PARTNERTAP GUIDE

White-Glove Rollout, Onboarding, and Training

PARTNERTAP

Introduction

Thank you for your interest in choosing PartnerTap as your Partner Ecosystem Platform and Account Mapping solution. It's our mission to help you drive more revenue with each of your partners.

This document explains how our product rollout and custom implementation works at PartnerTap. In the following pages we will explain, step by step, how we implement our product, train your team, support rollout with your partners, and what continuous training and support for your team will look like.

Each company that we work with has a unique way of working with their partners. This in turn requires customized implementation to help fit their individualized use case. Whether you primarily work with resellers, co-sell with partners, or you want to cross-sell post M&A, we can customize our product to help you accelerate revenue.

Building partner ecosystems will continue to be critical for businesses that wish to succeed in the future. The companies that can leverage their partnerships using data and analytics to accelerate co-selling will be the leaders in their categories. PartnerTap is a platform that can energize your channel, partner, or alliance teams by building a customized revenue engine for your business.

Thanks again, and we hope you walk away with concepts that help you partner better.

Cassandra Gholston

CEO, PartnerTap

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Initial Rollout Consultation

Review business objectives and success metrics

Our mission at PartnerTap is to help companies drive more revenue with each of their partners. During the initial rollout consultation, we will review business objectives and key KPI's that you and your team wish to meet.

We will also go over the challenges you are facing without a Partner Ecosystem Platform which may include:

- Ad hoc mapping, manual mapping of account lists by AMs resulting in missed opportunities, revenue and siloed data
- Poor data integrity in CRM and incomplete lists provided by resellers
- Poor data transparency for channel and sales teams to find the overlap
- Building a strategic pipeline of partners

As we work together we will check in regularly to be sure we are aiding you in overcoming these business challenges and measure your success against key KPI's. This will give us a clear understanding of whether or not you are reaching your goals and also a road map of how to continue moving forward.

We provide white-glove onboarding and training

1 **DEPLOYMENT**

- Custom onboarding plan, timeline + kickoff
- Custom data and sharing controls
- Synch with CRM or import User account setup

2 **ADOPTION**

- Clear actionable plans
- Adoption and success metrics
- Training and workshops
- Best practices for your team
- Partner collateral and webinars

3 **ONGOING SUCCESS**

- 1-1 coaching
- Ongoing change management
- Training for new team members
- Maturity plans

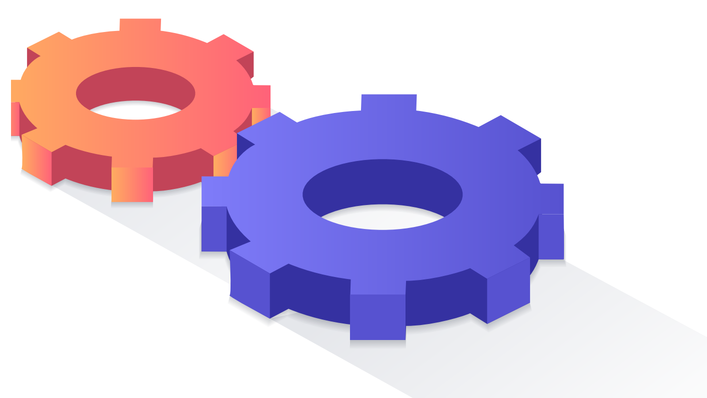
Setup and Configuration

Pre-configuration Checklist

Most of our enterprise customers have unique working relationships with their partners. Because each company's style of partnering varies from business to business, we provide custom setup and implementation for each client based on their individual needs.

Each client is given a checklist at the onset of their customized rollout. The checklist helps ensure that everything is accomplished as we move through the implementation. The checklist that you can expect to see from us includes:

- [ ] **Choose authentication options:** based on your current CRM SSO/SAML rules, OAuth or Okta access, and customized session length
- [ ] **Discuss account ownership model in PartnerTap:** based on your specific CRM account ownership rules
- [ ] **Management hierarchy views** can support manager fields or profiles with divisional hierarchies
- [ ] **Identify accounts for blacklisting:** if you need to prevent certain accounts from being synced into PartnerTap
- [ ] **Identify organizations for blacklisting:** if you have specific competitors or organizations you want to block from interacting with your users
- [ ] **Identify PartnerTap users and roles:** roles are defined for each user: admin, manager, channel manager or sales rep. Hybrid roles also available upon request



Sync your CRM

We will begin the official implementation by syncing your CRM to PartnerTap. This can take anywhere from a few hours to a full day (if you have more than one million accounts). Once your CRM has synced, we will go through your authentication options. These are based on your current CRM SSO/SAML rules, OAuth or Okta access, and customized session length.

Import Accounts from Spreadsheets

If you prefer not to sync your CRM at the time of initial rollout, you have the option of uploading your account information manually. You can use spreadsheets to upload as much or as little account information as you are comfortable with. This won't affect the mapping process or the functionality within PartnerTap. One disadvantage to this is that you lose the ability to auto sync with your CRM on a weekly basis. Another drawback is that you are limited to the information that is on the spreadsheets that you upload.

Add Users with Appropriate Product Settings

Once your accounts are either synced using your CRM or uploaded manually, we can then set up an account ownership model in PartnerTap based on your specific CRM account ownership rules. This process also includes creating:

- Management hierarchies to support manager fields or profiles with divisional hierarchies
- Account blacklisting: if you need to prevent certain accounts from being synced into PartnerTap
- Organization blacklisting: if you have specific competitors or organizations you want to block from interacting with your users
- PartnerTap roles are defined for each user: admin, manager, channel manager or sales rep. Hybrid roles also available upon request
- CRM objects: explain the specific data that is synced on a nightly basis
- Connect your account to your specific tier 1 partners
- Test & Validate your data so that your partner information is correct

User Training and Rollout

As part of our rollout and implementation, we provide personalized training for any of your team members that will be using PartnerTap. Our Customer Success team will help coach your channel managers and your sales reps on best practices that will help you achieve your business goals.

PartnerTap was designed by two channel sales reps after 15 years working in the industry. It was built for the channel by channel veterans, so it is very intuitive. Nonetheless, there are some parts of the onboarding such as the initial mapping and setting up of users and roles that are a bit more complex. Our success team sets aside time to make sure that you move through this process as easily and expeditiously as possible.

Oftentimes, during one-on-one training, we learn how we can further customize the system to best serve you. Our success team will take what we learn about your specific use case back to our tech team to further adapt the solution to your needs. Our enterprise customers often have unique needs that we are happy to accommodate when possible. We can promise you a platform that is a one of a kind solution designed with your company in mind.

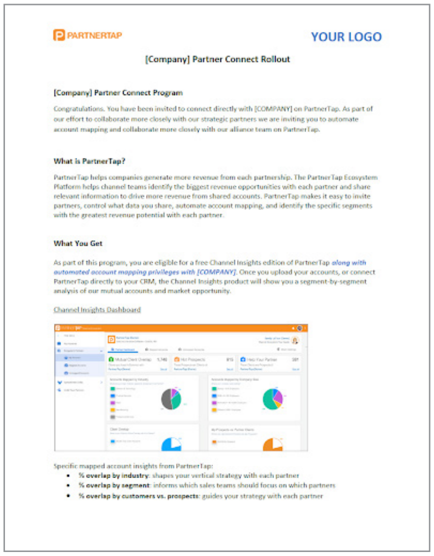
Guided Support for Rollout to Partners

Co-branded webinar

To get the most value out of PartnerTap it's important that your partners are also on PartnerTap. We want you to be successful using PartnerTap, and it's for this reason that we do co-branded webinars with our customers to facilitate your partner rollout. Your partners will have a live demo to see how the tool works and how they can leverage mapped data with you.

Co-branded Partner Rollout Guide

Your partners will also receive a co-branded rollout guide that explains how to begin using PartnerTap. It will also explain best practices and how to get the most out of the platform. In addition to this, our success team is always available to hop on a call when needed. We want all PartnerTap customers and their partners to have an understanding of the system, so they can drive more revenue from their partnerships.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[Company] Partner Connect Rollout

[Company] Partner Connect Program

Congratulations. You have been invited to connect directly with [COMPANY] on PartnerTap. As part of our effort to collaborate more closely with our strategic partners we are inviting you to automate account mapping and collaborate more closely with our alliance team on PartnerTap.

What is PartnerTap?

PartnerTap helps companies generate more revenue from each partnership. The PartnerTap Ecosystem Platform helps channel teams identify the biggest revenue opportunities with each partner and share relevant information to drive more revenue from shared accounts. PartnerTap makes it easy to invite partners, control what data you share, automate account mapping, and identify the specific segments with the greatest revenue potential with each partner.

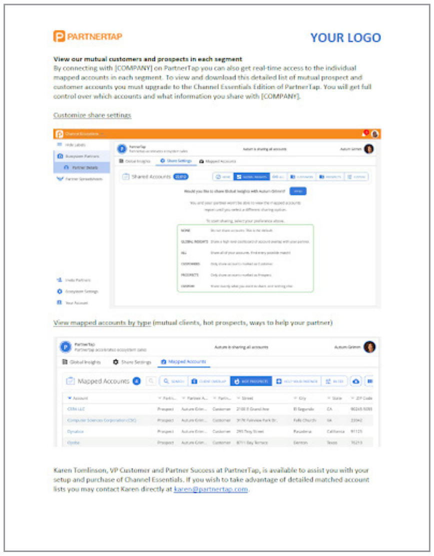
What You Get

As part of this program, you are eligible for a free Channel Insights edition of PartnerTap *along with automated account mapping privileges with [COMPANY]*. Once you upload your accounts, or connect PartnerTap directly to your CRM, the Channel Insights product will show you a segment-by-segment analysis of our mutual accounts and market opportunity.

Channel Insights Dashboard

Specific mapped account insights from PartnerTap:

- **% overlap by industry**: shapes your vertical strategy with each partner
- **% overlap by segment**: informs which sales teams should focus on which partners
- **% overlap by customers vs. prospects**: guides your strategy with each partner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View our mutual customers and prospects in each segment
By connecting with [COMPANY] on PartnerTap you can also get real-time access to the individual mapped accounts in each segment. To view and download this detailed list of mutual prospect and customer accounts you must upgrade to the Channel Essentials Edition of PartnerTap. You will get full control over which accounts and what information you share with [COMPANY].

Customize share settings

View mapped accounts by type (mutual clients, hot prospects, ways to help your partner)

Karen Tomlinson, VP Customer and Partner Success at PartnerTap, is available to assist you with your setup and purchase of Channel Essentials. If you wish to take advantage of detailed matched account lists you may contact Karen directly at karen@partnertap.com.


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How to Get Started
It is easy to get up and running on PartnerTap. To connect with [COMPANY] on PartnerTap follow these steps:

1. **See the email from your [COMPANY] Alliance Manager and click on the invite-only link to connect.**

   Signing up for PartnerTap from this email will ensure your account is connected with [COMPANY].

2. **Connect via CRM or upload your accounts via spreadsheet upload**

   This will sync your accounts into PartnerTap

3. **Accept the [COMPANY] Connection**

   This will create a connection between your PartnerTap account and [COMPANY] but will NOT share your data with them yet.

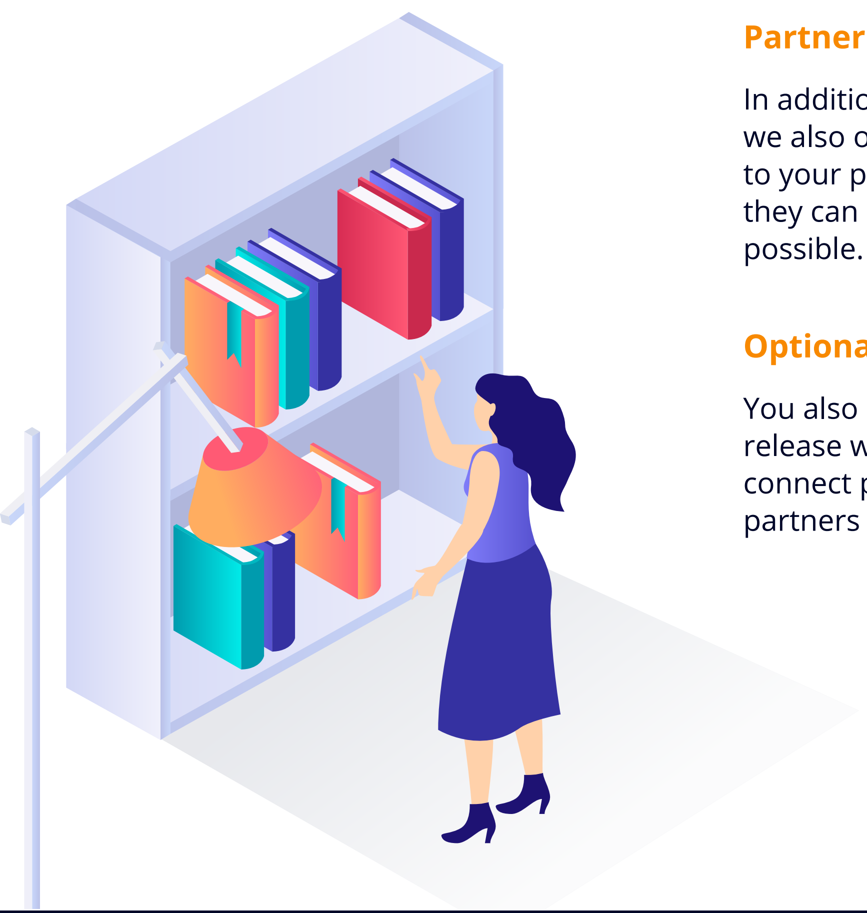
4. **Customize your Share Settings**

   You can protect sensitive accounts and control what information you share with each partner. Your data will not be shared with [COMPANY] until you customize your Share Settings.

5. **See your mutual account overlap with [COMPANY] in the Channel Insights dashboard**

   Use this segment-by-segment overlap information to refine your partnership with [COMPANY].

We look forward to partnering more closely with your company. If you have any questions please contact Karen Tomlinson at karen@partnertap.com.



Partner Training and Collateral

In addition to the webinar and rollout guide, we also offer individual training and collateral to your partners. We train your partners, so they can begin co-selling with you as soon as possible.

Optional Press Release

You also have the option of doing a press release which establishes your new direct-connect program as a way to motivate your partners to respond and engage quickly.

Ongoing Success Reviews and Support

Executive Consultation and Detailed Review of your Mapped Data

We take a proactive approach to ongoing customer success. Our customer success team will continue to work with you as long as you are a client of ours. If a new functionality rolls out for example, we will be there to guide you through it. Our executive team will also meet with you regularly to review your mapped data. We will constantly be looking for new opportunities to ensure you succeed.

Quarterly Business Reviews

We run quarterly business reviews with your team to make sure you are hitting your KPIs. We also look for potential revenue opportunities leveraging the data from PartnerTap. You can project revenue for the next quarter based on open pipeline and opportunities with your partners. With the Salesforce Managed Package, you can also see all tracked and attributed revenue through your partnerships. This gives you an idea of your most valuable partnerships and how to proceed moving forward.

One-on-One Coaching for your Team Members and Training for New Team Members

A huge benefit to working with PartnerTap is our continuous training. We will always give you one to one coaching sessions that keep your team up to speed on any changes or best practices.

Training for new Team Members and Ongoing Management Changes to help you Maximize Results from your New Process

Just as PartnerTap will continue to evolve with new functionality, your business will evolve as well. As your business evolves, your partnerships will require new ways of working. We are here to help you adapt to all new changes to our system and the needs of your different partnerships.

As you add new people to your team, or decide to give access to PartnerTap to a new team member, we will provide training for them as well. You don't have to use resources training any new people on our system. We provide all the support that new teammates require.

Once again we would like to thank you for you interest in PartnerTap, and we look foward to working with you and your team.

PARTNERTAP

The leading enterprise partner ecosystem platform

- **Products for both channel and sales teams**
- **Automates partner account mapping** while giving each company full control over what data they share with each partner
- **Identifies new pipeline opportunities** and ways to accelerate deals with partners
- **ROI** typically realized during 1-2 month pilot