

LICENSED PARTNERS

Refer the work, keep the line clean

For consultants and advisers who prepare organisations for assessment and want a route into the Westmark schemes that leaves their own advisory work at arm's length.

THE ARRANGEMENT

You prepare them. Westmark judges them. The two never meet.

Preparing an organisation for assessment is proper work, and Westmark does not do it. Deciding whether that organisation meets the standard is Westmark's work, and a partner does not do it.

That separation is what lets you recommend a scheme to a client without acquiring a conflict, and it is written into the Licensed Partner Agreement rather than left to good intentions. It is also enforced by the hub: where a partner has advised an organisation, no assessor connected with that partner can be assigned to assess it.

1 You record the referral

The organisation's details and the scheme, entered in the hub. It takes a couple of minutes and it timestamps your introduction.

2 Westmark contracts with them directly

Quotation and Assessment Agreement are issued to the organisation and accepted by them. You carry no liability for the assessment and take no part in it.

3 The assessment runs

You see that it is running and where it has reached. You do not see findings, scores or the assessment record, and neither does anyone else outside the engagement.

4 The outcome is issued

You are notified. If there are improvement actions attached, the organisation may well want your help with them, and that work is yours to quote for.

Twelve-month non-circumvention

Every referral is recorded with a twelve-month non-circumvention period. Where an organisation comes to Westmark through you, that introduction is protected for a year, whether or not they proceed straight away.

IN ONE LINE

You keep the client relationship and the preparation work. Westmark takes the judgement, and the liability that goes with it.

VISIBILITY AND MATERIALS

Enough to advise well, and nothing that would compromise the assessment

What a partner can see

OPEN TO YOU	CLOSED TO YOU
The standing of every organisation you referred	Assessment findings
Any status document marked visible to partners	Scores, at requirement or section level
Notice when an outcome is issued	The assessment record and the assessor's notes
The published criteria for both schemes	Anything the organisation has not chosen to share

The closed column is closed for a reason. An assessment that a third party can read over the shoulder of is worth less to the organisation being assessed, and the value of the mark rests on that.

What a partner receives

- **The Brand and Mark Use Rules**, setting out how the Westmark identity may be used in your own material, on your site and in proposals.
- **The partner recruitment pack** and the published criteria for both schemes, so you can tell a client what an assessment will involve before they commit to anything.
- **A hub account** showing your referrals and their standing.
- **Notice when an outcome is issued** to an organisation you referred.

Commissioning, which is a different thing

Where you want an assessment carried out for your own reliance rather than the organisation's, you commission it directly instead of referring it. You are then the commissioning party, the report is addressed to you, and the arrangement above does not apply.

WHY THE CLOSED COLUMN STAYS CLOSED

An organisation will show an assessor things it would not show its adviser, and that is where the value of the mark comes from.

Where a client wants to share findings with you, they can. It is theirs to share and nobody else's to release.

NEXT STEPS

What we need from you, and what follows

Write to us with what your practice does, the sectors you work in, and which scheme your clients are likely to need. The Licensed Partner Agreement and the materials follow.

What the agreement covers

- The referral route and the twelve-month non-circumvention period.
- The separation between advisory work and assessment, and the assessor assignment rule that enforces it.
- Use of the Westmark identity in your own material, under the Brand and Mark Use Rules.
- What you may say about the schemes, and what no partner may claim about them.
- Confidentiality, and the limits of what a partner sees.

What no partner may claim

A partner may say that they refer clients into the Westmark schemes and that they prepare organisations for assessment. No partner may claim to certify, to accredit, to approve, to assess on Westmark's behalf, or to influence an outcome. Nor may a partner suggest that using them improves the result.

Talk to us

Tell us about your practice and the clients you work with, and we will send the agreement and the materials.

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Verify any outcome at hub.westmarkassurance.co.uk/verify

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