

 **CONNECTWISE**<sup>®</sup>  
Partner Program



# ConnectWise Partner Program Rules and Guidelines



# ConnectWise Partner Program Rules and Guidelines

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# ConnectWise Partner Program

## Rules and Guidelines

### 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.

# ConnectWise Partner Program

## Rules and Guidelines

### 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 January 1, 2023. 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 Portal. Benefits and requirements vary by membership level. Accelerate and Strategic-Level Partners will be required to execute a ConnectWise Partner Development Agreement as well as the completion of 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 and be eligible for MDF and Co-Op funds 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 three programmatic membership levels: Registered, Accelerate, and Strategic, with Strategic being the highest level of membership. Program benefits and requirements increase as Partners engage in more complex security services and solutions. 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 to the ConnectWise Partner Program. Enrollment occurs when a TSP who has at least one product from ConnectWise, signs up for the program. This unlocks use of both our ConnectWise University and ConnectWise Partner Portal where Partners can get access to online training, best practices, and assets to advance their levels of operational maturity.

#### Accelerate Partner Tier

The “Accelerate” level of membership is the first level of promotion within the ConnectWise Partner Program to recognize and reward Partners who are committed to engaging their current customer footprint and new accounts 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 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

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### 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, Accelerate, and Strategic Partner tiers.

PROGRAM BENEFITS	Self-Paced	Guided	
	Registered	Accelerate	Strategic
<b>Account Manager</b> <i>To support your self-managed growth efforts</i>	Y	Y	Y
<b>Partner Portal access to playbooks, toolkits, &amp; journeys</b> <i>Saves you time and money, and helps get started quickly</i>	Y	Y	Y
<b>FREE Marketing Automation Platform</b> <i>Use pre-built email and social campaigns to drive leads</i>	Y	Y	Y
<b>FREE ITN Certify Fundamentals</b> <i>Owners, Sales, &amp; Engineers</i>	Y	Y	Y
<b>Dedicated Partner Development Executive (PDE)</b> <i>Helps guide growth, access to pre-sales resources</i>		Y	Y
<b>Access to pre-sales engineers and subject matter experts</b> <i>We sell with you and help you win</i>		Y	Y
<b>Dedicated Marketing Concierge</b> <i>Helps manage campaigns and assets in Partner Portal</i>		Y	Y
<b>Access to Market Development Funds (MDF)</b> <i>Approved on request to jumpstart marketing</i> * Co-Authored Business & Marketing Plans are requirements to receive these benefits.		Y	Custom
<b>Earn CO-OP Funds based on ACV</b> <i>Funds for approved marketing activities; See program Rules for details</i> * Co-Authored Business & Marketing Plans are requirements to receive these benefits.		10%	Custom
<b>Opportunity Registration</b> <i>To validate MDF leads; access pre-sales resources</i>		Y	Y
<b>FREE NFRs of eligible Solutions</b> * Co-Authored Business & Marketing Plans are requirements to receive these benefits.		Y	Custom
<b>Discounted ITN Secure All Access Virtual Company Pass</b>		Y	Y
<b>FREE ITN Certify Advanced &amp; Master courses</b> <i>Ongoing savings of USD 400 per month!</i>		Y	Y

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<b>PARTNER REQUIREMENTS</b>	<b>REGISTERED</b>	<b>ACCELERATE</b>	<b>STRATEGIC</b>
	<b>Enrollment</b>	Purchase any eligible Security Solution from ConnectWise	Meets Requirements
# Customer Endpoints under Management	0	500	4000
Minimum Monthly Recurring Spend with ConnectWise on Eligible Solution	\$0 USD	<b>\$400 USD</b>	\$25,000 USD
Partner Development Agreement Signed	Not Required	Required	Required
Internal Installation of either ConnectWise Risk Assessment, Cybersecurity Partner Kit Promo, or NFR equivalent	Recommended	Required	Required
Internal Security Assessment	Recommended	Required	Required
Complete SOC2, ISO 27001, or Secure MSP accreditation	Not Required	Not Required	Recommended
IT NATION Certify Fundamentals – Owner/Sales	Recommended	Required	Required
IT NATION Certify Fundamentals - Engineer	Recommended	Required	Required
PDE Fast Start Session Training - Owner	N/A	Required	Recommended
PDE Fast Start Session Training - Engineer	N/A	Required	Recommended
PDE Fast Start Session Training - Sales	N/A	Required	Recommended
IT NATION Certify Advanced	Recommended	Recommended	Recommended
Business Plan	Recommended	Required	Required
Marketing Readiness Assessment	N/A	Required	Required
Marketing Plan	N/A	Required	Required
Selling to Clients Campaign	Recommended	Required	Required
Customer Event	Recommended	Required	Required
Selling to Prospects Campaign	Recommended	Recommended	Required
Prospect Event	Recommended	Recommended	Required



# ConnectWise Partner Program Rules and Guidelines

## ConnectWise Partner Program Eligible Solutions

The following solutions qualify for the support, enablement, and benefits that the ConnectWise Partner Program provides.

- ConnectWise Incident Response Service
- ConnectWise SIEM
- ConnectWise MDR
- ConnectWise Vulnerability Management
- ConnectWise SOC Services
- ConnectWise Endpoint Policy Management
- ConnectWise Identify Assessment
- Exium - Secure Internet Access (SIA)\*
- Exium - Secure Private Access (SPA)\*
- Exium - Secure Things Access (STA)\*
- Exium - CyberGateway (CGW)\*
- Evo Standard
- Evo Standard with Networking
- Proofpoint
- Bitdefender
- SentinelOne
- ConnectWise Co-Managed Backup
- ConnectWise SaaS Backup
- ConnectWise Co-managed BCDR
- Acronis
- Veeam
- Axcient
- StorageCraft
- \*Exium will qualify with up to 25 users once the PDE has an approved business plan in place

## 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.

# ConnectWise Partner Program

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### 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

### Partner Program Portal

All participating Partner levels will get access to our Partner Portal containing all the assets, toolkits, and playbooks to jumpstart or accelerate your eligible ConnectWise solution offering. This Portal will also provide Partners at an Accelerate Level and greater visibility into their program incentives and will be a central point of collaboration with your Partner Development Executive regarding leads, opportunities, and business plans.

### Marketing Automation Platform

Participating Partners at all Partner levels will get free access to our marketing automation platform within the ConnectWise Partner Program Portal. 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.

### Marketing Concierge

Participating Partners at the Accelerate and Strategic Partner Level get access to a 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 all Accelerate and Strategic Tier Partners. ConnectWise will provide eligible Partners with a one-time investment of up to \$1,500 USD 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 the Partner Program Portal and provide supporting documentation for both approval and reimbursement. Partners will be emailed Tipalti setup instructions as outlined in Exhibit B. Approval for MDF will be based on the projected ROI and available marketing budget for any given quarter.

# ConnectWise Partner Program

## Rules and Guidelines

### Eligible Marketing Activities

In person or virtual customer/prospect lead generating events and activities, including:

- a. Lunch and Learns
- b. Office events
- c. Round Table Dinners
- d. Workshops
- e. Conference Sponsorship, inclusive of booth and breakout sessions
- f. Appointment Setting Services
- g. Paid Digital Marketing
- h. SEO
- i. 3<sup>rd</sup> Party Content Creation

### Conditions for Partner Participation

1. Partner must be in good financial standing and meet the minimum Partner Program requirements.
2. Partner must have updated their website with information about their cybersecurity offerings and have an active landing page to collect leads.
3. Partner must have sent out initial awareness campaign to clients.
4. Partner follows ConnectWise brand guidelines located at <https://www.connectwise.com/corporate-brand-guidelines>
5. 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.
6. Partner to target a minimum of 15 attendees, with a goal of 25.
7. Partner will load attendee list into the Partner Portal.
8. Marketing Activity must be completed within 90 days of MDF Approval.
9. 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.

### MDF Process

1. MDF requests must be submitted within the ConnectWise Partner Portal.
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 and a purchase order # to reference on your invoice via the Partner Program Portal.
5. If declined, ConnectWise will provide you notification via the Partner Program Portal on what information, timeframe, and/or ROI is required for approval.
6. Upon approved submissions, Partners will be emailed instructions on setting up an account with Tipalti, a 3<sup>rd</sup> party vendor that handles invoice processing and payment automation service for your ConnectWise MDF.
7. Funds will be paid promptly to the Partner after marketing activity is executed, proof of performance provided, and invoice remitted to Tipalti for payment.
8. 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.

# ConnectWise Partner Program

## Rules and Guidelines

### 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.

### Co-Op Marketing Funds

Cooperative marketing (Co-Op) incentive is a benefit you earn through the ConnectWise Partner Program at the Accelerate and Strategic Partner Program levels. Co-Op funds are designed to enable you to conduct marketing activities to increase brand awareness, drive sales pipeline, attain certifications, facilitate readiness, and develop Centers of Excellence.

### How to Enroll

Accelerate and Strategic Partner levels are auto enrolled in the Co-Op Incentive.

### Requirements

1. A business plan and marketing assessment must be completed as defined in the Partner Program requirements.
2. A minimum incremental annual contract value of \$2,500 of eligible solutions must be achieved any given quarter to receive Co-Op funds for that respective quarter.

### How Co-Op Funds are Calculated

ConnectWise calculates your Co-Op marketing funds for eligible solutions by multiplying your Co-Op percentage rate by the contract value of the following two transaction types.

#### 1. New Contract

New contract value is calculated by taking the total contract value of the minimum spend commit of eligible solution divided by the contract term multiplied by 12 months.

#### **Example – New ConnectWise MDR Contract for 250 endpoints**

24 Month Contract with a minimum monthly spend commit of \$200 in the first three months and a \$500 minimum monthly spend commit on the balance of the contract. New Contract Value equals \$5,550 based on a total contract value of \$11,100 divided by 24 months multiplied by 12 months. Co-Op Marketing funds would equal \$555 based on multiplying \$5,500 by 10% Marketing Co-Op rate.

#### 2. Amendment Contract

Amendment contract value is calculated by taking the new contract value of existing term less previous committed contract value.

#### **Example – Contract Amendment for an additional 250 endpoints**

The total value of the committed minimum spend of this amendment is \$20,000. Total billed amount to Partner for existing contract term totals \$8,000. The Amendment contract value is \$12,000 based on new contract valued at \$20,000 less the \$8,000 in previous billed amounts. Co-Op Marketing funds due is \$1,200 based on multiplying the Amendment valued at \$12,000 by the Co-Op percentage of 10%

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### When You See Accrued Co-Op Incentives

Eligible Partners earning Co-Op greater than \$250 USD in each quarter will receive a notification of available funds within 15 business days following the end of that quarterly earning period. Co-Op funds will be labeled by the Quarter by which they were earned. These accrued marketing funds will be available for the next 6 months for Co-Op approved activities until they expire and get removed from your available Co-Op funds.

### When to Claim Your Funds

Funds can be claimed on a quarterly basis. The three-month period during which you accrue your earnings becomes your **Earning period**. You must use these earnings at some point during the following six-month **Usage period**. If you do not use your earnings by the end of the usage period, you will forfeit them. The **Claiming period** is the 60-day period during which you can claim reimbursement for your program activities. ConnectWise reserves the right to request original proof of execution (PoP) documents.

The table below shows the different earning, usage, and claiming periods. Unless otherwise noted, periods extend from the first day of the first month to the last day of the last month.

Earning/Accrual Period	Calendar Year	Usage Period	Claiming Period
January – March 2023	Q1 FY23	April – September 2023	October – November 2023
April – June 2023	Q2 FY23	July – December 2023	January – February 2024
July – September 2023	Q3 FY23	October – March 2024	April – May 2024
October – December 2023	Q4 FY23	January – June 2024	July – August 2024

### How to Claim Your Funds

During your usage period, Partners must submit their request for funds within the Partner Portal for approval. The ConnectWise Partner Program Office will review and issue you a ConnectWise PO # once the claim complies within eligible activities. You can initiate an incentive claim from within the Partner Program Portal under your Co-Op funds section. Claims must comply with approved activities and core requirements as outlined in Exhibit A. Partners will receive Tipalti setup instructions for invoicing ConnectWise upon Co-Op approval as illustrated in Exhibit B.

### How to Manage Your Claims

You can see all the activity within the Co-Op funds section within the ConnectWise Partner Program Portal, such as your claim's status as it moves through the approval and payment process. If your claim is missing some of the core requirements, you may be required to provide additional documentation or proof of performance (POP). Payment reimbursements are tracked via Tipalti.

### Claim Reimbursement

Partners will be required to invoice ConnectWise for approved claims which are managed within Tipalti, a 3rd party vendor that handles invoice processing and payment automation service, where you can track payments.

### Core Requirements for Co-Op Claims

Each Co-Op 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.

# ConnectWise Partner Program

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### 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 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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# ConnectWise Partner Program Rules and Guidelines

# ConnectWise Partner Program

## Rules and Guidelines

### EXHIBIT A – Cooperative 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)



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Metrics	Summary of results (such as click-through report)
Eligible expenses	<ol style="list-style-type: none"> <li>1.) Fee - agency: Marketing services, including agency fees</li> <li>2.) Programming/development: Programming and development fees</li> <li>3.) Fee - SEO: Optimization and maintenance fees</li> </ol>

### Multi-touch Digital Campaign

Core Requirements	ConnectWise powered security services content
Communications requirements	<p>All Proof of Performance as detailed in the applicable activity page is required</p> <ol style="list-style-type: none"> <li>1.) Digital Advertising</li> <li>2.) Direct Email</li> <li>3.) Partner Website and Search Engine</li> <li>4.) Optimization</li> <li>5.) Telemarketing</li> </ol>
Metrics	NA
Eligible expenses	<ol style="list-style-type: none"> <li>1.) Third-party media placement</li> <li>2.) Fee - agency: Marketing and creative services, including agency fees</li> <li>3.) Database acquisition</li> <li>4.) Programming/development: Programming and development fees</li> <li>5.) Fee - SEO: Optimization and maintenance fees</li> <li>6.) Fee - Third-party call center charges</li> </ol>

### 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	<ol style="list-style-type: none"> <li>1.) Fee - agency: Marketing services, including agency fees</li> <li>2.) Fee - Third-party call center: charges</li> <li>3.) Database acquisition</li> </ol>

### Customer Seminars and Boot Camps

Core requirements	ConnectWise powered security services content
Communications requirements	<ol style="list-style-type: none"> <li>1.) Event invitation and agenda/program</li> <li>2.) Event photos</li> <li>3.) Presentation materials if event invitation and agenda do not meet core requirements</li> </ol>
Metrics	Number of registered guests

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Eligible expenses	<ol style="list-style-type: none"> <li>1.) Signage / display / printed materials</li> <li>2.) Giveaways</li> <li>3.) Fee - agency: Marketing services, including agency fees</li> <li>4.) Fee – registration</li> <li>5.) Fee - external speaker</li> <li>6.) Fee - facility and equipment rental including Surface devices owned and managed by a third party</li> <li>7.) Catering</li> </ol>
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### Tradeshows and Exhibitions

Core requirements	ConnectWise powered security services content
Communications requirements	<ol style="list-style-type: none"> <li>1.) Event invitation and agenda/program</li> <li>2.) Photo showing event participation (for example, photo of booth, photo of presentation, etc.)</li> </ol>
Metrics	Estimated number of attendees or booth visitors
Eligible expenses	<ol style="list-style-type: none"> <li>1.) Signage / display / printed materials</li> <li>2.) Giveaways</li> <li>3.) Fee - agency: Marketing services, including agency fees</li> <li>4.) Fee – registration</li> <li>5.) Fee - external speaker</li> <li>6.) Fee - facility and equipment rental</li> <li>7.) Catering</li> </ol>

### 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	<p>Actual costs up to 25% total of earned co-op funds per usage period for:</p> <ol style="list-style-type: none"> <li>1.) Signage, display, printed materials</li> <li>2.) Giveaways</li> <li>3.) Fee - agency: Marketing services, including agency fees</li> </ol>

### Funded Head

Core requirements	Services focused 100% on ConnectWise Services
Communications requirements	Sample of deliverables (based on what is described in the Funded Head form)
Metrics	NA

# ConnectWise Partner Program

## Rules and Guidelines

Eligible expenses	Actual costs up to 50% of earned co-op funds per usage period for: Fees - services: Services provided by Funded Head resource(s)
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### Proof of Concept/Evaluation

Core requirements	Proof of concept
Communications requirements	ConnectWise Services
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

# ConnectWise Partner Program

## Rules and Guidelines

	<p>4.) Fee - agency: marketing services, including agency fees</p> <p>5.) Fee - external speaker</p> <p>6.) Fee - facility and equipment rental</p> <p>7.) Catering (excluding alcohol)</p>
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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	<p>1.) Copy of conference/event invitation or registration confirmation showing evidence that conference is hosted by ConnectWise</p> <p>2.) Transportation itinerary with travel dates (Travel - airfare expenses only)</p>
Metrics	NA
Eligible expenses	<p>1.) Fee - Registration: for up to 3 attendees per conference</p> <p>2.) Travel - Airfare/Hotel: Transportation (airfare or train fare and applicable taxes) and hotel (room rate only and applicable taxes)</p> <p>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.</p>

### License Seeding/Demo Units

Core requirements	You can claim up to 10% of total accrued co-op funds or USD 1000 whichever is greater or per program period.
Communications requirements	<p>1.) Systems specifications for demo units built in-house.</p> <p>2.) Proof of delivery for third-party demo unit.</p> <p>3.) Proof of third-party demo unit.</p> <p>4.) Proof of license deployment</p>
Metrics	NA
Eligible expenses	NA

# ConnectWise Partner Program

## Rules and Guidelines

### EXHIBIT B – CO-OP & MDF Reimbursement via Tipalti Application

#### Initial Setup Email

Greetings,

We are thrilled to introduce you to our partnership with [Tipalti](#), a global vendor onboarding, invoice, processing, and payment automation service, which will enhance your payment experience with ConnectWise.

Tipalti will serve as ConnectWise's only payment system. To ensure a smooth transition onto our new payment platform, here is what you should expect:

#### **What do I need to do next?**

- You will receive an email invitation to register for an account with Tipalti. The 3-step registration process will require you to enter your contact information, select a payment method, and complete a digital tax form.
  - You will need to complete the 3-step registration process to receive payments.
- Refer to the ["FAQs"](#) on the registration process and tax forms.
- Please note that full transition to the Tipalti payment platform is mandatory for all payees.

#### **What benefits will I receive with the payment platform?**

- **A quick onboarding experience:**
  - Account set-up in minutes.
  - Guidance to select appropriate tax forms.
- **A "one stop shop" for your payments:**
  - Ease of invoice submission via pdf email attachments.
  - Instant access to your payment status and history.
  - Ability to make changes to your payment method.

We are excited to offer you a payment system that is best-in-class. We are dedicated to providing the highest level of service in order to make this transition as smooth as possible. If you have any questions, please contact [accountspayable@connectwise.com](mailto:accountspayable@connectwise.com).

Kind regards,