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Ivanti Partner Network

Marketing Development Fund Program 2022

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MDF Program Overview

Ivanti's Marketing Development Fund (MDF) Program is a global, proposal-based funding program designed to support eligible members of the Ivanti Partner Network in their marketing initiatives. The Ivanti MDF program is an invitation only program, with the intent that any and all funds will be used to support demand generation through the partner and partner facing enablement. Funds may also be requested to support additional activities that do not fall within demand generation or partner enablement. This guide will walk you through how funds can be requested, eligibility and usage.

Primary Purpose

The primary purpose of the Marketing Development Fund Program is to provide discretionary funding to successfully promote and sell Ivanti products. The program allows partners to effectively market through joint marketing activities as listed in this document, with Ivanti.

Program Eligibility

Ivanti partners must meet the following criteria:

- Be invited to participate in the program by their Channel Account Manager
- Depending on the partnership and partner, partner may be asked to submit an annual marketing plan that aligns to their Ivanti business plan
- Maintain active Ivanti partner program status with signed contract
- Maintain positive financial standing with Ivanti

Marketing Plan, Submission and Approvals

- MDF funds may be issued to the partner against an annual plan. In this case, partner must have an approved business plan and an annual Ivanti marketing plan – this plan should be submitted via the approved Ivanti marketing plan template. Please request the Ivanti Marketing Plan template from your Partner Sales Manager or your regional Ivanti Partner Marketing Manager.
- Within the Ivanti partner marketing plan template, you will show your local currency request, but must show the corresponding US\$ (United States Dollar) amount.
- Partner may have access to funds without having to submit a business plan or annual marketing plan - please work with your Ivanti Partner Sales Manager or your regional Ivanti Partner Marketing Manager.
- Regardless of whether the Ivanti partner is requesting funds via an annual proposal or activity by activity, all of the terms in respect to the Ivanti MDF program apply.
- **Return of Investment (ROI)** It is Ivanti's expectation that any funds requested should have a 30x (thirty times) return (pipeline) of the requested fund, by activity. For example, if you request US\$2,000 you should identify return of \$60,000.

- Partner must be prepared to speak to the return post any demand generation activity. Ivanti will be looking at deal registration reports to help support this discussion.

Co-Investment

The marketing development fund is an invitation only program, it's important that partners are willing to co-invest in their marketing plan with Ivanti. In this way, both Ivanti and partner are committed to the overall success of the activity and overall plan.

Depending on the plan or activity, Ivanti may request that the partner investment up to 50% of the plan, specifically as it relates to third party events. For example, partner may want to participate in a regional trade show as an exhibitor and the cost for participation is US\$5,000, Ivanti will request that 50% of this request be funded by the partner.

Spend Categories

Ivanti funds are issued to support the partners sales goals through marketing Ivanti to existing, net new and prospects. Funds are also issued to support partner enablement, incentives and in some cases – infrastructure.

Demand Generation

At least 80% of your overall marketing plan should align to demand generation. These funds should be applied to the area of the Net New.

Net New is defined as follows: a new logo, new customer or an existing customer who hasn't purchased from Ivanti in the last three years. It may also be defined as an existing customer who is purchasing a new product.

Partner Enablement, Incentives, and Infrastructure

Of the total plan, where 80% of the fund should be aligned to demand, the remaining 20% can be applied to partner facing enablement and/or incentives and/or infrastructure.

- **Partner Enablement** is defined as funding that can be leveraged to support the education of Ivanti (value drives, solution etc.).
- **Incentive** is defined as funding that can be leveraged to drive specific behavior within the partner sales organization. Any incentive that is put in place should be used **to drive incremental** bookings or pipeline. Please work with your Ivanti Partner Sales Manager or your Ivanti Partner Marketing Manager to define the approach if you wish to add an incentive to your plan.
- **Infrastructure** is defined as funds that support program fees or activity that does not fall within the Demand Generation, Partner Enablement or Incentive category – please work with your Ivanti Partner Sales Manager or your Ivanti Partner Marketing Manager on the details.

MDF Usage and Terms

- Depending on the activity, partners should be prepared to match the funding request made by 50% of the total cost of the proposed activity and proof must be provided e.g., a copy of a third-party invoice showing total cost of an activity.
- Funds will not be allocated for activities that were not approved prior to execution.
- MDF must be approved prior to the execution of the activity, funds will not be applied retroactively.
- All marketing assets must be co-branded and approved prior to the activity, regardless of whether the activity is web/digital or in print.
- Partners must follow the Ivanti Partner Brand Guidelines and leverage the Ivanti logo in their materials/web – please request these files through your Ivanti partner portal or your Ivanti partner marketing manager.
- A copy of the co-branded asset must be approved by your Ivanti partner marketing manager, a review, approval or feedback will be provided within 48 hours of the request submitted
- Partner may share their leads with Ivanti – please work with your Ivanti partner marketing manager to understand the mechanism, including the guardrail timelines that Ivanti aligns to any and all partner leads that are shared with Ivanti.
- If leads are not shared with Ivanti, partner must be willing to share the number so lead garnered through an event, aligning to the overall ROI that is identified as part of the request.

Submission/Approval of your MDF Request

- All Ivanti partners must use the Ivanti MDF portal to make their requests, please work with your Ivanti partner marketing manager to understand how these submissions are made
- If the partner is not yet part of the Ivanti Partner Program and is a partner of an acquired company:
 - Partner must be an approved vendor of Ivanti – this is required so that we can pay an invoice for reimbursement of the activity
 - There may be a different request process for funds
 - Please work with your Ivanti partner marketing manager or your Ivanti partner sales manager

As previously identified, activities will not be approved if the date identified has already passed, for example, activity start date is February 17th 2022, the submission of the activity is February 18th, 2022, this activity request will not be accepted.

- Activities must be submitted with a minimum of at least 4 weeks prior to the activity start — this allows for the appropriate workflow of approvals to be executed within the system.
- Understanding that activities may change from time to time, if this happens, work with your Ivanti partner marketing manager. The event can be deleted/ cancelled and re-entered.
- Partner will have up to 60 days from date of execution of the activity to claim for reimbursement of their activity – how to make a claim is reviewed in this guide.

- If the partner does not claim within the 60 day period as identified above, these funds expire and funds will no longer be available. Invoices will not be accepted after this deadline.
- The claim process is covered within this guide.
- Advanced payment for activity is strictly prohibited.

Lead Data

All prospect and lead data from MDF sponsored events should be shared back with Ivanti within ten business days. The information is not requested with the intention of calling or contacting leads, but rather for reporting purposes. The only reason an Ivanti representative would ever contact a partner lead would be in the case that two complete weeks have passed without the lead being contacted by the partner.

In accordance with privacy laws and GDPR, there is a specific process in which a partner must upload their lead list. Please work with your respective Partner Manager who will provide you the details on where and how to upload your leads.

Approved Activities

MDF is designed to reimburse participating partners for Ivanti-related sales and marketing activities. The following categories provide an example of approved activities/expenses, required proof of performance,

and non-approved expenses. If the event proposed isn't one of the activities listed under approved activities, that does not mean it will be immediately rejected. The activities listed are merely an overview of frequent activities, while Ivanti is always looking for

new ideas and ways to generate pipeline and revenue, if there is an activity that is not listed, this could fall under the "other" category — please discuss with your Ivanti partner manager.

Approved Activity	Spend Category	Approved Expenses	Proof of Performance	Non-Approved Expenses
CxO Workshop/Seminar or Meeting	Demand Generation	<ul style="list-style-type: none"> Space Rental Printing (must be co-branded) AV Equipment rental Food & Beverage Merchandise 	<ul style="list-style-type: none"> Partner Invoice List of attendees Copy of emails, collateral Copy invoices of any third party costs Picture of co-branded merchandise Deal registration report with deal registration IDs Lead list – follow the lead list upload process 	<ul style="list-style-type: none"> Alcohol Shipping Travel & lodging Cost of printing business cards and letterheads Shipping
Lunch and Learn (Customer Facing)	Demand Generation	<ul style="list-style-type: none"> Food and Beverage Gift cards (up to \$25) Merchandise List purchase 	<ul style="list-style-type: none"> Partner Invoice List of attendees Copy of emails, collateral Copy invoices of any third-party costs Picture of co-branded merchandise Lead list – follow the lead list upload process 	<ul style="list-style-type: none"> Alcohol Shipping Travel & lodging Cost of printing business cards and letterheads
Digital Campaigns** (Newsletters, PPC, Email)	Demand Generation	<ul style="list-style-type: none"> Maximum reimbursement of \$1,500 USD Optional verification Design, development, layout Third party execution Third party list purchase 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity if a third party has been leveraged Copy of email blast or newsletter Overview of recipients/Target Aud. KPI's Timeline of campaign duration Report showing PPC (Pay per Click) Report including number of inquires If available report including number of Deal Registrations with Deal Registration ID Lead List - please follow the lead upload process 	<ul style="list-style-type: none"> Expedited costs to outsourcing agencies if not created in house Purchase of new programs for use of further marketing efforts Cost of internal marketing automation

Approved Activity	Spend Category	Approved Expenses	Proof of Performance	Non-Approved Expenses
Direct Mail Campaigns**	Demand Generation	<ul style="list-style-type: none"> Printing, flyers, leaflets, handouts, postcards, brochures, data sheets Production Development 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity if a third party has been leveraged Copy of direct mail piece Description of mailing list Report including number of inquires If available report including number of Deal Registrations with Deal Registration ID Lead List - please follow the lead upload process 	<ul style="list-style-type: none"> Overnight Shipping Associated costs of printing business cards or letterheads Travel, lodging, food and beverage
Event/Tradeshow Participation**	Demand Generation	<ul style="list-style-type: none"> Collateral/print costs (co-branding, creative design, layout, production) A/V equipment rentals Booth space rental 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity Detailed description of activity Attendee list with full contact details (within GDPR regulation) Agenda or event guide Copies of event invoices Photos of the event Event registration report Lead list - please follow the lead upload process 	<ul style="list-style-type: none"> Production of giveaways/collateral with only 'Partner' branding on Carpeting, booth furniture Food and beverage for client or employee meals If event is cancelled, partner will be responsible for all fees and associated costs Customer reception and happy hours Travel, lodging, food & beverage
Floor Day	Partner Enablement	<ul style="list-style-type: none"> Food and beverage Prizes under \$50 Collateral/print costs (co-branding, creative design, layout, production) 	<ul style="list-style-type: none"> Partner Invoice Agenda List of participants Copy of collateral Copy of confirmation of creative costs Photos of the event 	<ul style="list-style-type: none"> Alcohol Prizes over \$50 in value Travel, lodging Shipment or fulfillment costs
Lead purchase**	Demand Generation	<ul style="list-style-type: none"> 3rd party lead purchase Lead subscription services Business data subscription (example Hoovers.com) 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity Copy of third party invoice Partner invoice Samples of lead generation campaign List of inquiries Lead list - please follow the lead upload process Deal registration report including deal registration ID's 	<ul style="list-style-type: none"> Travel, lodging, food & beverage Cost of internal marketing automation
Lead Qualification/ Blitz Day**	Demand Generation	<ul style="list-style-type: none"> Prizes under \$50 Food and beverage Collateral/print costs (co-branding, creative design, layout, production) 	<ul style="list-style-type: none"> Partner invoice Detailed description of activity List of participants and prizes awarded Copy of collateral Copy of confirmation of creative costs Photos of the event ROI report including deal registration ID's Lead list - please follow the lead upload process 	<ul style="list-style-type: none"> Gifts over \$50 in value Alcohol Travel, lodging Shipment or fulfillment costs

Approved Activity	Spend Category	Approved Expenses	Proof of Performance	Non-Approved Expenses
Lunch and Learn (Partner Facing)	Partner Enablement	<ul style="list-style-type: none"> Food and beverage Collateral/print costs (co-branding, creative design, layout, production) 	<ul style="list-style-type: none"> Partner invoice Agenda List of participants Copy of collateral Copy of confirmation of creative costs Photos of the event 	<ul style="list-style-type: none"> Alcohol Travel, lodging Shipment or fulfillment costs
Other Activities not defined above	Not defined, activity dependent	<ul style="list-style-type: none"> For activities not listed, approval must be sorted prior to execution and will come from Ivanti Global Channel Team 	<ul style="list-style-type: none"> Proof of performance will be outlined when activity is approved by Ivanti Management 	<ul style="list-style-type: none"> All events requested will be under careful consideration Ivanti does maintain the right to approve or deny any expense that is not listed on this chart
Webinars	Demand Generation	<ul style="list-style-type: none"> List purchase 	<ul style="list-style-type: none"> Partner invoice Proof partner has contributed 50% of the activity if a third party has been leveraged Copy of the presentation clearly showing Ivanti's promotion SQLs List of registrants and attendees to include company name, name, email and phone 	<ul style="list-style-type: none"> Travel, lodging, food & beverage
Print & Online ** Advertising (including collateral literature)	Demand Generation	<ul style="list-style-type: none"> Print & placement cost Expenses for advertising, agency fees, layout Production, creation or any other costs associated with creation Electronic banner ads Printing costs 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity if a third party has been leveraged Copy of tear sheet of printed ad Screenshot of web banner Run dates, media schedule ROI report with number of leads and deal registration ID's where applicable 	<ul style="list-style-type: none"> Expedited printing costs Travel, lodging, food and beverage
Web Page**	Demand Generation	<ul style="list-style-type: none"> Production Creation 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity if a third party has been leveraged Copy of the advertisement 	<ul style="list-style-type: none"> Talent hire Travel, lodging, food and beverage

Approved Activity	Spend Category	Approved Expenses	Proof of Performance	Non-Approved Expenses
Sales Incentive**	Incentive	<ul style="list-style-type: none"> Activities built around acquiring Net New Customer Details involving expense of sales incentive Activity must include a timeline and list of goals around the incentive 	<ul style="list-style-type: none"> Partner invoice Detailed description of incentive Amount of anticipated pipeline and revenue List of participants and prizes awarded 	<ul style="list-style-type: none"> Alcohol Visa Gift Cards Travel, lodging, food & beverage
Sales Kick-Off/Sales Enablement	Partner Enablement	<ul style="list-style-type: none"> Sponsorship Development of collateral/signage associated with kick off Food & Beverage Merchandise (max cost per person) 	<ul style="list-style-type: none"> Partner Invoice Copy of agenda List of attendees Copy of all co-branded collateral 	<ul style="list-style-type: none"> Travel, lodging Alcohol Shipment costs Printing costs
Sales/Technical Training	Partner Enablement	<ul style="list-style-type: none"> Food and beverage Printing of collateral Giveaways and/or incentive (to be aligned with partner terms on incentive issue and just be a component of the activity) 	<ul style="list-style-type: none"> Agenda Copies of notification of the event List of attendees with company name, name, phone and email Copies of any collateral or presentations used during the event 	<ul style="list-style-type: none"> Travel, lodging Shipping or fulfillment costs Alcohol
Search Engine Optimization (SEO)** Search Engine Marketing (SEM)**	Demand Generation	<ul style="list-style-type: none"> Adwords purchase 3rd party consulting fees Inbound marketing assistance Key word search assistance 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity if a third party has been leveraged KPI reporting (click rates, CTR, # of leads generated, Timing) Landing page development Confirmation of call to action 	<ul style="list-style-type: none"> Travel, lodging, food and beverage Domain purchases Shipment or fulfillment costs Cost of internal marketing automation
Telemarketing**	Demand Generation	<ul style="list-style-type: none"> Telemarketing service fees Cost of list acquisition List subscription services 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity if a third party has been leveraged KPIs Campaign duration A copy of all leads generated during this activity, and deal registration ID's 	<ul style="list-style-type: none"> Travel, lodging, food and beverage Bonus to telemarketing staff Partner staff time for campaign planning In-house telemarketing activities made from your place of business

Ineligible Activities for Reimbursement

Activities that are seen to be 'outside' the scope of sales pipeline (demand) generation activities will be reviewed by a wider number of Ivanti colleagues and a verdict provided within 7 working days after the MDF request has been submitted.

Examples of these would be:

- Sponsorship of Ivanti led events, for example booth space at Interchange. This activity must be funded wholly by the partner.
- Customer gifts
- Associated cancellation fees of any activity that may or may not have a third party associated. This could be discussed.
- Office supplies
- Attending "sports" events without an aligned sales generation plan
- Bribes, inducements
- Unapproved print magazine/publication advertisements
- Funded heads and their incurred/associated costs*
- Visa Gift Cards
- Flights/travel costs and depending on the activity, food & beverage
- Alcohol-related gifts including giveaways and co-branded alcohol promotional items
- Legal fees
- Clothing or giveaways not associated with an event
- Deposits or pre-paid activities

Contact Us

Ivanti Partner Marketing contacts:

EMEA: mariusz.nowak@ivanti.com

AMS: charles.ramseur@ivanti.com

APAC: matilda.wee@ivanti.com

Global MDF management: koen.franckaert@ivanti.com

General Ivanti Partner Marketing inquiries: ipn@ivanti.com

When submitting your claim be prepared to have the following documentation ready:

1. A copy of the invoice—the invoice must be addressed to the list of Ivanti entities that are regionally based.
2. The invoice MUST have the Fund Request Number (FR) clearly identified, any invoice without this Fund Request Number will be automatically rejected.
3. Copies of the activity proof of performance as identified in the activity listing in the MDF Guide.

Submitting your invoice

1. All claims must be submitted through the MDF portal (selected Partners) or by email to the Ivanti Partner Marketing Manager, depending on the partnership/partner. For submitting MDF invoices and proof via the MDF portal, you can ask your Ivanti Partner Marketing Manager for guidance.
2. It is required that every and each APPROVED ACTIVITY has a unique invoice.
3. An invoice must be submitted within 60 (sixty) days of the activity start date.
4. If the activity is not submitted within 60 (sixty) days of the activity start and is submitted outside of this window, the activity fund will be revoked and will not be reimbursed.
5. The invoice must be submitted with copies of the applicable proof of performance as identified in the activity listing in the MDF Guide.
6. Your regional Ivanti Partner Marketing Manager will review the invoice and submit it to Ivanti Accounting on your behalf.

** within GDPR regulation– during all MDF funded activities i.e. events, webinars, tradeshowes etc, Partners must clearly cite (display) a disclaimer that customer/prospect data collected by them will be shared with Ivanti and demonstrate that their leads have opted into this agreement

North America

Partners who are in Canada and the United States should address their invoices to:

IVANTI INC

10377 South Jordan Gateway,
Suite 110 South Jordan, Utah
84095 USA

Latin America

Partners who are in Latin America with the exception of partners in Brazil should address their invoices to:

IVANTI INC

10377 South Jordan Gateway,
Suite 110 South Jordan, Utah
84095 USA

Latin America: Brazil

Partners who are in Brazil should address their invoices to:

IVANTI INC

10377 South Jordan Gateway,
Suite 110 South Jordan, Utah
84095 USA

EMEA

Partners who are in EMEA should address their invoices to:

IVANTI UK LIMITED

3 Arlington Square
Downshire Way
Bracknell Berkshire
RG12 1WA United Kingdom

APAC

Partners who are in APAC with the exception of China and Japan should address their invoices to:

IVANTI UK LIMITED

3 Arlington Square
Downshire Way
Bracknell Berkshire
RG12 1WA United Kingdom

APAC: China

Partners who are in China should address their invoices to:

Ivanti Software Technology

(Beijing, Co. Ltd.)
Unit 905-907, Level 9
No 1 Dong Change An Avenue,
Dongcheng District
Beijing, 100738 China

APAC: Japan

Partners who are in Japan should address their invoices to:

Ivanti Software KK

Chiyoda-ku, Hirakawa-cho 1-1-8
Koujimachi Ichihara bldg 5F
Tokyo 102-0093
Japan

MDF Activity Closure

- An invoice must be submitted by the partner and include approved Fund Request number for each MDF payment submitted within 60 days after the end date of the activity. Ivanti will refuse any claim submitted after this 60-day period.
- Invoice MUST show the FR number, this number can be found against the activity in the MDF portal, without this number, your invoice will be rejected.
- Once the MDF activity is closed, Ivanti will no longer make payment against the activity.

General Guidelines (MDF Usage, Reimbursement, etc.)

- An invoice must be submitted by the partner for each MDF payment and submitted within 60 days after the end date of the activity. Ivanti will refuse any claim submitted after this 60-day period.
- If after having an activity approved for funding the partner decides to no longer execute the 'approved activity', the partner must demonstrate how the new activity will generate equally as much pipeline/revenue prior to moving forward with the activity if expecting reimbursement. No information may be misleading or deceptive as to price, product, performance, features or specifications.

- Activities that feature products from other vendors will be reimbursed on a pro rata basis. Ivanti reserves the right to decline participation or reimbursement if other vendors are not considered strategic to Ivanti's sales plans.
- No privileged information regarding Ivanti may be disclosed in the channel partner's printed or external communications.
- Ivanti logos, copyrights and trademarks must be used in accordance with Ivanti's brand guidelines. Please access the Ivanti Partner Brand Guidelines via your portal or via your Ivanti partner marketing manager.
- MDF may not be used for personal items.
- The Ivanti partner sales manager is not permitted to incur any expenses against a partner's previous allocation of funds.
- Ivanti will endeavor to ringfence data captured and submitted from the activity, to ensure the partner has priority in following up with the leads from the activity. Ivanti reserves the right to override this if the leads are not being followed up within two weeks of the activity end date or when the data is available.
- Pre-approved funding requests cannot be combined for a single (unapproved) activity.
- Claims (and respective invoices) must be submitted with a valid FR number that was supplied by Ivanti for that activity only.
- Behavior not conforming to these rules, could result in the Partner's removal from the MDF program.
- Reimbursement for MDF expenditures are budgeted expenses in Ivanti's accounting structure and, as such, cannot be combined with the purchase of Ivanti's product.
- Debit memos or deductions from invoices are not allowed and may be grounds for disqualification from the MDF Program.
- Ivanti reserves the right to refuse reimbursement for any activity that does not follow the agreed upon guidelines or otherwise is deemed inappropriate for MDF reimbursement by Ivanti. Ivanti retains the rights to all MDF funds.
- The assignment and/or ownership of the funds will remain with Ivanti and are non-transferable or assignable without written permission from Ivanti.
- Any insertion order/contract or SOW must be signed by an Ivanti authorized signatory. Your Ivanti partner sales manager and Ivanti partner marketing manager are not authorized signatories. All documents that require a signature will need to be reviewed by legal and signed by an authorized signatory. Please ensure that you are aligning an appropriate timeframe for review and signature. Please work with your Ivanti partner marketing manager who will direct you accordingly.