Deal Registration – Partner-Guideline

1. Purpose of Deal Registration

Diese Richtlinie definiert die Anforderungen, den Ablauf und die Gültigkeit von Deal Registrations (DealRegs) bei Theobald Software. Ziel ist es, die Zusammenarbeit mit Partnern zu fördern, Marktchancen strukturiert zu verfolgen und transparente Zuständigkeiten zu schaffen.

2. Requirements for a DealReg

A DealReg can be requested if:

- It is exclusively New Business; renewals of existing contracts are excluded from Deal Registration.
- The partner has actively developed the customer or qualified a specific project.
- The partner is the first to register the deal.
- All required information in the DealReg form is submitted completely.
- The project is not yet publicly tendered or in an advanced status with another partner.

3. Validity and Extension

- A DealReg is valid for 6 months from approval.
- A one-time extension of 3 months is possible – however, only for active projects with documented progress.
- Extensions must be requested in writing at least 14 days before expiration.

4. Process & Approval Procedure

1. The partner submits the DealReg form.
2. Partner Management checks the completeness and relevance of the submission within 24-48 hours (on business days).
3. Upon positive verification, the deal is officially registered, and the partner receives written confirmation.

In case of conflicts (e.g., duplicate registrations), Partner Management decides based on information quality, timing, and engagement.

5. Exclusivity & Benefits for the Partner

An approved DealReg means:

- Guaranteed best price: The partner receives the best available partner discount for the registered deal.
- No direct offer: During the registration, no offer from Theobald Software will be made directly to the customer
- No price undercutting: No other partner or reseller will be granted a better price for the same deal.
- Vendor protection: The project remains partner-led; there is no direct vendor interference.
- Project exclusivity: No other partner will be supported for the same customer/use case as long as the registration is active.

6. Loss or Revocation of the DealReg

The registration can be revoked if:

- The partner shows no verifiable activities.
- False information was provided in the form.
- The customer actively objects or explicitly prefers another partner.
- The partner violates contractual or ethical guidelines.

7. Data Privacy (GDPR)

The partner undertakes to comply with the provisions of the General Data Protection Regulation (GDPR) when transmitting end-customer data. By submitting the DealReg, the partner confirms that they are entitled to pass on the personal data of the contact person to Theobald Software (e.g., through consent or legitimate interest for project initiation). Theobald Software processes this data exclusively for the purpose of deal validation and project support.

8. Contact & Support

For questions regarding the DealReg or the status:

- E-Mail: partnermanagement@theobald-software.com
- Responsible: Artjom Knaus; Stefan Müller