FIRST 90 DAYS PLAN

PARTNERNOMICS®

DATE:

1. Contacts (Teams)

1. Principal Company (you):
    a. Executive Sponsor
    b. Working Team Members:
        i. Channel Chief (lead)
        ii. Channel Account Manager (CAM)
        iii. Marketing Manager
        iv. Customer Success
        v. Accounting / Commissions / Payments
        vi. Technical / Integration Manager
2. Partner:
    a. Executive Sponsor // Systems access and permissions
    b. Working Team Members:
        i. Channel Chief (lead) // Systems access and permissions
        ii. Channel Account Manager (CAM) // Systems access and permissions
        iii. Marketing Manager // Systems access and permissions
        iv. Customer Success // Systems access and permissions
        v. Accounting / Commissions / Payments // Systems access and permissions
        vi. Technical / Integration Manager // Systems access and permissions

2. Goals & Milestones (outcomes / lagging indicators)

1. Establish up to 3 goals (3-1-3-3) to be completed within the first 90 days of the partnership's "effective date."
2. Who? Starting Point? Intended Finish Point? Due Date?
    a. Mark will take "IQ Referral Sales" from "X" to "Y" by "End of Q2."
    b. Follows Objective - Key Result (OKR) methodology
3. Identify additional "milestones" (tasks/steps) that need to be accomplished.

3. Metrics & Dashboards (activities / leading indicators / targets)

1. Identify up to 3 activities (leading indicators) and their associated quantities that connect to each goal.
    a. Software Development (percentage complete)
    b. Webinars (one-to-many)
    c. Solution Demonstrations (one-to-one)

   d. Sales Planning (Acct Mapping)
   e. Sales Training (percentage complete, final score)
   f. Marketing Meeting
   g. Technical Meeting
   h. Accounting/Finance Meeting
   i. Partner Business Review
   j. Partner Spotlight (internal memo)
   k. Blog posts
   l. White Papers
   m. E-books
   n. Podcasts
   o. Conference/Events
   p. Keynote Presentations
   q. Newsletter highlights
   r. LinkedIn/social media posts
   s. Other
      i. Identify additional activities that will connect to a goal or milestone.
2. Who? Starting line? Finish line? Deadline?
   a. <u>Mark</u> will take <u>“IQ Blog Posts”</u> from <u>“1 per month”</u> to <u>“3 per month”</u> by <u>“End of Q2.”</u>
   b. Follows Objective - Key Result (OKR) methodology

4. Communications

1. Self-Managed Partner
2. Managed Partner
   a. Establish meeting cadence (weekly, bi-weekly, monthly, quarterly)
   b. Will this relationship include a governance team (and gov. meetings)
   c. Will you deploy “Role-Based Partner Pairing?”
   d. What data will you share and how will you share it?
   e. Establish a scoreboard based on your goals, metrics, and milestones and a mechanism to share it.

5. Onboarding / Administration

1. Self-Managed Partner
2. Managed Partner
   a. CRM/Salesforce entry - New Account (Partner)
      i. Request IRS Form W9 - 1099

ii. Load Contacts
iii. Load PARTNERNOMICS IQ Info
iv. Connect SPP, Term Sheet to account,
v. Contract details
    1. Effective Date
    2. Expiration/Termination Date
    3. Notice to renew/terminate
    4. Auto-renewal [Yes / No]
    5. Termination for Convenience [Yes / No]
    6. Exclusivity Clause [Yes / No]
    7. Minimum Commitments [Yes / No]
    8. Other Key Dates [Yes / No]

b. Grant Partner Portal access (if applicable)
c. Grant PRM access (if applicable)
d. Accounting setup (commission structure, payment terms, etc.).
e. Conduct an account mapping exercise (Crossbeam, PartnerTap, etc.).
f. Create a “Partner Solutions” page on the internal resource library.

6. For Consideration

This is the section of the 90-Day Plan where each party adds new items they would like to discuss and/or propose.