



Malbek Partner Brochure

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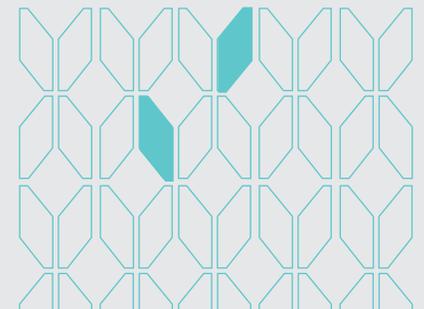


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Partner Program

Malbek and our Partners serve as trusted advisors, helping our customers gain valuable insights.

INTRODUCTION



Malbek's Partner Program is a network of best-in-class service, solution, and technology providers selected for their unique capabilities to enable our mutual clients with specialized expertise and tailored solutions that maximize return on marketing investment. Together, Malbek and our Partners serve as trusted advisors, helping our customers gain valuable insights, utilize best practices, and optimize their technology to achieve world-class CLM results.

At Malbek, we believe a healthy and robust network of partners is crucial to our success and provides opportunities for all parties involved. It enables us to focus on providing the best technology to our partners and customers, and our partners can, in turn, deliver complementary products or focus on successful implementation services.

Solution (implementation) partners can focus on providing expertise to their clients, knowing they have the Malbek platform to rely on as a solution. In turn, Malbek can focus on continued innovation in its contract lifecycle management platform. Providing a top-notch product line makes the job of our partners easier as they try to provide solutions for our end customers.

For Technology Partners, Malbek relies on complementary solutions to extend the capabilities of our platform, allowing customers to utilize a best-in-breed CLM solution.

Malbek is continually looking for additional partnerships that bring mutual value.

01

PROGRAM OVERVIEW

The Malbek Partner Program provides our partners with benefits, tools, technology, and support to drive mutual business growth. We sustain successful relationships with these partners through ongoing business development initiatives, joint marketing programs, enablement training, focused resources, and support services. When you partner with Malbek, we work with you to jointly promote solutions and services, increase market growth, and deepen customer relationships.

EXPAND MARKET REACH

- Connect with Malbek's market-leading customers worldwide
- Increase opportunities for market innovation and thought leadership
- Expand global reach and market penetration

DELIVER ADDITIONAL VALUE

- Leverage Malbek's expertise in the contract lifecycle management industry
- Solve complex CLM problems for mutual clients

GENERATE MORE DEMAND

- Drive new revenue streams for solutions, applications, and services
- Build a competitive advantage with our combined solution offerings

INCREASE YOUR EXPERTISE

- Certify your staff on Malbek with Malbek University
- Keep up to date by attending product updates and configuration seminars
- Access sales & technical collateral as well as co-branded assets in the Partner Portal





"It is always a pleasure to partner with Malbek on projects! Their team is very responsive and provides excellent feedback and guidance to our clients for legacy contract data extraction and migration. Love the Malbek CLM and all the people behind the software and the company".

Samir Bhatia, Brightleaf

TYPES OF PARTNERS

There are two types of partners that Malbek seeks to work with, each with its own strengths and purposes. Recognizing these differences makes it easier for our customers to find the partners they need.

Solution Partner

System integrators, CLM consulting firms, and partners that implement Malbek for their customers. Our Solution Partners are those partners that recommend or implement solutions to their customers that include Malbek products. They are generally System Integrators or Consulting Firms that have consultants who specialize in CLM. They will engage with a client in order to understand that client's needs and bring together a comprehensive platform to meet those needs.

Technology Partner

Software vendors with a complementary product that extends the breadth of Malbek's CLM platform. Technology Partners (i.e. software vendors) produce products that are complementary to Malbek's product platform. These products or integrations help extend the solution that can be implemented beyond the capabilities of the Malbek platform alone, making a more comprehensive solution possible. This type of partnership is in everyone's best interest – it provides a better value-added solution to our customers and enables us as partners to work together in joint deals.

PROGRAM BENEFITS

Malbek is committed to helping our partners be successful. Each partner that signs with Malbek will get immediate access to various benefits and resources, whether it be sandbox access, special partner communications, joint marketing, or training discounts.

These benefits increase based upon a partner's activity and experience with Malbek. While the program does not have specific tiers based upon performance, how closely we work together will be driven pragmatically as we work pursuits together, gain experience working together on campaigns, etc. In general, we'll work with each partner jointly to assess progress and to decide what activities make sense looking ahead.

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Benefits	Technology Partner	Solution Partner
Training and Communication	✓	✓
Partner newsletters and communications	✓	✓
Malbek University access (Free consultant and sales training)	✓	✓
Malbek Partner Certifications	✓	
Malbek Solution Center access	✓	✓
Malbek product feature rollout information	✓	✓
Monthly technical configuration webinar		✓
Assurance Services Packages and Partner Enablement Programs		✓
Access to Malbek Instances	✓	✓
Access to shared sandbox	✓	✓
Discounted dedicated sandbox	✓	✓
Relationship and Joint Marketing	✓	✓
Dedicated partnership meetings	✓	✓
Target account mapping/planning	✓	✓
Eligible for joint go-to-market planning and activities	✓	✓
Joint solution demo environment	✓	
Use of Malbek logo in marketing and on partner website	✓	✓
Featured on Malbek website - logo and summary	✓	✓
Resources for joint case studies	✓	✓
Invitation to attend and sponsor Malbek ENvision event	✓	✓
Eligible for annual partner awards (at Malbek ENvision)	✓	✓

PARTNER ONBOARDING

In any new partnership, it is important to set the stage and gain momentum early. Malbek has a consistent “checklist” of steps we take as we onboard new partners to ensure both sides are enabled to bring success to the partnership.

This includes activities such as setting mutual expectations, joint enablement of sales teams, defining rules of engagement for working together, and setting up a go-to-market plan.

Malbek works with each partner to put together a tailored plan for how to advance the partnership that includes the above activities and puts them onto a schedule where we can hold each other mutually accountable. The list of activities below comes from a template, but the specific items are chosen during a discussion together.



Recruitment

Malbek takes the identification of potential partners very seriously to ensure a good value proposition and a good fit. As part of recruitment, we'll go through the following activities:

1. NDA
2. Develop a value proposition
3. Define integration strategy
4. Align goals/expectations
5. Partnership agreement

Onboarding

Onboarding is a critical stage, where the new partnership must be nurtured to ensure it gains traction. This means making a concerted effort to work together in various activities:

1. Partner certification
2. Basic marketing materials
3. Initial account mapping
4. Work lighthouse accounts
5. Identify initial GTM activities
6. Consultant enablement

Execution

Even with initial partnership success, it is important to keep looking ahead and maintain joint activities.

1. Continued account planning
2. Joint pursuits
3. Continued GTM activities and demand gen to grow pipeline
4. Regular touchpoints
5. Refine joint strategy/goals
6. Implementation project discussions and support

Day	Benefits
10	Contract - mutual NDA signed
10	Initial kickoff call - review Malbek Partner Community benefits
20	Contract - Malbek Partner Community agreement signed
30	Partnership value prop defined / partnership goals define
30	Partner overview deck complete
30	Update to our website - add Partner profile
30	Update to partner's website - add Malbek profile
30	Customer-facing solution brief
30	Partner given access to Partner Portal site
30	Partner given access to Malbek University
30	Partner given access to shared sandbox
30	Partner given access to Solution Center
45	Initial account mapping
45	Integration - integration strategy decided
60	Partner to complete certification in Malbek University
60	Joint customer-facing sales deck
60	Announcement to SIs about new tech partner
60	Establish joint marketing plan
	Joint marketing campaign
	Joint press release

Day	Benefits
	Co-branded partner social media promotions
	Partner blog
	Co-branded webinar
	Co-branded Partner video
	Other events with Partner
90	Integration - integration/offering completed
90	Malbek Marketplace entry
90	Sales enablement - Malbek
90	Sales enablement - Partner
120	Integration demo site available
120	Ongoing GTM marketing plan





PARTNER MARKETING

Malbek's marketing programs include several activities designed to jumpstart our relationship with new partners. These activities include access to marketing materials, PR, joint marketing, events, webinars, and joint success studies.

We've also put together a Partner Marketing Package template designed to ensure that the basic marketing items (website presence, sales enablement materials, etc.) are easy to put together.



"Having partnered with Malbek on multiple projects, we have always found the Malbek team to be pro-active, supportive, practical and solution driven, making implementing Malbek for our clients a smooth process".

Lucy Bassli, InnoLaw Group

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Multi Partner Campaigns

Malbek also does multi-partner campaigns that leverage the combined strengths of multiple partners in an outreach: For example, two technology partners or a combination of a technology partner and a solution partner skilled in implementation for Malbek and that technology partner.

SALES TRAINING



Each partner must be able to understand and sell the solution successfully to their clients. As we bring on new partners, Malbek will generally go through the following activities:

01

Development of a joint value proposition so both organization's sales teams understand why the partnership is special and how to sell it. This also includes the development of a joint presentation deck so that each partner has the key talking points needed to sell the other's solution.

03

Enablement of the partner's sales teams on the capabilities of Malbek and how to sell it. Additional training on the sales and marketing materials that are available to our partners.

05

Access to regular product rollout webinars that help keep your team up-to-date.

02

Enablement of the sales teams on the partnership, value proposition, and any integration (if applicable).

04

Free online access to the sales and marketing materials available in the Malbek Solution Center and Malbek's Partner Portal.

06

Access to the shared sandbox.

PARTNER TRAINING

Malbek considers the enablement of partners a critical component in achieving the success of the partnership. All partners must be sufficiently trained to understand and sell the solution, and Solution Partners must have the training to successfully implement the solution. Malbek is dedicated to providing the training necessary to make our partners successful.

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PARTNER ENABLEMENT PROGRAM FOR SOLUTION PARTNERS

Having skilled Solution Partners who can successfully implement our products is key to Malbek's success. Thus, there is a mutual expectation that Malbek will provide access to training and that Solution Partner consultants will complete training on how to implement Malbek. The Malbek solution has many capabilities and takes time to learn to implement effectively. Malbek's enablement strategy provides a number of different tools to help partner consultants out as they learn and implement Malbek. Multiple learning modules will be available in Malbek University to ensure they have a proper understanding of the Malbek CLM platform. Once learning modules are complete, a passing certification exam is required to implement the Malbek platform. All certifications can be shared on LinkedIn to attract potential clients.

Consulting on Malbek also requires different facets of enablement. Architects need to understand the components of the Malbek solution and how they can be leveraged together, and with third-party software, as well. Functional consultants need to understand how the software works and how to configure it to match customer requirements. Integration consultants will need to understand the technical architecture of the application and the various tools Malbek provides to support connections between applications.

Each customer is different, and each implementation will push the boundaries of knowledge of consultants. So, while enabling begins with product certification in Malbek University, Malbek also provides several additional enablement activities to support a partner on their first few engagements.

Malbek provides these opportunities because we want our partners to be successful. Everyone wins: our partner gains revenue, Malbek can concentrate on product instead of services, and we both get a happy customer. As Malbek invests the time on early partner projects, there are several goals.

One is to ensure success, but another key goal is to develop a self-sufficient partner. Malbek provides the resources to enable partners on their initial projects, but the expectation is that the partner will leverage their own newly trained consultants going forward on future projects.



Benefits	Technology Partner	Solution Partner
Product Certification (in Malbek University)	<p>All consultants must be actively certified while working on an Malbek project (both of these)</p> <ul style="list-style-type: none"> • Standard product certification • Practitioner certification 	<p>This is the way to get started to learn the capabilities of the platform and how to configure it. Malbek provides this training at no cost through Malbek University.</p>
Continuing Education	<ul style="list-style-type: none"> • Attend monthly configuration webinars • Watch “Configure Me” videos as new features are released 	<p>Monthly webinars will also be available in the Malbek Solution Center at no cost.</p>
Sales Certifications for Resellers	<p>Reseller partners must maintain two sales certifications</p>	<p>Malbek provides this training at no cost</p>
Shadowing Opportunities (Malbek leads first project, partner shadows)	<p>Partner provides consultants to participate at no cost</p>	<p>Malbek provides opportunities for consultants to learn under Malbek lead</p>
Hybrid Project - Malbek and partner jointly staff project to ensure customer success AND partner skill transfer	<p>Partner fills roles based upon their capabilities</p>	<p>Malbek fills skills where new partner has a gap</p>
Assurance Services	<p>Solution partner contracts for assurance services on first two implementation engagements</p>	<p>Malbek provides project-based (paid) functional and technical guidance and expert-level advice delivered to the partner by an Malbek subject matter expert during the activation of Malbek technology. This service helps partners learn key best practices and implementation details on their first several projects. Goal is to support partner success.</p>
Design Reviews	<p>Partner contracts for a paid design review of 4 hours for each engagement</p>	<p>Malbek provides (paid) design reviews on partner implementations to ensure that partner consultants have the benefit of the extensive experience of our key solution architects.</p>



"When our clients select Malbek, we breathe a sigh of relief. We know that our clients will, without exception, have a positive experience with the Malbek team. Their technology is excellent, their roadmap is solid, but the expertise of their management, implementation, and customer success teams is top-notch. It's a pleasure to partner with them."

Steph Corey, UpLevel Ops

ACCOUNT MAPPING AND CO-SELLING EXERCISE

Soon into the partnership, we'll generally start trying to find a lighthouse account to prove out the value of the partnership and to generate some momentum. Nothing breeds enthusiasm for the partnership more than some success!

We start with account mapping. As part of this process, here are the steps we follow to establish a joint go-to-market strategy:



01

Identify industry of focus



02

Share account list



03

Review overlapping accounts



04

Establish GTM strategy

JOINT CUSTOMERS

For Technology Partners, identifying joint customers provides an opportunity to integrate our solution and provide a much stronger value proposition for the end customer.

For solution partners, identifying joint customers can lead to new or additional business for both of us.

JOINT PROSPECTS

Joint prospects are a goal to work towards together. They are a double win for the partnership, as they provide both sides with added revenue and give the partnership a case study for success.

08

09

PARTNER REFERRAL FORM

As part of the partnership, we'll work together to increase each other's business. Sometimes, Malbek will identify a new lead for our partners and vice versa. Please let us know how you'd like us to report those leads to you so we can get our sales executives working together.

For leads for Malbek, partners may register their referrals on the Malbek website at: www.malbek.io/refer-a-client-to-Malbek/. Malbek will assess the referral and respond within 3 business days.

PARTNER SANDBOX OPTIONS

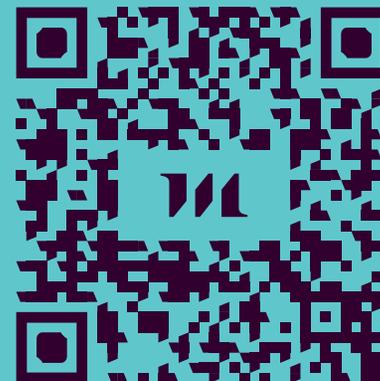
Upon signing and consultant certification, each partner will gain access to a shared sandbox provided by Malbek. In addition, partners may purchase a dedicated sandbox in order to have greater security and flexibility in testing configurations and/or integrations. This dedicated sandbox is provided at Malbek's cost in order to encourage partners to take advantage of this program.

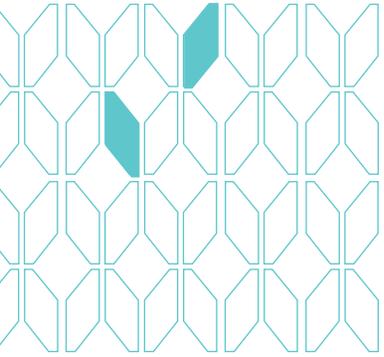


Become a Malbek Partner

Complete the form on the Malbek website at:

malbek.io/partner-directory





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