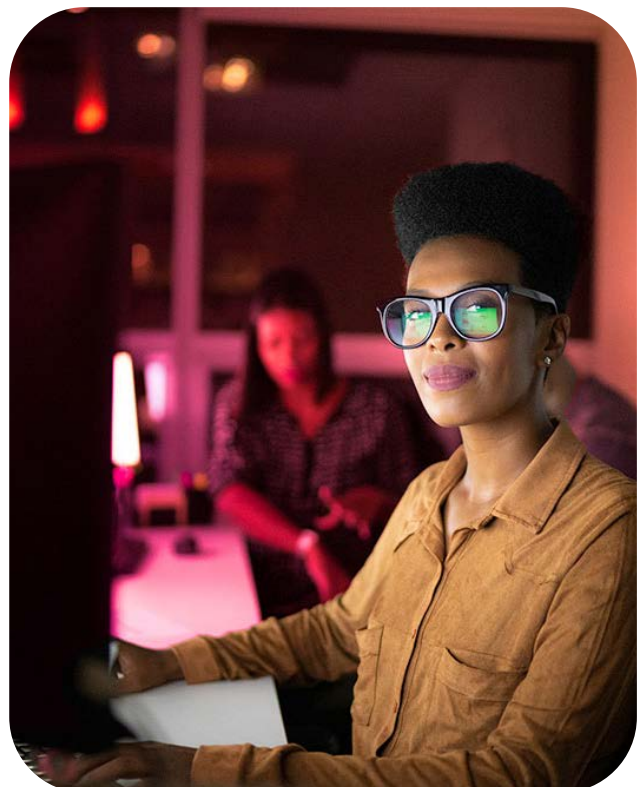


Regular legal updates and exclusive guidance and resources

ISO certifications

High standards? Same here. That's why Citation ISO Certification helps businesses achieve internationally-recognised standards in as little as 45 days, to make sure they stand out from the crowd and get your growth in motion. Certifications include:

- **ISO 9001 - Quality Management**
- **ISO 14001 - Environmental Management**
- **ISO 27001 - Information Security**
- **ISO 45001 - Occupational Health & Safety**
- **ISO 45003 - Psychosocial Health & Safety**





Problems we solve

To give you an idea of how we can help businesses, here's the most commonly-asked issues on our HR and Health & Safety client advice lines:

Health & Safety

- Risk assessments
- Accidents
- Accreditations
- Health & Safety policies

HR & Employment Law

- Conduct
- Sickness
- Probation
- Grievance

Spotting an opportunity

Making a referral isn't about being a salesperson, and you don't need to know everything about our services - it's just about identifying a member who you think might benefit from our help.

Here are some questions to ask or consider:



How do you manage employee contracts and handbooks?



How do you currently recruit and retain staff? Would you like support with this?



How do you do risk assessments? And do they meet regulatory requirements?



How do you manage tricky HR situations, like disciplinaries, grievances or absence problems?



When were your Health & Safety policies last updated? How do you keep these updated?



Have you ever had an accident or injury at work? Do you know what you need to do if the worst happens - including what's RIDDOR reportable?



Do you ever bid for any tenders or plan to in the future? If so, are you ISO certified?

Got any questions about Partner Referrals?

Want to know more about Citation's service and
how you can refer members?

Email Citation's Partner Marketing Lead:
laurenbird@citation.co.uk