

FileBound Partner Program 2014



Our goal is to develop consistent success for all FileBound partners, while rewarding those partners who focus their valuable energy on showcasing the FileBound Solution.

The Program is designed to reward partners with price and services based upon their level of engagement with FileBound. All businesses are not alike and one size seldom fits all situations. So it is with the FileBound Partner Program – designed to fit the needs of the individual partner.

Three Tiers of Partner

Executive Partners have a very high level of engagement with FileBound and fully support the FileBound brand as a critical part of their business. In turn, Executive Partners receive top discounts, priority support and a profit builder rebate based on growth. This is a very special, and exclusive group of FileBound Partner.

Premier Partners support the FileBound Product at a good level and the FileBound brand is an important part of their business. Premier Partners receive very good discounts on product and services in addition to full support from FileBound Sales and Customer Success.

Business Partners support the FileBound brand and sell and service their customers as needed. Business Partners are qualified with FileBound Certified Professional training. These partners receive a discount off MSRP on product sales.



New For 2014

Referral Partners will find FileBound opportunities in the course of business and receive a 15% commission on the first year product and service revenue. Perfect for the partner whose business doesn't justify the investment in training and support staff. Referral Partners can also earn commissions by referrals for other Upland products. An Executive, Premier or Business Partner can also be a Referral Partner for other Upland Software products.

Please see the "Partner Program Requirements and Benefits" chart (attached) for a complete listing of benefits.

Opportunity Registration

Earn additional margin by registering your opportunities

The FileBound Opportunity Registration Program has been very popular and many partners have earned additional margin simply by registering the opportunity and following the program guideline. It is simple and easy to administer, earns extra money and protects your position with FileBound in an opportunity.

What is an opportunity? An opportunity is a prospective customer with whom the partner has engaged in at least one sales conversation, who has a problem with an indication of willingness to spend money to solve. An "opportunity" is more than a lead or cold call – with an opportunity, there is the potential of real business.

Here is how it works:

1. On the Partner Portal "Sales" page, select "Opportunity Registration"
2. Complete the form. Note that there are required and optional fields. All "required" information must be entered in order for the opportunity to register.
3. Only one partner may register an opportunity for a prospect. If another partner has previously registered the opportunity, you'll be notified by Sales and the registration will be cancelled.
4. Engage your FileBound Account Manager with regular information as requested and ask for help. Registered opportunities are provided with complete pre-sales support, demo support, and special pricing (as needed). FileBound will only provide pre-sales support to registered opportunities.



5. When FileBound receives your confirmed purchase order for the opportunity, the partner will receive an additional 5% off the dealer price for the order. For On-Demand gig pricing, this is 5% off the set up and Office Automation Fee. For Subscription orders, this will be 5% off the first year's contracted value. For all other orders, it will be 5% off the order value. This discount does not apply to existing customer upgrades or additional purchases.
6. An opportunity may only be registered one time and is valid for 6 months. At the end of 6 months, the registration will expire and may not be re-registered.
7. FileBound reserves the right to cancel registrations on opportunities that are not, in the opinion of the Account Manager, being actively engaged by the partner.

Customer Support

Partners handle all Tier 1 technical support issues with their customers. FileBound Technical Support will stand ready to assist you when issues arise. Maintenance pricing effective October 1st recognizes this commitment. Business Partners not providing Tier 1 support are subject to a maintenance surcharge.

FileBound Priority Support – *Something Really Special*

FileBound Executive Partners are eligible for Full Priority Technical Support from FileBound. This benefit includes:

- All emails and calls coming into the support queue from Executive Partners will receive priority over other calls.
- Senior Management will have visibility of all open cases.
- Unresolved calls from Executive Partners will be automatically escalated to Level 2 technical support after the initial call.

Maintaining FileBound Dealer Status

A minimum of \$25,000 per year in new FileBound business is required in order to maintain FileBound Dealer status. Dealers consistently unable to reach this minimum are subject to review of their Reseller Agreement. Qualifying new business includes new license sales, license upgrades and FileBound On-Demand billings. Maintenance, dealer training and marketing are excluded.



Overview

TIER 3 FileBound Business Partner	TIER 2 FileBound Premier Partner	TIER 1 FileBound Executive Partner
FileBound Business Partners represent the FileBound brand in a high quality manner	FileBound and Premier Partners engage in a collaborative selling and service effort with the end-user customer.	FileBound Executive Partners receive the highest level of support and service. FileBound and Executive dealers sell collaboratively.

What FileBound Provides You

Discount	30% off MSRP	40% off MSRP	50% off MSRP
Opportunity Registration Discount	5%	5%	5%
Account Manager Support	LIMITED	YES	YES
Personalized Business & Sales Planning		YES	YES
Priority Technical Support		LIMITED	FULL
Additional Maintenance Discount		YES	YES
5% "Profit Builder" annual rebate (requires 10% Sales growth over previous Year)			YES
Referred Partner	YES	YES	YES
Promotion on filebound.com			YES
Web Leads			YES
Personal Service from FileBound Executive Leadership			YES

What We Ask of You

Annual Sales Minimum	\$25,000	\$50,000	\$100,000
New FileBound end-user customers	4	4	4
FBCP (Renewable each year)	Minimum 1	Minimum 1	Minimum 2
FBCE (Renewable each year)		Minimum 1	Minimum 1
FileBound Proficiency	Signoff by Account Manager	Signoff by Account Manager & Director of Customer Success	Signoff by Account Manager & Director of Customer Success
Deal Registration	Required	Required	Required
Tier 1 Customer Support		ALL	ALL
FileBound Brand on Website		Required	Required

NOTES:

1. Tier achievement is measured annually from January 1st – December 31st.
2. Dealers generating less than \$25,000 in new FileBound business are subject to review of their Dealer Agreement. Qualifying new business includes new license sales, license upgrades and FileBound Cloud sales. Maintenance, dealer training, and marketing are excluded.
3. Opportunities can be registered on the Partner Portal and are valid for 6 months. Account manager will be involved in the sales process and have working knowledge of the opportunity.
4. FileBound will provide sales support for registered opportunities. Sales support includes assistance with product demonstration, sales consultation and promotional pricing (at FileBound's discretion). Only one (1) dealer may register a specific end-user opportunity at a time.