Elevale®

PARTNER BROCHURE

PARTNER PROGRAMME

YOUR BRAND.
OUR TECHNOLOGY.

Deliver a full-featured strategic execution platform under your own identity: strategy, OKRs, live KPIs, and reporting in one system your clients actually use.

elevale.app/partner-programme

For agencies, consultants, coaches & advisers

THE PROGRAMME

02

STRATEGIC EXECUTION, SOLD AS YOURS

You already advise, coach, and deliver for clients. Elevale turns that expertise into a platform offer: rebrand a complete command centre for strategy, OKRs, and live KPIs as your own product. You stay front and centre with the relationship. Elevale powers everything behind the scenes.

White-label from day one

Your logo, your colours, your domain. No Elevale branding anywhere in the client experience.

Commercial freedom

Position, package, and price the platform your way, with full portfolio visibility of cost, revenue, and profit.

One partner login

Every client gets their own workspace. You run the whole portfolio from a single partner view.

AT A GLANCE Live in under an hour • No development required • Enterprise-grade security built in

PARTNER FIT

BUILT FOR PARTNERS WHO ALREADY DELIVER

03

The Partner Programme is built for organisations that already advise, coach, or deliver for clients, including:

Marketing & creative agencies

Run client strategy, reporting, and delivery from one system, with live dashboards and OKRs your clients can see between engagements.

Management consultants & business advisers

Support owners with live dashboards, planning frameworks, and execution discipline, without rebuilding tooling for every engagement.

Business coaches

Give clients a structured home for goals, accountability, and progress between sessions, so coaching outcomes stay visible and measurable.

Accountants & financial advisers

Give clients strategic clarity alongside the numbers, with structured planning, KPI visibility, and board-ready reporting in one branded workspace.

PARTNER VALUE

04

WHY PARTNERS CHOOSE ELEVALE

Build a differentiated offer, retain clients longer, and grow recurring revenue, without rebuilding tooling for every engagement.

01

Differentiated offer

Move beyond slide decks, PDFs, and spreadsheets to a living strategic system your clients keep using.

02

Client retention

Clients stay in your ecosystem when planning and data live in one place between engagements.

03

Recurring revenue

Build partner income aligned to client growth, not one-off project fees alone.

04

Faster delivery

Reuse proven OKR, KPI, and reporting patterns across every engagement you run.

05

Your brand, front and centre

Clients experience the platform entirely under your identity. You own the relationship while Elevale powers everything behind the scenes.

06

Stay on the front foot

AI is moving fast, and traditional reporting and strategy are being left behind. Offer live execution and AI guidance so your clients pick up the pace, and your practice stays ahead.

WAYS TO PARTNER

05

TWO WAYS TO RUN THE PARTNERSHIP

There is no single way to be a partner. Some build a software product; others build deeper client relationships. The platform supports both, and most partners blend the two.

YOUR PRODUCT

The white-label partner

Offer the platform as your own product. Your brand, your pricing, your billing. Clients buy software from you, and Elevale stays invisible behind the scenes.

- Your logo, colours, and domain across every workspace
- Your prices and markup on every seat
- Clients experience one product: yours

YOUR PARTNERSHIP

The embedded adviser

For consultants and coaches who want a close, ongoing connection with clients. Communication, information, and strategy live in one shared place. Your guidance connects directly to their OKRs, KPIs, and day-to-day execution, so the engagement never goes quiet between sessions.

- You sit inside the workspace as the named advisor
- Shared chat, documents, and live KPIs between sessions
- One strategy linking your advice to their execution

Most partners blend both: offer the platform broadly, and embed closely where the relationship warrants it.

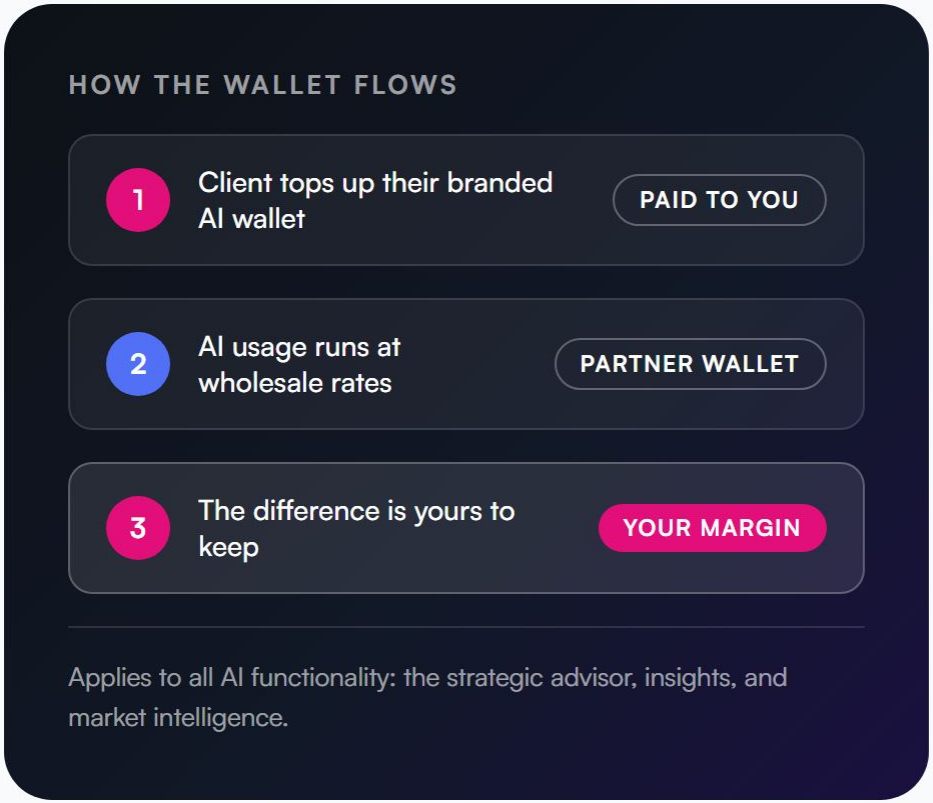
THE AI WALLET

YOUR MARKUP ON EVERY AI INTERACTION

Every client workspace runs its own AI wallet, presented under your brand. When a client tops up, the payment goes directly to you, not to Elevale. As the workspace uses AI, usage is drawn from your separate partner wallet at wholesale rates.

You control the markup between the two, so fees from all AI functionality flow through you: every advisor conversation, every AI-assisted plan, every automated insight earns your margin.

- You set and change the markup at any time
- Client top-ups are paid directly to you
- Margin on every AI feature your clients use

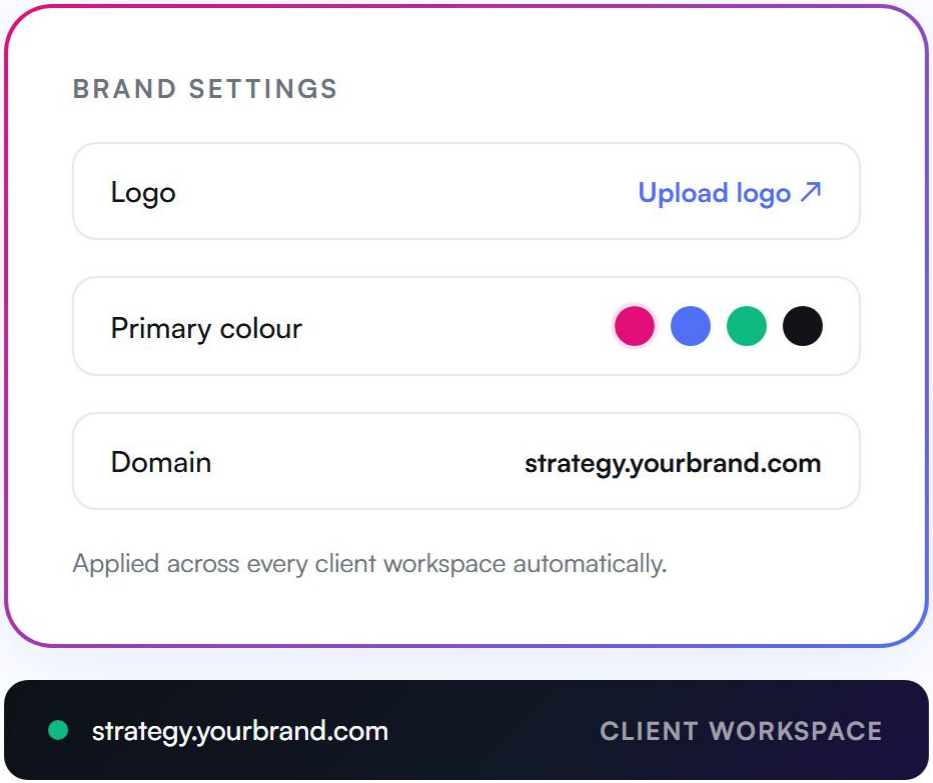


YOUR BRAND

EVERYTHING BUILT UNDER YOUR BRANDING

Clients see your identity, not ours. Upload your logo, set your primary colour, and configure your domain. Every login, workspace, and dashboard is presented as your product, with no Elevale branding in the client experience.

White-label is built in from day one. You stay front and centre with the relationship while Elevale powers the platform behind the scenes.

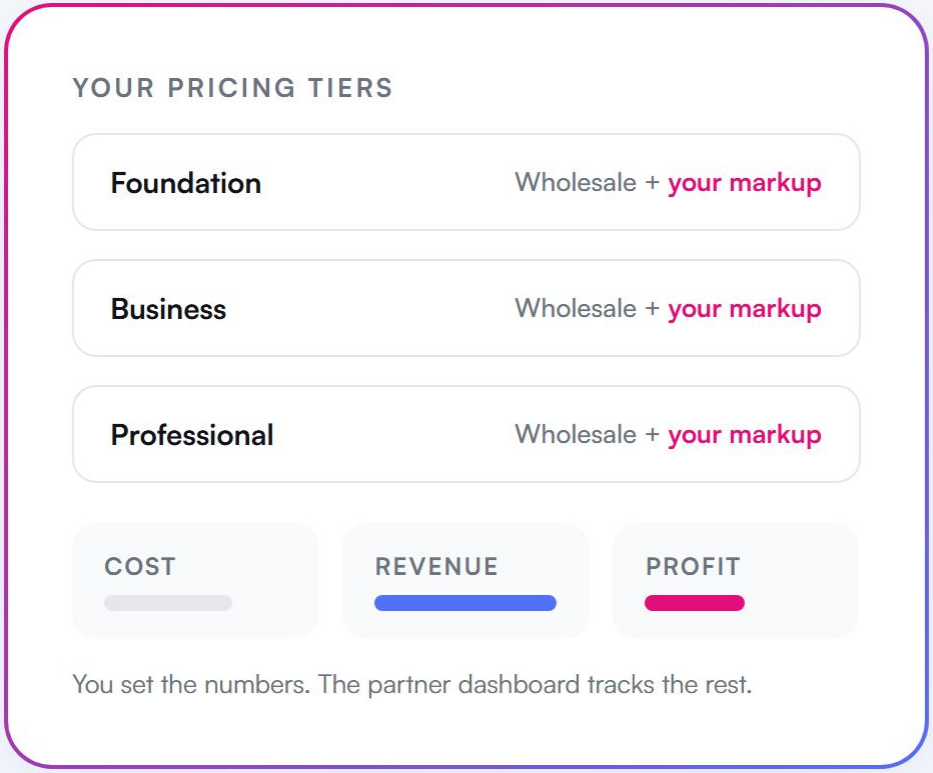


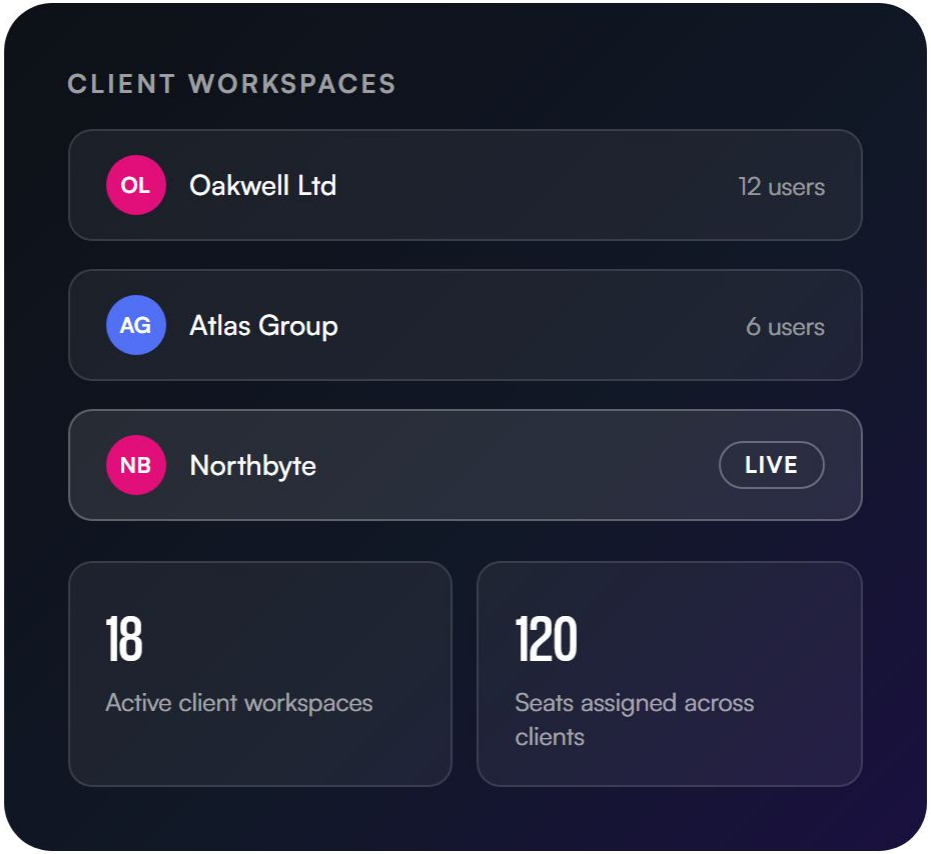
COMMERCIAL FREEDOM

BUILT AROUND YOUR BUSINESS MODEL

Set your own markup across the Foundation, Business, and Professional tiers, with different clients on different plans and seat counts, all rolling up into one portfolio view of cost, revenue, and profit.

Set markup on AI wallet top-ups too: clients pay you directly while your partner wallet covers usage, so you keep the full margin. You introduce the platform as part of your methodology, not a disconnected tool stack.





MULTI-CLIENT DELIVERY

RUN YOUR WHOLE PORTFOLIO FROM ONE LOGIN

Add a client by provisioning a workspace with billing and tier assigned from the start. Onboard their users under your brand, then switch between client environments instantly, with no separate admin tools or logins for each engagement.

Your partner dashboard shows what is live across the portfolio: active subscriptions, seat counts, and workspace status at a glance. As you take on more clients, admin stays centralised instead of spreading across spreadsheets and one-off setups.

WORKSPACE CONTROLS

10

ACCESS, ADVICE, AND AI UNDER YOUR NAME

Every client workspace runs on your logo, colours, and domain. You control what clients can use, who advises them, and how AI is billed, all inside the branded experience they already trust.

Features you offer to every client

Choose which modules are available in your partner offer: OKRs, dashboards, wiki, process map, AI, and more. Define your package once and update it for every client when your offer changes.

Your advisor, or your AI advisor

Assign a strategic advisor from your team for hands-on guidance, or switch the workspace to the built-in AI Strategic Advisor. The AI runs white-label too: your name on the advisor, Elevale's technology underneath.

AI wallet with your markup

Each client workspace has its own AI wallet under your brand. Client top-ups go directly to you, while your separate partner wallet is deducted as AI is used. You set the markup and keep the full margin.

TWO BILLING MODELS, ONE PLATFORM

Choose the commercial setup that fits how you sell and support clients. The same tiers apply. The difference is how billing and seat management run behind the scenes. You can mix both across different clients.

CONNECT AND GO

Stripe Connect

1. Connect your Stripe account via Stripe Connect
2. Sync products and prices from Stripe automatically
3. Clients subscribe and pay through your checkout flow
4. Elevale's platform fee is deducted from each payment, so you receive your margin immediately

Best for: partners who want automated client billing with instant margin on every payment.

SEATS YOU CONTROL

Manual licenses

1. Purchase licenses for the seats you need
2. Assign and distribute seats across client workspaces from your partner admin
3. Bill clients externally using your own invoice or contract process

Best for: relationships where you manage billing offline and distribute seats directly.

ONBOARDING

FROM APPLICATION TO FIRST CLIENT IN FIVE STEPS

No development, no technical setup. Most partners are live within an hour, with onboarding support to match your client model.

1

Apply

Apply online in minutes. No contract negotiation to get started.

2

Brand

Upload your logo, set your primary colour, and configure your domain.

3

Pricing

Choose your billing model and set your markup per tier.

4

First client

Provision their workspace with tier, seats, and billing assigned from the start.

5

Go live

Onboard client users under your brand. Most partners are live within an hour.

Apply → configure → live: typically under an hour, end to end.

GOVERNANCE

TRUST AND SECURITY

Each client workspace is a separate environment with its own users, data, and role-based access. Nothing crosses between clients unless you choose to share it.

Your clients get enterprise-grade security without you building that infrastructure yourself.

elevale.app/trust

COMMON QUESTIONS

PARTNER FAQ

How long does onboarding take?

Most partners are live within an hour. Configure your brand settings, set your pricing, and create your first client workspace, with no development required.

Can I white-label the platform?

Yes. Upload your logo, set your primary colour, and configure a custom domain so clients experience the platform entirely under your brand.

Is client data isolated between workspaces?

Yes. Users, data, and permissions stay scoped to each client workspace, with role-based access controlling who can see and change what.

Can I control which features my clients can access?

Yes. From your partner dashboard you choose which modules are included in your offer: OKRs, dashboards, wiki, process map, and AI.

Can clients use my team's advisor or the AI advisor?

Yes. For each workspace, assign an advisor from your team or switch to the AI Strategic Advisor, running under your name, on Elevale's technology.

START PARTNERING

READY TO GROW UNDER YOUR BRAND?

Get your first workspace free under your brand. Set your pricing and scale advisory services with ease on a proven framework, then add client workspaces when you are ready.

Start your partner account →

- ✓ Live in under an hour
- ✓ Your margins, your prices
- ✓ First workspace free

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