

Uptiq Partner Program Guide

Version: 1.0 Date: July 15, 2025

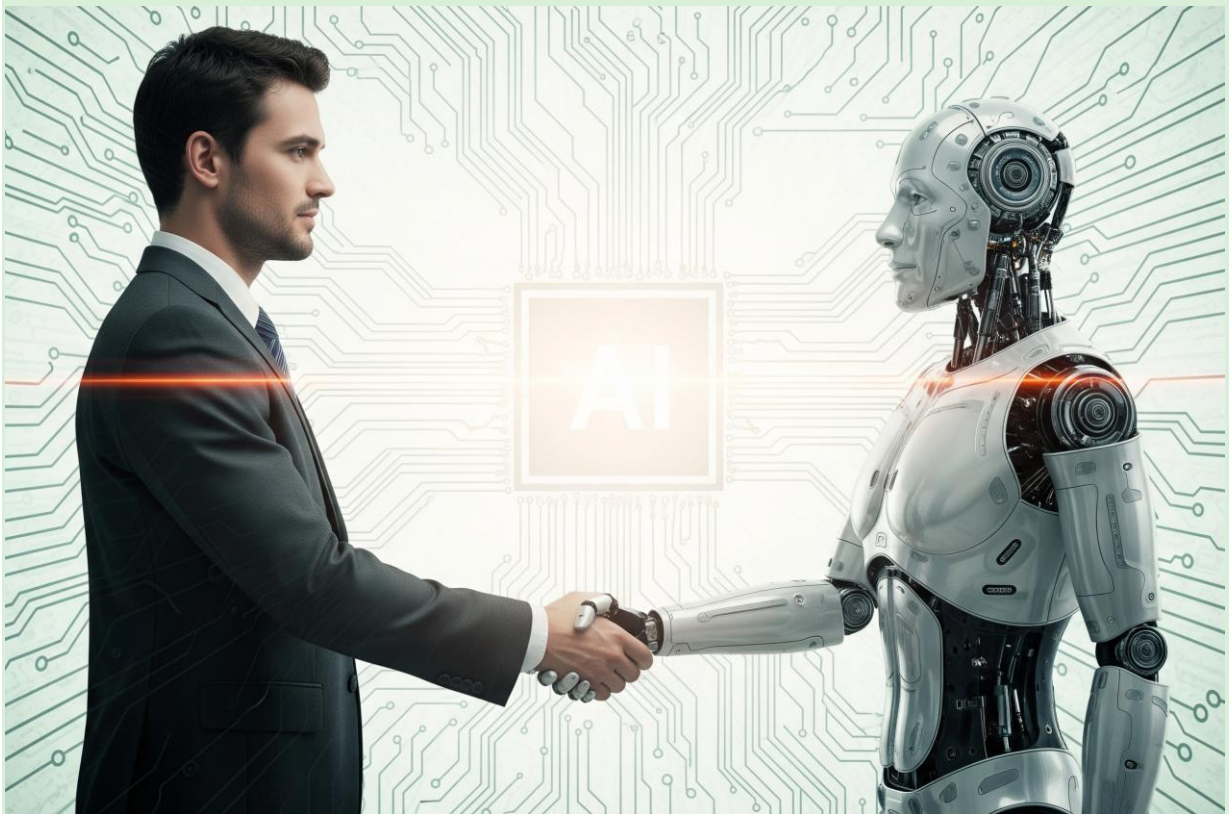


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1 Welcome to the Uptiq Partner Program

1.1 Our Vision for Partnerships

Our vision is to empower our partners to unlock unprecedented value by delivering Uptiq's cutting-edge pre-built turnkey agents, the transformative Agentic AI Workbench, and essential professional services to your clients in the Financial sector.

Through this partnership, you'll tap into a continuous stream of subscription-based recurring revenue, directly benefiting from every successful deployment. Our vision is for every partner to benefit from the substantial, sustained income stream as they help financial institutions integrate a multitude of AI agents, sophisticated Agentic Applications, or the powerful Workbench in realizing large scale efficiencies and cost savings.

Together, we will transform financial operations, drive innovation, and build a future where intelligent automation is standard. Embrace this opportunity to secure significant, long-term recurring revenue and establish your firm as a leader in next-generation AI solutions for finance. Your success is our shared future.

1.2 Program Objectives

- To empower partners to unlock unprecedented value by delivering Uptiq's pre-built turnkey agents, Agentic AI Workbench, and professional services to organizations in financial sector.
- To enable partners to tap into a continuous stream of subscription-based recurring revenue.
- To help partners secure significant, long-term recurring revenue by integrating a multitude of AI agents, sophisticated Agentic Applications, or the Workbench independently or along with their existing solutions or services
- To establish the partner's firm as a leader in next-generation AI solutions.

1.3 Why Partner with Uptiq?

Partnering with Uptiq offers a unique opportunity for your firm to lead the charge in Agentic AI transformation within the financial sector. The benefits that can be realized include:

- **Leading-Edge Agentic AI Technology:** Gain access to our cutting-edge Agentic AI Platform, including pre-built turnkey agents and the powerful Agentic AI Workbench. Our technology is designed to deliver intelligent automation and significant operational efficiencies, positioning you at the forefront of AI innovation with specialization in finance.
- **Deep Financial Sector Expertise:** Uptiq boasts a team with extensive experience and profound understanding of complex financial processes. This domain-specific knowledge means our solutions are purpose-built to address the unique challenges and opportunities of organizations in financial sector, ensuring relevant and impactful deployments.
- **Highly Dependable and Customer-Oriented Team:** We are committed to your success. Our team is renowned for its reliability, responsiveness, and unwavering focus on customer satisfaction. We provide the support and resources you need to deliver exceptional value to your clients.
- **Unlock New Growth with Uptiq's Agentic AI:** Partnering with Uptiq equips you with powerful advantages to expand your business. Our Agentic AI platform provides a unique door-opener for new accounts, allowing you to engage prospects and secure deals that would typically require a

much longer sales cycle. Furthermore, Agentic AI service line can also be seamlessly introduced to your existing client base, enabling farming your client base with premium offerings. Importantly, the low-code/no-code nature of Uptiq's platform means you can realize proportionately recurring revenues with lesser manpower, leading to a better impact on your bottom line.

- **Recurring Revenue Model:** Our subscription-based product model ensures a consistent and significant recurring revenue stream for our partners. By selling our AI Agents, Agentic Applications, or the Workbench, you will build a substantial and predictable income foundation.
- **Eager to Win:** We understand the nuances of partnerships. Uptiq is committed to offering flexible and mutually beneficial terms that are designed to help you increase your win rates
- **Focus on Innovation, Your Focus on Delivery:** While our core team is intensely focused on continually enhancing the Uptiq platform to stay ahead of market, we empower our partners to win opportunities creating a clear division of labor that maximizes collective impact.

Partnering with Uptiq, enables offering transformative AI solutions backed by a robust platform and a dedicated team, securing a strong position in the future of financial technology.

2 Partner Program Overview

2.1 Program Philosophy

At Uptiq, our philosophy centers on **empowering our partners** to lead the charge in Agentic AI adoption within the financial sector. We believe that the future of enterprise automation lies in intelligent, autonomous agents, and that Partners are crucial to realizing this vision. Our **collaborative ecosystem** amplifies your expertise in client relationships and solution delivery with our cutting-edge, low-code/no-code AI Agent development platform. We focus intensely on **product innovation**, providing a robust, constantly evolving foundation that allows you to rapidly deploy pre-built, industry-specific agents and confidently develop custom solutions using our Workbench. Our goal is to equip you with a **decisive competitive advantage**, enabling you to capture significant recurring revenue and establish yourself as a frontrunner in the burgeoning Agentic AI market, without significant investment in the Service line.

2.2 Key Benefits of Partnering

Partnering with Uptiq offers System Integrators a unique opportunity to swiftly enter and dominate the Agentic AI space, particularly within the lucrative financial industry. Here's how you'll benefit:

- **Instant Market Leadership:** Gain immediate access to a suite of pre-built, finance-specific AI Agents, and Industry leading Agentic Workbench. This allows you to position yourself as an instant leader in automating critical financial processes, giving you a significant edge over competitors still developing their capabilities from scratch.
- **Accelerated Revenue Generation:** Start generating **Annual Recurring Revenue (ARR)** from the sale and implementation of our ready-to-deploy agents. This provides a clear, predictable revenue stream with minimal time to market.
- **High-Margin Custom Development:** Leverage our intuitive low-code/no-code platform to build custom AI Agents tailored to your clients' unique needs. For these custom-built agents, you retain a **large percentage of the ARR**, adding a service line and significantly boosting your profitability.
- **Reduced R&D Costs & Risk:** Avoid the substantial investment and inherent risks associated with developing the Agentic AI service line from the ground up. We provide the robust technological backbone, allowing you to focus on client acquisition and solution delivery.
- **Competitive Edge in Agentic AI:** Every IT company is looking to enter the Agentic AI market. We offer the easiest and fastest path to entry, backed by a proven platform and a library of industry-specific agents that provides a true competitive differentiator.
- **Scalable Growth:** Our platform and growing library of agents provide a scalable foundation for your Agentic AI practice, allowing you to expand your offerings and client base efficiently.

2.3 Program Structure

2.3.1 Onboarding & Training:

Comprehensive Platform Training: Workshops and self-paced modules to familiarize your team with the Uptiq low-code/no-code platform for agent development, deployment, and management.

Agent Solution Training: Detailed guides and sessions on our pre-built library of financial industry agents, covering their functionality, implementation best practices, and value proposition.

Sales & Marketing Enablement: Access to sales collateral, pitch decks, case studies, and marketing guidelines to effectively position Uptiq solutions to your clients.

2.3.2 Access & Resources:

Uptiq Platform Access: Limited time Sandbox access to our secure, scalable platform for building, customizing, and deploying AI Agents. Partners may choose to subscribe to the Workbench to start developing Agents themselves.

Dedicated Partner Portal: A centralized hub for documentation, technical resources, marketing assets, training materials, and support ticketing.

Technical Support: Priority access to our expert technical support team for platform-related queries, troubleshooting, and best practices.

2.3.3 Customization Support:

Development Tools & SDKs (for advanced users): For partners looking to subscribe to the workbench for developing the Agents themselves, or extend functionality of existing agents, relevant developer tools and documentation will be provided.

Version Control & Updates: Seamless updates to the Uptiq platform and agent library, ensuring you always have access to the latest features and performance enhancements.

2.3.4 Sales & Revenue Generation:

Reselling turnkey agents, agentic applications: Clear frameworks for earning revenue from the sale and implementation of both pre-built and custom-developed agents.

Revenue Share Model: A transparent revenue sharing agreement for agents you implement and those you build on our platform, with higher percentages awarded for partner-developed solutions.

Deal Registration & Protection: A system to register your opportunities, ensuring deal protection and clear incentives for your sales efforts.

2.3.5 Ongoing Support & Growth:

Regular Business Reviews: Periodic check-ins with a dedicated Partner Manager to review performance, identify growth opportunities, and provide strategic guidance.

Product Road-map Briefings: Exclusive insights into upcoming platform features and agent developments, allowing you to align your strategy with our innovation.

Community & Networking: Opportunities to connect with other Uptiq partners, share insights, and collaborate on complex projects.

Our Program Structure is designed to foster a mutually beneficial relationship, enabling partners to confidently expand their service offerings, deliver unparalleled value to clients, and secure a dominant position in the Agentic AI Ecosystem.

2.4 North American Territory Focus

Uptiq is strategically focused on empowering partners to serve the **Banking, Financial Services, and Insurance (BFSI) sector exclusively within the USA**. This deliberate specialization is our core strength: our growing library of AI Agents has been meticulously trained on U.S.-specific financial

processes, regulatory frameworks, compliance documentation, and industry-standard workflows. This unparalleled precision means that when you engage a BFSI client in the USA, our agents arrive pre-configured and immediately relevant, dramatically reducing implementation time, mitigating compliance risks, and accelerating time-to-value. For our partners, this translates into a powerful competitive advantage, enabling you to confidently address the nuanced needs of the U.S. financial market with solutions that are not just intelligent, but intrinsically compliant and highly efficient from day one.

Our partners are encouraged and supported to use above foundation to customize the agents or develop new agents using the Workbench for other regions.

3 Partnership Types & Requirements

3.1 Reseller Partners

This model is ideal for organizations that possess an existing client base and/or have a strong sales channel. Typically, these partners excel at client acquisition and solution positioning but may lack the in-house technical resources or desire to manage complex AI solution implementations and ongoing support. Their strength or preference is to leverage ready-to-sell product suite to enhance their portfolio and generate new revenue streams with minimal operational overhead.

3.1.1 Partner Responsibilities:

- **Sales & Client Engagement:** Actively identify, qualify, and secure new client opportunities for Uptiq's pre-built Agentic AI solutions within their BFSI client base.
- **Solution Presentation:** Effectively articulate the value proposition of Uptiq's Agentic AI solutions to prospective clients.
- **Lead Generation & Management:** Generate and nurture leads, manage the sales cycle up to contract closure.
- **Client Relationship Management (Pre-Sale):** Maintain strong relationships with clients during the pre-sale phase as well as value realization cycle.
- **Discovery:** Conduct needs assessments and detailed requirements gathering and documentation

3.1.2 How They Benefit:

- **Access to Cutting-Edge Technology:** Immediately offer innovative, pre-trained AI Agents specific to the U.S. BFSI market without any R&D investment.
- **Rapid Time-to-Revenue:** Focus purely on sales, with Uptiq handling the complex implementation, customization, and ongoing support, enabling quicker deal cycles and revenue recognition.
- **Zero Implementation Overhead:** No need to build or maintain an implementation or support team for AI solutions, significantly reducing operational costs and risks.
- **High-Value Portfolio Addition:** Enhance their service offerings with a high-demand, high-value solution, differentiating themselves in a competitive market.
- **Attractive Revenue Share:** Earn a competitive percentage of the Annual Recurring Revenue (ARR) generated from the sale of Uptiq Agentic AI solutions.

3.2 System Integrator (SI) Partners

This model is perfectly suited for System Integrators, IT consulting firms, or professional services organizations with technical expertise and a proven track record in implementing, customizing, and supporting enterprise software solutions. These partners have the capability to not only sell but also to take ownership of the technical implementation, ongoing support, and even customize existing Agentic applications or develop new, bespoke AI Agents for their clients.

3.2.1 Partner Responsibilities:

- **Sales & Client Engagement:** Proactively identify and win new business opportunities for Uptiq's pre-built and custom AI Agent solutions.
- **Solution Implementation & Deployment:** Take full responsibility for the technical implementation, configuration, and deployment of Uptiq Agents within client environments.

- **Customization & Development:** Utilize the Uptiq low-code/no-code platform to customize existing agents or build entirely new AI Agents from scratch to meet unique client requirements.
- **Ongoing Support & Maintenance:** Provide first-line and second-line support to clients, ensuring the smooth operation and optimal performance of deployed agents.
- **Training & Adoption:** Train client staff on the usage and management of the deployed AI Agents.
- **Client Relationship Management (End-to-End):** Manage the entire client relationship lifecycle, from pre-sales to post-implementation support.

3.2.2 How They Benefit:

- **End-to-End Solution Ownership:** Offer comprehensive Agentic AI services, from sales and implementation to customization and ongoing support, allowing for deeper client relationships and larger project scopes.
- **Maximized Revenue Potential:** Earn revenue from agent sales (ARR), implementation services, ongoing support contracts, and a significantly higher percentage of the ARR for custom agents they build.
- **Platform Empowerment:** Leverage a cutting-edge low-code/no-code platform to build, deploy, and manage AI Agents efficiently, reducing development cycles and increasing project profitability.
- **Competitive Differentiation:** Position themselves as leading experts in Agentic AI with the capability to deliver both off-the-shelf and highly tailored solutions.
- **Strategic Growth:** Expand their service portfolio into a high-growth, high-demand area with the backing of Uptiq's innovative technology and expert support.

3.3 Embedded Solutions Partners

This partnership is designed for Independent Software Vendors (ISVs) or product companies that develop and own core software products. These partners are looking to enhance the utility, intelligence, and competitive edge of their existing software products by seamlessly embedding Uptiq's Agentic AI capabilities directly into their product offerings.

3.3.1 Partner Responsibilities:

- **Product Integration:** Architect, develop, and manage the technical integration of Uptiq AI Agents directly into their proprietary software products.
- **Joint Solution Marketing:** Collaborate with Uptiq on co-marketing initiatives that highlight the enhanced value of their product powered by embedded AI Agents.
- **Sales & Distribution of Integrated Solution:** Market and sell their combined software-plus-AI-Agent solution to their existing and new client base.
- **First-Line Support:** Provide initial support for the integrated solution to their end-customers.
- **Roadmap Alignment:** Work closely with Uptiq's product team to ensure seamless compatibility and future-proofing of the embedded solutions.

3.3.2 How They Benefit:

- **Product Differentiation & Innovation:** Infuse their core software product with advanced AI capabilities, significantly enhancing its functionality, efficiency, and market appeal.
- **Increased Product Value:** Offer a "smarter" version of their software, justifying higher price points and increasing customer stickiness.

- **Competitive Edge:** Gain a significant advantage over competitors who do not offer integrated Agentic AI capabilities.
- **New Revenue Streams:** Potentially create new licensing or subscription tiers for their AI-enhanced product, leading to increased ARR.
- **Reduced Development Costs:** Avoid the massive investment required to build AI capabilities from scratch, leveraging Uptiq's proven platform and agents.
- **Enhanced Customer Experience:** Provide their end-users with more intelligent, automated workflows directly within the applications they already use, improving operational efficiency and user satisfaction.

4 Rules of Engagement & Policies

4.1 Deal Registration Process:

- How to Register a Deal (via Partner Portal)
- Required Information for Registration
- Deal Approval & Conflict Resolution
- Deal Protection Terms

4.2 Referral Program:

- Criteria for a Qualified Referral
- Referral Fee Payout Process

4.3 Pricing & Licensing:

- Access to Partner Price Lists
- Understanding Uptiq Licensing Models (Subscription, Consumption-based, etc.)
- Quoting & Invoicing Procedures

4.4 Co-Selling Guidelines:

- Roles and Responsibilities in Joint Sales Engagements
- Lead Sharing & Management
- Joint Customer Engagements

4.5 Co-Marketing Guidelines:

- Brand Usage Guidelines (Logos, Messaging)
- Approval Process for Joint Marketing Activities
- Guidelines for Press Releases, Case Studies, and Webinars

4.6 Confidentiality & Data Privacy:

- NDA Requirements
- Data Handling & Security Protocols
- Compliance with Relevant Regulations (e.g., GDPR, CCPA)

4.7 Support Escalation Procedures:

- L1/L2 Support Responsibilities for Partners
- How to Escalate Issues to Uptiq Support
- Defined Service Level Agreements (SLAs)

5 Partner Onboarding & Enablement Journey

5.1 Application & Vetting Process:

- How to Apply (Online Form)
- Initial Vetting Criteria
- Interview Process (if applicable)
- Legal Agreement Execution

5.2 Onboarding Checklist for Partners:

- Sign Partner Agreement & NDA
- Complete Initial Training (Pre-Sales, Sales, Dev/Support)
- Identify Dedicated Team Members (Pre-Sales, Sales, Dev/Support)
- Develop Initial GTM Plan (with Uptiq guidance)
- Set Initial Revenue Targets
- Access Partner Portal & Resources

5.3 Training & Certification Paths:

- Detailed Curriculum for Each Role (Pre-Sales, Sales, Developer, Support)
- Certification Requirements and Process
- Recommended Learning Paths

5.4 First 90 Days Success Plan:

- Key Milestones and Objectives for New Partners
- Dedicated Onboarding Support from Uptiq

6 Roles and Responsibilities

6.1 Uptiq Responsibilities:

- Product Development & Innovation
- Tier 3 (and above) Technical Support
- Marketing & Brand Awareness
- Partner Program Management & Enablement
- Account Management & Strategic Guidance

6.2 Partner Responsibilities:

- Active Pursuit of Uptiq Agent Opportunities
- Investment in Dedicated Resources (Pre-Sales, Sales, Dev/Support)
- Maintenance of Certifications
- Timely Deal Registration & Reporting
- Adherence to Program Policies & Guidelines
- Provision of Tier 1 & 2 Customer Support

7 Program Governance & Review

7.1 Quarterly Business Reviews (QBRs):

- Purpose: Review performance, discuss GTM strategies, identify challenges, plan next steps.
- Attendees: Partner Leadership, [Uptiq](#) Partner Manager.

7.2 Annual Performance Review:

- Evaluation of Tier Status and Potential for Advancement.
- Adjustment of Targets and GTM Plans.

7.3 Program Updates & Communications:

- How Uptiq will communicate program changes (email, partner portal announcements).

8 Appendices

- Key Uptiq Contact List (Partner Manager, Support, Sales Operations)
- Glossary of Terms
- FAQs

Annexure 1: Uptiq Partner Program Application Form

Please complete all sections of this form to provide us with a comprehensive understanding of your company and your vision for a partnership with Uptiq.

1. Company Information

Company Legal Name	[Enter full legal name of your company]
Trade Name (if different)	[Enter common operating name, if different from legal name]
Website URL	[e.g., https://www.yourcompany.com]
Headquarters Address	[Street Address, City, State/Province, Postal Code, Country]
Year Founded	[e.g., YYYY]
Company Type	[e.g., System Integrator, Value-Added Reseller, Consulting Firm, Independent Software Vendor (ISV), Managed Service Provider (MSP), Technology Alliance Partner]
Number of Full-Time Employees	[Enter approximate number]
Current Total Annual Revenue	[Enter approximate annual revenue in your currency, e.g., \$X Million USD]
Current Annual Revenue from Focused Geographies	[If applicable, enter approximate annual revenue from the geographies you plan to target with Uptiq solutions]
Relevant Industry Certifications/Specializations	[List any certifications, awards, or specializations relevant to AI, automation, digital transformation, or your target industries]

2. Authorized Representative & Key Contacts

Authorized Representative Name	[Full Name of the primary person authorized to sign this agreement]
Authorized Representative Title	[Title/Designation, e.g., CEO, Managing Director, Head of Partnerships]
Authorized Representative Email	[Email Address]
Authorized Representative Phone	[Phone Number with Country Code]
Partnership Single Point of Contact (SPOC)	[Full Name of the dedicated person managing the Uptiq partnership day-to-day]
SPOC Title/Designation	[SPOC Title/Designation]
SPOC Email	[SPOC Email Address]
SPOC Phone	[SPOC Phone Number with Country Code]

3. Partnership Vision & Objectives

Your Vision for Partnering with Uptiq	[Describe your strategic vision and long-term goals for this partnership. How does it align with your company's overall direction?]
Specific Objectives & Expected Achievements	[What are the measurable goals you aim to achieve through this partnership in the short-term (1 year) and mid-term (2-3 years)? E.g., revenue targets, new client acquisition numbers, expansion into new markets, service line diversification.]
Why Agentic AI?	[Explain your understanding of Agentic AI's unique value proposition and how it complements your current offerings.]
How Agentic AI Opens New Accounts	[Describe how you envision leveraging Agentic AI to engage and acquire new clients, particularly those that have historically been challenging to penetrate.]
New Service Line Potential	[Detail how Agentic AI creates a distinct new service line for your business and its potential impact on your service portfolio.]

Leveraging Agentic AI with Existing Clients	[How do you plan to introduce this new service line to your existing client base to generate additional revenue with reduced sales costs?]
Impact on Bottom Line	[Explain your perspective on how the low-code/no-code nature of Uptiq's platform will lead to disproportionately higher revenues with minimal additional manpower, thus improving your profitability.]

4. Geographic Focus & Resource Commitment

Primary Target Geographies	[List the primary countries/regions where you intend to actively sell and implement Uptiq solutions.]
Secondary Target Geographies	[List any additional countries/regions you plan to explore in the future.]
Dedicated Sales Personnel	[Number of full-time equivalents (FTEs) you commit to sales activities specifically for Uptiq solutions in Year 1, Year 2, Year 3.]
Dedicated Technical/Implementation Personnel	[Number of full-time equivalents (FTEs) you commit to technical, pre-sales, or implementation activities specifically for Uptiq solutions in Year 1, Year 2, Year 3.]

5. Financial Projections from Partnership

Fiscal Year Projected Revenue from Uptiq Partnership (in USD or your local currency)

Year 1 [e.g., \$X,XXX,XXX]

Year 2 [e.g., \$X,XXX,XXX]

Year 3 [e.g., \$X,XXX,XXX]

6. Go-to-Market (GTM) Strategy - High Level

Target Customer Profile	[Describe your ideal customer for Agentic AI solutions (e.g., industry, company size, specific departments, key challenges/pain points they face).]
Processes/Areas Targeted for Automation	[Identify specific business processes, functions, or areas within target organizations that you envision automating or enhancing using Agentic AI (e.g., customer service, finance, operations, HR).]
High-Level Sales & Marketing Approach	[Outline your initial thoughts on how you will market and sell Uptiq solutions. (e.g., existing sales channels, new campaigns, webinars, industry events, direct outreach).]
Proposed Initial Market Entry Timeline	[Provide a rough timeline for when you expect to launch your Uptiq-focused services and achieve initial sales. (e.g., Q4 2025, H1 2026)]

7. Expectations from Uptiq

Technical Support Required	[e.g., Dedicated technical account manager, API support, integration assistance, advanced troubleshooting.]
Sales & Marketing Support Required	[e.g., Co-marketing funds, joint sales calls, lead sharing, sales enablement materials, access to branding guidelines, joint event participation.]
Training & Certification Needs	[e.g., On-site training, online courses, certification programs for sales/technical teams.]
Access to Resources	[e.g., Partner portal, comprehensive documentation, API access, sandbox environments for development/testing, pre-built templates/solutions.]
Other Expectations	[Any other specific requirements or expectations you have from Uptiq to ensure a successful partnership.]

8. Why Partner with Uptiq?

Your Rationale for Choosing Uptiq	[Beyond the general benefits of Agentic AI, what specific aspects of Uptiq (e.g., technology, platform features, vision, market reputation, team, existing relationships) led you to choose us as your partner?]
Competitive Differentiators	[How do you see Uptiq's platform distinguishing itself from other solutions in the market, and how will this help your sales efforts?]

Declaration

By submitting this application, the undersigned representative acknowledges that all information provided herein is accurate and complete to the best of their knowledge. They understand that this application is a preliminary step in exploring a potential partnership with Uptiq and does not constitute a binding agreement.

Signatures

For Partner Company:	For Uptiq:
Signature: _____	Signature: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

