

ILLUSTRATIVE PARTNER INTRODUCTION KIT

Open the right conversation without becoming the benefits expert.

The Beal Introduction Kit gives trusted connectors a disciplined way to recognize relevance, ask permission, make the handoff, and remain visible while Beal Ventures carries the company-specific review.

01**Recognize relevance**

Listen for care-access concerns, benefit-cost pressure, retention, payroll strategy, company growth, or a leadership team asking for more practical employee value.

02**Ask permission**

Share one accurate observation and offer the smallest useful next step. Never upload a contact list or pass private information without clear permission.

03**Make the handoff**

Introduce the employer with useful relationship context. Beal Ventures qualifies fit, answers technical questions, documents assumptions, and leads follow-through.

A safe opening

“You mentioned that everyday-care access and retention have become harder. I know the Beal Ventures team, which helps employers evaluate whether an additional care benefit may be relevant. Would you be open to a short, low-pressure fit conversation?”

Protect the relationship

Do

Use company-level context.
Ask permission before sharing contact details.
Set the expectation of a short fit review.
Let specialists handle technical details.

Do not

Promise savings, eligibility, tax credits, or outcomes.
Describe the program as a required plan replacement.
Collect employee health information.
Pressure a relationship into a meeting.

Your role

Create trusted access and useful context. Beal Ventures earns the next step by conducting a clear, compliant, company-specific review.

Illustrative material only. Partner approval, employer fit, results, enrollment, or compensation are not guaranteed. Formal terms are documented separately.