



# Carbonite Partner Program Guide

**CARBONITE** 

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Carbonite is very excited about our Partner Program designed to help you differentiate yourself from your competitors and provide you with the tools to make the most of every sales opportunity. As we transform our channel strategy, we value our relationship with you even more and therefore have designed the program to help support and grow our respective businesses.

Our goal, through our sales and marketing resources, product discounts and financial incentives, free demo products, training and our award-winning technical support, is to provide you with the infrastructure to promote and support your business. Our team is working diligently to provide the tools necessary to support your success so that we can forge a strong relationship that helps improve your business and ours for the future.

Your customers place a high priority on the security, protection, and manageability of their information and IT infrastructure, so Carbonite products add value to the solutions you offer— and Carbonite brand leadership and quality inspire your customers' confidence in you. Through this mutually beneficial relationship, we believe that you and your customers will enjoy the unique solutions we can offer.

We recognize your importance and are committed to earning your loyalty and rewarding you for it. We aim to prove our value to your business with financial rewards, engagement, meaningful resources, and multiple opportunities to help grow your business. We believe that the more closely we work together, the more successful we'll both be. Welcome to the Carbonite team!

Sincerely,

A stylized, handwritten signature in white ink, appearing to read 'DM' or 'David Maffei'.

**David Maffei**  
VP, Global Channel Sales



# Join the Carbonite Partner Program

Carbonite recognizes that your relationship with your customers is part of the key to your success. Your customers look to you as a trusted advisor, that is, someone who can take their fundamental business issues and address them with the latest technology and services, allowing them to focus on growing their own respective businesses.

We have created the Carbonite Partner Program to work with you to help you grow your own business. We invite you to take advantage of our growing success and leverage our tools, training and support, and benefit from our financial incentives. With your unique expertise and offerings, our technology leadership, and the Carbonite Partner Program, we believe that you stand to maximize your growth, increase your revenue potential and drive new opportunities.

## Why Carbonite?

With more than 50,000 SMB deployments in over 100 countries, Carbonite is a leading provider of online backup for the SMB market. Cloud computing is at the forefront of expansion where small businesses specifically are migrating to backup in the form of cloud-based managed services. The worldwide cloud computing market will grow at a 35% compound annual growth rate (CAGR) through 2016, reaching a market size of \$19.5B by 2016.\* This is your opportunity to expand your own value-added professional services by adding SaaS technologies, like online backup, to your set of competencies. Carbonite's solutions naturally complement any SMB infrastructure from the workstations that you configure to the storage and disaster recovery solutions that you deploy.

### **Channel-first strategy**

Carbonite is committed to our Partners. We're transforming into a channel model, which will allow our channel representatives to work diligently to minimize channel conflict and provide more qualified leads and sales opportunities.

### **Strong brand awareness**

Partner with one of the most recognized names in online backup. Our ChannelPro Gold Medal award-winning products are known for their reliability and ease of use.

### **Most comprehensive set of solutions**

With an extensive product line and expanding pipeline, you'll find affordable, reliable, high-speed solutions for all your clients. All products can be seamlessly bundled with your line of products and services.

### **Products that are easy to sell, deploy & manage**

Carbonite solutions are easy to sell, deploy and bundle with your other professional services and solutions. Our easy-to-use Partner Portal provides you with the tools to successfully monitor and manage all of your customers' accounts.

### **Access to a profitable & engaging partner program**

Take advantage of some of the highest renewal rates, plenty of marketing support and award-winning tech support. The low entry costs and minimal training required make it easy for you to join the program, start selling and achieve even higher levels of benefits.

\* <http://www.forbes.com/sites/louiscolumbus/2013/09/04/predicting-enterprise-cloud-computing-growth>





## Channel Partner Framework

The Channel Partner Program includes three tiers of participation based on investment and associated benefits. Silver is the entry tier with Platinum as the highest tier.

### SILVER PARTNER ●

#### **Silver Tier**

This is the ground floor for all Carbonite Partners and includes a variety of benefits like deal registration and access to sales and technical tools. A basic level of revenue is expected for the first year of participation.

### GOLD PARTNER ●

#### **Gold Tier**

Gold Partners have successfully sold Carbonite solutions and have achieved their status by meeting certain revenue goals and taking advantage of the training we offer. The promotion in rank comes with higher deal registration incentives, access to initiative-based MDF and other rewards.

### PLATINUM PARTNER ●

#### **Platinum Tier**




Platinum Partners have met demanding revenue goals, closed major deals, invested significantly in training and actively promoted Carbonite. The distinction comes with deeper product discounts, incremental initiative-based MDF, dedicated Carbonite resources, and greater alignment with Carbonite.

# Benefits & Requirements Tables

The following tables list the particular benefits a Carbonite Partner can earn as they rise through the ranks. Each tier also has very specific requirements and obligations. The tables are broken up into the following categories: Relationship, Communication, Financial, Marketing, Sales, Technical and Training.

## Program Benefits Table

Carbonite Partners are eligible to receive the following benefits depending on their program level:

	SILVER PARTNER 	GOLD PARTNER 	PLATINUM PARTNER 
<b>Relationship</b>			
Channel Account Manager	Named	Named	Named
Marketing Consultant	As Needed	Named	Named
Sales Engineer		Named	Named
Executive Sponsor			By Invitation
<b>Communications</b>			
Ongoing Communications	✓	✓	✓
Partner Portal	✓	✓	✓
Joint Business Planning		As Needed	✓
Partner Advisory Council		By Invitation	By Invitation
Local User Group		✓	✓
<b>Financial</b>			
Product resale discount	20%	20%	25%
Renewal discount	20%	20%	25%
Deal Registration Incentive	5%	10%	10%
Access to Carbonite's Referral Program	✓	✓	✓
<b>Marketing</b>			
Syndicated Content	✓	✓	✓
Marketing Campaign Materials	✓	✓	✓
Carbonite Partner logos/branding materials	✓	✓	✓
Access to initiative-based MDF	Case By Case	✓	✓
Partner Finder		✓	✓
<b>Sales</b>			
Sales Materials & Tools	✓	✓	✓
Free NFR Software License	✓	✓	✓
Discounted NFR Appliance (off-list price)	50% Discount MSRP	75% Discount MSRP	100% Discount MSRP
Leads		✓	Priority
<b>Technical Support</b>			
How-to guides	✓	✓	✓
Partner Technical Support	✓	✓	✓
Product Roadmaps		✓	✓
Access to Beta Programs		By Invitation	By Invitation
<b>Training</b>			
Online Product Sales Training	✓	✓	✓
Online Technical Training	✓	✓	✓
Field Training		As Needed	As Needed

# Program Requirements Table

Carbonite Partners are required to achieve the following requirements by program tier:

	SILVER PARTNER 	GOLD PARTNER 	PLATINUM PARTNER 
<b>Relationship</b>			
Completed Program Application	✓	✓	✓
Maintain Updated Profile	✓	✓	✓
Signed Carbonite Partner Agreement	✓	✓	✓
Primary Contact Assigned	✓	✓	✓
Executive Assigned		As Needed	✓
Joint Business Plan		As Needed	✓
Joint Marketing Plan		As Needed	Part of Business Plan
Annual Executive Briefings			✓
<b>Sales/Marketing</b>			
Promoted Partner Website		✓	✓
Monthly Pipeline Reports			✓
<b>Financial</b>			
Annual Revenue Attainment*	n/a	\$5k	\$25k
<b>Skills**</b>			
# of Certified Sales (minimum)	1 Person	1 Person	2 People
# of Certified Technical (minimum)	1 Person	2 People	3 People

\* Annual revenue attainment calculations for all tiers of the partner program are based on MSRP.

\*\* The same person can be certified for both roles.

## Description of Benefits

### Relationship Benefits Overview

#### Channel Account Manager

Each Silver, Gold and Platinum Partner will be assigned a Channel Account Manager (CAM) that will help you develop and grow your relationship with Carbonite. At the Platinum tier, the CAM has greater flexibility in putting together programs and helping to facilitate joint business initiatives.

#### Marketing Consultant

All Platinum Partners are assigned a Marketing Consultant to assist with marketing planning and initiatives, and to help make sure that MDF is being used to the greatest effect. Gold and select Silver Partners, on an as-needed basis, will have access to a Marketing Consultant for approved MDF activities.

#### Sales Engineer

Platinum and Gold Partners will have access to a named Sales Engineer to provide guidance and insight into technical initiatives, issues and new products. The Sales Engineer will also be available for sales calls as needed. This resource will provide technical support during joint sales meetings with Platinum Partner end customers and their sales teams.

## Executive Sponsor

Platinum Partners may be invited to engage with a named Carbonite executive who will participate in bi-annual calls and help drive strategic alignment between our company and yours.

## Communications Benefits Overview

As a Carbonite Partner you have access to marketing tools and resources that will help you position and market your solutions and technical leadership.

### Syndicated Content

The Carbonite Marketing Showcase by SharedVue can sync with your website and push the latest Carbonite marketing and product information to your clients. Additionally, the Carbonite Showcase features an email marketing tool that can help you promote Carbonite products as well as your services to existing and prospective clients you have identified as potential targets. All a Partner needs to do is register, and they have immediate access.

### Marketing Campaign Materials

Carbonite provides a variety of demand generation tools to enable Carbonite Partners to deliver targeted, content-rich marketing messages and information to prospects and customers.

### Carbonite Partner Logos/Branding Materials

Carbonite has developed logos for Carbonite Partners to represent their status as Platinum, Gold, and Silver tier program participants. These logos can be used by the Carbonite Partner to promote their relationship with Carbonite on their websites and in direct customer marketing. Use of the logo is subject to Carbonite's "then-current" published logo and/or trademark usage and branding guidelines. Logos and guidelines can be found in the Marketing section of the Carbonite Partner Portal.

### Access to Initiative-based MDF

Initiative Based MDF, is available to Platinum and Gold Partners (and Silver Partners on a case-by-case basis) at Carbonite's discretion based on revenue opportunities, ROI and is designed for specific demand generation marketing initiatives. Either a joint business plan (Platinum Partners) or joint marketing plan (Gold Partners on a case-by-case basis) must be submitted prior to requesting MDF funds. Please see the Carbonite MDF section that explains how to request, use, and claim Market Development Funds (MDF) in support of your efforts to develop revenue opportunities and secure new business.

### Partner Finder

Platinum and Gold partners will have the opportunity to promote themselves with their logo, contact information and company description on Carbonite's Partner Finder page located on Carbonite's website. Prospects will have the ability to contact the Partner directly from the site, with a copy of the request going to both Carbonite and the Partner. **One of the requirements for being represented in the Carbonite Partner Finder is that the Partner respond to inquiries from prospects within one business day. Failure to follow-up with the prospect within the agreed upon SLA will result in the Partner being removed from Partner Finder.**



## Sales Benefits Overview

Carbonite is committed to making it as easy as possible to sell our solutions to your customers. We offer support in the field, mentoring, and a variety of sales tools.

### Sales Materials & Tools

All Carbonite Partners have access to a comprehensive set of sales tools critical for selling Carbonite's products. These tools include battle cards and product sheets, among others. Materials and tools can be found in the Sales Resources section of the Carbonite Partner Portal.

### Free NFR Software License

All Carbonite Partners have access to (1) Not For Resale (NFR) software product that allows Partners to either use the license internally for their own use or for demonstration purposes. Please contact your CAM to request the software.

### Discounted NFR Appliance

All Carbonite Partners have access to (1) discounted Not For Resale (NFR) appliance product for internal use or for demonstration purposes. Discounts range from 50% to 100% off of list based on member tier. Please contact your CAM in order to get access to an appliance.

### Leads

Platinum Partners receive priority access to leads generated through Carbonite demand generation activities. Gold Partners may also be given leads, determined on a case-by-case basis. **Leads will be sent to the Partner by their CAM based on geography, product type and availability. Customer experience is important to all of us and as we have interactions with customers through our various means at Carbonite, we'll set expectations with the customer that they will be followed up promptly by a Carbonite Partner. This means that we'll expect our Partners receiving leads to attempt to contact the customer within eight business hours of lead acceptance. It will be important for the Partner to "Accept" only those leads that they are willing and able to follow up on.**

## Technical Support Benefits Overview

Carbonite Partners enrolled in our program will have access to a wide range of technical resources to guide them as they promote and sell Carbonite products. These resources are there to help you achieve and maintain market leadership in your target area, reinforcing your status as a trusted advisor to your customers.

### How-to Guides

All Carbonite Partners will have access to How-to Guides that will demonstrate how to configure and use the Carbonite features. The Guides can be accessed through the Carbonite Portal under Support.

### Partner Technical Support

All Carbonite Partners have access to technical support through the following methods:

- Phone: **877.334.7603**
- Email: **partnersupport@carbonite.com**
- Accessing live chat through the portal

Support is provided from 8:30 a.m. – 9 p.m. EST



### **Product Roadmaps**

Platinum Partners have access to product roadmaps and presentations given by product teams. To access a product roadmap and product managers for a particular product or service, contact your CAM. Gold Partners may also be granted access as needed.

### **Beta Programs**

Carbonite Platinum Partners are eligible to participate in beta programs by invitation.

## **Training Benefits Overview**

Carbonite delivers comprehensive training on its products and solutions to ensure its Partners are fully prepared for success. All training is available at no cost and available online.

### **Online Product Sales Training**

All Carbonite Partners have access to online product sales training at no cost.

### **Online Technical Training**

All Carbonite Partners have access to free online technical training at no cost.

### **Field Training**

On an as needed basis, Carbonite Platinum partners can request on-site field training at no cost.

## **Description of Requirements**

### **Relationship Requirements**

work with their CAM to develop a Joint Business Plan.

### **Completed Program Application**

All Carbonite Partners must complete a program application and keep an updated profile in order to join and remain in the program. The Partner Profile form can be updated on the Carbonite Partner Portal.

### **Signed Carbonite Partner Agreement**

All Carbonite Partners must agree and accept the terms of the Carbonite Partner Agreement and submit a copy of their W-9, EFT and resale certificate. Carbonite Partner agreements will be automatically renewed until either terminated by Carbonite or the Partner.

### **Primary Contact Assigned**

All Carbonite Partners must identify a primary contact to support the relationship with Carbonite.

### **Joint Business Plan**

Platinum Partners must complete a joint business plan and update it on a bi-annual basis. Partners will

### **Joint Marketing Plan**

Gold Partners that want to request initiative-based MDF may be asked to complete a joint marketing plan. Partners will work with their CAM to develop a Joint Business Plan.

### **Executive Assigned**

Platinum Partners must identify a named executive to collaborate with Carbonite.

### **Annual Executive Briefings**

Carbonite Platinum Partners are expected to participate in annual executive briefings that will include a review of the relationship, identification of new initiatives, feedback and sharing of Carbonite's product strategy and roadmap.

## Sales And Marketing Requirements

### **Promoted on Partner Website**

We encourage all Carbonite Partners to promote their alliance with us on their websites, though only Platinum Partners are required to do so with a logo and company description. The Carbonite logo and guidelines can be found under the Marketing section on the Carbonite Partner Portal.

### **Monthly Pipeline**

Platinum Partners are required to provide a pipeline report on a monthly basis and may work with and submit to your CAM.

## Financial Requirements

### **Annual Revenue Attainment**

Platinum and Gold Partners are required to achieve a certain level of annual revenue in order to remain at a particular tier. See Program Requirements Table for the revenue requirements by tier.

## Skills Requirements

### **Certified Sales**

Although all Partners are required to have a minimum number of current personnel successfully complete product sales training for Carbonite's products. These training courses can be found under the Training Section on the Carbonite Partner Portal.

### **Certified Technical**

All Carbonite Partners are required to have a minimum number of current personnel successfully complete technical training for Carbonite's products. These training courses can be found under the Training Section on the Carbonite Partner Portal.



# Programs

## Deal Registration

Carbonite has implemented a new Deal Registration Program whereby Carbonite Partners can receive an additional discount by registering an opportunity that is approved by Carbonite and is closed by that Partner within an allotted time period.

A deal is defined as a “net-new” customer who has not purchased any Carbonite products from Carbonite or any partner, including the submitting partner, within the last 24 months. Additional transactions up to 45 days for an approved deal registration are eligible for the additional deal registration discount. Renewals for approved deal registrations are eligible for the same discount.

Specifics	Description
Eligibility	Platinum, Gold and Silver Partners are all eligible for the deal registration incentive
Discount	Additional 5% (silver) and 10% (gold and platinum) over tier discount (also includes renewals)
Minimum Deal Size	\$2,500 annual contract
Approval Time Frame	Less than two business days
Deal Registration Approval Period	45 days
Ability to Extend Deal Registration	Partners have the ability to extend their deal registration for one period lasting 45 days by submitting an email to their CAM
Maximum Number of Approved Deals	Unlimited for Platinum Partners; 10 per day for Gold and Silver Partners
Increasing Value of the Deal Registration	A partner can increase the transaction size on the deal registration up until the order is processed and still receive the 10% discount by notifying their CAM through email
Special Pricing	Deal registration benefits can be stacked on top of any other pricing or special promotion

## Deal Registration Criteria

- The deal is not currently actively engaged by Carbonite at the time the Partner submits the deal.
- The deal is not an approved registration by another Partner.
- The aggregate size of the deal must meet the Minimum Deal Size set forth in the table above. Aggregate deal size is determined before any taxes, shipping, handling, or other fees are applied. Only Carbonite-branded products and services are included in determining deal size - third party products and services are not included in such determinations.
- Before registering a deal, the Partner has made significant pre-sales efforts related to such deal, such as but not limited to meeting with the end user's decision makers, qualifying the deal, helping the end user to

quantify the project budget with Carbonite products or services, and helping the end user to define the project requirements to include Carbonite products or services. Partners must document such efforts, including proof of date and time, to be provided to Carbonite on request.

- Deal eligibility will be measured and qualified by the Partner's skills to deliver the specified solution, demonstrated, among other factors, through previous engagements, industry recognized certifications, or the specialization profile of the Partner. The Partner must provide sufficient information when registering the deal to allow Carbonite to determine if the Partner is well positioned to service the deal and in order to assist Carbonite in determining whether to approve the deal registration.

## Deal Registration Process

- The Partner must submit a deal registration request through a deal registration form found on the Carbonite Partner Portal. The first Partner to submit a deal that meets all of the deal registration criteria specified above, as determined by Carbonite in its sole discretion, will receive an approved deal registration for that deal.
- If a deal is approved, Carbonite will notify the Partner by e-mail. Carbonite strives to notify Partners of its decision within two business days.
- If a deal is declined, Carbonite will notify the Partner by e-mail and will include the reason(s) for such decision.

## Deal Registration Form

The Carbonite Partner needs to fill out a deal registration form found under Sales Resources within the Partner Portal with the following information:

### Channel Partner Information

- Partner Name
- Partner Rep (name, email, phone)
- Distributor Notification

### End-Customer Information

- Company Name
- Key Contact (name, title, email, phone)
- Address (city, state, zip, country)
- Website

### Deal Qualifications

- Opportunity Name
- Project Description
- Budget
- Estimated Close Date
- Identified Products
- Was a Trial Deployed

## Deal Registration Approval Process

A Partner must close an approved deal prior to the expiration of the Approval Period. Partners may request one extension per deal that is valid for 45 days. At its discretion, Carbonite may extend the Approval Period if sufficient justification exists.

Exceptions: Notwithstanding above, Carbonite may, at its discretion:

(a) quote or bid for a deal in the following scenarios:

- i. If the end user requests that Carbonite quote or bid on the deal;
- ii. If the end user has rejected the registering Partner's bid or quote;
- iii. If, with respect to a deal that is the subject of an approved deal registration, the Partner does not close the deal within the Approval Period, and no extension has been granted;
- iv. Carbonite may respond to a public RFP, IFB, IDIQ, or similar public tender process; or
- v. Any of the scenarios set forth in clause (b) below;



(b) deny, remove, rescind, suspend, or terminate any deal or Registration and/or registration access in the following scenarios:

- i. If the Partner is not actively working the deal or has been inattentive to the end-user's needs (for example, by failing to respond to the end-user's or Carbonite's communications);
- ii. If the Partner does not lead with or quote the Carbonite products identified in its registration form(s);
- iii. If Carbonite is under a legal or contractual obligation to quote or bid on the deal, or if failure to quote or bid on the deal could subject Carbonite to legal liability (as determined by Carbonite);
- iv. If the Partner is not able to fulfill the deal or provide support for the end-user (for example, by failing to have sufficient credit available for the deal, if the end-user refuses to work with the Partner, or, with respect to Federal Government deals, if the Partner doesn't possess the required security clearances);
- v. If the end-user chooses to fulfill its bid requirements under a contract vehicle which is not held by the registering Partner, or in a manner that prevents the registering Partner from being able to fulfill such requirements;
- vi. If the Partner's account has been placed on hold by Carbonite or Partner has been late in paying invoices;
- vii. If it is determined that a deal is already registered to another Partner;
- viii. If the Partner (a) is in breach of the applicable Carbonite Partner Program Terms and Conditions for the region in which it is located, (b) has engaged in any activity that impairs the integrity of the Carbonite Partner Program as determined by Carbonite; or
- ix. For any other reason as Carbonite shall determine in its sole discretion.

## Initiative-based Market Development Funds (MDF)

### Overview

Carbonite has implemented a formal initiative-based MDF component designed to support the efforts of participants focused on successfully developing their marketing capabilities and end user customer relationships. The Carbonite MDF benefit will provide you with marketing tools, money, and resources to help drive awareness and demand for your Carbonite-sourced end user customer solutions (please see the Eligibility section for the explanation of the MDF benefits).

This Carbonite MDF guide explains how to access, use, and claim Market Development Funds in support of your efforts to develop revenue opportunities and secure new business.

Access to and use of the Carbonite MDF requires membership in the Carbonite Partner Program and is subject to the formal approval process as outlined in this Carbonite program guide.

### MDF Description

Carbonite will be offering initiative-based MDF to their Platinum, Gold and to select Silver Partners on a case-by-case basis that will require an MDF Request Form to be submitted and approved, in advance, which can be found on the Carbonite Partner Portal.

#### **Initiative-based MDF**

Available to Platinum, Gold (and Silver tier Carbonite partners on a case-by-case basis) as a benefit of the Carbonite Partner program.

Initiative-based MDF is available for use in the quarter allocated and will expire at the end of that quarter if unused. Initiative-based MDF allotted to a Carbonite participant is based on future earnings potential and opportunities and the activity ROI, not on past performance.

## MDF at a Glance

Element	Description
Percent Funding Contribution	Carbonite's contribution to the funding of each pre-approved activity is up to 50% and proportional to the number of activity participants e.g., Carbonite and Partner would be up to 50%; Carbonite, Partner and Technology Partner would be up to 33%.
MDF Requests	<p>To have access to MDF, all requests for support of proposed activities must be approved by Carbonite before the partner commits, executes, or incurs any expenses for such activities. Partners can submit their requests through the Partner Portal.</p> <p>To ensure that maximum effect will be obtained from the support and resources made available through the Carbonite MDF benefit, Carbonite participants are asked to work with their CAM and Marketing Consultant to plan their activities in the quarter that precedes the funding quarter. <b>In all cases, requests must be made within 5 days of the activity requested.</b></p>
Eligible Activities	A list of possible activities can be found in the Eligible Activities, Reimbursement & Proof of Performance section. These activities are expected to drive demand for Carbonite products and solutions. If a Carbonite participant has an innovative activity that is not listed, it should be discussed with your Channel Account Manager.
Creative	All creative must adhere to the Carbonite Branding Guidelines available on the Partner Portal under Marketing Resources. If you have any questions, please contact your Marketing Consultant.
Claims & Proof of Performance	<p>Qualifying expenses must be incurred within the quarter that the MDF is allocated and the related MDF reimbursement requests must be submitted using the MDF Reimbursement Claim form on the Partner Portal and submitted within 14 days of the completion of the activity.</p> <p>The associated Proof of Performance (PoP) must be submitted for each type of activity and valid documentation is required for reimbursement (for the list of requirements please refer to the Eligibility and Proof of Performance section of this Carbonite program guide).</p>
Approval /Audit	All claims are subject to being reviewed and audited, and will be approved according to the Carbonite MDF guidelines contained herein.
Reimbursement & Payment	The Reimbursement Claim form submitted in connection with a previous request are paid based solely on a Carbonite participant's compliance with Carbonite program requirements as outlined in this MDF guide. Payments will be made by check within 30 days of claim approval.
Administration & Management	MDF is administered and managed by Carbonite Channel Marketing.

## Planning Process

The first step of the Carbonite MDF planning process is the development of your MDF Request Form, that is approved by your Channel Account Manager and Marketing Consultant. Change to 'The MDF Request Form can be found on the Partner Portal under Marketing Resources.

All subsequent steps are managed online through the Carbonite Partner Portal and your Marketing Consultant is ultimately responsible for the pre-approval process.

Activity	Description
Creating the Joint MDF Plan	In order to request MDF, Carbonite Partners must complete an approved MDF plan that can be downloaded from the Marketing Section on the Partner Portal. For Platinum Partners the Joint MDF Plan is included as part of the Joint Business Plan. There is also a separate Joint Marketing Plan that Gold Partners may be asked to complete. Partners are encouraged to work with both the CAM and Carbonite Marketing Consultant to develop this plan.
Creating the MDF Request	<p>The Carbonite Partner must completely fill out the Carbonite MDF Request Form available under the Marketing section on the Portal within 10 business days of the activity.</p> <p>Carbonite will review the request and notify the Carbonite participant by email within 5 days if the MDF request is approved or if further information is needed.</p> <p>If approved, an MDF Approval Number will be assigned which should be referenced on all future correspondence with Carbonite.</p> <p>Please note that prior approval is required for all MDF funded activities. There are no exceptions.</p> <p>Any changes to the MDF Request Form must be submitted through an email to <a href="mailto:fieldmarketing@carbonite.com">fieldmarketing@carbonite.com</a> with the MDF Approval Number and details around the change. All responses will be made by Carbonite through email.</p>
Conduct the MDF Activity	Following approval, the Carbonite Partner must conduct the MDF activity in the designated funding quarter.
Submitting an MDF Reimbursement Claim, PoP, & Appropriate Metrics	<p>To receive reimbursement for an MDF activity, a Carbonite participant must submit an MDF Reimbursement Claim request. This form is available on the Carbonite Partner portal under Marketing.</p> <p>The MDF Reimbursement Claim must include:</p> <ul style="list-style-type: none"> <li>• MDF Approval Number</li> <li>• Proof of Performance (PoP) and appropriate metrics (number of new contacts, number of new deal registrations, and attendees)</li> <li>• Any other information required in connection with the processing of the Reimbursement Claim request</li> </ul> <p>Documentation must clearly support the MDF activity being claimed. Failure to supply clear supporting documentation will result in the reimbursement claim failing to pass review.</p> <p><b>Claims must be submitted within 14 days of the completion of the activity.</b></p> <p><b>Claims will be approved or denied by Carbonite within five days.</b></p>
Receiving Your Payment	<p>The Carbonite Marketing Consultant will review the Reimbursement Claim and supporting documentation.</p> <p>All claims are reviewed and may also be audited for compliance and completeness before or after the Reimbursement Claim is approved.</p> <p>The MDF benefit will reimburse up to but not exceeding the MDF request amount previously approved by Carbonite.</p> <p><b>Payment will be by check and sent out within 30 days.</b></p>

## Eligible Activities, Reimbursement & Proof of Performance

The Carbonite MDF benefit is designed to support a Carbonite Partner's demand generation activities. The table below outlines at a high-tier the types of activities eligible for MDF support, the associated Proof of Performance, and the specific metrics that will be used to measure projected results. Partners are asked to submit the expected ROI that the MDF activity spend will generate.

Activity Type	Reimbursable Expense Description	Proof of Performance/Proof of Cost
Advertising	<ul style="list-style-type: none"> <li>• Print</li> <li>• Radio</li> <li>• Television Spots</li> <li>• Billboards</li> <li>• Banners</li> <li>• Other general non-digital advertising of Carbonite products or solutions</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoices</li> <li>• Date(s) of activity</li> </ul>
Banner Stand or Signage	<ul style="list-style-type: none"> <li>• Banner production costs</li> <li>• Graphic design</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoice</li> <li>• Client name</li> <li>• Banner description must include Carbonite logo and content</li> <li>• Photo of banner</li> </ul>
Co-branded Merchandise	<ul style="list-style-type: none"> <li>• Promotional Items (i.e. pens, pencils, t-shirts, hats, mouse pads, etc.) that includes Carbonite and partner branding</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoice</li> <li>• Description of merchandise</li> <li>• Number of pieces ordered</li> <li>• Photo of merchandise with branding</li> <li>• Outline of usage/purpose</li> <li>• Client name</li> </ul>
E-Advertising	<ul style="list-style-type: none"> <li>• Web-based advertising, electronic banner ads</li> <li>• Electronic flyers or web-content which features Carbonite products or solutions</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoices</li> <li>• Date(s) of activity</li> <li>• Website address for the web-content or example of e-advertising</li> </ul>
Web Placement and Production	<ul style="list-style-type: none"> <li>• Third-party fees</li> <li>• Graphic design and development</li> </ul>	<ul style="list-style-type: none"> <li>• Activity invoice from vendor</li> <li>• Copy of web ad/page including URL and Carbonite trademark or branding</li> </ul>
Direct Mail/ Collateral	<ul style="list-style-type: none"> <li>• Postage</li> <li>• Printing fees</li> <li>• Third-party mail house fees</li> <li>• Graphic design and development</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoices</li> <li>• Sample of mailer or collateral with Carbonite and partner branding</li> <li>• Actual number of pieces mailed</li> <li>• Date mailed</li> <li>• Client name</li> </ul>
E-mail Campaign	<ul style="list-style-type: none"> <li>• Email Creation</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoice</li> <li>• Copy of the email</li> <li>• Email send date</li> <li>• Target audience</li> <li>• Distribution size</li> <li>• Call-to-action</li> <li>• Client name</li> </ul>
List Purchase, Rental, Subscription	<ul style="list-style-type: none"> <li>• Cost of list purchase or rental</li> <li>• Purchase price of contact list</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoice</li> <li>• Number of names purchased or rented or subscription start/end dates</li> <li>• Client name</li> </ul>
Telemarketing	<ul style="list-style-type: none"> <li>• Telemarketing call campaigns for lead generation direct mail or e-mail marketing campaign follow-ups</li> </ul>	<ul style="list-style-type: none"> <li>• Itemized invoice</li> <li>• Dates of telemarketing campaign</li> <li>• Number of calls to make</li> </ul>

Activity Type	Reimbursable Expense Description	Proof of Performance/Proof of Cost
Customer Briefings/ Seminars	<ul style="list-style-type: none"> <li>Partner-hosted activities to educate prospects and customers about Carbonite products and solutions either on site or off site               <ul style="list-style-type: none"> <li>- Event location</li> <li>- Food and drinks</li> <li>- AV equipment</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Itemized invoices from third-party suppliers</li> <li>Date(s) of activity</li> <li>Description of event including Carbonite involvement</li> <li>Copy of presentation or agenda</li> <li>Copy of invitation</li> <li>Target audience and number of participants</li> </ul>
Partner-Hosted Shows and Events	<ul style="list-style-type: none"> <li>Partner-hosted events, exhibitions, conferences, roadshows or trade shows highlighting Carbonite products and solutions for customers. Carbonite led/hosted events in which partners participate.</li> </ul>	<ul style="list-style-type: none"> <li>Itemized invoices</li> <li>Date(s) of event or activity</li> <li>Pictures</li> </ul>
Webinars	<ul style="list-style-type: none"> <li>Broadcast and subscription fees</li> </ul>	<ul style="list-style-type: none"> <li>Itemized invoices</li> <li>Copy of scripts or presentation</li> <li>Number of times aired</li> </ul>
Trade Shows & Vendor Fairs	<ul style="list-style-type: none"> <li>Booth space</li> <li>Furnishing cost</li> <li>Shipping</li> <li>Signage</li> <li>Event planning</li> </ul>	<ul style="list-style-type: none"> <li>Itemized invoices</li> <li>Description of trade show or vendor fair including Carbonite's involvement</li> <li>Pictures of booth or signage</li> </ul>

\*Attendee lead lists should be submitted in electronic format. Excel (.xls) or Comma- or Tab-Delimited (.csv) formats are acceptable and the following information must be provided in individual fields:

## Non-eligible MDF Activities

1. Alcohol, when not associated with a Carbonite program sponsored event (i.e. social activity)
2. Consulting expense: Carbonite participants, sales engineers, and third-party consultants
3. Engineering or product development
4. Entertainment activities such as sporting events, concerts, and events held in non-business venues that do not include some form of formal solution presentation and discussion
5. Infrastructure equipment not related to Carbonite program demo product
6. Carbonite participant operating expenses/facilities related to normal business operations or office costs
7. Political activities
8. Shipping and labor costs
9. Crediting of incentives to end user customer (direct credit or indirect through price reductions)

## How to Access MDF

The Carbonite MDF process will be managed through your CAM and Marketing Consultant. If you have any questions, please contact them directly.



## Additional Information on Reimbursement & MDF Benefit Terms

### Reimbursement Claim Auditing

The Carbonite Channel Marketing Team has the right to audit all activities and Reimbursement Claims for compliance with the terms of the Carbonite MDF benefit. If an activity or Reimbursement Claim does not meet the terms of the Carbonite MDF benefit, Carbonite is not obligated to reimburse the claim. Any such decision is final and at the sole discretion of the Carbonite Channel Marketing team. For example, if the PoP that a Carbonite participant provides does not match the activity listed on the Reimbursement Claim, the costs for the activity will not be reimbursed. In addition, if Carbonite has paid an MDF Reimbursement Claim and, after audit (including a reasonable opportunity for the Carbonite Partner to supply additional information), the Carbonite Channel Marketing team determines, in his or her sole discretion, that the Partner has not met the program requirements, the Carbonite Partner must remit such misappropriated amounts back to Carbonite. No further MDF will be available to that program Partner until the misappropriated amounts have been repaid.

### Incomplete Reimbursement Claim Status

If the Carbonite Channel Marketing team determines that an MDF Reimbursement Claim is incomplete, the Carbonite Partner will be notified to submit further information. Examples of missing information include missing itemized receipts or additional PoP or measurement metrics. If the incomplete status is not resolved before the Reimbursement Claim deadline, no Reimbursement Claim will be paid.

### Payment of Reimbursement Claims in Excess of the Approved MDF Request Amount

Carbonite Partners shall not exceed the value of their MDF requests during the request submission process. If the costs of an activity of a Carbonite participant exceed the original approved MDF request amount, the Carbonite MDF administrator may, in his or her sole discretion, reimburse the participant up to 10% over the approved MDF request amount to cover eligible activity expenses.

## MDF Terms

- a) All activities must be pre-approved by Carbonite.
- b) Use of Carbonite logo, branding and creative content must adhere to Carbonite's Brand and Logo Usage guidelines and the MDF Terms and Conditions located in the Partner Portal.
- c) Verbal statements or the presence of any proposed activity in an MDF Plan do not constitute approval and will not be reimbursed; the written MDF approval process outlined above must be followed in all cases prior to receiving reimbursement.
- d) Carbonite Partners may not subcontract work to themselves.
- e) Carbonite Partners have 14 days from the completion of their activity to submit their Reimbursement Claim for processing.
- f) MDF may only be used to promote Carbonite program products and services.
- g) MDF may not be used to improve a Carbonite Partner's margins or reduce its pricing.
- h) Failure to adhere to the Carbonite MDF requirements described in this Carbonite program guide will result in denial of Reimbursement Claims.
- i) Payment of Reimbursement Claims will be made to Carbonite Partners only; no payments will be made to any third party.
- j) Carbonite reserves the right to modify or discontinue the Carbonite MDF benefit at any time, including this Carbonite program guide, including, without limitation, any conditions, requirements or benefits contained herein. All such changes shall be effective upon notice to the Carbonite Partner or at such time as Carbonite may specify. However, Carbonite will use commercially reasonable efforts to give Carbonite Partners thirty (30) days written notice of the discontinuance of or any material change to the Carbonite MDF benefit.
- k) If a Carbonite Partners disagrees with any change or modification to the Carbonite MDF benefit, its sole remedy is to terminate participation in the program. Additionally, Carbonite reserves the right to suspend or terminate a Carbonite Partner's MDF benefits if the Carbonite Partner does not maintain its good standing in the Carbonite program, or fails to comply with any of the Carbonite program's then-current policies.

# Program Policies

## Overview

All requirements and benefits outlined in this program guide are effective through December 31, 2015.

Carbonite reserves the right to review a Carbonite Partner Program compliance at least once a year, and also reserves the right to re-level Carbonite Partners that exceed or no longer meet the requirements of their previous tier status.

## Moving Between Tiers within the Program

### Moving to a Higher Tier

Carbonite may determine if Partners are eligible to be advanced within the program to a higher tier by regularly reviewing a Partner's performance. Partners can also reach out to their CAM and request to be advanced based on satisfying the requirements of a different tier.

### Moving to a Lower Tier

Although it is hoped that these situations are limited in number, a Partner could be moved to a lower tier in the program if they have not been able to maintain their revenue requirements, required number of trained personnel or otherwise satisfied the requirements applicable to their participation in the program or a particular tier. Partners will first be notified their participation or tier status is in jeopardy by their CAM and options will be discussed to help the Partner in its efforts to remedy the situation. If the Partner is not successful within 3 months, Carbonite will send a written notice to the Partner confirming that they will be removed from the program or moved to a lower tier.



## Program Changes & Reservation of Rights

Carbonite reserves the right to alter or discontinue the Carbonite Partner Program at any time, including this Program Guide, and without limitation any conditions, requirements or benefits contained herein. All such changes shall be effective upon notice to the Partner or at such time that Carbonite may specify. However, Carbonite will use commercially reasonable efforts to give Partner thirty (30) days written notice of any material change to the Program and the Program Guide. If the Partner disagrees with any change or modification, the Partner may terminate your participation in the program. Additionally, Carbonite reserves the right to suspend or terminate a Partner's status if the Partner does not maintain their good standing in the program, or fails to comply with Carbonite's then-current policies.

## Notices

Any legal notices to Carbonite must be in writing and will be deemed given upon actual receipt by Carbonite. Notices must be sent by first-class mail, return receipt requested to the attention of Carbonite's legal department or the address we provide you via written notice or by electronic mail to [legal@carbonite.com](mailto:legal@carbonite.com). Any notice provided by Carbonite, including changes to the Program Guide, may be furnished via post, email, fax, or by publication on Carbonite's Partner web site including the portal.



**CARBONITE** 

**CARBONITE.COM/PARTNERS**

**877.391.4759**