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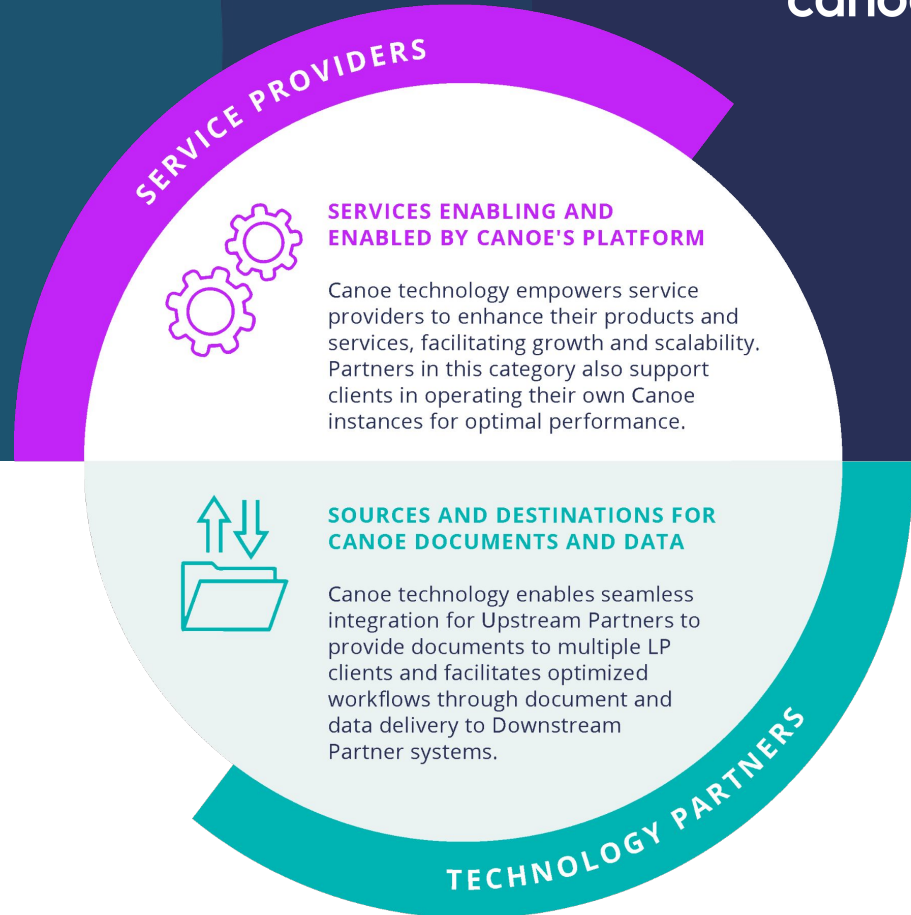
Partner Program

canoe[✓]
CANOEINTELLIGENCE.COM

The Canoe Partner Ecosystem

The Canoe Partner Program creates an ecosystem of technology and service partners that deliver effective integrations and remove points of friction in our clients' workflows. Working closely with our partners, we identify mutual business goals and opportunities, optimize client experiences, and act as trusted consultants, advocates, and advisors.

Establish community, improve connectivity, strengthen relationships.



Why partner with Canoe?

Becoming a member of Canoe's Partner Program is a great way to strengthen the alternative investment community, and also receive the following benefits:



ACCESS TO CANOE'S CLIENT BASE

including 300+ Capital Allocators, Institutional Investors, General Partners, Asset Servicers, and Wealth Managers.



NETWORK WITH 100+ PARTNER FIRMS serving the alternative investment market.



ASSOCIATE YOUR BUSINESS WITH CANOE

an industry-leading brand, synonymous with tech-forward innovation, efficiency, and alternative investment expertise.

COLLABORATE ON INTEGRATIONS that accelerate mutual client workflows and help them scale businesses.



DIFFERENTIATE YOUR BUSINESS from your competitors with Canoe training and certification.



Benefits for mutual clients

Canoe's Partner Program offers a great set of resources to solve your business' needs. Explore the benefits of our Partner solutions:



CONSULTATIVE APPROACH

Your Canoe representative can provide information about partner solutions and help make introductions to the right connections.



PROVEN COMPATIBILITY WITH CANOE

Partner Program members already provide services and solutions to other Canoe clients, reducing your implementation time and speeding time to value.



SYSTEM INTEGRATIONS & ENHANCEMENTS

Canoe collaborates with its partners to continually optimize system integrations and further streamline client workflows.



COORDINATED CLIENT EXPERIENCE

Canoe works closely with its partners to align on goals, priorities, and process to ensure the best mutual client experience.

Partner Tier Criteria by Member Type

As you become more engaged within Canoe's ecosystem, you can advance through the tiers and unlock additional benefits.

MEMBER TYPE	Partner	Preferred Partner	Premier Partner
PRO Providing outsourced services or technology for Canoe Pro/Pro Tech product offerings	n/a	n/a	All Pro Partners receive the highest level of benefits
CHANNEL Offering commercial incentives for referred clients and partners to drive pipeline growth	Have at least 1 mutual client or provides a minimum of 5 qualified leads to Canoe, annually	Have at least 1 mutual client and provides a minimum of 10 qualified leads to Canoe, annually	Have at least 5 mutual clients and provides a minimum of 20 qualified leads to Canoe, annually
INTEGRATION Facilitating document and data integrations to streamline and enable mutual client workflows	<ul style="list-style-type: none"> Have at least 1 mutual client Supports standard inbound data extracts from Canoe 	<ul style="list-style-type: none"> Have at least 10 mutual clients Supports standard inbound data extracts from Canoe 	<ul style="list-style-type: none"> Have at least 20 mutual clients, or Supports semi- or fully-automated document/data integration with Canoe
NETWORK Focused on continually improving shared client experiences and strengthening the overall network	All Network Partners receive basic benefits	n/a	n/a

Member Benefits by Partner Tier

Premier Partner

Preferred Partner

Partner

Resources and Community			
Partner Resources Hub	✓	✓	✓
Monthly Product Release Notes	✓	✓	✓
Quarterly Product Roadmap Updates	✓	✓	✓
Product Update Webinars	✓	✓	✓
Canoe Academy Training	✓	✓	✓
Included in Partner Program Member events	✓	✓	✓
Included in Partner + Client events		✓	✓
Canoe Partner Certification Program + annual recertification		✓	✓
Canoe Sandbox environment for training + Knowledge Base (at Canoe's discretion)			✓
Relationship Management			
Dedicated Channel/Partner Relationship Manager		✓	✓
Quarterly Business Review w/ Channel/Partner RM		✓	✓
Executive Alignment w/ members of Canoe's Commercial Leadership Team			✓
Commercial Benefits			
Account Mapping w/ Crossbeam (firm names shared)	✓	✓	✓
Canoe Spotlight presentation for Partner's GTM team	✓	✓	✓
Partner Spotlight presentation for Canoe GTM team		✓	✓
Monthly Pipeline Review w/ Channel/Partner RM		✓	✓
Sales Comm Slack Channel w/ Canoe GTM team			✓

Marketing Benefits			
Access to Canoe brand assets and marketing templates	✓	✓	✓
New Partner Press Release	✓	✓	✓
Can list Canoe as a partner on Partner's website	✓	✓	✓
Canoe Partners webpage logo/listing	✓	✓	✓
Canoe Partners webpage enhanced profile w/ linked content		✓	✓
Case Study featuring mutual client success story		✓	✓
Blog, webinar, or other thought leadership co-marketing		✓	✓
Canoe creates co-branded marketing collateral			✓
Technical Benefits (Integration Partners Only)			
Open API documentation + API Best Practices documentation	✓	✓	✓
Integration Design Consultation with Canoe Product team resource	✓	✓	✓
Integration Project Management support		✓	✓
Canoe Sandbox environment for integration testing + Knowledge Base		✓	✓
In-app logo panel for data integrations		✓	✓
Integration User Guide in Knowledge Base		✓	✓
Tech Comm Slack Channel w/ Canoe Product team			✓
Pro Benefits (Canoe Pro Partners Only)			
Pro Partner Resources Hub			✓
Canoe Implementation Training			✓

CHECKLIST

Partner prerequisites

- ❑ **Product Market Fit**
Partner offers complementary services or solutions within the same market segments / client profiles as Canoe
- ❑ **Mutual Clients / Prospects**
Partner and Canoe have at least one common client and/or partner actively supports the growth of our mutual client roster
- ❑ **Proven Canoe Compatibility / Expertise**
Partner has experience supporting Canoe clients' workflows within Canoe and/or through other integrated platforms
- ❑ **Shared Relationship Goals**
Partner and Canoe are aligned on mutually beneficial goals to support commercial expansion and/or technical integration
- ❑ **Partnership Agreement(s)**
Partner will execute the appropriate documents to support and govern its Pro, Channel, Integration, or Network Partner relationship with Canoe

CHECKLIST

Next steps

- ❑ **Partnership agreement** Canoe will provide the appropriate agreement depending on the partner type
- ❑ **New partner questionnaire** Partner provides details about its solution and ideal client profile
- ❑ **Account mapping** Canoe works with partner to identify mutual clients and prospects via [Crossbeam](#)
- ❑ **New partner announcement** Social media post and/or press release about Partner's participation
- ❑ **Partner Program website** Logo and profile added to [canoeintelligence.com/partners](#) (redesigned page coming soon)
- ❑ **Canoe and Partner Spotlights** Overview presentations to educate both parties' Sales and RM teams to be scheduled
- ❑ **Ecosystem Participation** Partner contacts will be added to receive community announcements, newsletters, product updates, and event invitations



Keep in touch

Let's explore partnership opportunities together.

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