

## Polycom Preferred Partner Program

### Frequently Asked Questions

The Polycom Preferred Partner Program is designed to protect and to reward Partners who have invested valuable time and resources developing a new end user opportunity. This protection and reward may come through incremental discounts or increased Polycom support and resources resulting in increased margin protection, a reduction of channel conflict and a greater probability of end user wins. If you are actively investing in developing an opportunity you should be rewarded for that work – the Polycom Preferred Partner Program does just that.

The rules are simple and are aimed at assisting the partner, who created the opportunity and is best positioned to support the customer, with the support and resources needed to win the deal.

Please refer to the Polycom Preferred Partner Program Terms & Conditions document for full terms and conditions related to this program. All documentation related to the Polycom Preferred Partner Program, including its Terms and Conditions, are considered confidential and are not to be shared with anyone outside of your organization, including end user customers.

#### How Do I Register a Deal?

To register a Polycom deal, access <http://portal.polycom.com> and log on using your username and password. Under the Partner Programs tab, select the Deal Registration page from the menu items to review program materials, terms and conditions and access the registration forms.

#### Step by Step Registration & Approval Process

1. Identify a qualified opportunity (customer's needs are a good fit with Polycom's solutions; identified budget), or Polycom has introduced you to an opportunity.
2. Visit Polycom Partner Resource Center located at <http://portal.polycom.com> and access the Deal Registration page.
3. Review program materials, eligibility requirements and terms and conditions.
4. Complete the program registration form (available on the Deal Registration page).
5. Email the program registration form to [nancy.williams@polycom.com](mailto:nancy.williams@polycom.com) with subject line that reads 'Preferred Program Registration Request' (note: submission of request form does not guarantee approval in the Preferred Partner Program and that the opportunity will be registered)
6. Polycom will route the registered opportunities through an approval process. In most cases, a Polycom Sales Representative will contact partners to discuss the opportunity in order to evaluate whether the qualification criteria has been met.
7. Polycom will approve or decline the registered opportunity based on the criteria set forth in the program eligibility requirements.
8. Partner will receive an email notification whether the opportunity registration has been accepted or declined.
9. Assuming the opportunity meets the qualification requirements, Polycom will register the opportunity to the partner within the Polycom opportunity management system. **The opportunity will not be registered nor will partners receive the benefits of the program until Polycom notifies the partner in writing (electronically) that the opportunity has been registered and partner is provided a Preferred Number.**
10. Partner works the opportunity to close (within 180-days) with support as required from the Polycom Sales Team.
11. During the 180-day sales cycle, the partner who registered the opportunity (the Preferred Partner) will receive price support as needed. For partners purchasing through a Polycom Distributor, price support will be passed through the Distributor.

#### How do I create an account on the Partner Resource Center?

Visit <http://portal.polycom.com> and select 'register for an account'. As a Certified Polycom Partner, you will be granted full access to the website. If you do not have the appropriate access to view the 'Partner Program Section', please send an email to [prcfeedback@polycom.com](mailto:prcfeedback@polycom.com) with subject line 'Polycom Preferred Program Access Needed'.

### **What criteria will the Polycom Sales Team use to approve the request to register my deal?**

The Polycom Sales Team will review your deal registration application to see that all the eligibility requirements have been met. In most cases, the Polycom Sales Team will contact you to review the details of the opportunity. If the Polycom Sales Team can confirm all qualifications have been met, there is a real, qualified opportunity and the opportunity will be registered on your behalf, the Polycom Sales Team will notify you within 3-5 business days with a Preferred Number.

### **For what reasons might a registration be rejected?**

There are any number of reasons why a deal might be rejected and Polycom always reserves the right to reject an application, regardless of the circumstances. Possible reasons might include: incomplete or inaccurate data on the application; falsification of information; multiple applications for the same opportunity; or partner is not in good standing with Polycom.

### **Once my registration is approved, can Polycom revoke my registration?**

Polycom reserves the right – under extenuating circumstances – to revoke an opportunity registration. Possible reasons include: Customer expresses dissatisfaction with the Preferred Partner and states that they will not purchase from that partner; Partner is unresponsive to the customer; Partner is not in good standing with Polycom.

### **Is feedback required through the registration period?**

Yes. Partner is required to provide regular feedback to the Polycom Sales Team. If a partner does not provide feedback, the registration will be subject to termination. If a registration is terminated due to lack of feedback, partner will not be eligible to register any opportunity for the same customer for 3 months. During this time, a competing partner may register the opportunity utilizing the same evaluation criteria. To avoid this situation, please ensure regular engagement and feedback with the Polycom Sales Team.

### **How Do I know if an Opportunity I am working is already registered?**

The Polycom Account Manager is the best person to discuss the opportunities you are planning to work on, and can verify whether or not an opportunity has already been registered by a competing Partner.

### **Should I register an opportunity which has been qualified by Polycom?**

Yes. If Polycom provides you the opportunity, you will need to register the opportunity to qualify for pricing assistance (NST).

### **How long is the deal registration period?**

Once a deal registration has been approved, it will remain open for 180 days. Exceptions to the 180 day registration period may be made and the sole discretion of Polycom.

### **What if my deal does not close within the registration period?**

If your deal is taking longer than the 180-day close period, you may request an extension. All extensions will be approved at the sole discretion of Polycom.

### **What happens if a competing partner is working the opportunity and does not register the deal?**

Polycom will accept the PO from the distributor or competing partner, however, will only give the Preferred Partner pricing assistance (via NST) as needed to close the opportunity.

### **Can I register an account?**

No. Only specific opportunities which meet the requirements of the program can be registered.

### **Can I register an opportunity outside of North America?**

Yes. Opportunities outside of the United States or Canada can be registered if the opportunity is part of a US or Canada based end user implementation which is being supplied by a US or Canada based Polycom certified partner. Polycom's Global Fulfillment Program must be used for orders fulfilled outside the United States or Canada (where Polycom can sell/ship product). All terms and conditions of the Polycom Global Fulfillment Program apply. Partner must use correct Regional MSRP price on the order. Global Fulfillment fees are non-discountable.

### **How do I register my opportunity?**

Partners must have an account on the Polycom Partner Resource Center located at <http://portal.polycom.com> in order to access the program guidelines and registration form in order to register an opportunity. Follow the simple steps listed above. If you do not have a username and password for the Polycom Partner Resource Center, visit <http://portal.polycom.com> and select 'Register for an Account'. As a Certified Polycom Partner, you will be granted full access to the website. If you do not have the appropriate access to view the 'Partner Program Section', please send an email to [prcfeedback@polycom.com](mailto:prcfeedback@polycom.com) with subject line 'Polycom Preferred Program Access Needed'.

### **Who can see the opportunity I register?**

The registration will be seen by only the Preferred Partner and the Polycom Sales Team. Competing partners or distributors will not be able to see the registered opportunity.

### **What support can I expect from Polycom?**

Resources will be available for Preferred Partners. Any request for pricing assistance will be determined by the Polycom Sales Team on a case by case basis. Pricing assistance will be provided to the Preferred Partner(s) only. Non-Preferred Partner(s) may participate in the opportunity; however, Polycom will not provide pricing assistance for that such partner(s).

### **What is the Preferred Number?**

Upon approval of an opportunity registration, Polycom will send an email to the approved partner including the Preferred Number. The Preferred Number should be used as a reference for all future correspondence regarding the opportunity. Partners will need to include the Preferred Number on the PO which is submitted to Polycom.

### **If I purchase through a Distributor, do I need to specify the Distributor when I register the opportunity?**

Yes. If you are purchasing through a Distributor, please specify the select Distributor on the program registration form which is submitted to Polycom.

### **What if I choose to use a different Distributor after my registration has been approved?**

At any time, you can modify the Distributor of choice during the sales cycle. If you choose to purchase through a different Distributor than what provided on the registration form, please notify the Polycom Sales Team so your selection can be captured within the opportunity management system.

## **REFERENCE MATERIALS & PROGRAM ASSISTANCE**

All Program materials are available on the Polycom Partner Resources Center located at <http://portal.polycom.com> (Deal Registration page).

Based on feedback from partners, Polycom will continue to provide partners with additional resource materials to make it easier for partners to do business with Polycom.

If you have additional questions or need assistance, please refer to the contact listed below or contact your Polycom Sales Representative.

Nancy Williams  
[Nancy.Williams@polycom.com](mailto:Nancy.Williams@polycom.com)  
(408)474-2809

*Polycom reserves the right to revise this program at any time with 30 days prior notice posted to the Polycom Partner Resource center website, or waive any term at its sole discretion.*

# Polycom Preferred Partner Program

## Terms & Conditions

The Polycom Preferred Partner Program is designed to protect and to reward Partners who have invested valuable time and resources developing a new end user opportunity. This protection and reward may come through incremental discounts or increased Polycom support and resources resulting in increased margin protection, a reduction of channel conflict and a greater probability of end user wins. If you are actively investing in developing an opportunity you should be rewarded for that work – the Polycom Preferred Partner Program does just that.

The rules are simple and are aimed at assisting the partner, who created the opportunity and is best positioned to support the customer, with the support and resources needed to win the deal.

### **BENEFITS**

Once an opportunity has been approved in the Polycom Preferred Partner Program, the Partner will become a 'Preferred Partner' for that opportunity. Polycom will support the 'Preferred Partner' with resources based on the opportunity, partner contribution, investment and effectiveness.

A Preferred Partner is also eligible for price support, such support will be offered to Preferred Partners on an 'as needed' basis through the Polycom NST process. For partners who purchase through a Polycom Distributor, the price support will be passed through such Distributor.

### **ELIGIBILITY REQUIREMENTS**

Partners that meet the following criteria may be considered eligible:

- Partner is a Certified Polycom Partner in the United States or Canada. Exceptions due to certification status will be dealt with on a case by case basis.
- End User opportunity is based in the United States or Canada with orders being placed by the channel in the United States or Canada. Global Fulfillment is eligible as part of the end user opportunity in which all terms and conditions of the Global Fulfillment program apply.
- Partner registers the opportunity at least 30 days before the projected close date.
- Partner fully qualifies the opportunity they have introduced to Polycom, or which Polycom has provided to the partner.
- Partner actively engages with Polycom sales team early and often in the sales cycle to help close the opportunity.
- Partner has demonstrably developed the opportunity with the customer.
- Partner has the capability and capacity to provide a solution to meet the customer's needs.
- Partner agrees (upon request) to provide documented pre-sales support including but not limited to customer presentations, Polycom product demonstration and needs assessment evaluation.
- End User opportunity is new business to Polycom.

### **PROGRAM EXCLUSIONS**

The following are excluded from the Preferred Partner Program:

- Opportunities for services and/or maintenance only;
- Opportunities for non standard and custom products;
- Stocking orders;
- Demonstration equipment or promotion orders;
- OEM orders; and
- Opportunities covered by an RFP not previously registered.

## ADDITIONAL TERMS

1. Partner confirms that the opportunity is for an independent non-affiliated End User.
2. Partner must be certified for the relevant product lines included in the registered opportunity.
3. Upon approval in the program, the Preferred Partner has 180-days to place the order. Exceptions to extend the order past 180-days will be reviewed and approved at the sole discretion of Polycom.
4. Partner must lead with Polycom exclusively on the opportunity.
5. Pricing assistance may not be granted if a partner is promoting multiple manufacturer solutions.
6. Products in Discount Code 99 are not eligible for a discount through the NST process.
7. Pricing assistance provided with this Program can be combined with another NST only when previously approved. Pricing assistance can also be combined with end user promotions (unless otherwise specified in the terms of the promotion), but not with other reseller promotions.
8. Polycom's Global Fulfillment Program may be used to fulfill orders placed outside of the United States or Canada. All terms and conditions of the Polycom Global Fulfillment program apply.
9. Distributors who sell to Certified Resellers who take part in the program commit to passing through any NST approved on an opportunity at 100% to the Polycom Preferred Partner.
10. Polycom will review and evaluate all opportunities under the Program in its sole discretion and may choose to accept or deny any or all claims as it deems appropriate.
11. In case of a dispute between Partner and Polycom about the implementation or terms of the Polycom Preferred Partner Program, Polycom retains sole control on any final determination which will be binding on the Partner.
12. Polycom reserves the right to cancel or modify this program at any time.

*Polycom reserves the right to revise this program at any time with 30 days prior notice posted to the Polycom Partner Resource center website, or waive any term in its sole discretion.*