

CargoWise Service Partner guidebook

Your guide to the CargoWise Service Partner program, criteria, tools and resources



Welcome

Welcome to the CargoWise Service Partner program.

As a CargoWise Partner, you have joined a strong global network of highly-skilled industry practitioners that are united in their commitment to empowering and enabling the world's supply chains. We share a mutual goal to accelerate the growth and productivity of CargoWise customers.

We believe the most successful CargoWise Service Partners are those who continually invest in building their technical capability, their product expertise, and their industry networks.

These guidelines will explain the resources and tools available to help you grow and thrive as a CargoWise Service Partner.

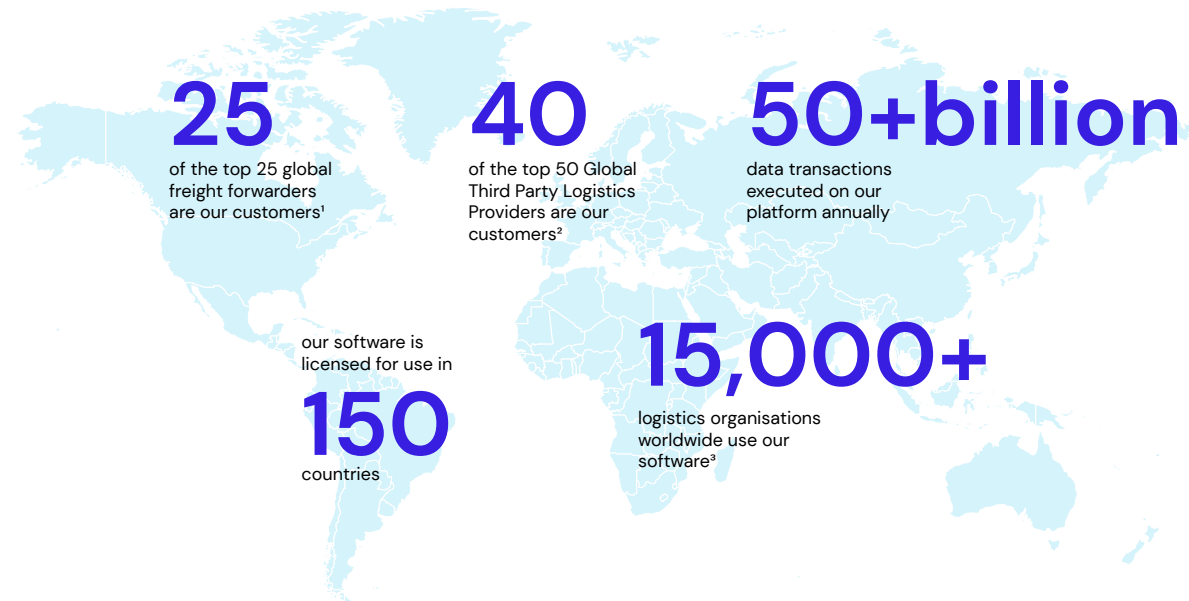


The program

As a CargoWise Service Partner you play an integral role in supporting the worlds' logistics providers and their use of our industry-leading platform, CargoWise.

You will earn revenue working with CargoWise customers by offering technology and business consulting services; training and high-touch product support; project management and business process services; and software integration services and customer support. As a CargoWise Service Partner, you will leverage your expertise to deliver business results, and differentiate yourself in the global marketplace of platform service providers to more than 15,000 customers worldwide.

We will provide you with opportunities, tools, and resources to help you promote and grow your business, and deliver value to CargoWise customers.



¹ Ranked by Armstrong & Associates: Top 25 Global Freight Forwarders List, ranked by 2017 logistics gross revenue/turnover and freight forwarding volumes.

² Ranked by Armstrong & Associates: Top 50 Global Third Party Logistics Providers List, ranked by 2017 logistics gross revenue/turnover.

³ Logistics organizations refer to purchasers of our software. Includes customers on the CargoWise application suite and legacy platforms of acquired businesses; legacy customers may be counted with reference to installed sites.

Tiers & benefits

<p>Certified</p> <p>Partner benefits</p> <p>by competency level</p>	<ul style="list-style-type: none"> • Endorsement as a credentialed CargoWise Partner • Access to Partners only program management site, which offers: <ul style="list-style-type: none"> - Product education and certification program materials - Partner branding toolkit and digital assets (logos) - Product marketing toolkits • Access to the latest features and functionality of CargoWise in a shared training environment [dedicated non-production and/or production systems available for a fee] <ul style="list-style-type: none"> • Eligible for new CargoWise customer referral programs • Priority support channel for CargoWise critical incident resolution • Access to exclusive CargoWise user forums
<p>Gold</p> <p>Partner benefits</p> <p>by competency level</p>	<ul style="list-style-type: none"> • Endorsement as a credentialed CargoWise Partner • Access to Partners only program management site, which offers: <ul style="list-style-type: none"> - Product education and certification program materials - Partner branding toolkit and digital assets (logos) - Product marketing toolkits • Access to the latest features and functionality of CargoWise in a shared training environment [dedicated non-production and/or production systems available for a fee] • Eligible for new CargoWise customer referral programs <ul style="list-style-type: none"> • Priority support channel for CargoWise critical incident resolution • Access to exclusive CargoWise user forums • Access to marketing support to promote your Partner activity and events • Qualified lead referrals from CargoWise channel marketing campaigns • Exclusive offers for regional CargoWise sales events and premier events such as global CargoWise conferences (by select invitation only)
<p>Platinum</p> <p>Partner benefits</p> <p>by competency level</p>	<ul style="list-style-type: none"> • Endorsement as a credentialed CargoWise Partner • Access to Partners only program management site, which offers: <ul style="list-style-type: none"> - Product education and certification program materials - Partner branding toolkit and digital assets (logos) - Product marketing toolkits • Access to the latest features and functionality of CargoWise in a shared training environment [discounted dedicated non-production system available] • Eligible for new CargoWise customer referral programs • Priority support channel for CargoWise critical incident resolution • Access to exclusive CargoWise user forums • Access to marketing support to promote your Partner activity and events <ul style="list-style-type: none"> • Qualified lead referrals from CargoWise channel marketing campaigns • Exclusive offers for regional CargoWise sales events and premier events such as global CargoWise conferences (by select invitation only) • 100% Discounted dedicated non-production CargoWise system (excluding CargoWise cloud premium service fees) • Priority access to new product commercialisation opportunities • Dedicated Partner account manager • Premium and discounted access to CargoWise Partner conferences

Criteria & competencies

Criteria

All CargoWise Service Partners must achieve and maintain the below minimum requirements to achieve CargoWise Service Partner status:

1. **CargoWise certification** – Maintain a minimum of one active CargoWise Certified Professional (CCP) and 60% of active CargoWise Certified Operator (CCO) or above Partner consultants; and
2. **Competencies** – Maintain a minimum of one Certified, Gold or Platinum competency according to the table over the page.

Competencies

CargoWise Service Partners differentiate themselves in the market by attaining Certified, Gold or Platinum levels in the following competency areas: Forwarding; Customs; Warehouse; Accounting; Workflow; Integration; Global rollouts.

To achieve a Certified, Gold or Platinum level within a competency, Partners are required to maintain competency-specific **subject matter experts** and recent demonstrated results (**validated completed customer projects**).

The table over the page details the criteria specific to each competency.



Project closure reports

To validate a completed customer project, CargoWise Service Partners must pre-fill and submit the project closure report [online form](#). We will then verify the submission with the client contact.

Criteria & competencies



Forwarding

Forwarding includes training, configuration and optimisation of CargoWise's core forwarding module.

Certified	Gold	Platinum
 1 PROJECT	 3 PROJECTS	 5 PROJECTS


Customs

Customs includes training, configuration and optimisation of CargoWise's customs module. Subject Matter Experts must be in-house resources with a recognised accreditation in customs.

Certified	Gold	Platinum
 1 PROJECT	 3 PROJECTS	 5 PROJECTS 1 EXPERT


Warehouse

Warehouse includes training, configuration and optimisation of CargoWise warehouse module, including inventory management, virtual warehouse, scan-packing and distribution processes. Subject Matter Experts must be in-house resources with a recognised accreditation in warehousing operations and/or previous management experience in the warehousing and storage industry i.e. warehouse operations manager, warehouse branch manager etc.

Certified	Gold	Platinum
 1 PROJECT	 3 PROJECTS	 5 PROJECTS 1 EXPERT



Accounting

Accounting includes training, configuration and optimisation of CargoWise accounting, invoicing and netting features. Subject Matter Experts must be in-house resources with a recognised accreditation in accounting, and/or the equivalent of Chartered Accountant (CA) or Certified Public Accountant (CPA) qualifications.

Certified	Gold	Platinum
 1 PROJECT	 3 PROJECTS	 5 PROJECTS 1 EXPERT




Workflow

Workflow includes training, configuration and optimisation of CargoWise workflow and PAVE projects. Subject Matter Experts must be in-house resources with a recognised global accreditation in business process management (BPM), process improvement, and/or workflow management.

Certified	Gold	Platinum
 1 PROJECT	 3 PROJECTS	 5 PROJECTS 1 EXPERT


Integration

Integration includes CargoWise interface development, eAdaptor and EDI project scopes, Integration-only Partners only require a CargoWise Certified Professional (CCP) consultant for Gold & Platinum tiers. Subject Matter Experts must be in-house resources with the equivalent of Microsoft Visual Studio 2010, Microsoft Certified Professional Developer (MCPD), Microsoft Certified Solutions Developer (MCSCD) certified, and/or Java, XML, XLST, EDI development experience.

Certified	Gold	Platinum
 1 PROJECT 1 EXPERT	 3 PROJECTS 1 EXPERT	 5 PROJECTS 1 EXPERT

Global rollouts

Global rollouts include Global, Multi-region and Multi-party CargoWise project scopes. Only Lead Consultants are eligible to achieve Platinum. There is a separate [global rollouts project closure report](#) online form for those who are requesting consideration as a 'Contributing Consultant' or 'Lead Consultant'. Subject Matter Experts must be in-house resources with a recognised global accreditation for project management.

Certified	Gold	Platinum
 1 PROJECT	 3 PROJECTS	 3 PROJECTS 2 EXPERTS

Growing your business

CargoWise Service Partners enjoy exclusive access to powerful tools and resources to build additional revenue streams and grow their consulting businesses:



CargoWise sales tools and processes

Proven sales processes and content utilised by our global sales teams to grow your CargoWise engagements.



Operational and commercial business resources

Operational business toolkits to activate new business opportunities and set yourself up for commercial success.



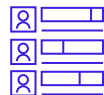
A real world demonstration environment

A feature rich CargoWise sandpit environment to train consultants, reduce project build times and increase speed to market.



CargoWise service opportunities

Work with CargoWise global sales teams to directly access service opportunities and new business leads.



Demand generation activities and campaign toolkits

Access to industry events, lead generation initiatives and campaign toolkits.



CargoWise customer referral program

Build an additional ongoing revenue stream through the CargoWise customer referral program.

Tools, resources & training

The CargoWise Service Partner program gives you access to a range of benefits to assist your business.

The CargoWise Service Partner portal provides Partners with a range of enablement tools and resources to grow and market your business. Our industry-leading CargoWise Learning portal (My Account) empowers Partners to develop and enhance your CargoWise skills and ensure your Consultants are the best they can be in this complex world of logistics.



CargoWise team

Global team of Partner management, customer service, and sales professionals working together to support Partner activation and success.



Partner portal

Digital resources, courseware and community forums give you access to onboard your consultants and grow your practice capability.



L&D and business building events

Virtual and in-person events that offer learning, development and business building opportunities with the CargoWise team and other CargoWise Partners, and promotional campaigns that help you generate new business leads.



Product training: My Account

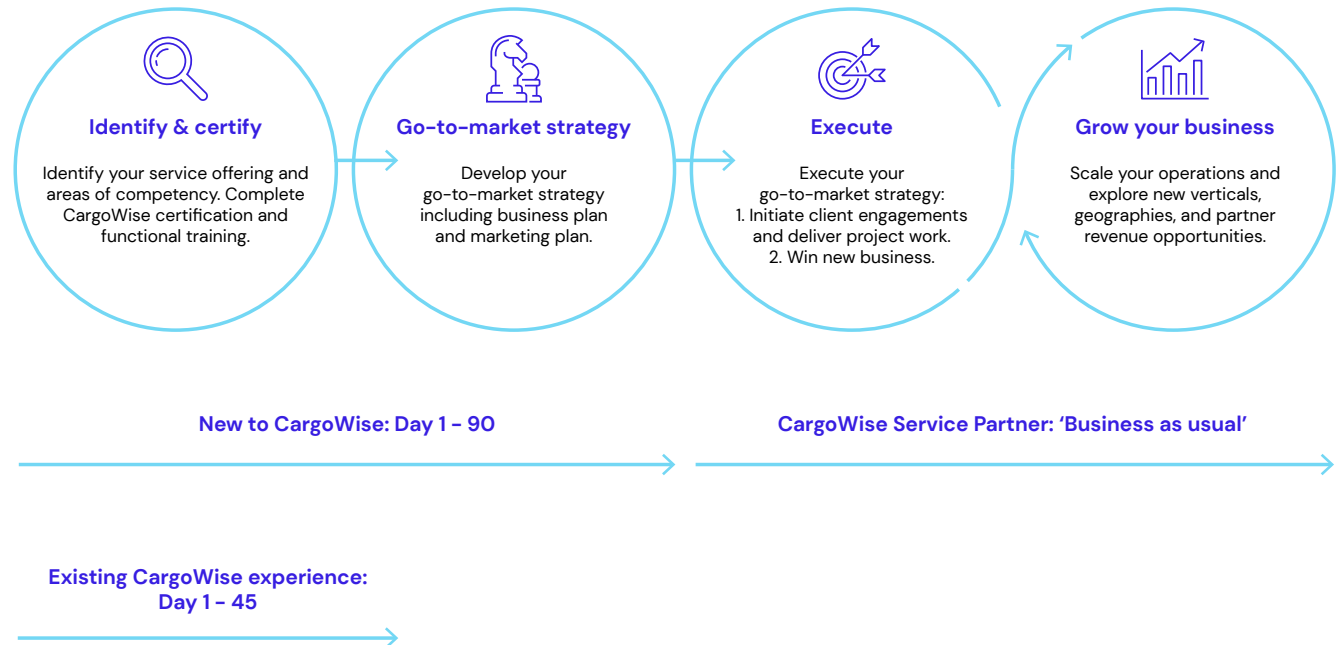
Self-paced online learning for obtaining product certification for each consultant in your practice, and for sharpening skills when new features are released.

Partner success pathway

Getting started as a CargoWise Service Partner?

The Partner success pathway highlights the key milestones to commercialise your operations and set yourself up for success.

Upon acceptance as a CargoWise Service Partner, new partners and their consultants are guided through an interactive onboarding journey. During this process, you will setup your business as a CargoWise Service Partner, identify your value proposition, develop your go-to-market strategy, and connect with the CargoWise community.



Contact us

With offices in more than 60 countries worldwide, we're here to help.

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