

Partner Onboarding & Enablement Roadmap

From signup to first commission, by tier. Program terms are governed by the Empower Partner Agreement v2026.10, Schedule 1 and the Program Guide. **Client wins. Partner wins. AccuSights wins.**

Onboarding at a glance

	TIER 1 — REFERRER	TIER 2 — MSP PARTNER	TIER 3 — PLATFORM PARTNER
Time to live link	5 minutes	5 minutes (link) · 2 business days (countersignature)	Same as Tier 2
Required training	None (20-minute orientation optional)	2-hour MSP certification, 1 person, within 60 days	1-day Platform certification before first engagement
Named contacts	—	Partner manager (partner side); partner contact (AccuSights side)	Practice lead (partner side); alliance contact (AccuSights side)
First-30-day target	3 link placements, 1 referral registered	Kickoff call, certification started, 2 deal registrations	Kickoff, certification complete, first engagement scoped
First-90-day target	First tagged client purchase	First tagged client purchase; first co-sell or white-label order	First two engagements through QA; 3 active tenants
Review cadence	Quarterly webinar	Quarterly check-in / QBR; Level review every January	Quarterly QBR; Level review every January

Portal onboarding checklist · all tiers, at portalaccusights.com

IMMEDIATELY AT SIGNUP

Live in 5 minutes

- ☐ Application submitted at accusights.com/empower (name, email, company, website, firm type, tier)
- ☐ Sanctions / denied-party screen passed (automatic)
- ☐ Agreement accepted: Tier 1 clickwrap; Tier 2/3 in-site e-signature
- ☐ Unique Link (accusights.com/r/yourcode), QR code and UTM builder issued
- ☐ Dashboard live: clicks, signups, quotes, closed, MRR, commission accrued / paid, per-client status and Client Year, Referred-Only / Managed status, weekly CSV export
- ☐ Welcome email with kit link, Program Guide, Schedule 1, disclosure templates

WITHIN THE FIRST WEEK

Ready to be paid

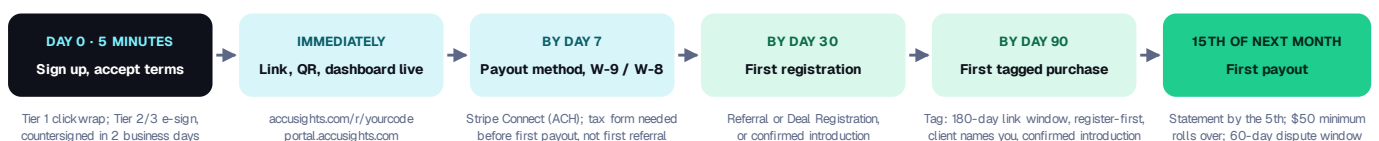
- ☐ Profile complete: logo, one-line description, territory, verticals served
- ☐ Payout method added (Stripe Connect, ACH)
- ☐ W-9 or W-8BEN / W-8BEN-E uploaded (required before first payout, not before first referral)
- ☐ Regulated-professional flag set (CPA / attorney / broker): unlocks disclosure templates and the Client Credit Option workflow
- ☐ Marketing kit downloaded; disclosure language placed on at least one owned channel

TIER 2 / 3 ADDITIONS

Paper, people, proof

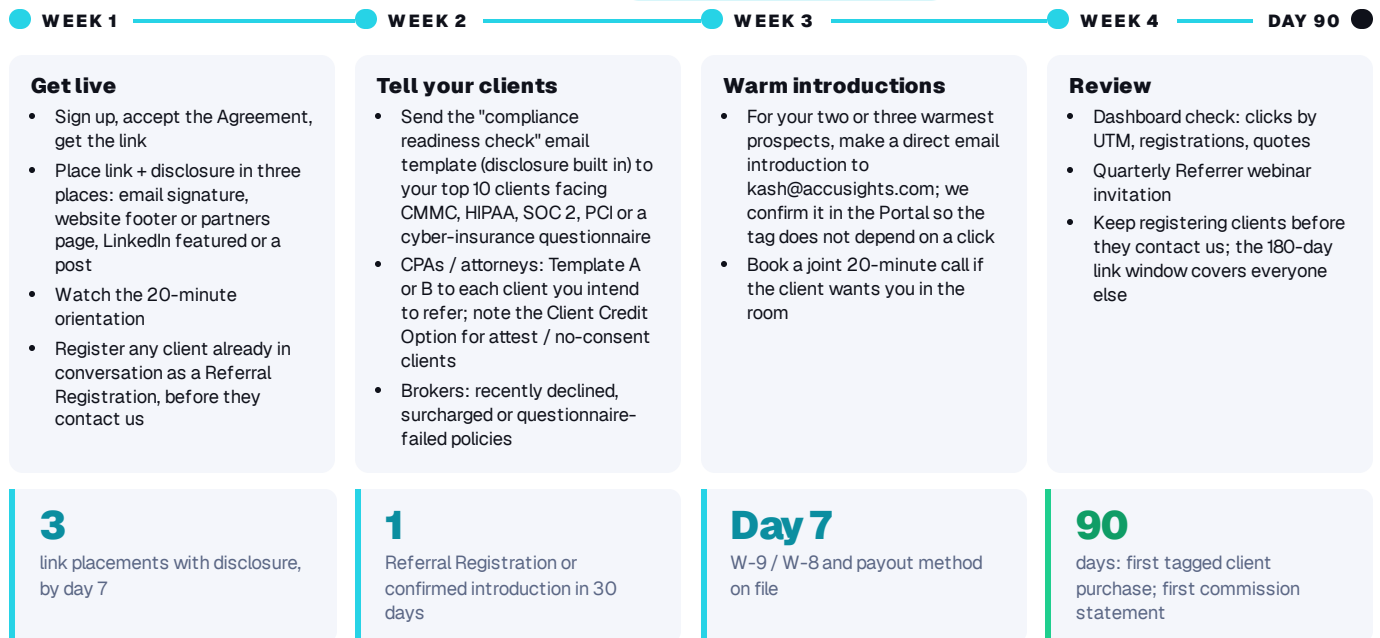
- ☐ AccuSights countersignature received; executed PDF filed
- ☐ Named partner manager / practice lead entered in Portal
- ☐ Certification enrolled
- ☐ NFR / demo tenant requested (optional)
- ☐ Insurance certificate uploaded (Agreement § 21: CGL, tech E&O and cyber liability at not less than \$1,000,000 per claim, plus professional liability)
- ☐ Tier 2 white-label: Model MSP End-User Agreement downloaded; flow-down process confirmed
- ☐ Tier 3: assessor credentials and independence attestation on file

The path every partner walks · from signup to first payout



Tier 1 — Empower Referrer · week by week

15% · 7.5% · 3.75% FOR LIFE



AccuSights owner: partner-marketing automation · support@accusights.com (subject "ATTN: Empower Partner") for questions · Kash for introductions.

Tier 2 — Empower MSP Partner · week by week

30 / 35 / 40% FLAT ON MANAGED CLIENTS



AccuSights owner: partner contact (kickoff, deal-reg support, QBR) · solutions lead (demo, technical questions) · support@accusights.com (Portal).

Tier 3 — Empower Platform Partner · week by week

40 / 45 / 50% FLAT ON IN-PLATFORM DELIVERY



AccuSights owner: alliance contact (kickoff, QA, QBR) · delivery lead (QA reviews, backend support) · product (template loading, roadmap input at 10+ tenants).

First 30 days, by tier · summary of targets

TARGET	TIER 1	TIER 2	TIER 3
Agreement and profile complete	Day 1	Day 2 (countersigned)	Day 2 (countersigned)
Payout method and W-9 / W-8	Day 7	Day 7	Day 7
Disclosure placed on owned channels	3 placements by day 7	3 placements by day 7	Website + proposal template by day 14
Named contact	—	Partner manager, day 1	Practice lead, day 1
Kickoff call	Optional	Day 5	Day 5
Training	Orientation (optional)	Certification started day 14, complete day 60	Certification complete day 14
Pipeline	1 Referral Registration or introduction	2 Deal Registrations	1 engagement registered and scoped
Tenant	—	NFR / demo tenant live	Practice tenant + sandbox engagement complete
First-90-days outcome	First tagged purchase	First tagged purchase + first co-sell / white-label order	Two engagements through QA; 3 active tenants

Certification outlines

Empower Referrer orientation

Tier 1 · optional · ~20 minutes · self-paced video

1. What AccuSights is: platform, Assess, Comply, CMMC Accelerator, AI Governance, Secure Office (Inc.); Protect and vCISO (LLC)
2. What AccuSights is not: not a certifier, not a C3PAO, no pass guarantees; the Readiness Re-Performance Commitment is a re-performance remedy, not a guarantee
3. Spotting a referral: CMMC clause in a contract, HIPAA risk analysis due, SOC 2 request from a customer, cyber-insurance questionnaire, PCI SAQ, board asking for a security posture
4. The four tagging methods and the 180-day window; why Referral Registration should come before the client's first contact
5. The disclosure: where, how, wording
6. Dashboard, statements, payout (Stripe Connect, by the 15th), W-9; how Client Years work (15% in the client's first year, 7.5% in the second, 3.75% from the third for life)
7. CPA / attorney module: Templates A, B, C and the Client Credit Option

Empower MSP certification

Tier 2 · required · ~2 hours · online with quiz · 20 questions, 80% to pass · badge issued and listed in Portal

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|--------|--|
| 25 min | Platform tour. Tenant structure, dashboards, assessments, continuous compliance, evidence, reports; what the client sees |
| 20 min | Three engagement models. Referral vs. co-manage / bundle vs. wholesale / white-label: who contracts, delivers, supports, bills; Referred-Only (Level rate, then half, then a quarter for life) vs. Managed Client (flat Level rate every year); wholesale math; payment independence; how Levels are earned |
| 20 min | Contracts and flow-down. Order Form and Terms of Service; the LLC Protect Services Agreement (response modes, cap acknowledgment); MSP End-User Agreement and third-party-beneficiary flow-down |
| 15 min | Deal registration and tagging. Registering, protection period, extensions, incumbency; the four tag methods; what ends a tag |
| 20 min | Selling compliance. Vertical triggers, pricing conversation, objection handling, what you may and may not say, disclosure |
| 10 min | Support and escalation. L1 / L2 / L3 routing for white-label; direct support for referral / co-sell; security incidents |
| 10 min | Program compliance. No brand bidding, no discounts, no side letters, gift cap, legitimate orders, NFR rules, MDF rules |

Empower Platform certification

Tier 3 · required · ~1 day · live or virtual, hands-on · practical sign-off + 25-question quiz, 80% · badge and "Certified Empower Platform Practitioner" listing · recertification annually with a 60-minute update module (platform changes, framework updates such as CMMC rule changes, HIPAA Security Rule updates)

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|--------|--|---------|---|
| 60 min | Program and platform foundations. Tier 3 economics (40 / 45 / 50% flat on everything you deliver in-platform; referred Protect 30 → 15 → 7.5%; other referred purchases 20 → 10 → 5%; Levels); ownership of deliverables; independence and conflict rules; QA process | 60 min | Report generation and QA. Generating the client-facing report; the QA checklist AccuSights applies to your first two engagements; common defects |
| 60 min | Scoping an engagement. Frameworks and boundaries; evidence sources and integrations; timelines; loading your report template | 30 min | Protect and vCISO handoff. When to introduce monitoring / advisory; the LLC agreement; what you earn (30% in the client's first year, 15% in the second, 7.5% from the third for life) |
| 90 min | Evidence and assessment workflow. Evidence collection, interviews, automated checks; AI-assisted analysis, how to review it, where it is wrong; control mapping across frameworks | 120 min | Practical: sandbox engagement. Deliver a sample engagement end-to-end; reviewed live |
| 60 min | Findings, risk acceptance and remediation. Writing findings; POA&M generation; the Risk Acceptance mechanism; remediation tracking; continuous compliance handoff | | |

Quarterly business review · Tier 2 and 3 · 45–60 minutes · partner manager or practice lead + your AccuSights contact

Elite partners add the annual joint business plan, reviewed at each QBR. Pre-read (Portal export, 3 business days before): tagged clients, status and Client Year; Referred-Only vs. Managed split; Active Tagged Clients, current Level, months in good standing; revenue and commission by month; co-marketing logged; deal registrations open / expiring / closed; MDF balance and expiry; certification status; open tickets; QA results (Tier 3). **Outputs:** updated joint plan (Elite), action list, next-quarter targets.

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|--------------------|---|----------------------|---|
| 1
10 min | Scorecard. Active Tagged Clients vs. last quarter; Managed vs. Referred-Only mix and accounts to re-mark; current Level and distance to the next (Select: 6 months, 5 clients or \$50K trailing-12, one co-marketing activity a quarter; Elite: 12 months, 15 clients or \$150K, joint business plan, two activities a quarter, one case study a year); commission trend; churn; tag disputes. | 2
15 min | Pipeline. Open deal registrations and next steps; registrations expiring in 30 days (extend or release); AccuSights-sourced accounts assigned; co-sell requests for next quarter. |
| 3
10 min | Delivery and quality. Tier 2: white-label support tickets, end-client flow-down, Protect agreements in place. Tier 3: QA findings, cycle time per engagement, AI-review issues, template requests, independence check on new clients. | 4
10 min | Marketing and MDF. Last quarter's MDF activities and results; this quarter's proposal; balance expiring; marketing approvals pending; disclosure spot-check results. |
| 5
5 min | Enablement. Certification status and recertification dates; new playbooks; product and regulatory updates worth taking to clients. | 6-7
10 min | Program, relationship, actions. Level review (every January or on request; promotion next month; demotion only after 90 days' notice and cure); joint business plan update (Elite); feedback, escalations; actions with owner and due date in the Portal |

Support and escalation · who to call, and how fast AccuSights responds

TIER 1 · REFERRER

Automation first, Kash for introductions

- Questions: support@accusights.com, subject "ATTN: Empower Partner"
- Warm introductions: email kash@accusights.com; confirmed in the Portal within 5 business days
- Tag conflicts: decided within 5 business days; 30-day dispute window
- Statements by the 5th; payout by the 15th; 60-day statement dispute window

TIER 2 · MSP PARTNER

Partner contact, solutions lead, support

- Partner contact: kickoff, deal-registration support, QBR
- Solutions lead: demo, technical questions, NFR tenant
- Deal registrations approved within 2 business days; 120-day protection, one 60-day extension
- White-label: L1 by you, L2 / L3 by AccuSights behind your brand; referral / co-sell clients get direct support
- Security incidents: route immediately to support@accusights.com and your partner contact

TIER 3 · PLATFORM PARTNER

Alliance contact, delivery lead, product

- Alliance contact: kickoff, QA checkpoints, QBR
- Delivery lead: QA reviews (5 business days for acceptance #1 and #2), backend delivery support
- Product: report-template loading; roadmap input at 10+ tenants
- Marketing approvals within 5 business days; MDF approvals proposal-based with proof of performance

Service levels that apply to every partner

2 days

business days to approve a deal registration and to countersign Tier 2 / 3 agreements

5 days

business days to resolve a tag conflict, confirm an introduction, or approve marketing

15th

payout by the 15th of the following month, Stripe Connect ACH, \$50 minimum rolls over

30 days

notice before any Program Guide change; rate reductions never touch existing tags

Who owns what inside AccuSights · so you know who is working your request

ACTIVITY	RESPONSIBLE (CONSULTED)
Signup flow, kit, automation · marketing approvals (5 business days) · disclosure and brand monitoring · MDF approvals and reimbursement	Partner marketing (partner contact; legal on approvals and monitoring; finance on MDF)
Countersignature (Tier 2/3) · kickoff and QBRs · deal-registration approvals (2 business days) · tag conflicts (5 business days)	Partner contact / alliance contact (legal accountable for countersignature; solutions consulted on kickoff and QBRs)
Certification delivery · QA acceptance (Tier 3)	Solutions / delivery (partner marketing and partner contact consulted)
Monthly statements and payouts (by the 15th) · W-9 / W-8 and 1099-NEC	Finance (partner contact consulted on statements; legal on tax forms)
Program Guide changes (30-day notice)	Legal (partner marketing, partner contact and finance consulted)

Contacts

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Partner support

support@accusights.com · subject "ATTN: Empower Partner"
Portal: portal.accusights.com

Program

accusights.com/empower · Program Guide, Schedule 1 and disclosure templates in the Portal
Your link: accusights.com/r/yourcode

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