



Ultimus Partner Program Guide

Grow Your Business and
Accelerate Performance with Ultimus

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ENTERPRISE SOLUTIONS

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Introduction

This document outlines and ultimately symbolizes our commitment to employ industry-leading best practices in channel partnering. Our investment in a partner program is a critical building block for our company and we hope that you will easily see both the individual partner elements as well as the collective program strength that encourage you to work with us. We're building a network of high impact value-added resellers and solution partners that share our goal to bring leading business process solutions to your prospects and customers throughout North America.

As an innovator and global industry leader of business process management solutions, we firmly believe that our product and business platform keenly addresses the market needs like no other product, solution, or platform. For more than 20 years, Ultimus has consistently set the bar for bringing solutions to market with the highest levels of reliability, flexibility, ease of use, and ROI compared to other products. Ultimus-based solutions yield measurable business value and the results that dynamic organizations demand.

At Ultimus, we recognize that Value-Added Resellers, System Integrators, and OEM Partners like you are critical to our success. The solutions you provide play a significant role in our expansion—broadening our reach and increasing our BPM footprint. With a state-of-the-art product, a compelling business need, your geographic and domain expertise, and the collective reach of our community—together we can deliver to our world the standard for business process excellence.

With this philosophy as our guide, we offer the Ultimus Partner Program. We are committed to delivering a benefits-rich program with the resources you need most to increase your revenues, expand your product offerings to your existing customer base, and develop a new product line that attracts and delivers net/new clientele.

Partnering with Ultimus leverages several key elements including:

- An innovative BPM platform
- A Best-of-Breed Solutions-Support methodology
- A global reach and set of experiences across 2,000 customers
- A best-in-class channel program that includes compensation plans with substantial upside and margin protection
- A sales support model that allows you to define the level of support to foster a cooperative selling environment with Ultimus professionals
- A training and support organization dedicated to the Channel

In the seemingly crowded BPM market, your clear advantage is selling solutions based on a technology that dramatically improves the efficiency and effectiveness of the way customers work. This *Program Guide* details the opportunities, benefits, and requirements to participate. The Ultimus Partner Program ensures you will be well-resourced to market, sell and implement Ultimus solutions. We appreciate your business and look forward to a successful and lasting partnership!

Ultimus Partnership Opportunity

The Ultimus Partner Program presents significant opportunities for you to sell into the many companies looking to adopt more effective and efficient business processes to solve real business process issues. With a long list of technology firsts and a best-in-class partner program, Ultimus positions you for success where others have failed.

The many benefits of an Ultimus Partnership include:

- Authorization to resell the entire award-winning Ultimus Adaptive BPM Suite
- Use of Ultimus software for internal processes as well as marketing and sales support purposes
- Access to Beta versions of new Ultimus products for internal use and customer trials
- A state-of-the-art Training Program and platform
- Joint demand creation campaigns
- Access to Market Development Funds
- Access to Ultimus support incidents for pre- and post-sales inquiries
- Ultimus sales support and an assigned Business Development Manager
- Access to sales promotions, spiffs, and special rebates

Ultimus growth strategy

One of the major tenets of our plan to capitalize on this market opportunity is achieving aggressive growth through the Ultimus Partner Program. As veterans of the enterprise software space, we realize that success starts with the wide adoption of your product platform. Where we believe our peers are more concerned with holding or acquiring incremental margin primarily through direct sales—which pits them against their “partners”—we place the Partner Program and your business first. Ultimus is actively recruiting a strong channel partner community, the best of the best, to achieve the company’s aggressive growth plan over the next three to five years.

Ultimus technology

The Ultimus Adaptive BPM Suite is a complete, enterprise software application designed to create an operational environment that empowers business agents across the organization to drive process automation and improvement. The product consists of multiple modules, seamlessly integrated together and is designed to support the needs of all BPM stakeholders in the company including executives, business process champions, IT teams, and business analysts alike.

Modeling, analysis, and optimization capabilities are deployed in easy-to-use graphical interfaces for business analysts. Reporting and Business Activity Monitoring (BAM) are tailored to management and presented through performance dashboards, email, desktop gauges or within process forms. Business process champions gain convenient access to workflow and forms through email, portals, or collaborative clients. IT teams collaborate on the design, development, and administration of business processes through modules that accelerate deployment through the use of graphical interfaces, while also providing for sophisticated custom development when necessary.

The Ultimus architecture is scalable, extensible, and secure and is SOA-based, meaning all interactions with Ultimus clients and third-party applications are through XML, SOAP, and WSDL. The execution engine has dynamic multi-threading; the product is Unicode compliant and is supported in 20 languages.

Ultimus is paving the way for partners to use these solutions and more to meet the business challenges customers regularly face.

Ultimus: Channel-ready solution

Fundamental to our collective success is ensuring “channel readiness” beginning with the Ultimus Adaptive BPM Suite. Ultimus delivers on the promise to build truly channel-ready products. Our most recent product—Ultimus Adaptive BPM Suite 2014 —has been re-architected from the ground up to embrace current application technology practices that IT departments worldwide require for adoption in their facilities.

Ultimus Partner Program Overview

The recast Ultimus Partner Program has one over-arching goal: to identify, partner, and together implement business process solutions across North America. To ensure success, we have gone back to the proverbial drawing board and identified a handful of basic tenets that will serve as the foundation of our program. These include:

- Our partners' business comes first.
- We will organize ourselves around supporting our partners.
- We will develop products and services that meet the needs of our partners and their customers.

The detailed program specifications enclosed in this document hopefully fully embrace those tenets.

Ultimus Partners enter the program meeting base level requirements and having demonstrated success in selling enterprise software and services. In exchange, partners receive access to the Ultimus resources that will help grow business the most. Ultimus will help you broaden your reach and lay a foundation for ongoing business. It is not just about the leading technology Ultimus provides; it's about demand creation, sales assistance, and a compelling compensation model that drives sales—to get solutions into the hands of your customers when they need them.

Program levels

A key goal of our Partner Program is to reward/compensate partners for increased levels of involvement. In simple words: as you sell more, you make more. Also, as you sell more, you have additional support programs that enable you to make more. We understand that your level of commitment will be commensurate with the size of the opportunity. Our job is to align your level of commitment with a commensurate level of compensation and support.

Value Added Reseller (VAR) partner (US and/or Canada)

VAR partners have made a commitment to invest in the Ultimus partnership through dedicated sales, technical, and support resources. Accordingly, Ultimus rewards VAR partners with the highest level of support and benefits.

Through certification, VAR partners can be authorized to sell Ultimus' Adaptive BPM Suite. With a solutions approach, VAR partners overcome the most complex BPM challenges their customers face. Their skill sets and expertise span a variety of technology areas such as:

- Infrastructure technology
- Process modeling
- Integration techniques
- Applications

VAR partners can take advantage of several Ultimus incentive programs with significant potential rewards above and beyond standard discount compensation. Incentive programs yield monies that can be passed to customers or invested back into the business.

Partner on-boarding

Once your partnership is activated, your Ultimus Business Development Manager (BDM) and you begin on-boarding your sales and technical groups with an in-person session at your location. This session launches the partnership and provides orientation to product, program, and process.

Internal and external communication

What's one of the most important activities in any successful business? Communication! At Ultimus, we believe it is important to start our relationship off properly by ensuring our alliance is properly communicated. This includes press releases as well as ensuring our Website is updated with your logo and brief description of your business.

Welcome packet

Printed documentation of the Ultimus *Partner Sales and Marketing Guide* is provided. This document is intended to help you gain the confidence and understanding that you need to position the Ultimus solution to the right target using language that outlines "what's in it for them." This guide provides detailed information for the entire sales process including prospecting, qualifying, sales tools, competitive landscape, example presentations, and much more.

System setup

One of the biggest advantages your organization has to being an Ultimus partner is the tools we provide to help you be more successful. Upon completion of the sales and marketing training, we will set up access to the following tools:

- Partner Portal
- Online Training Portal
- Knowledge Center
- Customer Console

Marketing

An invaluable part of being an Ultimus partner is the marketing expertise we share with you. We provide tools and resources to help you develop business opportunities including:

- Standard Ultimus collateral (for example, case studies, brochures, or other printed marketing material) may be downloaded freely from the Partner Portal.
- We will provide partners with support in order to maximize the success of joint events. We do not commit in advance to any particular level of support. However, our level of support will be determined by your own investment into any given event and by the requirements of the common business plan.

Training and Certification

The value in training is for you to build the expertise that you need in order to grow your business. Several methods for sales and technical training are available to match your needs. Instructor-led technical certification training is held at Ultimus locations for a hands-on experience. Our more preferred training method is evolving towards our Online Training Portal where partners can get the same training experience as instructor led, at a fraction of the cost.

Sales

Ultimus provides comprehensive sales-related training for your staff responsible for selling or recommending the Ultimus Adaptive BPM Suite. Typically, this training is at your location and lasts one full day.

Technical

Ultimus' technical training is designed to provide partners with easy access to a comprehensive set of learning instruments that will facilitate the acquisition of knowledge required to successfully configure, sell, demonstrate, implement, and support the Ultimus Adaptive BPM Suite. Training is delivered in a variety of formats including our online training portal, "shadowing" learning sessions, Web-based sessions and traditional classroom-based sessions.

Partner Management

As a valued Ultimus partner, the opportunity for lucrative benefits is yours.

The support and tools you need are available every step of the way to get your organization on board, ramp your business, and excel!

Rules of engagement

Ultimus has established a clear code of conduct for supporting partners as they work through sales opportunities. Ultimus' commitment is to communicate every step of the way as you identify and register opportunities, and work to effectively assist you as you bring those opportunities to closure. Your most important questions about how Ultimus sales teams support you in a variety of circumstances are clearly addressed in *Ultimus Rules of Engagement*. Guidelines include:

- How do Ultimus teams work to support partners when multiple parties pursue the same opportunity?
- How do Ultimus AEs work to support partners who have registered opportunities and those who have not?
- Under what circumstances would Ultimus do business directly with a customer?

Ultimus is dedicated to your success and a mutually profitable relationship. A clearly communicated Rules of Engagement policy, practiced and enforced, provides a strong foundation that builds lasting trust.

Partner empowerment

Opportunity registration

Ultimus believes in the importance of an opportunity registration. Make sure to share your leads with Ultimus to reduce the risk of conflicts. To keep us updated, send opportunity into to your BDM.

Ultimus values the view into your sales funnel that opportunity registration provides. It is a qualified pipeline that assists Ultimus with forecasting and resource appropriation.

Demonstrations: online, remote, and Ultimus systems

Ultimus recognizes the importance of effective demonstrations to support the sales process. The company offers several methods for conducting product and solution demos to match your needs and the needs of your prospects. As you begin your training with us, feel free to leverage online and remote demos with Ultimus' technical sales personnel.

For greater flexibility, knowledge, and control, leverage the software VARs receive as a part of the Ultimus Partner Program for your internal use. This software can be used to showcase Ultimus solutions at your location for briefings and events, internal staff training, testing with other products, and more.

Operational and technical support

Service is consistently cited as a reason why customers enjoy such high levels of satisfaction with Ultimus and its innovative BPM solution.

Ultimus Support Center

Staffed 24x7x365, the Ultimus Support Center takes calls for service and support issues involving products sold by Ultimus and its Ultimus partners. The Ultimus Support Center features:

- Collaborative problem solving
- Online services, including support requests
- Ultimus KnowledgeBase and user documentation

Ultimus Professional Services

The Ultimus Professional Services team provides quality service and support, focused on maintaining successful, long-term customer relationships. Fee-based Professional Services include:

- Installation of Ultimus solutions
- Post-sale support

The role of Ultimus partners

Ultimus partners play a critical role in the customer relationship and take on the following responsibilities:

- Lead the sales cycle and the customer relationship
- Take ownership to Ultimus software
- Set end-user pricing, provide quotes, and sell products and/or services directly to the customer
- Maintain an Ultimus price list

Program Benefits

Sales support and teaming

Ultimus' evolution to a best-of-breed partner management model means the company views and treats Ultimus partners as a true extension of its sales, support, and services teams. This message can be found from the CEO to our support teams: our partners are our priority. Ultimus' account executives focus on supporting the company's channel partners' sales efforts vs. competing with them. Ultimus' compensation models, together with a Code of Business Conduct and enforced Rules of Engagement, are critical to successful teaming and building trust between Ultimus and Ultimus partners.

The relationship between Ultimus and its partners is vital to mutual success and at the field level, requires open communication regarding potential and existing customers. Ultimus' sales management model, complete with a corresponding best practices compensation model, paves the way for true cooperative selling. When you notify Ultimus of opportunities you've identified, you lead the sales effort and if necessary leverage the Ultimus sales, technical, and support teams as you need. Ultimus is there to support your efforts to bring deals to closure.

Business Development Manager

Each Ultimus VAR partner is assigned a primary Ultimus contact who fills the role of Business Development Manager (BDM). These channel managers are teamed with Ultimus channel systems engineers and are dedicated to your success. This team regularly works with your executive team and is responsible for:

- Business planning, forecasting, and marketing planning
- Coordinating partner training activities, translating product features into customer value propositions, and ensuring appropriate certifications are achieved
- Participating in seminars, executive briefings, etc., as requested
- Serving as the liaison to other resources at Ultimus to support Ultimus Partner activities
- Effectively training Ultimus partners on the use and technical superiority of Ultimus Adaptive BPM Suite
- Providing knowledge about competitive offerings

Business Development Manager (continued)

Sales teams

The Ultimus BDM has many sales-associated resources at their disposal to help you in your sales cycles. If necessary, these resources can include account executives, systems engineers (who provides pre- and post-sales support), and professional services associates, who generally handle installation and on-site field support. Via the BDM, you may bring in these sales-associated resources as needed on individual opportunities. Proactive, consistent joint account planning at the local level determines which opportunities to target, the role each team will play, and the sales strategy to win.

Inside sales support

Ultimus also offers regionally-focused inside business development managers to assist partners with prospecting, lead generation, and day-to-day process assistance.

Ultimus' suite of local sales support, partner management, and inside sales teams provides a strong network of support to all Ultimus partners which is second to none!

Sales tools

Partner Portal

Ultimus' Partner site is a Web site portal designed exclusively for Ultimus partners enrolled in the Ultimus Partner Program. It is accessed from www.ultimus.com/partners and is a secured Web site with requisite security to manage all aspects of your book of business.

This Web-based resource center provides the information you need to grow your Ultimus business, providing tools that will help you move quickly and efficiently through the sales process. Partner Zone provides five main areas:

- Plan & Manage Your Business
- Market & Sell
- Implement & Support
- General Resources
- Feedback & Suggestions

Ultimus' commitment is to provide the most useful information Ultimus Partners need to generate sales, locate needed information with ease, and keep it up-to-date. Each of these main areas is described in detail below.

Program Requirements

To participate in the program, several base requirements must be met. As partners move up through program levels, corresponding benefits and requirements increase.

If your company is considering partnership with Ultimus, please review the *Partner Program Guide* and complete an application form available through your local Ultimus BDM (see "Ultimus Partner Program Contacts" below or at www.ultimus.com, under Partners). The Ultimus management team will review applications and notify you of acceptance into the program.

Ultimus Partner Agreement

A fully executed Ultimus Legal VAR Partner Agreement is required to join the Ultimus Partner Program. Once completed and approved, you will receive access to Ultimus' partner portal (Partner Zone) for the resources needed to begin. Your Ultimus BDM is your main contact as you plan the on-boarding and development activities your sales, technical, and operations teams need to gain a solid foundation with Ultimus.

Sales and technical staffing

Ultimus partners are required to have minimum levels of staff to support the partnership. Staffing requirements for sales professionals and technical sales engineers are determined by your program level.

Training and certification

Sales and technical staff at each major selling location are required to complete training, beginning with on-boarding to review product and process fundamentals, and continuing throughout the partnership. Depending upon your program level, some number of your technical staff must complete Ultimus certification training, which focuses on configuring BPM solutions.

Relationship contacts

Through the application process, Ultimus partners are required to provide Ultimus with a relationship management contact responsible for the day-to-day activities with Ultimus. At least one contact is required.

Annual business plan

All Ultimus partners are required to develop an annual business plan together with the assistance of an Ultimus BDM. Business plans focus on establishing annual and quarterly goals and identifying revenue and growth attainments, resource requirements, marketing plans, and the corresponding investments to be made. Ultimus BDMs will coordinate with you to develop a plan and monitor progress to identify gaps and make course corrections if necessary.

- Staffing: The number of sales and technical resources supporting your Ultimus business
- Expertise: Completed industry and Ultimus certifications

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