CONNECTWISE®
Partner Program

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Introduction

These rules and guidelines apply to the business relationship between ConnectWise and its Partners who have been admitted to the ConnectWise Partner Program. This document outlines ConnectWise's expectations from such Partners, ConnectWise's general commitment to such Partners, and the work processes to be adhered to by Partner. It is designed to assist ConnectWise to effectively enable, develop, reward, and support Partners in their daily work in the promotion and sales of ConnectWise's products and services and to enhance ConnectWise's internal control.

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Partner Program Rules and Guidelines

The ConnectWise Partner Program Rules & Guidelines provides Partners with an overview of the Rules and Guidelines of the Partner Program and is effective as of April 1, 2021. The ConnectWise Partner Program Rules & Guidelines is divided into clearly defined sections for easy reference. Please note that this ConnectWise Partner Program Rules & Guidelines supplements your current agreement with ConnectWise, and it may be amended, by ConnectWise, at its sole discretion periodically.

ConnectWise has the right to terminate this Program and/or amend any of its terms, in whole or in part, from time to time as it deems necessary and at its sole discretion. ConnectWise will provide written or email notice to Partners regarding any changes to the ConnectWise Partner Program Rules & Guidelines.

ConnectWise Partner Program Enrollment and Compliance

To join the ConnectWise Partner Program, a Partner must complete a ConnectWise purchase of one or more of the eligible ConnectWise solutions and accept the terms of the Partner Program Portal. Benefits and requirements vary by membership level. Accelerate and Strategic-Level Partners will be required to complete a Co-Authored Business and Marketing plan within the first 60 days of membership to retain a compliant status. The Business Plan and Marketing plan are also requirements to receive included NFR licenses (if applicable) and be eligible for MDF associated with program membership. ConnectWise reviews program compliance at least once a year and reserves the right to re-level Partners that exceed or no longer meet the requirements of their membership level.

Territorial Restrictions, Legal Entity, and ConnectWise Partner Program Membership

"Territory" under ConnectWise Partner Program means the country in which Partner's principal place of business is located. Partners with an operating presence in more than one country must join the Partner Program, purchase an eligible solution, accept the terms of the Partner Portal, and sign a separate Partner Development Agreement if applying for co-managed benefits available within the Accelerate and Strategic Partner tiers. Each legal entity or organization that wants to join the ConnectWise Partner Program must satisfy the program membership requirements on its own, and each must execute a separate ConnectWise Partner Development Agreement. Parent companies, affiliates, subsidiaries, or acquired companies of a program member are not program members and do not qualify for program benefits unless each individually satisfies the program membership requirements of that given partner level. Company name, DBA (Doing Business As), or AKA (Also Known As), or other naming convention identified by the program member can be used to establish distinct legal status. In the case of acquisitions, mergers, and/or other business combinations, the existing membership level of the surviving entity and the operating status of the acquired or merged entity, as applicable, shall dictate the membership criteria applicable to the newly formed entity. If for example, a Partner at the Accelerate Partner Level is acquired by another Partner type (say a Technology Solution Provider at the Strategic Partner Level), and the acquired company (Accelerate Partner) is effectively subsumed entirely within the umbrella of the parent company in terms of ongoing business focus, operations and/or corporate structure, the newly formed entity and its subsidiaries will be held to the membership criteria applicable to the parent company (Strategic Level Partner).

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ConnectWise Partner Program Overview

The ConnectWise Partner Program is designed to help ensure a successful partnership with ConnectWise, through offering benefits such as support, enablement, and tools through which Partners can develop, promote, and sell their services. In this guide, Partners will find a detailed review of the ConnectWise Partner Program, including program benefits, requirements, and important notes on how to take advantage of all this program has to offer.

Target Audience

The ConnectWise Partner Program was created for Technology Solution Providers (TSPs) looking to expand or build out their service offerings.

Program Criteria

Eligibility for ConnectWise Partner Program are Technology Solution Providers currently providing Hosted IT Services looking to build or expand their practice and have purchased at least one of the eligible ConnectWise Solutions.

Legal Entity

As part of the ConnectWise Partner Program registration, a Technology Solution Provider must list all eligible affiliates which may want to participate in the ConnectWise Partner Program and Program benefits. After the point of initial program authorization, the Technology Solution Provider may add Affiliates only upon written agreement by ConnectWise.

Partner Tiers

ConnectWise Partner Program has four programmatic membership levels: Registered, Emerging, Accelerate, and Strategic, with Strategic being the highest level of membership. Program benefits and requirements increase as Partners engage in further facets of the program. All Partner levels are required to license at least one of the eligible ConnectWise solutions in their end-customer service delivery.

Registered Partner Tier

The "Registered" level of membership is the entry point into the ConnectWise ecosystem. Enrollment occurs when a TSP who has at least one product from ConnectWise, enrolls within the Connectwise University This unlocks Partner's access to online training, best practices, and assets to advance their levels of operational maturity.

Emerging Partner Tier

The "Emerging" level of membership is where a partner has desires to invest their time and effort into growing their business with ConnectWise. To earn an invitation to this program, the partner must meet the minimum requirements of this tier, agree to build a business plan, and collaborate in GlassHive with their assigned Account Manager.

Accelerate Partner Tier

The "Accelerate" level of membership is the level of promotion within the program to recognize and reward Partners who have demonstrated their commitment to accelerate their current customer engagement and their prospects with services powered by ConnectWise. To earn an invitation to the Accelerate Partner Level, the Partner will have signed the ConnectWise Partner Development Agreement (PDA) and has agreed to meet the qualifications set forth in that agreement which includes access to the IT Nation Certify courses, review of business readiness objectives, and coordinated the necessary resources to drive success.

Strategic Partner Tier

The "Strategic" level of membership is the highest partnership level within the ConnectWise Partner Program. This partnership level is for Partners who have demonstrated their business and technical expertise with their current customer base and are

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now seeking to strategically grow their practice aligned with the ConnectWise eligible solutions. This level is invitation only and is designed for certain Strategic Partners inside the ConnectWise ecosystem.

ConnectWise Partner Program Benefits & Requirements

To support Partners who are members of the ConnectWise Partner Program in the most effective way, ConnectWise Partner Program benefits are tailored for each partnership type. The tables in this section outline the specific program benefits and requirements for Registered, Emerging, Accelerate, and Strategic Partner tiers.

PROGRAM BENEFITS	All Partners	Guided		
PARTNER LEVELS	Registered	Emerging	Accelerate	Strategic
Account Manager *To support your self-managed growth efforts*	Y	Y	Y	Y
ConnectWise University Portal access to Marketing, Sales, and training assets. *Saves you time and money, and helps get started quickly*	Y	Y	Y	Y
FREE ITN Certify Fundamentals *Owners, Sales, & Engineers*	Y	Y	Y	Y
Access to Market Development Funds (MDF) *Approved on request to jumpstart marketing.* * Co-Authored Business & Marketing Plans are requirements to receive these benefits.		Up to $1,500	Up to $5,000	Custom
General Marketing Resources		Y	Y	Y
Marketing Automation Platform - $1,200/year *Use pre-built email and social campaigns to drive leads*		Y	Y	Y
Access to pre-sales engineers and subject matter experts *We sell with you and help you win*		Y	Y	Y
Dedicated Partner Development Executive (PDE) Helps guide growth, access to pre-sales resources			Y	Y
Dedicated Marketing Concierge *Helps manage campaigns and assets in Partner Portal*			Y	Y
MDF Access based on Connectwise Quarterly Billings Growth *Funds for approved marketing activities; See program Rules for details* * Co-Authored Business & Marketing Plans are requirements to receive these benefits.			10%	Custom
Opportunity Registration *To validate MDF investments; access pre-sales resources*		Y	Y	Y

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			Y	Custom
FREE NFRs of eligible Solutions * Co-Authored Business & Marketing Plans are requirements to receive these benefits.			Y	Custom
Discounted ITN Secure All Access Virtual Company Pass		Y	Y	Y
FREE ITN Certify Advanced & Master courses *Ongoing savings of USD 400 per month!*		Y	Y	Y
GlassHive Multi Location Marketing Reporting				Y
Partner Program Advisory Council				Y

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PARTNER REQUIREMENTS	REGISTERED	EMERGING	ACCELERATE	STRATEGIC
Enrollment	Purchase any eligible Solution from ConnectWise	Meets Requirements/Invitation Only	Meets Requirements/Invitation Only	Meets Requirements/Invitation Only
$150 GlassHive Access Fee	Not Required	Required	Waived	Waived
# Customer Endpoints under Management	0	500+	1,000+	4000+
Minimum Monthly Recurring Spend with ConnectWise on Eligible Solution	$0 USD	$1,000 USD	$5,000 USD	$25,000 USD
Partner Development Agreement Signed	Not Required	Not Required	Required	Required
Internal Installation of Connectwise Solution, Cybersecurity Partner Kit Promo, or NFR equivalent	Not Required	Recommended	Recommended	Required
Internal Security Assessment	Not Required	Recommended	Recommended	Required
Complete SOC2, ISO 27001, or Secure MSP accreditation	Not Required	Not Required	Recommended	Recommended
IT NATION Certify certification related to your solution of focus	Not Required	Recommended	Required	Required
PDE Fast Start Session Training - Owner	Not Required	Recommended	Required	Recommended
PDE Fast Start Session Training - Engineer	Not Required	Recommended	Required	Recommended
PDE Fast Start Session Training - Sales	Not Required	Recommended	Required	Recommended
IT NATION Certify Advanced	Not Required	Recommended	Recommended	Recommended
Joint Business Plan	Not Required	Required	Required	Required
Marketing Readiness Assessment	Not Required	Required	Required	Required
Marketing Plan	Not Required	Required	Required	Required
Selling to Clients Campaign	Not Required	Required	Required	Required
Customer Event	Not Required	Recommended	Recommended	Required
Selling to Prospects Campaign	Not Required	Required	Required	Required
Prospect Event	Not Required	Recommended	Recommended	Required

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ConnectWise Partner Program Eligible Solutions
The following solutions qualify for the support, enablement, and benefits that the ConnectWise Partner Program provides:
All GA available solutions via ConnectWise are eligible.

Account Manager
This individual is responsible for maintaining regular proactive contact with your account. They help you identify the ConnectWise resources, services, and programs that will aid you in both overcoming some of your current business challenges and exploiting new business opportunities.

Dedicated Partner Development Executive
This subject matter expert works with the practice area lead of participating Partners on the development, support, and execution of both a Partner's expansion strategy within their existing customer base as well as their acquisition strategy.

Opportunity Registration
The opportunity registration program is designed to reward those authorized resellers who are in good standing and proactively identify new eligible security opportunities within their existing customer base as well as with new customers. Those who obtain approval will receive the benefit of ConnectWise exclusive pre-sales resources on the approved registered customer, sales support from your Partner Development Executive, and notification of any future direct ConnectWise inquiry from said registered customer. All other Partners are excluded from these benefits.

Sell Through Presales Resource
Partners at the Accelerate Partner Level and above will gain access to Pre-Sales Resources for ConnectWise Eligible solutions once an opportunity has been registered and approved with ConnectWise. Our Presales resources will welcome your technical lead's participation as we support you through the sales cycle from technical discussions through evaluations.

Licenses
Not for Resale (NFR) Licenses- A Co-Authored Business and Marketing plan are requirements to receive the included Security NFR licenses program benefit – INTERNAL USE ONLY

Marketing
ConnectWise University Portal
All Partner levels will get access to our ConnectWise University Portal containing marketing assets, toolkits, and playbooks to jumpstart or accelerate your ConnectWise solution offering.

Marketing Automation Platform powered by GlassHive
Participating Partners at Accelerate and Strategic levels will get free access to our marketing automation platform. Emerging Level Partners will get GlassHive access at a discounted price of $150 per year. This platform will provide participating Partners with quick visibility into the success of their campaigns and will integrate to most CRM platforms, such as ConnectWise PSA. This platform will also provide Partners with greater visibility into their program incentives and will be a central point of collaboration with your Account Manager and/or Partner Development Executive regarding leads, opportunities, and business plans.

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General Marketing Resources
Emerging, Accelerate, and Strategic partners will get access virtual workshops and trainings related to marketing best practices, marketing plan creation, and GlassHive instructional trainings.

Dedicated Marketing Consultant
Participating Partners at the Accelerate and Strategic Partner Level get access to a dedicated marketing resource that will help support or supplement your demand generation efforts in areas such as profiling the ideal prospects, launching campaigns, and supporting other demand generation activities.

Proposal MDF (Marketing Development Funds)
The ConnectWise Market Development Fund (MDF) benefit is available to Emerging, Accelerate and Strategic Tier Partners. ConnectWise will provide eligible Partners with MDF for approved marketing activities designed to build awareness of the eligible ConnectWise service offering(s) within their client base, drive leads, and win new business. Since this benefit is proposal-based, Partners must complete a business plan and a marketing readiness assessment prior to getting access to MDF. Partners must request MDF within GlassHive and provide supporting documentation for both approval and reimbursement. Approval for MDF will be based on the projected ROI and available marketing budget for any given quarter.

Eligible Marketing Activities
In person or virtual customer/prospect lead generating events and activities, including:
   a. Lunch and Learns
   b. Office hosting events
   c. Hosted Dinners
   d. Workshops
   e. Conference Sponsorship, inclusive of booth and breakout sessions
   f. Appointment Setting Services
   g. Paid Digital Marketing
   h. SEO
   i. 3rd Party Content Creation
   j. Offsite events

Conditions for Partner Participation
   1. Partner must be in good financial standing and meet the minimum Partner Program requirements.
   2. Partner follows ConnectWise brand guidelines located at https://www.connectwise.com/corporate-brand-guidelines
   3. Events: Partner agrees to promote activity across multiple channels, starting at least 2 weeks prior to the activity, including but not limited to:
        a. Sending at least two invitations to clients and prospects prior to the event
        b. Promoting events on social media.
        c. Provide a follow up communication.
        d. Share resulting leads with your Partner Development Executive so we can support winning business.
   4. Partner will load attendee list into the Partner Portal.
   5. Marketing Activity must be completed within 90 days of MDF Approval.
   6. Partners to make best effort to exceed a projected ROI of 15:1 on pipeline generation and a 5:1 ROI on Closed Won Business within 3 months after event.

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MDF Process

1. MDF requests must be submitted within GlassHive platform.
2. Approvals will be determined within five working days from submission.
3. Approvals are subject to projected ROI and remaining funds available.
4. If approved, ConnectWise will provide an approval notification via GlassHive.
5. If declined, ConnectWise will provide you notification via GlassHive on what information, timeframe, and/or ROI is required for approval.
6. Funds will be paid promptly to the Partner after marketing activity is executed, proof of performance provided, and invoice submitted within GlassHive for payment.
7. There is a total use period of 6 months for funds once issued. We encourage all requests to be made within the first 3 months and the POP and Invoice to follow within the last 3 months or sooner to ensure receipt of funds.

ConnectWise Social Media Sharing Guidelines

Social media content shared by Accelerated or Registered Partners will be addressed on a case-by-case basis and may be shared depending on theme or engagement. Content shared by Strategic Partners will be prioritized.

What Defines Shareable Content

- Engageable
  - It sparks conversation.
  - Provides an opportunity for ConnectWise to get involved in a conversation.
- Promotes a ConnectWise product or service or serves as a "success story."
- Includes a ConnectWise colleague. (i.e., Webinar guest)
- Is a current hot topic.
  - These will change daily, weekly, monthly so will be assessed on a case-by-case basis
- Fits with a current demand gen or partner program campaign.

Core Requirements for Marketing Growth Fund Claims

Each Marketing Growth Fund activity you submit for an incentive claim has core requirements. You need to demonstrate that you have met these requirements in your proof of performance documents. Some activities also require specific communication types and metrics as well. Please refer to Exhibit A for the core requirements for each of the accepted activities.

Training Accreditation/Certification

IT Nation Certify Fundamentals

Available to Sales, Owners, and Engineers at no cost, these courses are a requirement of the Accelerate and Master Partner Levels. During this full-day training event, you will learn about foundational cybersecurity, including industry frameworks and standards, risk assessment best practices, and navigating the ecosystem of security products, as well as role-specific segments tailored specifically for MSP sales professionals and MSP engineers.

IT Nation Certify Advanced

This 12-month program is a requirement of the Accelerate and Strategic Partner levels. This course provides in-depth insights into implementing a strong cybersecurity posture inside your business and reliably extending that same level of protection to

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your clients. With the MSP + Cybersecurity Framework as its foundation, this program teaches competencies necessary to build a credible cybersecurity practice.

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EXHIBIT A –Marketing Funds Accepted Activities & Claim Requirements

Print Advertising

Core Requirements	ConnectWise powered security services content
Communications Requirements	Copy of final communication piece (based on advertising) showing program-specific core requirements.
Metrics	Estimated customer (or partner) reach
Eligible Expenses	1.) Third-party media placement 2.) Printed material 3.) Fee - agency marketing and creative services including agency fees

Digital Advertising

Core Requirements	ConnectWise powered security services content
Communications Requirements	Screenshot of digital advertisement, URL of landing page, showing program-specific core requirements
Metrics	Summary of results (such as click-through report)
Eligible Expenses	1) Third-party media placement 2) Fee - agency marketing and creative services including agency fees

Direct Mail, Email, and Short Message Service (SMS)

Core Requirements	ConnectWise powered security services content
Communications Requirements	1) Copy of final communication piece showing program-specific core requirements 2) Proof of distribution can include postmarked shipping envelope or other proof of mailing (direct mail), final email showing dated header or other proof of emailing (email), or photo of phone message (SMS)
Metrics	Estimated customer (or partner) reach
Eligible Expenses	1) Database acquisition 2) Printed material 3) Postage 4) Fee - agency: Marketing and creative services, including agency fees

Partner Website and Search Engine

Core Requirements	ConnectWise powered security services content
Communications requirements	1) URL and/or screenshots of site page(s) showing URL 2) Statement of work or service agreement for SEO project (SEO activity only)
Metrics	Summary of results (such as click-through report)

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Eligible expenses	1.) Fee - agency: Marketing services, including agency fees 2.) Programming/development: Programming and development fees 3.) Fee - SEO: Optimization and maintenance fees

Multi-touch Digital Campaign

Core Requirements	ConnectWise powered security services content
Communications requirements	All Proof of Performance as detailed in the applicable activity page is required 1.) Digital Advertising 2.) Direct Email 3.) Partner Website and Search Engine 4.) Optimization 5.) Telemarketing
Metrics	NA
Eligible expenses	1.) Third-party media placement 2.) Fee - agency: Marketing and creative services, including agency fees 3.) Database acquisition 4.) Programming/development: Programming and development fees 5.) Fee - SEO: Optimization and maintenance fees 6.) Fee - Third-party call center charges

Telemarketing and Expositions

Core requirements	ConnectWise powered security services content must be included in the tele sales script, ConnectWise content
Communications requirements	Copy of script
Metrics	Summary of results (number of calls and number of successful contacts)
Eligible expenses	1.) Fee - agency: Marketing services, including agency fees 2.) Fee - Third-party call center: charges 3.) Database acquisition

Customer Seminars and Boot Camps

Core requirements	ConnectWise powered security services content
Communications requirements	1.) Event invitation and agenda/program 2.) Event photos 3.) Presentation materials if event invitation and agenda do not meet core requirements
Metrics	Number of registered guests
Eligible expenses	1.) Signage / display / printed materials 2.) Giveaways

	3.) Fee - agency: Marketing services, including agency fees 4.) Fee – registration 5.) Fee - external speaker 6.) Fee - facility and equipment rental including Surface devices owned and managed by a third party 7.) Catering

Tradeshows and Exhibitions

Core requirements	ConnectWise powered security services content
Communications requirements	1.) Event invitation and agenda/program 2.) Photo showing event participation (for example, photo of booth, photo of presentation, etc.)
Metrics	Estimated number of attendees or booth visitors
Eligible expenses	1.) Signage / display / printed materials 2.) Giveaways 3.) Fee - agency: Marketing services, including agency fees 4.) Fee – registration 5.) Fee - external speaker 6.) Fee - facility and equipment rental 7.) Catering

Internal Incentives and SPIFFs

Core requirements	Internal contest rules driving new security contracts
Communications requirements	Show offer with terms and conditions. Actual costs up to 25% total of earned co-op funds per usage period.
Metrics	Summary of results
Eligible expenses	Actual costs up to 25% total of earned co-op funds per usage period for: 1.) Signage, display, printed materials 2.) Giveaways 3.) Fee - agency: Marketing services, including agency fees

Proof of Concept/Evaluation

Core requirements	Proof of concept
Communications requirements	ConnectWise Services

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Metrics	Eligible service fees can include deployment services, configuration, data migration, testing, or customer-facing set-up. Programming/development expenses can include API system development.
Eligible expenses	1.) Programming / development 2.) Fee - service: Labor services provided by partner or third-party vendor in support of the proof of concept

ConnectWise Exams and Tuition

Core requirements	Course code/exam code on ConnectWise Learning
Communications requirements	Invoice with exam code and date of completion
Metrics	Attendee list and per person cost
Eligible expenses	1.) Fee - exam: ConnectWise exam fees for certifications and competencies 2.) Fee - training / tuition: ConnectWise tuition fees for certifications and competencies, including on-demand training expenses 3.) Third-party ISV solution training - tuition expenses for training on third-party solutions that can be demonstrated to leverage or reside on ConnectWise platforms 4.) Fee - ConnectWise Certified Trainer fee (no metric required)

Internal Training and Floor Days

Core requirements	100% ConnectWise content for timeframe of day or event space being claimed
Communications requirements	1.) Training Agenda or Event Program 2.) ConnectWise presentation content
Metrics	Number of attendees
Eligible expenses	1.) Fee - training/tuition/registration/digital training platform or digital training formatting 2.) Signage / display / printed materials 3.) Giveaways 4.) Fee - agency: marketing services, including agency fees 5.) Fee - external speaker 6.) Fee - facility and equipment rental 7.) Catering (excluding alcohol)

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ConnectWise Hosted Conferences

Core requirements	ConnectWise hosted conferences. Airfare/hotel expenses are capped at up to USD 3,000 per person per conference, limited to 3 attendees, with a total cap of USD 9,000 for airfare/train fare/hotel expenses per period per program. Hosting may have different allowances.
Communications requirements	1.) Copy of conference/event invitation or registration confirmation showing evidence that conference is hosted by ConnectWise 2.) Transportation itinerary with travel dates (Travel - airfare expenses only)
Metrics	NA
Eligible expenses	1.) Fee - Registration: for up to 3 attendees per conference 2.) Travel - Airfare/Hotel: Transportation (airfare or train fare and applicable taxes) and hotel (room rate only and applicable taxes) Note: Travel - Airfare/hotel expenses are capped up to USD 3,000 per person per conference, limited to 3 attendees, with a total cap of USD 9,000 for airfare/train fare/hotel expenses per period per program. Hosting may have different allowances.

License Seeding/Demo Units

Core requirements	You can claim up to USD 1000 per program period.
Communications requirements	1.) Systems specifications for demo units built in-house. 2.) Proof of delivery for third-party demo unit. 3.) Proof of third-party demo unit. 4.) Proof of license deployment
Metrics	NA
Eligible expenses	NA