

# Bold Partner Playbook

## Welcome to the Bold Partnership

At Bold, we believe that partnership is the key to mutual success. This Playbook is your guide to building a stronger, more impactful relationship with us. By understanding our brand, values, and differentiators, you'll be equipped to deliver exceptional payment solutions to your clients while growing your own business.

## Understanding the Bold Brand

Bold's brand isn't just about logos and colors; it's a reflection of our values, our approach to partnerships, and our commitment to excellence in the payments industry. This guide will help you understand and embody the Bold brand, fostering stronger collaborations and ultimately driving success for both your business and ours.

### Our Core Values:

Bold's core values guide our every action and decision, fostering a culture that empowers both our team and our partners:

- **We Are All In:** We're a passionate and dedicated team, committed to excellence and driven to achieve success together. We embrace challenges with a creative, problem-solving mindset.
- **We Are Human:** We believe in genuine connections and support each other through both triumphs and challenges. We value authenticity and foster an inclusive environment where everyone feels empowered to be their true selves.
- **We Dare to Be Different:** We're innovators, always pushing boundaries and seeking new solutions. We prioritize a people-first mentality, putting our partners and team members at the heart of everything we do.

These values are the foundation of our partnership with you. Together, we'll create a positive impact and achieve lasting success.

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## Embodying the Bold Brand:

As a Bold partner, you become an extension of our brand. By embodying our core values, you strengthen our shared mission and create a positive experience for your clients. Here are some ways to align yourself with the Bold brand:

- **Communication:** Be clear, concise, and professional in all your interactions. Demonstrate your expertise while remaining approachable and friendly.
- **Problem-Solving:** Adopt a proactive and solution-oriented approach when addressing challenges. Be resourceful and willing to explore creative solutions.
- **Collaboration:** Work closely with Bold's team and fellow partners to achieve shared goals. Share your insights, ask for help when needed, and celebrate successes together.
- **Commitment:** Dedicate yourself to providing exceptional service to your clients. Go above and beyond to meet their needs and exceed their expectations.

## Examples of Bold in Action:

- **Partner Communication:** When onboarding a new merchant, a Bold partner explains the integration process step-by-step, anticipating and addressing any potential questions or concerns. They remain patient and supportive throughout the process.
- **Problem Resolution:** When a merchant encounters an issue, a Bold partner takes ownership of the problem and works diligently to find a resolution. They communicate clearly with the merchant and Bold's support team, ensuring that the issue is resolved quickly and efficiently.
- **Seamless Collaboration:** A Bold partner is developing a new software integration. They collaborate closely with Bold's technical team, receiving prompt and insightful guidance on best practices and troubleshooting potential issues. This collaborative effort ensures a smooth and efficient integration process, resulting in a high-quality solution for the partner's clients.

By embracing these values and practices, you'll not only strengthen your partnership with Bold, but also enhance your own reputation as a trusted and reliable provider of payment solutions.

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Even though your clients may not see the Bold brand directly, your actions and interactions as a partner reflect on us. By embodying the Bold brand, you contribute to our collective success and reinforce our commitment to excellence in the payments industry.

## Brand Story: Bold Integrated Payments

### The Genesis: A Spark of Frustration

Bold was born from a simple frustration: a lack of control and transparency in the payments industry. In the early 2000s, our founder was struck by how payments were often shrouded in confusion, leaving businesses feeling powerless. This frustration ignited a passion to create something different.

### A Mission Takes Shape: Empowering Businesses

The mission became clear: empower ISVs and VARs with the tools they need to take control of their payment processing. We wanted to build partnerships based on trust, transparency, and unwavering support. This commitment resonated, and Bold quickly gained a reputation for its dedication to its partners' success.

### The Bold Difference: More Than Just Payments

What sets Bold apart goes beyond just technology. It's the unwavering dedication to our partners. We understand that every business is unique and tailor our solutions to their specific needs. Our Strategic Account Managers (SAMs) are more than just liaisons; they're trusted advisors who work closely with partners to build long-lasting relationships and drive growth.

### Looking to the Future: Embracing Change

The payments industry constantly evolves, and Bold is at the forefront of this change. We're actively exploring new verticals, from veterinarians to chiropractors, recognizing that integrated payments are essential for businesses of all sizes and industries. We're also excited about the potential of AI to revolutionize how businesses operate, and we're committed to incorporating these cutting-edge technologies into our solutions.

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## Our Vision: A Bold Future

Bold envisions a future where payments are seamless, transparent, and empowering for businesses of all sizes. We're committed to leading the charge in this transformation, working hand-in-hand with our partners to build a brighter future together.

## The Bold Advantage: Our Value Propositions

**Take Control of Your Payments:** Bold gives you the tools and transparency to manage your payment processing with confidence. No more hidden fees, no more surprises – just clear, straightforward payments.

**Partner with a Trusted Advisor:** We're not just a payment processor; we're your strategic partner. Our dedicated SAMs are here to support your growth, offering personalized guidance and solutions tailored to your unique needs.

**Fuel Your Growth with Innovation:** Stay ahead of the curve with Bold's cutting-edge technology and integrations. We're constantly innovating to provide you with the latest tools and insights to help your business thrive.

**Experience the Bold Difference:** We believe in partnerships built on trust, transparency, and exceptional service. When you partner with Bold, you gain a dedicated team committed to your success.

## The Bold Difference

Bold stands out as the preferred partner for VARs and ISVs due to:

- **Dedicated Partner Support:** We assign you a dedicated Strategic Account Manager (SAM) who acts as an extension of your team, providing personalized guidance, strategic insights, and proactive solutions to help you maximize your growth potential.
- **Transparent and Profitable Partnerships:** Our Schedule A is designed with fairness and transparency in mind, providing clear and competitive pricing structures. You'll have detailed visibility into interchange rates and other costs, allowing you to optimize your revenue streams and build sustainable profitability.

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- **Cutting-Edge Technology:** We equip you with the latest payment processing technology, including seamless integrations with popular software platforms, advanced security features, and robust reporting capabilities. This empowers you to offer your clients a superior payment experience while streamlining your own operations.
- **Data-Driven Insights:** Our comprehensive reporting tools provide you with in-depth insights into your clients' payment data, enabling you to identify trends, optimize performance, and make data-driven decisions to drive growth.
- **Flexible and Scalable Solutions:** We understand that your client base is diverse and ever-changing. Our flexible and scalable solutions allow you to cater to a wide range of businesses, from small startups to large enterprises, easily and efficiently.

## What This Means for You:

Partnering with Bold means more than adding a payment solution to your portfolio. It means gaining a strategic ally who is invested in your success and provides you with the tools, resources, and expertise to elevate your business to new heights.