

Case IQ™



Case IQ Partner Program Overview

Welcome to Case IQ

We greatly appreciate your exceptional skills and expertise, which we believe would be a valuable asset to our growing business. At Case IQ, we are dedicated to revolutionizing case management and investigations management solutions in an ever-evolving technological landscape. Our focus is to help businesses conduct more efficient and effective investigations. With 20+ years of experience, we understand that together, we really can make a difference.

We are thrilled to introduce the Case IQ Partner Program, a dynamic initiative designed to foster mutually beneficial partnerships. Our program is centered around providing comprehensive support to our valued partners, ensuring your success every step of the way. As pioneers in the field, we offer cutting-edge technologies, a team of experienced professionals, and invaluable insights into industry trends and strategies. With our program, you will have access to the essential tools and services needed to thrive and grow.

In today's rapidly changing business landscape, organizations are seeking innovative solutions to enhance their case management capabilities and improve investigations efficiency. With Case IQ, you will be equipped with the necessary resources to meet this growing demand and capitalize on the immense potential within the market.

We warmly invite you to join the Case IQ Partner Program, where you will discover a collaborative and empowering environment that enables you to deliver exceptional value to your clients. Together, we can revolutionize the way organizations handle cases, investigations, and data management.

Welcome to the Case IQ Partner Program.

Program Overview

Partners can unlock the full potential of Case IQ's software and leverage our unwavering commitment to research and development in the dynamic field of case management and investigations. As a partner, you will benefit from our continuous investment in cutting-edge technologies and solutions that cater to high-growth markets. Together, we can seize new opportunities and drive innovation in the realm of intelligent case management.

At Case IQ, we go beyond leading-edge technology. We recognize and appreciate the unique value you bring as a partner, and we are dedicated to supporting the growth of your business. As a Case IQ partner, you can expect a collaborative and empowering relationship that provides the resources, tools, and opportunities you need to thrive in the case management industry. Together, we will forge a successful path forward as part of the Case IQ Software Partner Program.

As a Case IQ Partner, you'll gain:

Collaborative Sales Engagement: We provide ongoing strategic guidance to identify opportunities and specialize in relevant Case IQ software, maximizing value for our mutual customers and driving mutual success.

Comprehensive training and support: It's at your fingertips, for free. We offer sales kits, e-learning tools, joint marketing efforts, video tutorials, and technical support to ensure you have the resources you need to excel.

Dynamic Solutions: We're dedicated to continuous improvement, constantly enhancing our software solution with the latest technology and capabilities. Our goal is to provide the most reliable and dynamic case management software available, ensuring that our customers always have access to cutting-edge tools for their evolving needs.

Worldwide experts and reach: With 20+ years of experience, our global footprint spans across several continents, with more than 5,000,000 cases logged and over 80,000 users.



Go-to-Market Models

The Case IQ partner program is tailored to recognize and amplify the unique value that our partners bring to the table. We understand that each partner plays a crucial role in driving our success, and we are committed to empowering them to thrive in their respective domains.

Referral Partners: Our referral partners possess deep industry expertise and extensive networks. By recommending Case IQ to businesses in need of advanced case management solutions, they provide invaluable insights and connections that drive growth and success.

Reseller Partners: Resellers are valuable strategic allies, specializing in selling and distributing Case IQ software. Together we expand market reach, accelerate revenue growth, and provide expertise in sales and distribution. With established customer bases and deep market knowledge, our resellers streamline selling, reduce costs, and enhance customer experience.

Value-Added Reseller (VAR) Partners: Our VAR partners are strategic collaborators who bring extensive experience and knowledge to the table. With their ability to deliver Case IQ solutions across various industries, they provide valuable consulting, solution development, and training services that enhance customer experience and success.

Professional Services and Industry Consultants: We actively engage with professional services providers and industry consultants who bring specialized expertise to enhance the value and implementation of Case IQ. By partnering with these experts, we ensure that our customers receive the best-in-class services and solutions tailored to their specific requirements.

Technology/Integration Partners: Combining solutions at various levels serves us and our Technology and Integration partners very well. We're constantly looking to improve and expand our offering, and find that these types of partners gain massive benefits in going deep with our industry leading Case Management Software.

Through our partner program, we aim to create a collaborative ecosystem where partners can leverage their unique strengths and capabilities to drive mutual growth and success. We recognize and celebrate the valuable contributions of our partners in shaping the future of case management and investigations. Together, we are committed to delivering exceptional value and transformative solutions to our customers.

Program Benefits

Lead Generation

- **Pre-qualified leads:** Quality pre-qualified leads supplied to Partners with the expectation of a collaborative approach in closing certain deals.
- **Deal Registration:** You register deals to obtain pre-sales volume discounts and special account exclusivity. Registered deals also have margin.
- **Referral Opportunities:** Referrals only need to result in our Case IQ team executing a demo with the customer! (no heavy lifting required). If this results in a closed won deal, you're compensated.
- **Volume discount:** Back-end rebates available for achieving volume requirements. As the Case IQ Partner Program grows, we will have higher authorization levels which receive greater discounts.

Sales Materials

- Case IQ is proud to offer a complete set of sales tools, including videos, presentations, collateral of all types, case studies, and much more.

Communications and Marketing

- **Partner Communications :** Case IQ communicates regularly with you about news, products, capabilities, resources and program changes through various communication channels, including newsletters, executive updates, webcasts, etc.
- **Market Development Funds (MDF):** Case IQ offers you initiative-based MDF that can be requested for lead generation and enablement activities. MDF guidelines can be found in the MDF section of the Case IQ Partner Program guide, in your Case IQ Partner Portal, or requested through your Channel Manager directly.
- **Partner Portal:** Case IQ's Partner Portal allows you to view all your leads, deals, pipeline, rebates, registered accounts, personal info, forms, collateral, resources and more - its also completely customizable, tailored to fit your needs.
- **Partner Logo:** You can promote your Case IQ partnership on your website. Brand guidelines can be found in the marketing section of the Case IQ Partner Program guide.
- **Partner Advisory Council:** A select number of partners will be invited to participate on the Case IQ Partner Advisory Council.
- **Enhanced Marketing opportunities:** A limited number of partners will be granted exclusive access to a range of enhanced marketing opportunities, including executive speaking engagements, point of view papers, video-based success stories, and collaborative success stories.

Program Benefits

Training and Credentials

- **Complimentary e-learning & resource library:** Case IQ is proud to offer self-paced e-learning that Partners can access anywhere, anytime, at no cost. Reach out to your Channel Manager to ensure full access.
- **Complimentary Certification testing:** In order to provide easier access to certifications, Case IQ's Partner Enablement gives you complimentary certification testing for all certification programs right on your Partner Portal. A description of these certification programs and tests will be announced through our Partner Newsletter, and posted on your Case IQ Partner Portal.
- **On-site/custom classes:** Please reach out to your Channel Manager to schedule on-site or custom training/enablement sessions.
- **Initiative-based MDF for training:** Please reach out to your Channel Manager to schedule on-site or custom training/enablement sessions.



Coming Soon

- **Annual Partner Conference:** Soon you will be invited to attend the live event, or view the presentations online with recorded video feeds and downloadable presentations.
- **Regionally based partner events:** Soon regional partners will be invited to join us at live events located regionally.

Partner Portal

The Case IQ Partner Portal serves as a centralized platform for our esteemed partners to conveniently access valuable sales, marketing, and technical resources, manage their deals, and engage with productivity tools for our software. Key features of the partner portal include:

Deal Control and Visibility: Submit, manage, and maintain complete visibility of all your opportunities right from our Partner Portal.

Asset Central: A comprehensive collection of product and solution content, such as overviews, data sheets, cheat-sheets, demos, marketing material, product launch schedules, and go-to-market kits.

Training & Enablement: A calendar of global enablement opportunities, including both live and online training sessions, and on-demand training modules.

News Updates: Stay up to date with the latest news and trending topics.

Event Calendar: Explore upcoming trade shows, conferences, and thought leadership webinars.

Marketing Opportunities: Engage with Case IQs teams in executing joint-marketing-campaigns, initiatives, and training.

And MUCH more.



Partner Program Requirements:

To ensure a successful and mutually beneficial partnership, we have established the following requirements for prospective partners:

- 1. Initiation Fees:** There are no fees associated with joining the Case IQ Partner Program. We believe in creating a barrier-free entry for partners to collaborate with us.
- 2. Application Process:** Prospective partners are invited to submit a Case IQ Partner Application to initiate the approval process. Our Partnership team will conduct virtual or in-person meetings with potential partners to assess compatibility and alignment with our program.
- 3. Register at Portal Site:** Partners will need to register on the Case IQ Partner Portal website and complete the application to formalize their partnership.
- 4. Qualification:** Partners must be engaged in customer-facing sales or direct consulting/advising. It is favorable if partners also offer complimentary products/services and possess installation/integration capabilities. In special scenarios, Case IQ will evaluate potential partners that do not fully meet the qualification metrics.
- 5. Partner Program Agreement:** Partners will enter into a Partner Program Agreement with Case IQ, which outlines the terms and conditions governing the partnership. Case IQ retains the right to make changes to the program as needed.
- 6. Participate in Joint Business Planning:** Partners are expected to collaborate with Case IQ to develop a Joint Business Plan that includes short-term and long-term goals, key performance indicators (KPIs), training objectives, and executing joint promotions. These plans will be reviewed regularly and may include regional strategies.
- 7. Complete Onboarding Enablement:** Partners will be expected to complete Case IQs onboarding training/enablement consisting of modules, and quizzes, to verify a standard level of knowledge around Case IQs solution.

Partner Program Requirements:

8. Forecasting: Partners are required to actively engage in regularly scheduled calls with Case IQ's Channel and/or Sales teams to discuss the status of opportunities. These calls aim to provide support and guidance in advancing opportunities. Partners are requested to make their best efforts to participate in these calls and provide up-to-date and accurate information on the status and associated revenue of their open opportunities to collaborate with us.



Referrals and Deal Registration

All Case IQ Referral Partners submit their leads through our Partner Portal. It's a simple form submission! From there – Referral Partners have complete visibility to monitor the lead, all the way to Closed!

For Case IQ Standard Partners, opportunities must be registered through the online portal using the deal registration form. In rare cases where the online portal is not available, manual registration is required.

Case IQ Sales and Partner operations will review the opportunities, with a commitment to completing the reviews within three business days of submission.

Approved Deal Registrations provide partners with a protected opportunity (exclusivity for a specific sales opportunity), increased margins, fair compensation, and improved sales planning.



Case IQ™



Better Case Management Software, Better Investigations

With a focus on investigative case management solutions and more than 20 years of successful implementations, Case IQ is the global leader in configurable case management software for investigations.

For more information about Case IQ



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Case IQ

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