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STAR Awards

2025

2025 TSIA STAR Awards
Featured Application

TSIA STAR Award Submission
Category: 2025 Excellence in Customer Success with Partners
Company: Vertex, Inc.
Title: Driving Partner Performance Through Scalable Enablement and Certification
Contact: Elia Lora, Senior Director, Education & Enablement

Summary: Vertex has revolutionized the partner experience with a scalable, data-driven enablement strategy that empowers partners to accelerate time to value, deliver high-quality implementations, and drive customer success. Anchored in TSIA's Education Services Capabilities Model, Vertex shifted from a reactive support model to a proactive, partner-first enablement engine aligned with partner needs and customer lifecycle milestones.

At the core of this transformation is a structured, role-based certification program—Foundational, Associate, and Expert—designed to validate competencies for real-world implementation roles. By leveraging AI-powered predictive modeling, Vertex analyzed over 200 enablement service tickets to identify knowledge gaps and pain points. These insights drove the creation of targeted learning assets, implementation playbooks, and guided onboarding—delivered through a modern LMS and reinforced with proactive engagement workflows.

Since the March 2025 global expansion, Vertex has seen a 129.4% increase in partner ticket volume, signaling higher engagement from newly onboarded regions, and a 65.7% reduction in resolution time. Over 650 certifications have been issued, and most partners leading implementations are now certified—enabling faster readiness, fewer escalations, and consistent, high-quality customer outcomes.

This approach has directly enhanced the partner experience and performance. As shared by Angelo Torres, Vice President of Tax Technology VAT Operations at DMA:

"Enablement resources and best practices from Vertex have been instrumental in our success. Certifications strengthened our product understanding and improved internal training. Our team now leads implementations more independently, escalates less, and earns greater client confidence."

Vertex's enablement strategy exemplifies a high-impact service model that improves operational efficiency, boosts partner autonomy, and drives long-term value. With early indicators showing faster readiness, reduced escalations, and partner praise, and as we introduce NPS and feedback mechanisms, we are positioned to quantify and amplify success across our partner ecosystem.

Challenge or Opportunity: Vertex identified a critical challenge in ensuring consistent, high-quality partner delivery across its growing ecosystem. With increasing reliance on partners to lead implementations, there was a rise in service tickets, delayed timelines, and inconsistent outcomes that impacted customer experience. Additionally, certification adoption lacked structure and strategic alignment, resulting in varied partner readiness.

Innovation and Creativity: Vertex adopted a forward-thinking, data-informed strategy to elevate the partner experience and drive implementation excellence. Leveraging AI-powered natural language processing and clustering algorithms, we analyzed over 200 partner service tickets to identify recurring issues and knowledge gaps. This insight enabled the training of a human-in-the-loop AI model that continuously monitors risk trends, detects emerging competency gaps, and recommends targeted training—ultimately reducing ticket volume and accelerating time-to-value, and replacing static, one size fits all training model with an AI informed, adaptive enablement strategy.

In response to partner feedback and predictive findings, Vertex launched a Product Readiness Webinar Series that prepares partners up to 30 days in advance of every major release. These sessions build partner confidence and, in turn, increase the trust customers place in them. Additionally, we introduced product-specific onboarding

workshops for Alliance Partners, featuring role-based learning plans, implementation checklists, project planning tools, and guided training across installation, activation, user documentation, and release content.

To reinforce skill validation, we developed a tiered certification program aligned to implementation roles and customer success milestones. Each level includes practical exams, CPE credit, and digital credentials to ensure credibility and engagement.

This integrated, insight-led approach redefines scalable partner enablement—transforming training into a strategic driver of implementation quality, partner confidence, and customer loyalty.

Impact and Results:
- 129.4% increase in partner ticket volume since the global expansion launch in March 2025, demonstrating strong partner engagement and adoption across expanded global regions.
- 65.7% reduction in average ticket resolution time (from 29.0 to 9.95 days), demonstrating faster triage and improved partner capability
- Over 650 certifications issued across the partner ecosystem in 13 countries validating partner commitment to competency development.
- AI analysis of 200+ resolved tickets identified five key implementation themes. Heatmaps guided onboarding, documentation, and best practices—creating a real-time feedback loop that informs Enablement planning and scalable partner learning.
- Internal dashboards and workflows now monitor ticket trends, partner engagement, and certification adoption—fueling continuous improvement across Enablement Services

These results validate the program's impact on recurring revenue, customer health, and services scalability.

Customer-Centric Approach: Vertex's certification and enablement strategy is rooted in customer experience. By equipping partners to deliver consistent, high-quality implementations, we reduce time to value, minimize rework, and prevent escalations—core outcomes that matter to our customers. Feedback from customer success teams, post-implementation surveys, and partner retrospectives directly informs updates to onboarding content, documentation, and training flows. For example, based on customer feedback about confusion during go-live, we added an Implementation Readiness module that has since reduced go-live escalations by 28%. Every element— from predictive knowledge gap analysis to rigorous, role-based certification exams—is designed to enhance partner performance and elevate the overall customer journey.

Execution and Implementation: Execution was grounded in scalability, usability, and operational alignment. Programs were deployed using a modern LMS, enablement ticketing workflows, and a dedicated Partner Enablement Website built on Confluence and Refined. This new platform solved a critical challenge: partners previously lacked access to key implementation resources, which were hosted on the customer-facing community. The partner-only site now offers a seamless, permissioned experience—reducing delays and increasing partner self-sufficiency. Internal dashboards and feedback loops allow the team to track performance, prioritize updates, and extend the model to new geographies and product lines. Since launch, the model has already been expanded to North America and is planned to support upcoming product rollouts and partner onboarding initiatives in H2 2025.

Conclusion: Vertex's partner enablement transformation delivers measurable impact through scalable services that drive implementation excellence, accelerate partner readiness, and reduce downstream support. Aligned with TSIA's Partner-Centric Service Model, our data-driven approach has strengthened partner autonomy, improved time-to-value, and enhanced customer outcomes across global regions. As we continue to expand, this repeatable model positions Vertex and its partners to deliver consistent value, deepen customer trust, and achieve sustained success in 2025 and beyond.

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