



Ivanti Partner Network
**Marketing Fund
Program 2024**

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Overview

Ivanti's Marketing Fund program is a **global, invitation only, plan-based program**. This program is designed to support eligible members of the Ivanti Partner Program in their demand generation marketing activities. This guide will walk you through how funds may be requested, eligibility and usage.

Primary Purpose

The primary purpose of the 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:

- Partner must be considered strategically important and have an agreed to business plan with clear goals and targets, of which Ivanti's marketing plan is integrated
- Partner must be willing to show a minimum of 50% investment into their Ivanti marketing plan
- Partner must be willing to share any and all marketing plans, regardless of if Ivanti is funding activities
- Partner must be willing to agree to share leads from an Ivanti funded activity

Marketing Plan, Submission and Approvals

Approvals of activities, plan and issue of funds is the responsibility of your regional Ivanti Growth Marketing Manager. No funds will be approved by your Channel Manager, if you've received approval of an activity from your Channel Manager, fund will not be issued.

The approval of the activity will be communicated in writing (via email) and where applicable or appropriate any contracts will be executed. Note that any contracts needing signature will go through Ivanti legal, please allow for a minimum of 72 business hours to allow for this process to complete. Upon approval, your regional Growth Marketing Manager will issue a Fund Request number which must be included on your invoice, this is covered later in the guide.

Funds may be issued to the partner against an annual plan, via the Ivanti Marketing Plan template. This marketing plan must align to the executed Ivanti Business Plan. All fields within the Ivanti Marketing Plan must be completed.

Activity should be considered growth, lead or demand generation and must meet with minimum Return on Marketing Investment (ROMI).

Approvals of the activity/plan will be provided by the Regional Growth Marketer and only by the Regional Growth Marketer.

Requests for funds should be submitted to your Regional Growth Marketing Manager a minimum of 6 weeks prior to the activity start date.

Co-Investment

Through requesting funds, supporting the Partner business plan, the partner must be willing to invest a minimum of 50% of the plan. This allows us to equally invest, to be equally held accountable and most importantly, ensure that we are agreed to the mutual outcomes of the plan.

The Partner must be willing to show the equal investment, for example, partner may want to participate in a regional trade show as an exhibitor and the cost for participation is USD5,000, Ivanti will request that 50% of this request be funded by the partner and when requesting reimbursement, the partner must show the full invoice paid to the third party along with an invoice showing the 50% reimbursement.

Return on Marketing Investment (ROMI)

It is Ivanti's expectation that ROMI should meet a minimum of 40x return on pipeline and 10x on bookings.

Ivanti has provided Partners with ROMI calculator which is posted on the Ivanti Partner Portal [here](#) (please ensure you're logged into the Partner Portal before accessing this link). This Calculator can also be shared with you via email by your Growth Marketing Manager.

For growth generation (demand generation, lead generation) activities, there is a requirement that the partner must submit a lead list within 24-48 hours on completion of the activity. Ivanti has a specific lead list template and all privacy compliance must be adhered to.

Partners are encouraged to work with their regional Growth Marketing Manager on all activity requests!

Spend Categories, Demand Generation, Partner Enablement, Incentives and Channel Programs

- **Demand Generation** is defined as the focus of targeted marketing programs to drive awareness and interest in a company's products and/or services, resulting in inquiries/leads/opportunities. Demand Generation funds should be applied only to net new or cross-sell initiatives. 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. Cross-sell is defined as an existing customer who is purchasing a new product
- **Incentives** is defined as a focus of targeted initiatives to incent a sales organization to drive a specific behavior. Incentives can only be applied to driving demand. An incentive must be reviewed with your Ivanti channel manager and marketing manager to determine terms and conditions. For example, a partner may want to drive an incentive to increase deal registrations and opportunity close within a specific timeframe. A reward is offered to drive incremental submission of a deal registration,

determining an uplift based on history. A further reward could be provided to close that registered deal.

- **Partner Enablement** is defined as funding that is leveraged to support the education of Ivanti solutions, value drivers, processes etc., within a defined sales or pre-sales audience.
- **Channel Programs** is defined as a focused initiative to support the business engagement with a partner. Often, these programs are designed by our largest partners who require a minimum spend to engage.

Usage and Terms

- Partners must be prepared to invest a minimum of 50% of the total cost of the plan and/or the activity.
- Funds will not be allocated for activities that were not approved prior to execution.
- Marketing funds 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.
- 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 Growth Marketing Manager.

- A copy of the asset associated with the activity must be reviewed and approved by your Ivanti Marketing Manager prior to execution. Please allow for a minimum of a 48 hour turnaround for approval. Depending on the type of asset, we may require a longer approval cycle.
- Generally, requests to pre-pay an activity is not permitted, however, special circumstances could apply. Please work with your regional Growth Marketing Manager.

Submission of the Invoice

- Partner MUST be an approved vendor of Ivanti, this is required to ensure that we can pay on invoice. There is an application process that requires detailed information, please work with your regional Growth Marketing Manager to determine status and application if necessary.
- Invoices MUST be submitted within 30 days of the activity START DATE.
- Failure to submit for reimbursement within 30 days of the activity start date could result in expiration of funds.
- The claim process is covered within this guide.
- Advanced payment for activity is strictly prohibited.

Lead Data

Partners who are leveraging Ivanti marketing funds are required to submit their lead list to Ivanti. All prospect and lead data from Ivanti marketing funded demand

generation demand generation activity should be shared back with Ivanti within 24-48 hours of activity end date.

Leads submitted to Ivanti will be withheld from automated Marketing workflows for 60 days. On day 61, all leads submitted will be made available to Ivanti Marketing for outreach (where necessary targeting and compliance criteria are met). Leads that are part of a Deal Registration within the 60-day period will be considered **partner sourced**. Any lead that is part of a deal registration after 60 days will be considered **Ivanti sourced**.

All leads must be submitted via the approved template, which can be found [here](#) and denotes all required information and format. When submitting your lead list to your regional Growth Marketing Manager via email, the list must be submitted in a secure way, a great way to do this is to encrypt your email. Depending on your email platform, there are several tools that you can use to encrypt your emails and the data being shared. For example, in Outlook, within the options menu, there is an “Encrypt” icon, this allows you to set permissions accordingly. Please work with your regional Growth Marketing Manager if you have any questions.

Approved Activities

Ivanti Marketing Funds are 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 Growth Marketing Manager.

Approved Activity	Spend Category	Approved Expenses	Proof of Performance	Non-Approved Expenses
Customer Facing In-Person Event	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
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
Events (Partner hosted)	Demand Generation	<ul style="list-style-type: none"> Based on sponsorship agreement 	<ul style="list-style-type: none"> Partner Invoice List of attendees/event registration Photos of the event 	<ul style="list-style-type: none"> Overnight Shipping Travel, lodging, food and beverage Alcohol
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 (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
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 in this document, please work with your Ivanti Partner Marketing Manager to review and garner approvals. 	<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
Partner Program Fees	Channel Programs	<ul style="list-style-type: none"> To be defined dependent on the program Please work with your Ivanti Partner Marketing Manager to define 	<ul style="list-style-type: none"> Partner invoice A copy of the program guide associated with fee outlining all of the components of the program If listed on the intranet for example, screenshots of Ivanti content 	N/A
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

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	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

Approved Activity	Spend Category	Approved Expenses	Proof of Performance	Non-Approved Expenses
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
Tradeshow (third party hosted events where the partner is sponsoring a space on the exhibit floor and inviting Ivanti to participate within)	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
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 	
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
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

Ineligible Activities for Reimbursement

Activities that are seen to be “outside” the scope of demand generation/sales pipeline must be reviewed by your regional Ivanti Marketing Manager.

Examples of these would be:

- Sponsorship of Ivanti-led events. This activity must be wholly funded by the partner.
- Customer gifts
- Associated cancellation fees of any activity that may or may not have a third party associated.
- Office supplies
- Attending “sports” events without an aligned sales generation plan
- Bribes, inducements
- Unapproved print magazine/publication advertisements
- Funded heads and their incurred expenses or associated costs, unless previously approved within the funded head contract.
- 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

Have questions? Please send an email to IPN@ivanti.com and a member of the team will assist you.

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, the addresses for the regional entities are listed to the right of this page.
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 this Guide.

Submitting your invoice

1. All claims must be submitted by email to the Ivanti Growth Marketing Manager, depending on the partnership/partner.
2. It is required that every and each APPROVED ACTIVITY has a unique invoice.
3. An invoice must be submitted within 30 (thirty) days of activity start date.
4. If the activity is not submitted within 30 (thirty) days of the activity start date and is submitted outside of this window, the activity fund may 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 this Guide.
6. Your regional Ivanti Growth Marketing Manager will review the invoice and submit it to Ivanti Accounting on your behalf.

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
Kojimachi Ichihara bldg 5F
Tokyo 102-0093
Japan

** within GDPR regulation— during all MDF funded activities i.e. events, webinars, tradeshow 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

Activity Closure

- An invoice must be submitted by the partner and include approved Fund Request number for each payment submitted within 30 (thirty) days after the start date of the activity. Ivanti may refuse any claim submitted after this 30 (thirty) day period.
- Invoice MUST show the FR number, this number will be provided to you by your Regional Growth Marketing Manager, without this number, your invoice may be rejected and funds expired.
- Once the activity is closed, Ivanti will no longer make payment against the activity.


General Guidelines (Fund Usage, Reimbursement, etc.)

- An invoice must be submitted by the partner for each MDF payment and submitted within 30 (thirty) days after the start date of the activity. Ivanti will refuse any claim submitted after this 30 (thirty) day period.
- If after having an activity approved for funding the partner decides to no longer execute the 'approved activity', the fund could be leveraged for a new activity. This activity must meet or exceed prior pipeline measures. Note that any activity leveraging Ivanti funds, must be pre-approved by your Regional Growth Marketing Manager.

- 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.
- Ivanti funding 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.
- Your Ivanti Partner Manager may not provide you approval of any activity. All approvals must be provided by your Ivanti Marketing Manager.
- Ivanti will endeavor to ringfence lead data submitted via the Ivanti Lead Portal for a period of 60 days, to ensure the partner has priority in following up with leads from the activity.
- 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 future funding programs.
- Reimbursement for expenditures are budgeted expenses in Ivanti's accounting structure and, as such, cannot be combined with the purchase of Ivanti's product.
- Ivanti reserves the right to refuse reimbursement for any activity that does not follow the agreed upon guidelines or otherwise is deemed inappropriate for reimbursement by Ivanti. Ivanti retains the rights to all issued marketing 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 marketing manager who will direct you accordingly.

About Ivanti

Ivanti elevates and secures Everywhere Work so that people and organizations can thrive. We make technology work for people, not the other way around. Today's employees use a wide range of corporate and personal devices to access IT applications and data over multiple networks to stay productive, wherever and however they work. Ivanti is the only technology company that finds, manages and protects every IT asset and endpoint in an organization. Over 40,000 customers, including 88 of the Fortune 100, have chosen Ivanti to help them deliver an excellent digital employee experience and improve IT and security team productivity and efficiency. At Ivanti, we strive to create an environment where all perspectives are heard, respected and valued and are committed to a more sustainable future for our customers, partners, employees and the planet. For more information, visit [ivanti.com](https://www.ivanti.com)

The Ivanti logo consists of the word "ivanti" in a bold, lowercase, sans-serif font. The letter "i" is red, while the remaining letters "vanti" are black. A small registered trademark symbol (®) is located at the top right of the letter "i".A vertical bar on the right side of the page, transitioning from red at the top to orange at the bottom.

For more information, or to contact Ivanti, please visit [ivanti.com](https://www.ivanti.com).