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Ivanti Partner Network

Contra Development Fund Program (CDF) for Carrier Partners

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CDF Program Overview

Ivanti's Contra Development Fund (CDF) Program is a global, funding program designed to support eligible members of Ivanti's Carrier and Telcom partners in their marketing initiatives.

Primary Purpose

Strategically, Ivanti will support partner organizations to successfully execute co-branded (where applicable or appropriate) demand generation, incentives, and partner enablement activities. In addition, upon approval, contra funding may be used for Funded Heads.

Program Eligibility

Ivanti partners must meet the following criteria:

- Be invited to participate in the program by their Ivanti Carrier Partner Manager
- Have an approved annual business plan
- Have an agreed to annual marketing plan with Ivanti prior to requesting funds of any kind
- Have an executed Ivanti Agreement in place

Marketing Plan, Submission and Approvals

Contra Fund Spend Categories

To ensure all activities are adequately planned and involve Ivanti related activities, Ivanti requires a pre-approval for all CDF activities.

The fund is aligned to four specific categories of spend – aligning to financial compliance/accounting best practice:

- **Demand Generation** – this category aligns to activity that drive lead and/or opportunity registration.
- **Partner Enablement** – this category aligns to activity that drives the enablement of partner sellers.
- **SPIF/Incentive** – this category aligns to activity that directly incentivizes a seller for a particular behavior to support lead generation and/or close of business. Funds aligned to this category can also be leveraged for team activities that generate leads and/or closes business.
- **Infrastructure** – this category aligns to activity that does not fall in the above three categories. This fund can be applied to activities such as a funded head/champion or generalized funding that is required to support overall programming and/or the relationship between Ivanti and the partner.

Spend Breakdown

Demand generation spend should represent at least 60% of your plan fund.

Partner Enablement/Incentive/Infrastructure fund should represent the remaining 40%.

We do realize that plans do change and once your annual plan is approved, it can be updated on an as needed basis. This also includes ad hoc requests that may arise during the year that were not part of the annual plan.

Plan Submission and Approvals

Your dedicated Ivanti partner marketing will drive an annual plan submission that aligns with the partner sales goals for the year. The intent is to allocate funds for the entire year and ensure that the partner has all of the tools and resources they need to execute on the plan.

The plan template, which is available via your Ivanti partner marketing manager, outlines a number of fields that are required, including the potential outcome of the activity spend. The plan should be completed with the partner, Ivanti partner marketing and the Ivanti partner manager.

Once your plan is finalized, please work with your Ivanti partner marketing manager for approvals. These approvals will normally be approved within an appropriate time frame, to allow for us to focus quickly on execution!



CDF Usage and Terms

Please read the following usage and terms carefully, this could result in non-payment of an activity.

- Funds will not be allocated for activities that were not approved prior to execution.
- CDF 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.
 - It's vital that partners follow the Ivanti Partner Guidelines. Please request a copy of the Ivanti Partner Brand Guidelines from your Ivanti Partner Marketing Manager.
 - Request the Ivanti logo files from your Ivanti Partner Marketing Manager.
 - For assets that are requiring a co-brand, please work with Ivanti Partner Marketing Manager for approval of the co-branded asset.
 - A review, approval or feedback will be provided within 24 hours.
- Funding requests must demonstrate at least a 30x return (pipeline) of business anticipated to close with Ivanti.
- Please follow the guidelines identified in this CDF guide as to what activities the CDF can be applied to.

- All claims for reimbursement against an approved CDF activity must be submitted with the invoice and proof of performance documentation.
- Submission of the invoices is outlined in this document.

Allocation and Approval of your CDF Request

- The approval of any activity must be received in writing and once your annual plan has been approved, please work with your Ivanti Partner Marketing Manager for support for content, etc.
- Understanding that activities may change from time to time, if this happens, work with your Ivanti Partner Marketing Manager to make updates.
- Approval of activities will only be given for activities that are in the future.
- Activities that have already happened are no longer eligible for CDF.
- Please ensure that invoices for the activity are received at least 60 days from the first date of execution of the activity.
- The claim process is covered within this guide.
- Advanced payment for activity is strictly prohibited.

Approved Activities

CDF 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 Marketing 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
PR/AR	Infrastructure	<ul style="list-style-type: none"> Outsourcing to PR or AR agencies Cost of vendor 	<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 related third party invoices Confirmation that any and all engagement with PR/AR is Ivanti related 	<ul style="list-style-type: none"> Travel, lodging, food and 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
Program Fees	Infrastructure	<ul style="list-style-type: none"> Subject to regional Channel Director approval 	<ul style="list-style-type: none"> Partner invoice Detailed description of program 	<ul style="list-style-type: none"> Travel, lodging, food & beverage Sponsorship of sports teams
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

Approved Activity	Spend Category	Approved Expenses	Proof of Performance	Non-Approved Expenses
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
Video production for Customer References and creation of (co-branded) video commercial/animation	Infrastructure	<ul style="list-style-type: none"> Production and editing Cost of vendor Must be reviewed/approved by Ivanti 	<ul style="list-style-type: none"> Partner invoice Proof that partner has contributed 50% of the activity Copy of related third party invoices Copy of video file 	<ul style="list-style-type: none"> Travel, lodging, F&B Incentives to the customer for the reference
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
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 and beverage

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 CDF 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

General Guidelines (CDF Usage, Reimbursement, etc.)

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 Ivanti Carrier partner's printed or external communications.

Ivanti logos, copyrights and trademarks must be used in accordance with Ivanti's brand guidelines. Please request a copy of the Ivanti Partner Brand Guidelines from your Ivanti Partner Marketing Manager

CDF may not be used for personal items.

The Ivanti Partner Manager is not permitted to incur any expenses against a partner's previous allocation of funds.

Submitting for reimbursement of an activity that is part of your Carrier marketing plan

Invoices aligned to an activity on your Carrier marketing plan should include the respective proof of performance identified in the prior list of approved activities. Your regional Ivanti Partner Marketing Manager will submit to Account Payable on your behalf.

Americas: Ashley.Brafford@ivanti.com

EMEA/APAC: Koen.Frankaert@ivanti.com

An invoice must be submitted by the partner for each MDF payment and submitted within 60 days from the first date of execution of the activity.

Third Party invoice

Any activities that are performed by a third party, must be discussed with your respective Ivanti Partner Marketing Manager.

If your activity has been executed upon by a third party, it's essential that you have discussed this with your Ivanti Partner Marketing Manager – any invoice that is not associated with partner company name will require advance approval and the vendor be submitted into our procurement process to be vetted as an approved vendor. Submitting an invoice on behalf of a vendor that may not be in Ivanti systems will delay payment.

** within GDPR regulation– during all CDF 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

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