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STAR Awards

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2026 TSIA STAR Awards
Featured Application

TSIA STAR Award Submission — Category: 2026 Intelligent Partner Enablement Initiative
Company: Vertex, Inc. www.vertexinc.com

Predictive Partner Enablement: A Self-Reinforcing AI Ecosystem

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Vertex has transformed partner enablement into a **self-reinforcing, AI-powered operating model** that gives partners faster access to trusted guidance, converts support activity into predictive intelligence, accelerates knowledge creation, simplifies accredited-learning compliance and modernizes certification. Rather than adding specialist capacity as the ecosystem grows, Vertex uses AI to turn each question, ticket and learning interaction into scalable capability. *Vertex is a global provider of enterprise tax technology. Its partners implement and support Vertex solutions across products, regions and enterprise resource planning (ERP) platforms.*

Challenge & Opportunity

Vertex's partners carry significant responsibility for implementation quality, time to value and customer confidence, but the guidance they need can be dispersed across documentation, training, support cases and individual experts. Partners may wait for answers that already exist, while the patterns predicting future readiness problems remain hidden in operational data. At the same time, accredited learning requires exacting compliance review and practical certification must reflect AI-enabled work without compromising fairness or security. Vertex saw the opportunity to connect these challenges through governed, purpose-built AI.

Innovation & Creativity

Vertex's breakthrough is not a chatbot, an analytics report or an authoring tool. It is a **predictive, self-reinforcing enablement architecture** that closes the distance between what partners experience and what Vertex improves next. Enablement Ticket Intelligence serves as the predictive brain, partner self-service delivers trusted support, and KCS (Knowledge-Centered Service) methodology—combined with the Knowledge Author agent—forms the action engine that turns insight into lasting organisational capability.

1. **Capture demand and serve the partner** — the partner-facing AI assistant provides immediate, conversational access to Vertex-approved implementation and product guidance through a secure partner site. It resolves known needs at the point of work while capturing the real language, questions and obstacles partners encounter.
2. **Predict where enablement is needed next** — Enablement Ticket Intelligence analyzes the full support lifecycle: current demand, cases requiring specialist investigation and resolved history. Its first evidence analysis classified 590 resolved partner-enablement tickets across approximately 29 months, exposing product, partner and regional concentrations, recurring issues, service dependencies and missing knowledge. Rather than simply reporting what happened, it shows where repeated friction is forming and recommends the interventions with the greatest potential value.
3. **Turn each resolution into reusable knowledge** — the KCS agent converts validated answers and recurring issues into consistent, searchable knowledge. Expertise that previously solved one case can now prevent the next partner from needing to ask.
4. **Turn knowledge into scalable enablement** — AI Knowledge Author transforms identified gaps into structured guides, job aids, training modules and targeted workshops faster, while subject-matter experts retain approval. Improved resources return through the partner AI and enablement programs, generating new signals that make the next cycle more precise.

This closed loop is the defining innovation: partner activity becomes predictive intelligence; intelligence becomes governed knowledge and targeted learning; improved enablement returns to the ecosystem; and the resulting activity shows Vertex what to improve next. Human validation, approved content and controlled access are built into every stage, allowing the system to learn and scale without trading trust for speed.

AI-Powered CPE Compliance

The CPE Compliance Agent brings the same governed-AI discipline to accredited education. It reviews courses and events against National Association of State Boards of Accountancy (NASBA) Continuing Professional Education requirements, assessing eligibility, coaching compliant learning objectives, checking material alignment and organizing audit-ready evidence. Human validation remains in place, while a specialist-dependent process becomes guided, consistent self-service.

AI-Native Certification with Cadet

Cadet brings governed AI directly into Vertex's hands-on software certification exams, ensuring that practical assessments remain relevant in an AI-powered world. Grounded exclusively in Vertex documentation and embedded within the controlled exam environment, the assistant gives every candidate access to the same approved capability. This creates a more authentic assessment of modern professional practice while preserving

fairness and security: candidates cannot rely on uncontrolled external AI tools, and every exam query remains within Vertex infrastructure.

Execution & Implementation

Execution is governed around trust and repeatability. Partners use the AI assistant through a secure, partner-only site; candidates use Cadet inside controlled exams; course and event owners use the CPE Compliance Agent; and enablement specialists use Ticket Intelligence, KCS and Knowledge Author to turn activity into insight, knowledge and content. Every capability relies on approved content or governed classification, with human validation at critical decisions. The result is one operating model that can scale across products, regions and ERP environments.

Relevance to Partners, Customers and Growth

Partners receive faster, more consistent guidance and learning shaped by real implementation needs. Certification tests practical performance in an AI-enabled environment, while accredited learning becomes more consistent and audit-ready. For customers, better-prepared partners mean fewer preventable escalations, less rework and faster progress toward value. Commercially, Vertex expands partner delivery capacity without equivalent growth in specialist support, enabling scalable, high-margin partner-led services across the customer lifecycle.

Impact & Results

Analysis of 590 resolved partner-enablement tickets from February 2024 to July 2026 provides direct evidence that the ecosystem is addressing repeatable, scalable needs:

- Scale and early AI signal: Vertex resolved 107 partner-enablement tickets in 2024, 250 in 2025 and 230 in the first seven months of 2026. Following the May 2026 launch of the partner-facing AI, tickets created averaged approximately 9% below January–April and 31% below the same months in 2025 as Partners increased adoption of the AI agent.
- Repeatable demand: three product families generated 73% of tickets, five partner organisations generated 85%, and two regions generated 82%, demonstrating why targeted knowledge and self-service can scale effectively.
- Knowledge production at scale: the KCS agent has created more than 300 reusable knowledge articles and best-practice assets, reducing the resource time required by approximately 75% compared with the original manual creation process.

Ticket Intelligence also surfaced where future readiness investment should move first. O Series grew from 36% of resolved demand in 2024–25 to 52% in 2026, while e-Invoicing increased from 0.7% to 5.1%. These are directional indicators from resolved-ticket data, used to prioritise content and readiness interventions rather than claimed as completed outcomes.

> The evidence validates the model: Ticket Intelligence turns 590 resolved interactions into a knowledge and readiness roadmap; the KCS agent has already converted more than 300 reusable assets with approximately 75% saving in resource time; and partner-facing AI delivers trusted knowledge at the point of need.

Conclusion

Vertex has established a new model for intelligent partner enablement. Its predictive loop learns from partner activity, anticipates readiness needs and converts insight into trusted guidance before friction becomes escalation. Purpose-built AI then extends the same governance into accredited education and certification. The result is an ecosystem that continuously improves, expands partner capacity and strengthens customer delivery—the combination of intelligence, scale and lifecycle value this award is designed to recognize.


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