

Client Referral Program

Full Terms & Conditions

These terms govern the Sofia Marketing Client Referral Program. They are designed to be simple; if anything here is unclear, your account manager is happy to walk you through it.

1. The offer

When an active Sofia Marketing client (the “referring client”) introduces a business that becomes a paying Sofia client (the “referred client”), the referring client earns a credit applied to their next monthly invoice.

- **Credit amount.** Equal to the referred client's first full month's retainer.
- **Credit cap.** The referring client's own current monthly retainer — so the most you can receive in any month is one full month free.
- **No roll-over of excess.** If the referred client's retainer is larger than yours, you receive one month free; the difference is not banked or carried forward.

2. Which services qualify

The referral applies no matter which Sofia service the referred client signs on for — including SEO, AI Search (AISEO), Paid Ads, Web Design, and any other recurring retainer service we offer.

- **The credit applies to:** monthly recurring retainer services only.
- **The credit does not apply to:** setup fees, one-time projects, ad-spend pass-throughs, third-party software costs (e.g. CallRail), or any line item outside the recurring retainer.

3. Who can refer

- Any active Sofia client in good standing — no past-due invoices, and not currently within a cancellation window.

4. Who qualifies as a referred client

- Must be a net-new business to Sofia, with no prior contract and no prior proposal within the last 12 months.
- Must be introduced by the referring client **before initial sales contact** — the introduction is logged in our CRM at the point of first conversation.
- **Self-referrals and related entities are excluded.** A client cannot refer a business they own or hold a controlling stake in, and referrals between sister companies under common ownership do not qualify.

5. When the credit is earned and applied

The credit is earned once the referred client has paid their first full month's retainer. It is then applied to the referring client's next monthly invoice.

6. Frequency, stacking, and limits

- **No cap on total referrals.** You may refer as many businesses as you like over the life of your engagement.
- **One credit per month, maximum.** Multiple successful referrals queue up and apply across consecutive months — three referrals in a quarter would mean three consecutive free or discounted months.
- **No compounding.** Two credits cannot combine to exceed a single month's retainer.
- **No cash value.** Credits are not redeemable for cash. If a referring client cancels with unused credits in queue, those credits are forfeited.

7. Specific situations

- **Referred client downgrades before their first paid month.** The credit is calculated on the amount actually paid, not the amount originally quoted.
- **Referred client leaves in month two or later.** The referring client keeps the earned credit; it is not clawed back.
- **Referring client cancels before applying an earned credit.** The credit is forfeited — it is not converted to cash or held indefinitely.
- **Referred client signs a seasonal or long-tail contract.** The credit is still calculated on the first month's retainer.
- **Two clients claim the same referral.** The credit goes to whichever client is listed first in our CRM at the point of first contact.

8. Worked examples

Your retainer	Referred client retainer	Credit applied
\$5,000 / mo	\$5,000 / mo	\$5,000 — one month free
\$5,000 / mo	\$3,000 / mo	\$3,000 — 60% off next month
\$5,000 / mo	\$8,000 / mo	\$5,000 — one month free (\$3,000 excess not carried)
\$3,000 / mo	\$10,000 / mo	\$3,000 — one month free (\$7,000 excess not carried)

9. General

- Sofia Marketing may update or discontinue this program at any time. Credits already earned before a change takes effect will be honored.
- This program is offered at Sofia's discretion and does not alter the terms of any existing service agreement.