



# Reseller Frequently Asked Questions

## 1. Who are you and how do I know I can recommend you to my customers?

CalendarRules was spun-off of OpenText, who had acquired Hummingbird, who had acquired LegalKEY Technologies. It was formed in 2007 by Scott Davis, a CA licensed attorney with over 20 years' experience in law office automation (feel free to contact Scott directly with questions at [sdavis@calendarrules.com](mailto:sdavis@calendarrules.com), or (925) 939-8991).

CalendarRules currently provides rules subscriptions to hundreds of law firms and agencies, through numerous Docket\Calendar and Case Management systems. Law firm subscribers range in size from some of the largest firms in the world (thousands of lawyers) subscribing to everything offered, to solo practitioners who do their own docketing in one or two courts in an Outlook calendar.

Our goal is to keep law firm subscribers for at least five years of recurring renewals, hopefully longer. In order to do this, we have to focus on customer satisfaction and retention. We do this by focusing on two things: rules accuracy and customer responsiveness.

## 2. Do you share subscription revenue with resellers?

Yes, we offer a Joint Sales and Support revenue sharing option. We strongly believe that working together we can build stronger relationships with subscribers, and retain them longer.

**Joint Sales and Support:** We work together to propose and deliver subscriptions and secure renewals each year. We support you as the primary face for the customer for anything other than substantive rules questions, and we share 15% of net subscription revenue for the life of the subscription, as long as you stay involved with the account, and they renew.

## 3. What other services can I sell around subscriptions?

Our focus is on building, updating, and delivering court rule subscriptions. We are not interested in providing billable support, training, consulting, and related services. If you have resources which provide these types of services, adding rules related services is fairly seamless, and we can help you do so.

## 4. Where do you offer rules?

We currently offer rules in all 50 states and several territories. We will provide you with a complete list once we have an agreement in place.

## 5. How often do you update the rules?

Building and monitoring court rules is our core business. We use a combination of proprietary technology and legal staff to build and maintain our rule sets. Because CalendarRules is cloud-



based, it can provide updates to customers in real-time, without any interaction required by end users. The frequency of updates is entirely controlled by the courts or agencies that make the rules. Generally, we update the rules on the first of every month, but also as needed.

Courts generally announce updates in two ways:

Many updates are published for comment, with a scheduled effective date. We make these updates in our staging environment and release them to production on the effective date. Thereafter, any subscriber to that court is automatically in compliance with the new rules.

Sometimes a court will publish rule changes with an immediate or imminent effective date. CalendarRules is positioned to make these changes effective immediately so the end user does not have to apply any updates. As soon as we update the production server, all subscribers are automatically up-to-date.

## 6. What if my customer wants rules not in your list of available rules, and how much do you charge to build new rules?

As long as the customer request is for a rule set which is reasonably likely to be needed by other potential subscribers (not too custom or esoteric) we do not charge anything beyond the annual subscription amount to build the rule set.

We generally deliver new rules on the first of each month, with rules updates. How long it takes to build and deliver new rules depends on the nature of the rule set (how many triggers and events, and how complex), and when it is requested. For example, a Federal Judge's local rules might take a ½ day, but a state code of civil procedure might take a few weeks.

## 7. How do we proceed?

First we need to get a Joint Sales and Support reseller agreement in place. Then we need to identify your customers to make sure we don't have any conflicts, put together subscription proposals, and verify rule sets needed to move forward.

Your primary contact at CalendarRules is Stacy Saliman ([stacy@calendarrules.com](mailto:stacy@calendarrules.com)). To get started, please send Stacy an email with your contact details, a signed reseller agreement, and any questions. We will then sign and return the reseller agreement and get you started!