




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

# **North America**

## **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 the expectations of ConnectWise for such partners, the general commitment of ConnectWise to such partners, and the work processes to be adhered to by the partner. It is designed to assist ConnectWise in effectively enabling, developing, rewarding, and supporting partners in their daily work in the promotion and sales of ConnectWise products and services, and to enhance the internal control of ConnectWise.

## Partner Program Rules and Guidelines

The ConnectWise Partner Program Rules and Guidelines provide partners with an overview of the Rules and Guidelines of the Partner Program and are effective as of August 1, 2024. The ConnectWise Partner Program Rules and Guidelines are divided into clearly defined sections for easy reference. Please note that the ConnectWise Partner Program Rules and Guidelines supplement 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 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 and 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. Emerging, 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 the ConnectWise Partner Program means the country in which the 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. The Partner Development Agreement can be located in the Policies and Guidelines section of [our legal site](#). 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, “doing business as” (DBA), “also known as” (AKA), or other naming convention identified by the program member can be used to establish distinct legal status. In the case of acquisitions, mergers, and 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 level is acquired by another partner type (say a managed service provider at the Strategic 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 by 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 is for managed service providers (MSPs) looking to grow their profitability and sales of their service offerings via the ConnectWise platform, services, and community.

## Program Criteria

To be eligible for the ConnectWise Partner Program, you must be an IT solution provider (TSP) or MSP currently providing or looking to provide hosted IT services, and you must have purchased at least one of the eligible ConnectWise solutions. All program levels, with the exclusion of Registered, are invitation only. Invitations are based on meeting the program requirements, assurance of partner resources, and commitment of time to meet or exceed joint business goals.

## Legal Entity

As part of the ConnectWise Partner Program registration, MSPs and TSPs 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, they may add affiliates only upon written agreement by ConnectWise.

## Partner Tiers

The ConnectWise Partner Program has four programmatic membership levels: Registered, Emerging, Accelerate, and the highest level of membership, Strategic. 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 an MSP who has at least one active paid subscription enrolls at <https://www.connectwise.com/partner-program/join-registered>. This unlocks the partner’s access to online sales, marketing, and technical training, best practices, and assets to advance their levels of operational maturity within the ConnectWise University.

### Emerging Partner Tier

The “Emerging” level of membership is where a partner has the desire 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 will have agreed to meet the qualifications set forth in that agreement which includes access to the ConnectWise Certify™ courses, a review of business readiness objectives, and coordination of the necessary resources to drive success.

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## 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 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.

### North America ConnectWise Partner Program Benefits

PARTNER LEVELS	Registered	Emerging	Accelerate	Strategic
Account Manager	Y	Y	Y	Y
Sales, Marketing, and Training assets	Y	Y	Y	Y
ConnectWise Certify Fundamentals	Y	Y	Y	Y
Annual Business Plan MDF Co-Investment		Up to \$1,250 USD	Up to \$5,000 USD	Up to \$25,000 USD
Growth MDF Co-Investment		5 % ACV	10 % ACV	10 % ACV
Marketing & Sales Workshops		Y	Y	Y
GlassHive Sales & Marketing Automation Platform - \$1,200/year	\$250 USD	Waived	Waived	Waived
Access to Co-Sell Resources		Y	Y	Y
Opportunity Registration		Y	Y	Y
FREE NFRs with your paid subscriptions		Y	Y	Y
Discounted ITN Pass		Y	Y	Y
ConnectWise Certify Advanced			Y	Y
Dedicated Marketing Consultant			Y	Y
GlassHive Multi-Location Marketing Reporting				Y
First Access to Advisory Council				Y

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IT Nation Exclusive Invites				Y
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## North America ConnectWise Partner Program Requirements

PARTNER REQUIREMENTS	Registered	Emerging	Accelerate	Strategic
Enrollment	Active ConnectWise License	Meets Requirements / Invite Only	Meets Requirements / Invite Only	Meets Requirements / Invite Only
Number of Users Under Management	0	500+	1,000+	5,000+
Minimum Current MRR	\$1+ USD MRR	\$1,000 USD	\$8,000 USD	\$50,000 USD
12-Month ConnectWise MRR Incremental Commitment & Business Plan	\$0 USD	\$750 USD	\$2,000 USD	\$10,000 USD
Business/Marketing Assessment	Not Required	Required	Required	Required
Marketing Plan	Not Required	Recommended	Required	Required
Marketing Campaign or Event	Recommended	1 (annual)	2 (annual)	4 (annual)
ConnectWise Certify	Recommended	1 Person	2 People	4 People
IT Nation Connect	Recommended	Recommended	1 Person	2 People
IT Nation Secure	Recommended	Recommended	Recommended	1 Person
Technical Training	Not Required	Recommended	Required	Required
Sales Training	Not Required	Recommended	Required	Required
ConnectWise Certify Advanced	Not Required	Recommended	Recommended	Required
Installation NFR	Not Required	Recommended	Recommended	Recommended

## ConnectWise Partner Program Eligible Solutions

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

- **Unified Monitoring and Management:** ConnectWise Automate, ScreenConnect, and RMM
- **ConnectWise Asio™ platform:** ConnectWise Sidekick, RPA
- **The IT Nation:** IT Nation Evolve™
- **Business Automation:** ConnectWise PSA and CPQ, Business Management packages, ConnectWise solutions: BrightGauge, ITBoost, Service Leadership, Inc.®, Smileback, WisePay, and Wise-Sync
- **Cybersecurity:** ConnectWise Identify Assessment, SIEM, MDR, Risk Assessment, Vulnerability Management,

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Backup, Co-Managed Backup, Continuity Backup, SaaS Backup

## 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.

## Opportunity Registration

The opportunity registration program is designed to reward those TSP's who proactively identify new eligible 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 account manager, and notification of any future direct ConnectWise inquiry from said registered customer.

## Sell Through Pre-Sales Resource

Partners at the Emerging, Accelerate, and Strategic partner levels will gain access to pre-sales resources for ConnectWise eligible solutions once an opportunity has been registered and approved with ConnectWise. Our pre-sales resources will welcome your technical lead's participation as we support you through the sales cycle from technical discussions to evaluations.

## NFR Licenses

Not-for-resale (NFR) licenses are an active paid subscription. Having a co-authored business and marketing plan is a requirement to receive NFR license program benefits for demonstration purposes.

Provided Client is in full compliance with the terms and conditions contained herein, ConnectWise hereby grants Client a nonexclusive, limited monthly subscription license the Free Offerings set forth in this schedule for not for resale ("NFR") purposes at no additional cost solely to demonstrate, market, and evaluate the NFR products to prospective end users of Client. Client may not use the NFR products for any other purpose, including without limitation to sell the products to any end users or other third party. These licenses are provided "as is" without warranty of any kind. ConnectWise may terminate this license at any time with or without notice.

## Training Accreditation/Certification

### ConnectWise Certify Business Builders Certifications

Available to all levels, as you begin embarking on the journey to grow your business, the ConnectWise Business Builder certifications will help you learn everything you need to know to stay on top of your finances, grow your pipeline, close more deals, retain more clients, and develop leadership teams that will help fuel your business.

### ConnectWise Certify PSA

Available to all partner levels, the ConnectWise PSA certifications are focused on the service, sales, and finance roles to accommodate your company's needs and foster growth in operational and business maturity.

### ConnectWise Certify Fundamentals

Available to sales, owners, and engineers at no cost, these courses are a requirement of the Accelerate and Strategic partner levels. During this on-demand training, you will learn about foundational cybersecurity, including industry frameworks and standards, risk assessment best practices, and navigating the ecosystem of cybersecurity products, as well as role-specific segments tailored specifically for MSP sales professionals and MSP engineers.



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## ConnectWise Certify Advanced

This 12-month program is a requirement for 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 the competencies necessary to build a credible cybersecurity practice.

## ConnectWise University Resources

Available to all partners, ConnectWise University offers a comprehensive range of sales, marketing, and technical training programs to enhance partners' skills. ConnectWise University allows partners to elevate their expertise and stay ahead in the ever-evolving business landscape by providing access to valuable resources and knowledge. Whether acquiring new sales techniques, mastering effective marketing strategies, or honing technical proficiency, ConnectWise University equips partners with the tools they need to succeed and thrive in their respective industries.

## Marketing & Sales Automation Platform powered by GlassHive

Participating partners at Emerging, Accelerate and Strategic levels will get free access to our marketing automation platform. Registered-level partners will get GlassHive access at a discounted price of \$250.00 per year. This platform will provide access to participating partners with quick visibility into the success of their campaigns and will integrate into most CRM platforms, such as ConnectWise PSA. This platform will also provide partners with access to marketing collateral and greater visibility into their program incentives and will be a central point of collaboration with your account manager regarding leads, opportunities, and business plans. Registered-level partners will be billed directly from GlassHive for their yearly subscription. Additional information regarding GlassHive can be found at <https://glasshive.com/>.

## General Marketing Resources

All partner levels will get access to marketing and sales materials available within ConnectWise University. Emerging, Accelerate, and Strategic partners will get additional access to live and dynamic virtual workshops and training related to marketing best practices, marketing plan creation, and GlassHive instructional training.

## 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 demand generation efforts in areas such as profiling the ideal prospects, launching campaigns, and supporting other demand generation activities.

## MDF (Market Development Funds)

Market Development Funds (MDF) are a benefit for eligible partners who want to grow their business with ConnectWise. Both the Business Plan MDF and Growth MDF are material investments from ConnectWise, with the expectations of returns of mutual growth. They are designed to support marketing activities that build awareness, drive leads, and win new business for partners' service offerings powered by ConnectWise solutions. All MDF allocation is based on mutual investment with the partner and alignment to the joint business plan. Partners can gain access to MDF in three ways:

- **By completing a 12-month business plan and a marketing plan within GlassHive.** Emerging, Accelerate, and Strategic partners will gain access to the Annual Business Plan MDF in the amount defined in the current partner program benefit matrix. Partners can choose from a list of eligible solutions to build their business plan and align their marketing activities with joint revenue goals. All requests will be subject to approval based on the amount requested, total cost of the activity, projected leads, and remaining MDF.
- **By adopting new ConnectWise core solutions as part of their technical stack for the first time.** Emerging partners can earn Growth MDF access equal to 5% of the annual contract value of the eligible ConnectWise solutions they contracted

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within the previous quarter. Accelerate and Strategic partners can earn Growth MDF access equal to 10% of the annual contract value of the eligible ConnectWise solutions they contracted in the previous quarter.

- **By increasing your contracted license commitment or migrating to another eligible ConnectWise solution within a given quarter.** Emerging partners can earn access to additional Growth MDF in the amount of 5% of the incremental annual contract value over previous contract. Accelerate and Strategic partners can earn access to Growth MDF in the amount of 10% of the incremental ACV over previous contract.

Partners can request against Business Plan MDF for marketing activities within the current fiscal year, pending their available balance. Partners who have gained access to additional Growth MDF must make a request against such funds within 90 days of access.

## ConnectWise Subscription MDF Eligible List:

This list of ConnectWise solutions qualifies for incremental MDF based on either 1st time license subscriptions or contracted add-ons, migrations, or term extensions to existing license subscriptions.

- **Unified Monitoring and Management:** ConnectWise Automate, ScreenConnect, RMM
- **ConnectWise Asio platform:** ConnectWise RPA, Sidekick
- **The IT Nation:** IT Nation Evolve
- **Business Automation:** ConnectWise PSA and CPQ, Business Management packages, ConnectWise solutions: BrightGauge, ITBoost, Service Leadership, Inc.®, Smileback, WisePay, and Wise-Sync
- **Cybersecurity:** ConnectWise Identify Assessment, SIEM, MDR, Risk Assessment, Vulnerability Management, Backup, Co-Managed Backup, Continuity Backup, SaaS Backup

## Eligible Fund Activities

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

- Lunch and Learns
- Office hosting events
- Hosted dinners
- Workshops
- Conference sponsorship, inclusive of booth and breakout sessions
- Appointment setting services
- Paid digital marketing
- SEO
- Third-party content creation
- Off-site events
- Internal training

## 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 two weeks prior to the activity, including but not limited to:
  - Sending at least two invitations to clients and prospects prior to the event
  - Promoting events on social media
  - Provide a follow-up communication
  - Share resulting leads with your account manager so we can support winning business.
4. Marketing activity must not exceed 90 days from the request date.
5. Partner will load the attendee list or lead list in GlassHive.
6. Marketing Activity must be completed within 90 days of MDF approval.
7. Partners to make their best effort to exceed a projected ROI of 15:1 on pipeline generation and a 5:1 ROI on Closed Won Business within three months following the event.
8. Partners are expected to register opportunities from the qualified lead generated in GlassHive within

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30 days of activity.

## MDF Fund Process

1. The marketing consultant will provide the partner with instructions on how to receive and complete EFT form.
  - a. In said instructions, the partner will receive a GlassHive email with an automatic response
  - b. GlassHive automatic email will reply to the partner's email with two secure links
    - EFT File secure link—this link will provide the partner with the EFT form to fill out
    - EFT Upload secure link—this link is to upload the EFT form once completed by the partner
  - c. GlassHive automatic email will also provide detailed instructions on the process
  - d. **Important**—please never share EFT files via email. Always use the secure link provided by GlassHive
2. MDF requests must be submitted within the GlassHive platform.
3. Approvals will be determined within ten working days from submission.
4. Approvals are subject to meeting the program requirements, ROI and funds available to the partner.
5. If approved, ConnectWise will provide an approval notification via GlassHive.
6. If declined, ConnectWise will provide you notification via GlassHive on what information, timeframe, and/or ROI is required for approval.
7. Once the activity is complete, the partner must upload proof of performance (POP) within 30 days of the activity's end date.
  - a. POP examples:
    - Activity receipts (show that the amount requested equals or exceeds the amount paid)
    - Lead list
    - Attendee list
    - Photographs (events)
    - Performance metrics (in the case of digital marketing)
8. Upon POP acceptance, funds will be paid promptly directly from GlassHive.

## ConnectWise Social Media Sharing Guidelines

Social media content shared by Emerging or Accelerate 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

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

## Core Requirements for MDF Claims

Each activity you submit for approval has core requirements. You need to demonstrate that you have met these requirements in your POP documents. Some activities also require specific communication types and metrics as well. All demand generation activities have a requirement of uploading your leads or opportunities within the GlassHive platform. Please refer to Exhibit A for the core requirements for each of the accepted activities.

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## EXHIBIT A: Marketing Funds Accepted Activities & Claim Requirements

### Print Advertising

Core Requirements	ConnectWise powered 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	<ul style="list-style-type: none"> <li>• Third-party media placement</li> <li>• Printed material</li> <li>• Fee: agency marketing and creative services including agency fees</li> </ul>

### Digital Advertising

Core Requirements	ConnectWise powered 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	<ul style="list-style-type: none"> <li>• Third-party media placement</li> <li>• Fee: agency marketing and creative services including agency fees</li> </ul>

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

Core Requirements	ConnectWise powered services content
Communications Requirements	<ul style="list-style-type: none"> <li>• Copy of final communication piece showing program-specific core requirements</li> <li>• Proof of distribution can include a postmarked shipping envelope or other proof of mailing (direct mail), a final email showing a dated header or other proof of emailing (email), or photo of a phone message (SMS)</li> </ul>
Metrics	Estimated customer or partner reach
Eligible Expenses	<ul style="list-style-type: none"> <li>• Database acquisition</li> <li>• Printed material</li> </ul>

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- Postage
- Fee: agency marketing and creative services, including agency fees

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## Partner Website and Search Engine

Core Requirements	ConnectWise powered services content
Communications requirements	<ul style="list-style-type: none"><li>• URL and/or screenshots of site page(s) showing URL</li><li>• Statement of work or service agreement for SEO project (SEO activity only)</li></ul>
Metrics	Summary of results (such as click-through report)
Eligible expenses	<ul style="list-style-type: none"><li>• Fee: agency marketing services, including agency fees</li><li>• Programming and development fees</li><li>• SEO: optimization and maintenance fees</li></ul>

## Multi-touch Digital Campaign

Core Requirements	ConnectWise powered services content
Communications requirements	All POP as detailed in the applicable activity page is required <ul style="list-style-type: none"><li>• Digital advertising</li><li>• Direct email</li><li>• Partner website and search engine</li><li>• Optimization</li><li>• Telemarketing</li></ul>
Metrics	Lead list
Eligible expenses	<ul style="list-style-type: none"><li>• Third-party media placement</li><li>• Fee: agency marketing and creative services, including agency fees</li><li>• Database acquisition</li><li>• Programming and development fees</li><li>• SEO: optimization and maintenance fees</li><li>• Fee: third-party call center charges</li></ul>

## Telemarketing and Expositions

Core requirements	ConnectWise powered services content must be included in the tele-sales script, ConnectWise content
Communications requirements	Copy of script
Metrics	<ul style="list-style-type: none"><li>• Lead list</li><li>• Summary of results (number of calls and number of successful contacts)</li></ul>
Eligible expenses	<ul style="list-style-type: none"><li>• Fee: agency marketing services, including agency fees</li><li>• Fee: third-party call center charges</li><li>• Database acquisition</li></ul>

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## Customer Seminars and Boot Camps

Core requirements	ConnectWise powered services content
Communications requirements	<ul style="list-style-type: none"> <li>• Event invitation and agenda/program</li> <li>• Event photos</li> <li>• Presentation materials if event invitation and agenda do not meet core requirements</li> </ul>
Metrics	Number of registered guests
Eligible expenses	<ul style="list-style-type: none"> <li>• Signage/display/printed materials</li> <li>• Giveaways</li> <li>• Fee: agency marketing services, including agency fees</li> <li>• Fee: registration</li> <li>• Fee: external speaker</li> <li>• Fee: facility and equipment rental including Surface devices owned and managed by a third-party</li> <li>• Catering</li> </ul>

## Tradeshows and Exhibitions

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

## Internal Incentives and SPIFFs

Core requirements	Internal contest rules driving new 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

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Eligible expenses	<p>Actual costs up to 25% total of earned MDF funds per usage period for:</p> <ul style="list-style-type: none"> <li>• Signage, display, printed materials</li> <li>• Giveaways</li> <li>• Fee: agency marketing services, including agency fees</li> </ul>
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## 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	<ul style="list-style-type: none"> <li>• Fee: ConnectWise exam fees for certifications and competencies</li> <li>• Fee: ConnectWise tuition fees for certifications and competencies, including on-demand training expenses</li> <li>• Third-party ISV solution training: tuition expenses for training on third-party solutions that can be demonstrated to leverage or reside on ConnectWise platforms</li> <li>• Fee: ConnectWise Certified Trainer fee (no metric required)</li> </ul>

## Sales Kickoff, Internal Training, and Floor Days

Core requirements	100% ConnectWise content for the timeframe of day, session, or event space being claimed
Communications requirements	<ul style="list-style-type: none"> <li>• Training agenda or event program</li> <li>• ConnectWise presentation content</li> </ul>
Metrics	Number of attendees
Eligible expenses	<ul style="list-style-type: none"> <li>• Fee: training/tuition/registration/digital training platform or digital training formatting</li> <li>• Signage/display/printed materials</li> <li>• Giveaways</li> <li>• Fee: agency marketing services, including agency fees</li> <li>• Fee: external speaker</li> <li>• Fee: facility and equipment rental</li> <li>• Catering (excluding alcohol)</li> </ul>



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## ConnectWise Sponsored Conferences

Core requirements	ConnectWise-sponsored IT Nation conferences
Communications requirements	<ul style="list-style-type: none"> <li>• Copy of conference/event invitation or registration confirmation showing evidence that the conference is sponsored by ConnectWise</li> <li>• Transportation itinerary with travel dates (travel and airfare expenses only)</li> </ul>
Metrics	NA
Eligible expenses	<ul style="list-style-type: none"> <li>• Up to 50% fee: registration for up to 2 attendees per conference</li> <li>• Up to 50% of travel, airfare, and hotel: Transportation (airfare or train fare and applicable taxes) and hotel (room rate only and applicable taxes)</li> </ul> <p><b>NOTE:</b> Travel, airfare, and hotel expenses are capped at up to USD \$2,500 per person per conference, limited to two attendees, with a total cap of USD \$5,000 for airfare/train fare/hotel expenses per period per program. Hosting may have different allowances.</p>

## IT Nation Evolve New Membership

Core requirements	New partner agreement. Eligible membership includes Evolve 2, Evolve 3, Service, Sales, COO, CFO, and Security Evolve 12-month membership.
Communications requirements	New member validation provided by Evolve
Metrics	Partner provided paid invoice for Evolve membership
Eligible expenses	<ul style="list-style-type: none"> <li>• Up to 25% of a full 12-month subscription</li> </ul>

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