



PARTNER PROGRAM

HELP BRANDS MAKE MORE PROFITABLE CONVERSATIONS

As of 13th September, 2023

JOIN US

More and more European eCommerce brands are looking to start with WhatsApp marketing. But they don't want to waste money, damage their brand or lose customers. Give them the security of a revenue-first, GDPR-compliant WhatsApp platform with charles, leading European WhatsApp Solution Provider:

- **Maximize revenue for your clients:** While some WhatsApp platforms focus on commerce and customer service use cases, we specialize in WhatsApp marketing for the best ROI
- **Skyrocket, don't replace, email:** For years, your clients focused on building email strategies to drive revenue – we focus on building upon them through our Klaviyo and other integrations
- **Offer peace of mind:** We're an expert in what we do – we're an Official Meta Partner and have been building our product since 2019



The charles Partner Program is a chance to grow your business – whether through introducing clients to us or providing managed WhatsApp services through our platform. At the same time, you unlock potential for your clients and help them grow their business through adding the reach and richness of WhatsApp to their marketing mix.

YOUR BENEFITS

We differentiate between 3 partner tiers, each with additional benefits. These are designed to ensure a win-win-win situation for yourself, your clients and us:

BENEFITS	REGISTERED	SELECTED	PREMIUM
ENABLEMENT			
Training session	✓	✓	✓
Access to training material	✓	✓	✓
Partner Slack channel	✓	✓	✓
Product updates	✓	✓	✓
Partner Manager (incl. check-ins)	---	✓	✓
Exclusive product roadmap insight	---	---	✓
Own charles solution for testing purposes	---	---	✓

PROMOTION			
Partner badge	✓	✓	✓
Access to marketing and sales material	✓	✓	✓
Listing on charles website	---	✓	✓
Sales support from Partner Manager	---	✓	✓
Own charles solution for demo purposes	---	---	✓
REVENUE SHARE			
Rev. share % of referred accounts	8% (12 month)	12% (18 month)	15% (24 month)
Rev. share % of managed accounts	2%	3%	4%

What's a referred account? A client that signs a contract with us after you've recommended our platform and introduced them to our sales team.

What's a managed account? A client that you provide services to while they have a contract with us. The services must be related to the use of the charles platform, like creative support, strategic consulting, technical support and implementation excellence.

HOW YOU CAN START 🏃

You can apply for registration any time via our website ([Link](#)). The evaluation for down-tiering and up-tiering occurs twice annually in April and October.

REQUIREMENTS	REGISTERED	SELECTED	PREMIUM
Approved partner application	✓	✓	✓
Visibility of charles brand on your website	---	✓	✓
Minimum annual recurring fees referred in the last 6 months	---	€50,000	€100,000
OR			
Minimum charles revenue managed in the last 6 months	---	€30,000 (avg. €5,000 per month)	€100,000 (avg. €16,667 per month)

EXISTING PARTNERS 🤝

We partner with marketing agencies, consultancies, and influencers in our key markets of DACH and Italy. To date, we've partnered with innovators like Chatmarks, Mawave, PsyCommerce and More Conversions. We like to work with innovative, motivated people whose main goal is to help clients grow their businesses.



"We couldn't be happier. We've been able to celebrate great successes together and take the WhatsApp marketing of various exciting eCommerce brands to the next level."
Thomas Möllers, Co-Founder, chatmarks

ABOUT US

Leading European WhatsApp marketing solution provider – used by marketing and CRM teams of consumer brands like ABOUT YOU, WWF and SNOCKS. We drive new revenue, higher retention and innovative customer experiences through complementing existing marketing channels with the reach and richness of WhatsApp. We are backed by leading investors like Accel, HV or Salesforce Ventures.

<https://www.hello-charles.de/partner>

<https://www.linkedin.com/company/charles/>



"We firmly believe that by 2030, 30% of all transactions will be attributed to WhatsApp and chat. This presents a golden opportunity for Charles to become a unicorn. Nevertheless, we recognize that to seize this opportunity, we need partners who can grow with us in the remarkable journey ahead."

Andreas Tussing, Co-CEO, Charles

Former e-Commerce Lead & Associate Partner, McKinsey



"WhatsApp Marketing is akin to the early days of Facebook Ads back in 2012, where those who embraced it early reaped extraordinary results. Today, we extend to agencies the incredible opportunity to seize a pioneering advantage by collaborating with the leading WhatsApp Marketing solution in Europe."

Artjem Weissbeck, Co-CEO, Charles

Former Co-CEO, Kapten & Son

GLOSSARY

PROGRAM BENEFITS 🏆

TRAINING SESSION 🚀

To enable you to pitch to prospects as well as onboard and train new Charles customers on your own, we will provide you with a ~2 hour train-the-trainer session. Training sessions with one of our Success Managers will cover the relevant steps in the implementation and onboarding process: i) integration of messenger and shop system into the Charles platform, ii) creation of a basic setup of templates, messages and flows within the universe to facilitate daily chatting and campaigning operations, and iii) a product training session that explains the main functionalities and flows within the platform.

ACCESS TO TRAINING MATERIAL 📖

Next to the live training sessions, we will provide you with on-demand access to our product guide and help center that contains user-friendly how-to guides (step-by-step documentation) for the necessary onboarding steps as well as written product guides and a Loom video library for the main tool functionalities.

PARTNER SLACK CHANNEL 🔗

Connect with Charles to share best practices, ask questions, and be the first to hear about Charles updates. Upon acceptance into the Charles Program, you will receive a link to join the community.

PRODUCT UPDATES 📢

You will receive timely updates (e.g., release notes) on the new product features and integrations in order to share them with clients and exploit the full potential of our solution.

PARTNER MANAGER (INCL. CHECK-INS) 🛠️

You will have a direct line to a dedicated Partner Manager to help you with any inquiries and issues. This will be your point of contact for product questions or escalating technical support. To discuss any new joint opportunities in new or existing clients, we will also set up monthly check-ins.

EXCLUSIVE PRODUCT ROADMAP INSIGHT 🗺️

You will receive an exclusive high-level outlook on our planned product developments for the next months once an internal product roadmap has been agreed. This will enable you to plan ahead and understand where we are heading strategically in the short- to mid-term.

OWN CHARLES SOLUTION FOR TESTING AND DEMO PURPOSES 📁

We will set up your own charles solution that you can use for testing, playing around and demoing our product to prospects. You will be able to set up your own campaigns and automated flows in a separately hosted solution.

PARTNER BADGE 🏆

Partner badge with your partner tier that you can use for marketing and sales material.

ACCESS TO CHARLES MARKETING AND SALES MATERIAL 🔑

You will be provided with access to a SharePoint folder with all the necessary materials to pitch charles and afterwards make clients successful: charles presentations, client success cases, case studies, how-to guides and much more.

SALES SUPPORT FROM PARTNER MANAGER 🛠️

You will have direct access to a dedicated Partner Manager to give you support in the sales process, help you navigate the nuances of conversational commerce and make sure you are well equipped to promote and charles' services.

REVENUE SHARE % OF REFERRED ACCOUNTS 📄

When a referred lead becomes a paying charles customer within 90 days of the referral, you will be paid a percentage of the revenue (license and usage-based revenues) for a specified period of time. The percentage and period of time are determined by tier status at the time the lead is accepted. Payments are processed within forty-five (45) days after the end of each calendar quarter, charles will initiate a credit note to the Partner. There is no minimum payment threshold for managed customer payouts.

REVENUE SHARE % OF MANAGED ACCOUNTS 📄

For every submitted and approved charles account you're actively managing, you will be paid a percentage of that account's charles revenues. The revenue share only applies to charles revenue as defined above and only to those that have actually been paid by the charles customer. The payout percentage is determined by your status at the time of the payment period. Payments are processed within forty-five (45) days after the end of each calendar quarter, charles will initiate a credit note to the Partner. There is no minimum payment threshold for managed customer payouts.

PROGRAM REQUIREMENTS 🏗️

APPROVED PARTNER APPLICATION ✅

This information helps us determine whether our program is a good fit for your organization; and if so, helps us align our resources to ensure our partnership is set up for success on day one. Further, before the final approval of applications, all partners must acknowledge the Partner Program Agreement. Program guidelines and rules of engagement are included within the agreement.

MINIMUM ANNUAL RECURRING FEES REFERRED IN THE LAST HALF YEAR 💰

Charles considers a variety of factors when accepting or rejecting leads, including, but not limited to:

- Timeliness of a partner's submission of the lead
- Depth of a partner's relationship with a lead
- Communication of accurate information about the lead by the partner
- Existence of a prior, active Charles sales relationship with the lead

Leads are only valid for 90 days from the date of information and must become Charles client during that time in order for referral credit to be awarded. For tier status evaluation, the last 6 months before the evaluation cycles in April and October will be considered. The annual recurring fees will be recognized by the signing date of the Charles client, but is only eligible if the client actually went live and started paying the first invoice.

MINIMUM CHARLES REVENUE MANAGED IN THE LAST HALF YEAR 🧳

Customers may pay a monthly base fee, usage based fees (conversation, agent, net sales, MAUs, etc.) and sometimes one-time service fees. All of these fees are recognized as Charles revenues. Fees that are charged by Charles on behalf of another party (i.e., WhatsApp Conversation fees on behalf of Meta) are not considered as Charles revenues

VISIBILITY OF CHARLES BRAND ON WEBSITE 💛

Partners who have achieved Selected tier or higher are required to mention Charles on their website. This acknowledgment of our partnership may come in the form of a case study, the inclusion of the partner badge or Charles logo among other partner logos, or a dedicated landing page that outlines the Charles product and related services.