

Partnership Process FAQ

Common considerations and questions on the partnership processes including guidance on resources and collaboration best practices.

Partnership Value and Description:

Kolleno and InterPayments have come together as best-of-breed integrated, solutions to drive excellence in payment processing, and compliant, processing fee recovery right within Kolleno! Merchants can sleep soundly knowing they can take advantage of Kolleno's automated tools, while leaning on InterPayments' Managed Surcharge suite to collect more revenue and increase the bottom line with mitigated risk to regulatory compliance requirements.

Key Contacts:

- **Partnership Liaisons:**
 - Tony Rappa: tonyr@interpayments.com
 - Director, Partnership Development
 - Devin Foster: devin@interpayments.com
 - Director, Partnership Management

Resources:

Kolleno– Partner Resource Library: <https://www.interpayments.com/kolleno-partner-resource-library/>

- Hosted by InterPayments
- Houses collateral/materials such as:
 - 1 Pagers
 - Sales Slides
 - Cases Studies/Blogs
 - Partnership Cheat Sheet
 - Objection Handling
 - Referral Form

Sales Go-To-Market Process – Kolleno's Team and Reps:

Step 1: Uncovering Pain and Initiative

- Kolleno team will uncover clients' key priorities and initiatives when working through sales process and leveraging tools such as Partnership Cheat Sheet to understand if a client is interested in recovering processing fees.

Step 2: Lead Submission

- If client is interested in recovering processing fees & surcharging, Kolleno rep will go to ***Kolleno + InterPayments Resource Library*** and fill out the required information for registering a lead.

- **Optional:** Kolleno Rep can also reach out Devin or Tony to notify InterPayments team of lead and ask for coordination on next steps

Step 3: Internal Partnership Strategy Sync

- InterPayments team will respond to Kolleno team (2 hour SLA during business hours) and coordinate calendars for an internal partnership strategy sync.

Step 4: Client Introduction/Outreach – Scheduling Discovery Call

- In tandem with Step 3, Kolleno team can either introduce InterPayments resources (Tony & Devin) right away to qualify opportunity, or wait until after internal strategy session to introduce/request InterPayments outreach. InterPayments will then coordinate directly with client their availability, and work around all viable parties schedule's to schedule a discovery call.

Step 5: Sales Process

- **Net New Customers:** InterPayments will work in tandem with Kolleno on Mutual Net New Sales to complement each other's offerings, enrich ROI/Savings, and drive wins together.
- **Current Customers:** InterPayments will run point on sales process and keep Kolleno team apprised of client evaluation and invite Kolleno to participate in process at its discretion.

Sales Go-To-Market Process – InterPayments Reps:

Step 1: Uncovering Pain and Initiative

- InterPayments team will prospect in accordance to collaborative partner strategy and inquire about priorities around payment processing initiatives and driving bottom line savings when appropriate.

Step 2: Opportunity Alignment

- InterPayments team will internally loop in Devin and Tony and work with Kolleno's partner team to schedule internal strategy call. No lead submission required by InterPayments.

Step 3: Client Introduction/Outreach – Scheduling Discovery Call

- In tandem with Step 2, InterPayments will coordinate calendars with the prospective client and Kolleno Sales team.

Step 4: Sales Process

- **Net New Customers:** InterPayments will work in tandem with Kolleno on these Net New Sales to complement each other's offerings, enrich ROI/Savings, and drive wins together.

Customer Success – InterPayments:

- **Step 1: Signed & Kickoff**
 - Once the customer is signed, InterPayments will run point on scheduling a client kickoff where the InterPayments customer success team explains on set up, training, and certification with InterPayments

- **Step 2: Onboarding and Certification**
 - The InterPayments team works with customer on setup, merchant statement analysis, disclosures, and training on InterPayments and merchant tools

- **Step 3: Post Certification**
 - Customers have named Customer Success Resources they will be able to lean on for resources and schedule business reviews and certifications so as to ensure compliance drive fee recovery

InterPayments Surcharging Support:

InterPayments will own the relationship with the merchant client on surcharging and fee recovery requirements and will be the line of support for any inquiries and questions.