

ADVANCED PARTNER TRAINING

Find · Qualify · Refer · Grow

A practical playbook for new and experienced partners

Organic prospecting + Meta Ads fundamentals

Bilingual examples • English / Español





THE OBJECTIVE

Become a consistent source of qualified referrals

01

Identify business owners with a real use for capital.

02

Start relevant conversations without pressure or misleading claims.

03

Send complete, consented applications; RNUEVA360 handles funding and closing.



WHAT YOU DO

A partner is a connector, not the underwriter

01

YOU: find prospects, ask basic qualifying questions, explain the process, obtain permission, submit referrals.

02

RNUEVA360: review eligibility, collect sensitive documents securely, coordinate lenders, present offers and close.

03

NEVER promise an approval, rate, amount, credit outcome or funding date.



THE IDEAL STARTING POINT

\$10K+ monthly revenue is the initial screening floor

01

Business is operating and generating verifiable revenue.

02

Owner or authorized decision-maker is engaged.

03

A legitimate commercial need exists; exact lender eligibility varies.

04

Higher revenue, longer operating history and clean bank activity can expand options.



TARGET INDUSTRIES

Look for healthy businesses, not just trendy industries

01

Construction and contractors • Restaurants and hospitality

02

Retail and ecommerce • Beauty, salons and spas

03

Cleaning, maintenance and professional services

04

Transportation and other sectors: check lender restrictions before promising eligibility.



BUYING SIGNALS

Timing creates a better conversation

06

01

Upcoming project or purchase order

02

Inventory build-up or seasonal demand

03

Hiring, payroll, expansion or equipment replacement

04

Cash-flow timing gap between completing work and receiving payment



FIND OWNERS LOCALLY

Prospect with relevance and permission

01

Google Maps: find established businesses with real activity.

02

Local chambers, trade groups and networking events.

03

Existing professional relationships and introductions.

04

Record business context; do not scrape personal contact data or spam.



SOCIAL PROSPECTING

Be useful before you pitch

01

Follow relevant business owners and engage authentically.

02

Post educational short videos about financing choices.

03

Use DMs to open a conversation, not to demand bank statements.

04

Invite interested owners to RNUEVA360's secure application process.



REFERRALS & PARTNERSHIPS

Build a repeatable referral engine

01

Accountants, equipment vendors, insurance agents and B2B service providers may know owners who need capital.

02

Ask for permission-based introductions; never share confidential client details without authorization.

03

Explain the referral arrangement and any compensation transparently where required.



FIRST CONVERSATION

Ask, listen, then qualify

01

1. What does your company do?

02

2. What would the funding help you accomplish?

03

3. Approximately how much does the business generate monthly?

04

4. How long has the business operated?

05

5. Are there current financing positions? (Only as needed.)



QUALIFY IN 90 SECONDS

A simple 5-point checklist

- 01 OWNER: speaking with an authorized decision-maker?
- 02 REVENUE: generally \$10K+ per month?
- 03 TIME: how long has the company operated?
- 04 NEED: realistic amount and business purpose?
- 05 CONSENT: willing to submit information through the secure portal?



UNDERSTAND THE PRODUCT MIX

Match needs, not buzzwords

- 01 Working capital / MCA: cash-flow based; often frequent repayments.
- 02 Term loan: defined repayment schedule; frequency varies.
- 03 Line of credit: draw as needed, subject to agreement.
- 04 Equipment financing: financing tied to eligible equipment.
- 05 SBA / other specialty products: stronger qualification and longer process may apply.



EXPLAIN COST CLEARLY

Funding amount is not the full story

01

Compare amount received, total payback, fees and net proceeds.

02

Discuss weekly or monthly payment burden and term.

03

Factor rate is NOT the same as APR.

04

Only lender-provided written terms determine actual cost and obligations.



HANDLE OBJECTIONS

Clarity beats pressure

01

“Will this affect my credit?” — RNUEVA360 does not run credit when you apply. Some lenders may require an authorized inquiry.

02

“Can I get over \$100K?” — Yes. Programs above \$100K are available if your business qualifies.

03

“Can I pay monthly?” — Yes. Monthly options are available for qualified businesses, depending on credit and program.

04

“Why documents?” — To verify the business and evaluate eligibility.



FROM INTEREST TO APPLICATION

Make the next step simple

- 01 Explain what happens after submission.
- 02 Send the official RNUEVA360 application link.
- 03 Ask the owner to complete it personally and accurately.
- 04 Do not collect SSNs or bank credentials in informal chats.
- 05 RNUEVA360 handles follow-up and underwriting.



ORGANIC CONTENT SYSTEM

Publish useful answers consistently

01

Problem: “A new contract can strain cash flow.”

02

Education: “LOC vs term loan: when each may fit.”

03

Myth: “Revenue alone does not guarantee approval.”

04

Story: anonymized examples with permission and accurate disclosures.

05

CTA: “Explore options through RNUEVA360.”



VIDEO FORMULA

Hook → Problem → Explanation → CTA

- 01 0–3 sec: a specific business-owner problem.
- 02 3–15 sec: explain the situation in plain language.
- 03 15–25 sec: one useful financing insight.
- 04 25–35 sec: invite qualified owners to learn more.
- 05 Avoid “guaranteed approval,” fake urgency and unsupported rates.



BILINGUAL VIDEO SCRIPTS

Two ready-to-use 30-second examples

EN: “Have customers waiting but need inventory to deliver? Business financing may help bridge timing gaps. Options depend on revenue, business history and underwriting. Explore your options with RNUEVA360.”

ES: “¿Tienes clientes esperando pero necesitas inventario para cumplir? El financiamiento empresarial puede ayudarte con el flujo de caja. Todo depende de tus ingresos y calificación. Conoce las opciones de RNUEVA360.”



FIVE VIDEO ANGLES

Rotate the problem, not just the background

01

1. Construction: materials before the client pays.

02

2. Restaurant: inventory for a busy season.

03

3. Retail: stocking products for demand.

04

4. Service business: hiring for new accounts.

05

5. Equipment: replacing machinery without draining cash.



META ADS STARTER

Run simple tests, not complicated funnels

- 01 One clear audience/problem per creative.
- 02 Show real people and real explanations; avoid misleading lifestyle imagery.
- 03 Use a landing page with clear qualification and privacy/consent disclosures.
- 04 Track leads, completed applications, approvals and fundings—not just clicks.
- 05 Comply with Meta's financial advertising policies and applicable laws.



LEAD QUALITY VS VOLUME

Optimize for funded outcomes

01

More form leads does not automatically mean more funding.

02

Avoid unnecessarily narrow qualification claims in the ad.

03

Track lead → conversation → completed application → offer → funding.

04

Review results by source, industry and product; adjust based on real data.



FOLLOW-UP THAT BUILDS TRUST

Be fast, relevant and respectful

- 01 Respond promptly to permission-based inquiries.
- 02 Use an organized CRM and documented follow-up schedule.
- 03 Ask one clear question per message.
- 04 Honor STOP, unsubscribe and contact preferences.
- 05 Do not add people to automated marketing without appropriate consent.



QUALITY SUBMISSIONS

Help underwriting move faster

01

Confirm legal business name, owner, state, revenue and purpose.

02

Avoid altered statements, inaccurate revenue and duplicate applications.

03

Use secure uploads for bank statements and identity documents.

04

Flag existing financing positions accurately.

05

Do not promise that a file will qualify.



ETHICS & PROTECTION

Never trade trust for a quick application

01

Do not claim RNUEVA360 is the lender for every product.

02

Never guarantee approval, pricing or timing. RNUEVA360 does not run credit; a lender may require authorization.

03

Do not publish a client story without permission.

04

Do not impersonate lenders or conceal costs.

05

Use approved scripts, privacy notices and opt-in flows.



YOUR FIRST 30 DAYS

A repeatable weekly operating rhythm

- 01 WEEK 1: learn products, qualification and the referral portal.
- 02 WEEK 2: build a targeted list and practice conversations.
- 03 WEEK 3: publish educational videos and test outreach.
- 04 WEEK 4: review completed applications, feedback and conversion.
- 05 Success = qualified, consented referrals—not activity for its own sake.