Advisor Partner Referral Process for Ostra

As a valued business partner, referring clients to Ostra can open up great opportunities for both parties. To ensure the referral process is seamless and aligned with Ostra's Ideal Client Profile (ICP), please follow the steps outlined below:

Step 1: Prequalify the Client

Before referring a client to Ostra, ensure that they meet Ostra's Ideal Client Profile (ICP). This will help ensure the client is a good fit for Ostra's services and maximize the likelihood of a successful engagement.

Criteria for Ostra's Ideal Client Profile (ICP) include:

- **Industry:** Most industries can benefit from Ostra services; however, the team and solution are optimized for manufacturing, healthcare, education, financial services, retail, legal, and professional services, energy and utilities, technology and SaaS organizations.
    - More details can be found in the form of case studies in the **Partner Portal** under Sales Resources
- **Business Size:** The company should meet certain size thresholds, between 50 and 1,000 endpoints.
- **Security Needs:** Client should require cybersecurity services, such as threat detection, compliance support, or data protection for compliance needs, cybersecurity insurance, or due to having sensitive data.
- **Geography:** Client must be located within the United States.

Prequalification Steps:

1. Discuss the client's business needs and verify they align with Ostra's ICP.
2. Assess their cybersecurity requirements and whether Ostra's offerings can address them.
3. Confirm their readiness to engage in a discovery conversation.

If the client meets Ostra's ICP, proceed to the next step.

Step 2: Register the Deal in Ostra's Partner Portal

Once you've confirmed that the client is a good fit for Ostra, you need to officially register the deal in the Ostra Partner Portal to ensure operational readiness, accurate compensation, and a seamless handoff process.

Instructions for Deal Registration:
1. **Log into the Ostra Partner Portal.**
2. Navigate to the **'Deal Registration'** section.
3. Enter relevant client information, including:
   a. **Company Name**
   b. **Company Contact (first & last name, email, etc)**
   c. **Estimated Endpoints**
   d. **Scope of Services Required**
   e. **Additional notes for context**
4. Submit the registration for review.

Once registered, Ostra's team will review the submission and reach out if additional details are needed.

Step 3: Schedule a Discovery Call

To ensure a smooth and productive introduction, Ostra requires a joint video conference between you, your client, and an Ostra representative. This allows for clear communication, deeper engagement, and a better understanding of how Ostra can meet the client's needs.

Instructions to Schedule the Video Conference:
1. **Utilize the calendar link** provided by Ostra (you'll find this link in your partner portal).
2. Coordinate with your client to find a suitable time for the meeting.
3. Book a time that works for all parties—ensure the meeting is scheduled at least 24–48 hours in advance.
4. Confirm the meeting details and include all pertinent parties from the Client are included. Hubspot will automatically send the invites.

Meeting Agenda:
- Brief introductions and roles.
- Overview of the client's cybersecurity needs and pain points.
- Discussion of Ostra's solutions and how they align with the client's goals.
- Next steps and potential follow-up actions.

Step 4: Attend the Video Conference and Facilitate the Discussion

As the referring partner, your role during the video conference is to act as a trusted intermediary. Help facilitate the conversation by:

- Ensuring the client feels comfortable and engaged.
- Providing context around the client's needs and why they are seeking cybersecurity solutions.
- Supporting Ostra's representative(s) in explaining the value of Ostra's services.

After the Video Conference:

- Make sure the client has clear next steps.
- Ostra will follow up with any additional information or proposals.
- You will be updated on the deal's progress via email or your regular Ostra meeting.

Step 5: Follow-Up and Support

Following the video conference, it's essential to maintain communication with both the client and Ostra's team.

1. **Stay in touch with the client** to address any questions or concerns.
2. **Continue to have open communication with Ostra Team** for updates on the deal status.
3. **Assist with any additional needs** the client may have as they move through the sales or implementation stages.

This ongoing support can help ensure a smooth transition to Ostra's services and a successful long-term relationship.

Conclusion

By following these steps—prequalifying the client, registering the deal, scheduling the meeting, and supporting the client—you are ensuring a streamlined process that benefits both your business and Ostra. We value your partnership and look forward to building successful relationships together.