

LexisNexis® Certified Partner Program - Canada

PROGRAM GUIDE



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Introduction

Welcome to the LexisNexis Certified Partner Program



The LexisNexis Certified Partner Program

Your clients in the legal and professional services vertical are no longer looking for simple offerings; they are seeking complete workflow solutions. The LexisNexis Certified Partner Program is a complete package designed for professional services consultants who want to better serve the legal and professional services verticals. This program allows partners to bring the best business solutions to their clients, and offer new products that integrate and complement the software solutions you offer now to create an efficient solution that has the potential to increase profitability.

The partner program is the foundation for how our certified partners interact with LexisNexis and our products, and advancement in the program is based on certifications, qualifications and quality of service delivered.

This Guide

This program guide outlines the program and expectations for certified program partners.

This guide will include:

- An overview of the LexisNexis Certified Partner Program
- A description of program benefits for each membership level
- A description of requirements for each membership level
- A description and process for doing business with LexisNexis
- Information about and the process for application and enrollment

Partner Program Overview

The LexisNexis Certified Partner Program is a multi-tiered model designed to offer you resources to grow your professional services practice. When you join the LexisNexis Certified Partner Program, you will have access to a variety of benefits to help you develop your expertise in delivering world-class solutions for the Legal and Professional Services verticals. As your commitment and knowledge of LexisNexis Law Firm Practice Management products grows, the benefits you receive from LexisNexis will also grow. The program is designed to reward partners who achieve selected certifications and qualifications. A brief explanation of program elements is offered below.

ELEMENT	EXPLANATION
Program Levels	There are three partner levels for firms: <ul style="list-style-type: none">1. Silver – entry point for new partners2. Gold – requires consultant(s) with advanced level of certification3. Platinum – highest level of partnership
Certification	Consultants have the opportunity to gain certification levels tied to different products in the portfolio. An example: certified consultants can earn Certified and Advanced Certified levels of certification for the Time Matters product.
Training	The Certified Partner Program is built around robust training and certification requirements. With every major product release, endorsement training and testing is required to maintain certification and cost is included in the annual program fee.
Product and Technical Support	Dedicated partner support line and comprehensive knowledge base for troubleshooting and implementing LexisNexis software solutions.



LexisNexis products included in this program:



Time Matters® Client, Case and Document Management Software

Time Matters® is flexible practice management software that fosters collaboration on matters, streamlines internal processes and fuels growth through increased billable hours and profitability.



PCLaw® Client, Matter, Billing and Accounting Software

PCLaw® enables firms to easily manage matters; track time, expenses, calendar appointments and tasks; bill and collect payment from clients; pay vendors; reconcile bank statements; and manage trust accounts—all from a single source.

The program provides:

- Technical and market training
- Certification and Advanced Certification levels
- Product information and collateral to drive marketing campaigns and awareness

Partner Program Structure

The LexisNexis Certified Partner Program designates three levels of partnership: Platinum, Gold and Silver. All new partners will enter the program at a Silver level designation. Partners will be eligible to apply for Gold and Platinum status after achieving relevant certification levels and qualifications. Acceptance into the Certified Partner program is predicated on payment of the initial program fee, signature on Partner Agreements and subsequent passing of certification with either Time Matters® or PCLaw® products.

A brief description of Platinum, Gold and Silver status is provided at right.

PLATINUM

Platinum is the highest level within the LexisNexis Certified Partner Program

Partners at this level will be rewarded with the highest level of benefits

Platinum status denotes the highest level of commitment to LexisNexis Certified Partner Program

GOLD

Gold level status requires higher levels of certification

Partners will be rewarded with elevated partner benefits

Gold level status denotes experience with delivering LexisNexis software solutions

SILVER

Silver level is the initial entry point for all new certified partners.

Silver level partners must have a Product Certification and will receive standard business benefits.

Certified Partners can gain higher levels of certification through LexisNexis University, an online hub for registering for software training

Silver partners may go on to attain higher Gold and Platinum level status and benefits

Silver is the program entry point
for all partners

Partnership Level Advancement

To achieve higher levels of certification at an individual consultant level, partners must take the required certification training and pass an endorsement testing with the required passing grade. At a firm level, partners must apply for higher level of status via the PartnerPortal tool.

Consultant Level Certifications

- Product level certifications are tied to the individual consultant.
- Consultants are required to pass endorsement tests on products they are certified on upon major product releases within 60 days of availability of the test. The cost of the training on new product release and the subsequent endorsement test are included in the annual program fee.

 LexisNexis® | Time Matters® and  LexisNexis® | PCLaw®

CERTIFIED



ADVANCED CERTIFIED



Partner Program Requirements

All partners entering the LexisNexis Certified Partner Program must comply at all times with the set of requirements defined for each level of the program.

Initial Program Requirements

1. Completion of LexisNexis Program Application and Company Profile
2. Acceptance of the LexisNexis Partner Agreement
3. Payment of initial program fee
4. Completion of initial certification training and passing score on certification training to achieve certification level for either Time Matters® or PCLaw®

REQUIREMENTS BY CONSULTANT TYPE	CERTIFIED	ADVANCED CERTIFIED
Product	Time Matters certification OR PCLaw certification	Time Matters advanced certification OR PCLaw advanced certification
Endorsement Training	Pass annual product endorsement test associated with product certification	Pass annual product endorsement test associated with product certification

TRAINING AND FEES	CERTIFIED	ADVANCED CERTIFIED
Initial training fee for Basic Certification per consultant	USD \$750	—
Advanced Certification training fee per consultant	See LexisNexis University on training costs per product	See LexisNexis University on training costs per product
Annual program fee per consultant (Prorated on quarter for new partners) at individual consultant level; owned at a consultant level, individual level	USD \$695	USD \$495
Annual product endorsement training and testing	Included with annual program fee	Included with annual program fee
Certification training and testing for a new product or new certification level (ex. Consultant is Time Matters and wants to become certified in PCLaw)	See LexisNexis University on training costs per product	See LexisNexis University on training costs per product
Annual Practice Management Partner Conference per consultant (optional and encouraged for all members of the Certified Partner Program)	USD \$400	USD \$300 (25% discount)

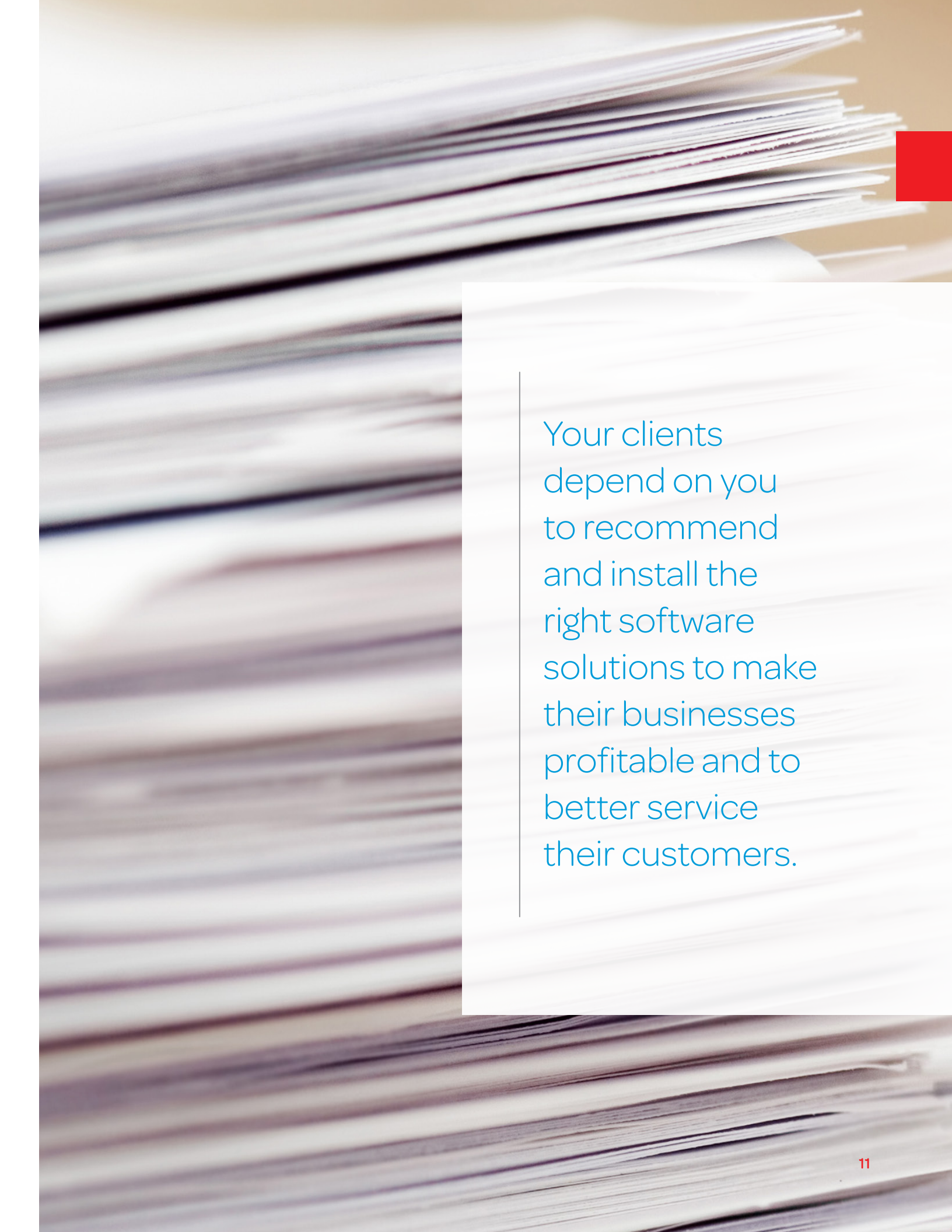
Partner Program Requirements

FIRM LEVEL REQUIREMENTS

	SILVER	GOLD	PLATINUM
Consultants in the firm	One consultant with either Time Matters or PCLaw certification	One consultant with either Time Matters or PCLaw Advanced certification	Five or more consultants with combination of Time Matters and PCLaw Advanced certifications
MSCE or equivalent	—	One MCSE Certified or equivalent either on-staff or sub-contracted; Note, a single sub-contractor cannot support more than five Certified consultants	One MCSE Certified or equivalent either on-staff or sub-contracted; Note, a single sub-contractor cannot support more than five Certified consultants

All partners entering the LexisNexis Certified Partner Program must comply at all times with the set of requirements defined for each level of the program as well as pay relevant fees in order to remain partners in good standing.

Please note that it is the responsibility of the partner to notify LexisNexis when a certified consultant employee or required resource leaves the company. The notification will need to go to the Channel Program Administrator at pmpartners@lexisnexis.ca. It is best to select another individual who will obtain and/or have the necessary qualification or certifications to avoid possible termination or reduction in membership level.



Your clients
depend on you
to recommend
and install the
right software
solutions to make
their businesses
profitable and to
better service
their customers.

Partner Program Benefits

The LexisNexis Certified Partner Program is a complete package designed for professional service consultants who want to better serve the legal vertical by enhancing their product offerings. Along with LexisNexis software and business benefits, LexisNexis offers their program partners certification and training, product and technical support, and partner-only resources and marketing tools. Benefits are broken out into:

1. Individual consultant level
2. Firm level (solo consultant up to multi-consultant nationwide firm)

BUSINESS BENEFITS	CERTIFIED	ADVANCED CERTIFIED
Demo Product	One re-sale license per certified consultant per product certification	Two re-sale license per certified consultant per product certification
Product for Business Use by the Consultant	Up to 2 licenses per consultant per product certified at 70% off list. Software Annual Maintenance Plan (AMP) priced at 70% off list.	Up to 5 licenses per consultant per product certified at 90% off list. Software Annual Maintenance Plan (AMP) priced at 90% off list. 5 users x 5 consultants = 25 user license

RELATIONSHIP BENEFITS	CERTIFIED	ADVANCED CERTIFIED
Consultant communications and newsletters	Yes	Yes
Practice Management Partner Conference (optional and encouraged for all Partners)	Yes	Yes
Opportunity to present at Practice Management Partner Conference (by invitation only)	—	Yes
Present at customer-facing webinars, live events and tradeshows by invitation only	—	Yes
Eligible for participation on Product advisory boards	—	Yes
Eligible for participation on Partner Program Advisory Council	—	Yes

TECHNICAL SUPPORT BENEFITS	CERTIFIED	ADVANCED CERTIFIED
Access to LexisNexis online support center	Yes	Yes
Access to dedicated Partner Support during posted business hours	Yes	Yes
Access to partner community support forums on LexisNexis PartnerPortal	Yes	Yes
Present at customer-facing webinars, live events and tradeshows by invitation only	Yes	Yes

Partner Program Benefits

MARKETING BENEFITS	CERTIFIED	ADVANCED CERTIFIED
Access to partner badges	Yes	Yes
Presence on external partner locator tool	Listed	Premium
Access to internal partner community locator tool	Yes	Yes
Access to partner community forum	Yes	Yes
Access to marketing tools for demand generation	Yes	Yes
Eligible for leads from LexisNexis	---	Yes
Eligible to participate in LexisNexis case study program	Yes	Yes



FIRM LEVEL BUSINESS BENEFITS *(commission % on the sale)*

FINANCIAL BENEFITS	SILVER	GOLD	PLATINUM
Net new Account with Net New License	20%	30%	30%
Existing Customer with add-on	10%	15%	15%
Software Annual Maintenance Plan (AMP)	5%	10%	10%
Minimum Practice Management Revenue requirements (New and AMP Renewals)	\$10K	\$25K	\$50K

MARKETING BENEFITS	SILVER	GOLD	PLATINUM
Access to program badges	Yes	Yes	Yes
Presence on external partner locator tool	Listed	Premium	Premium
Non-certified consultant attendees at Practice Management Partner Conference	Yes USD \$800 per attendee	Yes USD \$600 per attendee	Yes USD \$400 per attendee

Partner Program Benefits

FINANCIAL BENEFITS:

Net new opportunity via deal registration

- Certified partners will have the opportunity to register new customers.
- Approval is at the sole discretion of LexisNexis. An opportunity may be declined under various circumstances, including when the opportunity is already being pursued by LexisNexis or another certified partner previously registered the opportunity.
- Consultants can only register opportunities and receive sales commissions on products they have certification on.

Access to deal registration tool for net new customers

- The mechanism for registering deals will be via an online tool.
- All Certified Partners, no matter their status, will have access to the tool.

Net new opportunity via LexisNexis created lead

- If LexisNexis passes a LexisNexis created sales lead to a Certified Consultant, then sales commission will be paid at a lower rate than if the Certified Partner created and registered the opportunity on their own.
- LexisNexis reserves the right to engage Certified Partners at the discretion of LexisNexis to conduct product demonstrations and provide value-add services for the customer.

New license from existing customer

- Existing customers of LexisNexis Law Firm Practice Management solutions will often times purchase additional licenses of the software.
- Certified Partners have the opportunity to enable the sale of the additional licenses to a customer in partnership with LexisNexis sales teams.

Software Annual Maintenance Plan (AMP) from customer that was expired

- The LexisNexis install base of customers have the opportunity to purchase an Annual Maintenance Plan (AMP), which entitles them to both software upgrades during the period of the AMP and access to LexisNexis Technical Support.



BUSINESS BENEFITS:

Demo product

- Software for Certified Partners to use with product demonstrations.

Product for business use by the consultant

- Certified Partners will have the opportunity to purchase products that they are certified on at a discounted price to utilize in running their own business.

RELATIONSHIP BENEFITS:

Partner communications and newsletters

- Certified Consultants will have access to periodic and ad hoc communication vehicles relating to product updates, partner programs, best practices, etc to help deliver better outcomes to customers.

Practice Management Partner Conference

- Certified Consultants will be able to attend the Practice Management Partner Conference. The conference is highly recommended for all Partners to attend, but is not mandatory to maintain certifications.

- The Practice Management Partner Conference is an opportunity to gain insight into product roadmaps, supply Voice of the Channel to LexisNexis leadership team, network with partners in the ecosystem and take product training from both LexisNexis and from peers in the Certified Partner community.

Present at customer-facing webinars and live events and tradeshows by invitation only

- Periodically, LexisNexis will ask Certified Partners to participate in market facing demand generation vehicles including but not limited to tradeshows and webinars. This presents a powerful opportunity to partner with LexisNexis not only with new customers but also showcase the Partners' value-add services.



Partner Program Benefits

Eligible for participation on the product advisory boards

- LexisNexis encourages input from our Certified Partner community on the future of our product portfolio. Partners have the opportunity via product advisory boards to include Voice of the Channel in product direction and futures.

Eligible for participation on the Partner Program Advisory Council

- LexisNexis has an advisory council that serves as the voice for the Certified Partner community back to LexisNexis on market trends, partner programs, business process improvements, etc.

MARKETING BENEFITS:

Access to program badges

- Certified Partners will have access to consultant level badges signifying their level of certification with a particular product (ex. Certified and Advanced Certified)
- At a firm level, Certified Partners will have access to firm-level badges to signify their respective membership level (ex. Silver, Gold or Platinum level partner)
- Usage of LexisNexis logo and partner badge must adhere to published usage guidelines.

Presence on external partner locator tool

- Every Certified Partner will be listed on the LexisNexis partner locator tool including contact information and membership level

Access to internal partner community locator tool

- Every Certified Partner will have the option to provide in-depth profile information on an internal partner community locator tool accessible only by Certified Partners. This will help enable Certified Partners to engage with other members of the community for specific technical or legal practice skillsets to deliver better outcomes to customers.



Access to marketing tools for demand generation

- Templates, messaging and collateral will be available for Certified Partners to utilize for demand generation both to new customers and to existing customers.
- Usage of campaign materials will need to adhere to provided guidelines and reporting expectations.

Eligible for leads from LexisNexis

- LexisNexis reserves the right to provide leads to certified partners based on their membership level and published criteria and process.
- Reporting expectations from the partner back to LexisNexis will need to follow published guidelines to maintain access to leads provided by LexisNexis.

Eligible to participate in LexisNexis case study program

- Based on membership level and certification, Certified Partners will be eligible to participate in the LexisNexis case study program. This program is designed to foster the sales motion for both LexisNexis and Certified Partners, and will showcase complete solutions of the highlighted customer.

TECHNICAL SUPPORT BENEFITS:

Access to LexisNexis online support center

- LexisNexis maintains a rich online Knowledge Base for partners to utilize in troubleshooting, implementation and maintenance. Partners are encouraged to utilize this resource prior to contacting the partner support line.

Access to dedicated partner support during posted business hours

- Certified Partners will have access to a dedicated partner support line specific to the product the partner has certification. The line will be open during published business hours. Inquiries will be supported if issue is classified as “in-scope” by the support engineer.

Access to partner community support forums on LexisNexis PartnerPortal

- Certified Partners will have access to the Partner Community Support Forum on the LexisNexis PartnerPortal to ask technical questions amongst the partner community.



Partner Program Benefits

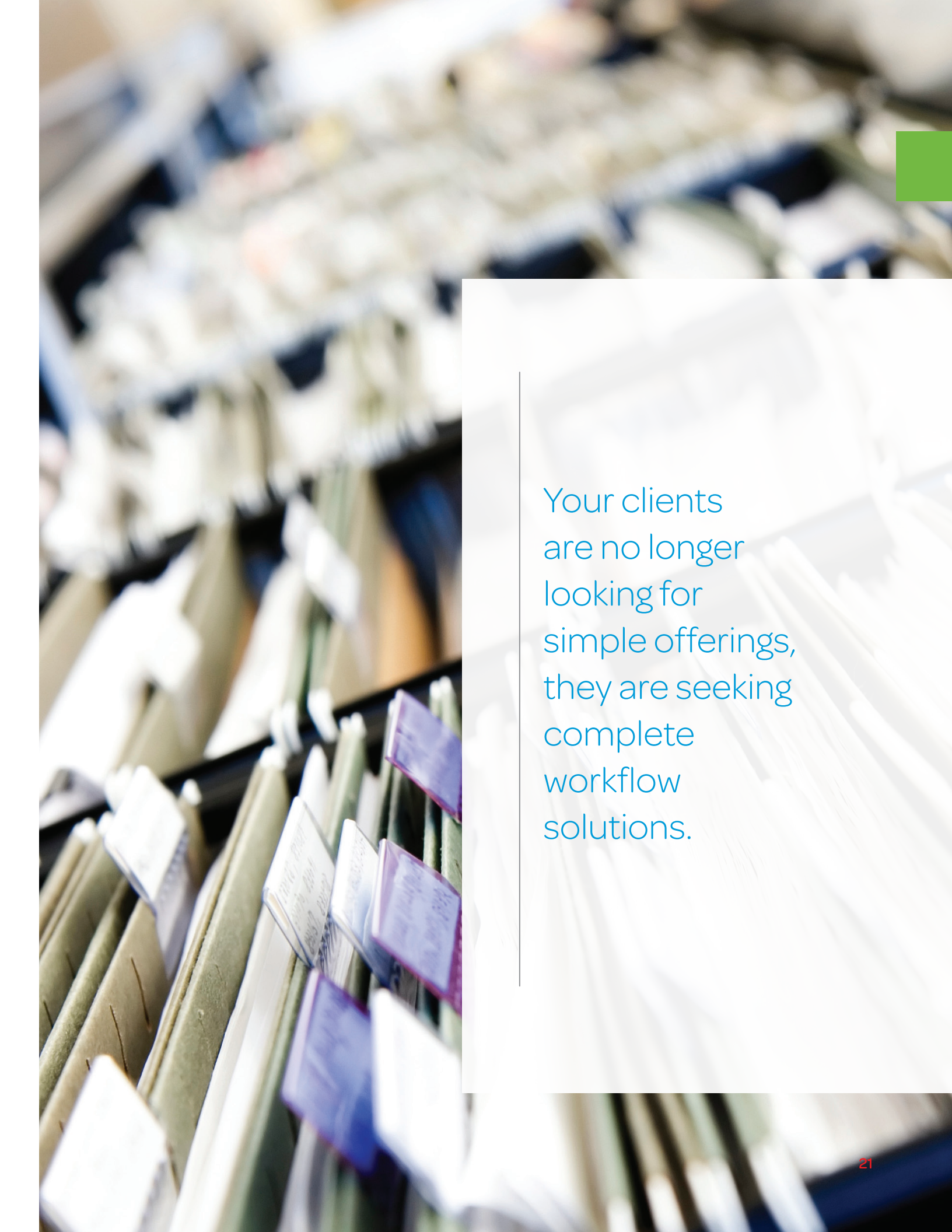
Overview of Training, Qualification and Certification

The LexisNexis Certified Partner Program is based on certifications and qualifications delivered via LexisNexis University. Certified Partners can achieve higher levels of partner benefits as they advance in levels of certification and in products certified on.

LexisNexis training classes combine hands-on, face-to-face classroom training at our Raleigh training center with online instructor lead training and web-based training modules. Content and training technique is tailored to the specific requirements for the product and certification. Online tests are made available soon after completion of the coursework. Passing grades aligned to published guidelines for the certification are required to either complete or maintain the certification.

Upon major product releases, endorsement training is provided to Certified Partners. The training and subsequent endorsement test is included in the Annual Program Fee. Certified Partners must complete the endorsement training with a passing grade per published guidelines to maintain certification level.

LexisNexis University also offers a range of training classes to help augment Certified Partners' skillsets both with LexisNexis products and with consulting and industry knowledge. These classes are often available at no charge or at discounted Certified Partner only prices.



Your clients
are no longer
looking for
simple offerings,
they are seeking
complete
workflow
solutions.

Partner Program Badge Usage

As a member of the LexisNexis Certified program you are entitled to use the LexisNexis Certified channel partner logo according to the terms found in the logo and badge guidelines addendum to the Partner Agreement. See the chart below for basic eligibility requirements. The logo and partner badge branding guidelines document will provide additional direction on how best to leverage this valuable benefit.

LexisNexis Certified Partner Badge



Partner Eligibility

The **Silver** level logo is the starting point for new partners entering the Certified Program. Once you are accepted into the program and meet the basic requirements for Silver, you will be provided the logo.



The **Gold** level logo is for use only by firms that have achieved Gold status in the Certified Partner Program. Upon achieving Gold status, you may request the logo via Certified Partner mailbox.



The **Platinum** level logo is for use only by firms that have achieved Platinum status in the Certified Partner Program. Upon achieving Platinum status, you may request the logo via Certified Partner mailbox.

LexisNexis Certified Consultant Badge



Consultant Eligibility

The **Time Matters Certified Consultant** logo is for use by individual consultants to signify achievement of certification in the Time Matters® product.

The **Time Matters Advanced Certified Consultant** logo is for use by individual consultants to signify achievement of advanced certification in the Time Matters® product.

The **PCLaw Certified Consultant** logo is for use by individual consultants to signify achievement of certification in the PCLaw® product.

The **PCLaw Advanced Certified Consultant** logo is for use by individual consultants to signify achievement of advanced certification in the PCLaw® product.



Membership Process

To enroll in the LexisNexis Certified Partner Program please go to www.lexisnexis.ca/practice-management-partner the LexisNexis website to access the application. Complete the application and send to pmpartners@lexisnexis.ca. Once your initial application is approved, you will need to assent to the LexisNexis Partner Agreement, with signed copies sent to LexisNexis. Once your initial program fee is received, you will receive a LexisNexis Certified Program welcome kit and subsequent access to the Certified PartnerPortal.

Steps to join the LexisNexis Certified Partner Program:

1. Complete and submit the LexisNexis Program Application
2. Complete and submit the Company Profile
3. LexisNexis approval and acceptance to begin the on-boarding process
4. Accept the LexisNexis Partner Agreement
6. Pay annual program fee
7. Sign-up for initial product training
7. Completion of initial certification training and passing score on certification testing.
8. Upon achievement of required test score on product certification test, the consultant will be entered into the LexisNexis Certified Partner Program and will enjoy the benefits of Silver status.

Membership Renewal

LexisNexis Certified Partner Program membership is for a one-year term. For Certified Partners maintaining good standing within the program and compliance with objective criteria, membership will be eligible for renewal. Consultants will need to pay required program fees by defined deadline. Additionally, Gold and Platinum level firms will need to maintain defined requirements to renew at their previous levels. If the firm is unable to do so, then the partner firm will be dropped down to the next eligible tier. If a partner firm is not able to meet minimum requirements for Silver at the time of renewal deadline, then the partner will be disqualified from the partner program. Firms and consultants will be eligible to re-apply at the full initial program price to be reinstated to the program.

LexisNexis reserves the right to terminate the channel partner agreement if the individual consultant and/or firm does not:

1. Pay required annual program fees
2. Meet minimum certification requirements

All partners entering the LexisNexis Certified Partner Program must comply at all times with the set of requirements defined for each level of the program as well as pay relevant fees in order to remain partners in good standing.

Please note that it is the responsibility of the partner to notify LexisNexis when a certified consultant



employee or required resource leaves your company. The notification will need to go to the Channel Program Administrator at pmpartners@lexisnexis.ca. It is best to select another individual who will obtain and/or have the necessary qualification or certifications to avoid possible termination or reduction in membership level.

Partner Program Changes

LexisNexis reserves the right to modify the LexisNexis Certified Partner Program, including all certification levels, partnership levels, partner benefits at its sole discretion. Although LexisNexis attempts to assure the accuracy of the information contained in this Program Guide, occasional corrections or updates may be required by LexisNexis. LexisNexis reserves the right to make such corrections or updates on an as-needed basis by posting such updates to the LexisNexis PartnerPortal. Partners agree that they are responsible for compliance with the terms of the LexisNexis Certified Partner Program Agreement and Program Guide.

LexisNexis Partner Support

Contact the LexisNexis Certified Partner Help Desk at pmpartners@lexisnexis.ca for questions regarding the LexisNexis Certified Partner Program, Partner opportunities or information on the LexisNexis Business of Law Software Solutions product portfolio.

When you join the Certified Partner Program, you will have access to a variety of tools to help you develop your expertise in delivering world-class solutions for the legal and professional services verticals.



Technical Support

Dedicated Partner Support number

1.877.507.6064

When calling into Customer Support, you will be required to enter your partner number, as well as the customer's number. You will be expected to provide both to the engineer before you can obtain support for the client. All customers are required to be on an Annual Maintenance Plan (AMP) to receive technical support, even when using a Certified Partner. See AMP FAQs [here](#):

Here are some tips to help you get the most out of LexisNexis Customer Support:

- Be sure to check the Knowledge Center before you call in to Partner Support
- Use Emergency Options when customer is completely down (ie: unable to open Time Matters)
- Make sure the customer meets system requirements for workstation and servers
- Test issue and reproduce issue on your demo database if possible
- Reboot server and/or affected workstations
- Utilize and exhaust other options when possible
- Backup the client's data
- Before calling, please be sure the client is on the most current service release of their version

LexisNexis Customer Support will do their best to provide guidance and resolutions on the first call into the Certified Partner hotline, but occasionally on complex issues they will enter a 'Webstar' to schedule more time to work on the issue. You can request the 'Webstar' number and then check back periodically.



Program Highlights

Partner Program for Professional Services consultants built on certifications and qualifications enabling better outcomes for clients

- Certified and Advanced Certifications for consultants, and Silver, Gold and Platinum tiers for consultants firms
- Dedicated Product and Technical Support lines and knowledge base
- Marketing tools to help build awareness for the consultant
- Path forward and tools to help build the consultants business in the Legal and Professional Services vertical



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