

# Partner Program Guide

Partnering for success  
in an increasingly competitive world



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## Introduction

Business partnerships and alliances have a long, rich history in the software industry. Most software companies have found it nearly impossible to reach all of their potential customers and meet all of their customer's needs without partnering. This is the case at Pitney Bowes Business Insight (PBBI). Our company has a strong tradition with business partners of all types. Today, over 25% of our worldwide revenue is generated with business partners and we project that our partner revenue will grow significantly in the coming years. Therefore, a successful partner program is critical to our success.

But what are the benefits of partnering with PBBI for you? We provide partners with an extensive portfolio of industry-leading operational and business intelligence software products and solutions. These offerings help your customers locate new opportunities, connect with their customers and communicate more effectively. This informed decision-making results in cost savings, market share increases, sales growth, and profitability improvements for your customers.

Our solutions are extremely flexible. They are highly scalable, with options for the desktop to enterprise systems. We make our software and data available in a licensed on-premise, PBBI hosted or on-demand delivery model. Our products can be embedded in your solutions, built on top of or next to your applications, or sold stand-alone. Partners, ranging in size from global systems integrators to local, niche players who experience increased revenue, greater profits, and higher customer satisfaction as a result of their PBBI affiliation.

This document describes the PBBI Partner Program, which provides a framework for doing business together. We recognise that each partner has their own unique approach to the market. We also recognise that some businesses are new and others mature. To address your requirements, we offer a range of options designed to meet your distinct needs. Together, using the tools available in the PBBI Partner Program, we will craft a business arrangement that works for both your organisation and ours.

To quote an ancient Chinese philosopher, "A journey of a thousand miles begins with a single step." The PBBI Partner Program helps us take that first step, but it also guides us on the journey. We strive to make our partnerships meaningful, long-lasting, and financially rewarding. A successful partnership provides a high return-on-investment and rewards for years to come.

Thank you for considering the Pitney Bowes Business Insight Partner Program.

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*"Businesses once grew by one of two ways; grass roots up, or by acquisition... Today they grow through alliances."*

**Peter F. Drucker**  
Political Economist and Author

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## Why Partner With PBBI?

### Partner with the Leader in Business and Operational Intelligence

By partnering with PBBI, you gain access to dozens of industry leading products and solutions in location intelligence, customer communication, operational efficiency, predictive analytics and data quality. The Pitney Bowes brand is known to millions of businesses worldwide, which gives you the instant credibility that comes with a global, well-established, business-to-business company.

### Take Advantage of High Growth Business Opportunities

Pitney Bowes Business Insight is on the leading edge of many of the hottest business trends: Location Intelligence, Customer Data Integration (CDI), Predictive Analytics, Multi-Channel Customer Communication, and Trans-Promotions, to name a few. Customers and prospects are asking for solutions in these new markets, and PBBI has solutions to address those needs. We also package our technologies into specific vertical market offerings designed to address business requirements with high-impact, quick ROI solutions. As a partner, you can leverage Pitney Bowes' market presence and PBBI's proven solutions to grow your business.

### Leverage a Proven Partner Program

PBBI has been partnering for over 20 years. Building on this foundation of experience, we are constantly evolving our program to keep it current and meet the demands of the market. As a PBBI partner, you can:

- Increase the average deal size or add new features and functions to your existing offerings
- Reduce development costs and accelerate your time to market with new solutions
- Call higher in your existing customers or gain access to executives in new accounts
- Deliver more of the solution to your customer, increasing revenue and customer satisfaction
- Offer new or more comprehensive services by leveraging PBBI's Professional Services Group
- Leverage extensive Sales and Marketing tools and programs to generate interest and close more deals

## Program Summary

The PBBI Partner Program is designed to meet the needs of a wide variety of partners. We recognise that each partner has business interests, as well as constraints, that dictate their level of commitment to a successful partnership. To address this, we've created a tiered program that helps us share the right level of commitment to the relationship. As you increase your commitment to us, we increase our commitment to you.

## Program Tiers

### Platinum Partners

Platinum Partners represent the highest level of commitment for both you and PBBI. Platinum Partners are typically market leaders in their respective areas, possess superior technical and business skills, and have a willingness to make important financial commitments to provide business-critical solutions to their customers. They may have an exclusive relationship with PBBI in the areas of operational and business intelligence. PBBI commits considerable resources to Platinum Partners, from sales and marketing to support and training.

Platinum *Distributor* Partners have the unique distinction of being authorised to sell to other partners within an assigned territory. PBBI typically establishes Platinum Distributor Agreements in geographies with limited PBBI coverage or in emerging markets.

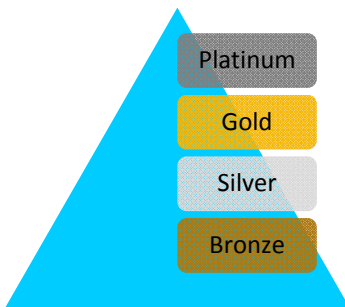
### Gold Partners

Gold Partners are businesses who commit sizeable energy and resources to the PBBI partner relationship. They may be smaller (in revenue or employees) than Platinum Partners or have more widely dispersed business interests. Accordingly, their commitment to PBBI is slightly less than that of a Platinum Partner. Gold Partners enjoy almost all of the benefits of the Platinum partnership, but on a smaller scale.

Partners at the Gold level typically add value through system integration, application development, product training, or localised customer support. Their business model reflects a significant focus on the PBBI relationship.

### Silver Partners

Silver Partners are businesses that offer PBBI technology in a variety of markets and application areas. They may develop and build customised applications on or along with PBBI technology, as well as distribute or recommend PBBI products with minimal or no modifications. Silver Partners add value, in some form, to the end-customer - from product availability to support and integration. Silver Partners constitute the broadest segment of the PBBI Partner Program community.



## Bronze Partners

Bronze Partners distribute or recommend PBBI products with little or no modification, yet add value in some form to the end-customer. Bronze Partners are usually new entrants to the PBBI Partner Program. This relationship tier gives both companies an opportunity to evaluate the business potential of the partnership without a significant resource commitment. Bronze Partners often move to Silver or Gold relationships within a year or two of program participation. The Bronze Partner level is ideal for the consultant, developer, or smaller organisation looking to build a business based around PBBI or on applications based on PBBI technology.

## Other Types of Partnerships

Not all partners fit neatly into these four tiers. Because of this, we offer a variety of other options for distributors, technology partners, referral partners, and systems integrators. Details about these programs are available through our representatives in the channel sales organisation.

## System Integration Partners

System Integration Partners are leaders in technical, marketing, sales or services and are the standard in their market. They are typically multi-disciplinary companies that have deep expertise in complex environments. We have tailored our Strategic Alliances program to fit into this context and meet the needs of this select group of partners.

## OEM Partners

OEM Partners are Independent Software Vendors (ISV's) who integrate PBBI software technologies with their own product offering for commercial resale. These partners may add on, bundle, host, or embed our software.

## Technology Partners

Companies who maintain a working relationship with PBBI or who use PBBI software to demo their own hardware or software fall into this category. They do not sell or support our products. Under a Technology Agreement, we work with these partners to get PBBI software installed, operational and supported most effectively to maximise the presentation of the partners' offering. Technology Partners may at any time upgrade to one of the standard tiers provided they meet the appropriate partnership requirements.

## Referral Partners

Referral Partners typically have a highly compatible product or service offering within a key market area. They understand the benefits of working with PBBI to maximise their value to their customer and increasing their customer's satisfaction. Likewise, organisations may for any number of reasons opt to not become expert in PBBI technology yet understand the importance of it for their customer, and be able to refer business to PPBI with some form of return consideration.

## What We Offer

The PBBI Partner Program offers a wide-variety of program elements designed to help your organisation be successful at any program tier. These benefits fall into the following three categories:

**Financial Benefits.** PBBI offers product and service discounts that allow you to generate revenue from the sale of those offerings to your customers and clients. We also offer incentives for helping us meet our business objectives. For example, we offer additional discounts to partners who grow their business with PBBI, partners who are able to obtain net new customers for PBBI or for specific solution offerings.

**Sales and Marketing Enablement.** Every organisation is looking for ways to expand their market by adding new customers or selling new products and solutions to existing customers. We have a broad range of sales and marketing tools to help with this endeavour, including:

- Professional sales collateral, white papers, case studies, and other tools to help you introduce our products and services to customers, and to close business quickly and efficiently.
- Lead generation programs, conducted by our organisation or in conjunction with yours, to help locate new prospects and facilitate new business with existing customers.
- Webinars, seminars, and other group events designed to inform customers and prospects of new solutions to their problems.
- The PBBI Partner Portal and Global Partner System, a comprehensive, web-based portal that allows you to receive leads, track opportunities, and access our extensive library of marketing, sales, and support literature.

**Technical Enablement.** Our goal at PBBI is to have your organisation know our products and services as well as we do. In fact, many of our partners have developed highly specialised expertise in vertical markets or product specialty areas that even exceed our capabilities. To help you gain this expertise, we offer a variety of training options for both sales and technical resources in your organisation. Our pre-sales engineers and product managers are available for large sales opportunities or to help you penetrate new market endeavours. We also offer technical support to help you deal with any challenging after-sale questions.

With PBBI's Partner Program, our main objective is to provide you with the tools you need to be successful. We are constantly evaluating new products and services to make our partner relationships an overwhelming success. Our on-going dialog helps ensure that we continue to meet your needs while you are helping us achieve our business objectives.

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*"The PBBI Partner Program has a lot to offer, which will continue to help us be successful especially in this increasingly competitive environment."*

VAR Partner

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## What We Expect

Successful partnerships require a commitment by both parties to the goals created for the relationship. To meet these goals, we've established the following success criteria to manage and monitor the relationship.

- PBBI will jointly develop an annual business plan with specific achievement goals. We will review this plan with you quarterly and update it based on current business and economic conditions. The plan's sophistication and detail is based on your business requirements and your product and service portfolio. Quarterly Business Reviews (QBRs) provide an excellent opportunity for partners and their Partner Account Manager to track year-to-date performance and implement any necessary adjustments. The amount of revenue that you generate selling PBBI products and services is a key element of the plan. This revenue commitment is a key factor in determining your partner tier and the financial benefits you receive from PBBI.
- PBBI will develop a plan to help you train your sales and technical resources to sell, implement, and support your selected products and solutions. To offset the opportunity cost of your time commitment for staff training, we provide training vouchers for our publicly available training classes. The number of training vouchers you receive is based on your program tier.
- To offset a portion of the PBBI Partner Program costs, PBBI charges a program entry fee and an annual renewal fee. This provides you with a licence for our Partner Portal, as well as partner start-up materials. The fee also helps offset a portion of the costs related to bringing you on board as a partner, and on-going services such as continuing education and technical support.
- To help both of our organisations flourish, we strongly encourage active and on-going information sharing. Especially important for our relationship is the sales pipeline and revenue forecast.

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*The PBBI Partner Program is geared to your success. Together, we will develop a plan for success, execute it collaboratively, and reap the rewards of our combined effort.*

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## Summary

The PBBI Partner Program is a mature, proven program. The combination of industry leadership and reputation of Pitney Bowes along with the extensive portfolio of industry-leading products and services gives your business a significant advantage in this competitive marketplace. As a member of the PBBI Partner Program, you are able to meet more customer needs, generate new revenue streams from products and services, and grow your business in proven and industry-leading areas. We appreciate the fact that you are considering the partnership and look forward to working with you in the near and long-term.

## What We Provide

### Financial Benefits

For most partners, the financial aspects of a partnership are critical to their initial decision to join a partner program and to the evaluation of their on-going relationship. The PBBI Partner Program offers a variety of ways to generate revenue with our products and solutions.

The foundation of our financial benefit is the ability for partners to buy at wholesale prices and sell at retail prices. PBBI does not dictate retail pricing but has a suggested list price, which may vary based on the region or country. We strongly suggest partners adhere to suggested retail to maintain price integrity for all selling parties. Discounts are dictated by your partner tier and are reviewed annually after the first year with the PBBI Partner Program.

Partners may resell PBBI services such as consulting, training and advanced support. You can also resell PBBI Professional Services, where the partner or PBBI can act as the general contractor or subcontractor, depending on the preferences of the customer. Discounts on services vary depending on a variety of factors including the types of services offered, the overall revenue, and the competitive climate.

Another way to generate revenue is referral fees. If a partner finds an opportunity that is too large for them to pursue, or if it falls outside of their expertise or geographic coverage, they may refer the opportunity to PBBI to pursue with another partner or with its direct sales force. If the opportunity generates revenue, the partner may be eligible to receive a referral fee. The fee is based on a variety of factors, which are negotiated when the opportunity is passed to PBBI.

Revenue may also be generated when a partner and PBBI jointly sell to an end customer. Revenue can be shared in a variety of ways for these co-selling opportunities. In our Direct Sales to Partner Rules of Engagement guidelines, PBBI describes a variety of joint sales scenarios and the recommended ways to compensate each participating party within the guidelines of an executed Teaming Agreement.

The PBBI Partner Agreement and this Partner Program Guide are the definitive documents when it comes to the financial aspects of the PBBI Partner Relationship. As always, your Partner Account Manager can provide guidance as you evaluate the PBBI Partner Program and throughout the relationship.

## Sales and Marketing Enablement

PBBI invests significant time, money, and resources supporting the company's sales and marketing efforts. As an extension of our organisation, our partners have access to these resources and programs.

This section describes those sales and marketing resources and how to take advantage of them. As with other aspects of our Partner Program, your commitment level directly determines the types of resources available for selling our products and solutions. The table below outlines the resources and details the availability of these resources at each commitment tier in our program.

Sales and Marketing Tools	Platinum	Gold	Silver	Bronze
Access to the PBBI Partner Portal and Global Partner System	Three User Licences	Two User Licences	One User Licence	One User Licence
Access to PBBI Industry Experts	✓			
Ability to present at PBBI Sales Meetings	✓	*		
Access to Marketing Funds	✓	✓		
Eligibility for Partner Advisory Council	✓	✓		
Access to PBBI Generated Sales Leads	✓	✓	*	
Assignment of Partner Account Manager	✓	✓	*	
Eligibility to participate in road shows	✓	✓	*	
Access to quarterly Channel Newsletter	✓	✓	✓	✓
Access to Customer Evaluation Software	✓	✓	✓	✓
Participation in PBBI Press Releases and Case Studies	✓	✓	✓	
Complimentary Pass(es) to PBBI Partner Conference	✓	✓	✓	✓
Availability of Not-For-Resale (NFR) software licences.	✓	✓	✓	✓
Listing in Partner Locator on PBBI web site	✓	✓	✓	✓
Availability of marketing literature	✓	✓	✓	✓
Use of PBBI Partner Branding	✓	✓	✓	✓
Access to On-Demand Seminars	✓	✓	✓	✓
Loan of trade show banners	✓	✓	✓	✓
Preferred pricing for licences for Salesforce.com internal use	✓	✓	✓	✓

\* These features are available to this partner tier as resources permit

## Access to the PBBI Partner Portal and Global Partner System

The PBBI Partner Portal is designed exclusively for PBBI Partners. It is centrally located and accessible from any location equipped with an Internet connection. The PBBI Partner Portal is used for tracking leads and opportunities, accessing marketing and sales materials, and providing feedback to PBBI on products, programs, and processes. Information you provide through the portal is shared with your Partner Account Manager who is available to help guide you through the sales process. This easy-to-use tool drives more revenue, makes it easier to do business together, and ultimately leads to more satisfied customers.

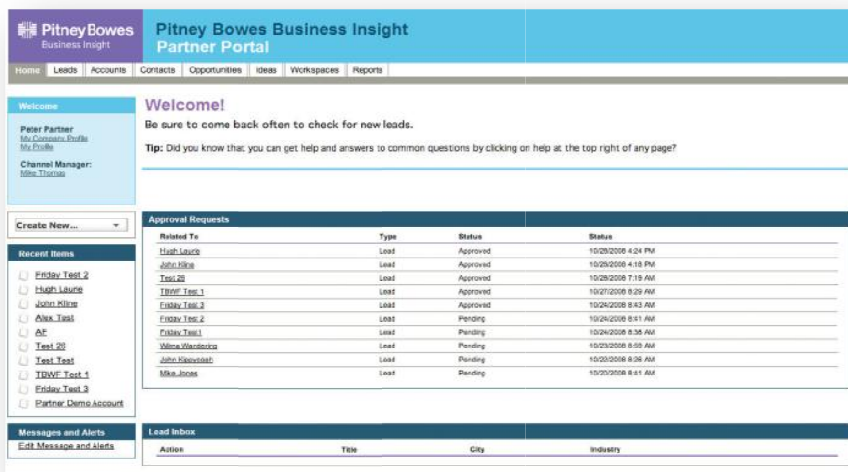


Figure 1: Partner Portal Home Page (Sample Data)

The primary purpose of the Partner Portal is to convert leads to opportunities and then to sales. The portal tracks both leads you generate and enter into the system, and leads that PBBI provides to you. Once the leads are qualified, they are converted to opportunities which are closely tracked through the sales pipeline. Deals are registered quickly and efficiently through the portal to minimise sales conflicts. Finally, a closed opportunity is converted to an order.

The Partner Portal also contains content in the following areas:

- Product launch documents
- Pricing schedules
- Win reports, competitive briefs, etc.
- Program guidelines and updates
- Forms and agreements

Each authorised PBBI partner has at least one licence to the portal. Additional licences are available for higher tier partners or at an additional charge. If you use Salesforce.com as your Customer Relationship Management (CRM) system, we can implement the Salesforce-to-Salesforce connector to make information sharing even easier.

## Access to PBBI Industry Experts

PBBI has a team of internal sales and technical experts for key vertical markets. They have extensive industry experience, understand the issues and challenges facing the industry, can articulate clear product and solution positioning, know the competitors in those markets, and understand how to most effectively solve a customer's problems.

Platinum Partners can request the assistance of these industry experts when a large-scale or challenging sales situation arises, or as part of our annual business planning process. These experts can advise you on the best approach to meet the customer's needs, engage jointly with you and the customer, and direct you to resources to help close deals. Your Partner Account Manager coordinates meetings with these experts if the need arises.

## Ability to Present at PBBI Internal Sales Meetings

Platinum and Gold Partners may be asked to provide information to PBBI's international, regional, or local direct sales force via an in-person or web-based presentation at a PBBI internal sales meeting. In this way, partners keep the PBBI sales force informed on the particular experience and expertise that they offer in developing new business opportunities and solving customer problems. In selected circumstances, Gold Partners have access to the PBBI direct sales force. Contact your Partner Account Manager to request and schedule these informational meetings.

## Availability of Marketing Funds

The PBBI Marketing Funds Request (MFR) program is available to PBBI partners who undertake marketing activities in support of PBBI's range of products and services. These funds can subsidise the cost of a wide variety of marketing activities. Funds can be requested through the submission of the 'Marketing Request Form'. All requests will be reviewed by your Partner Account Manager and the Channel Marketing Team prior to approval.

## Eligibility for Partner Advisory Council

Platinum, Gold and Silver Partners are eligible to participate in our Partner Advisory Council. This select group is nominated by the Partner Account Manager for an annual term. Partner Advisory Council members meet quarterly to discuss new products and solutions, business issues, and market trends with the goal of helping all partners improve their businesses.

## Access to PBBI Generated Sales Leads

PBBI Platinum and Gold Partners are eligible to receive sales leads and referrals directly from PBBI. PBBI expects the partner to provide detailed, periodic feedback on any leads and referrals. Prompt and thorough management of these leads is mandatory for continued lead referrals. Your Partner Account Manager assists you with lead and opportunity management using the Partner Portal.

In cases where there is insufficient vertical market coverage or product expertise with our Platinum and Gold Partners, select Silver Partners may be eligible to receive PBBI-generated sales leads, as resources permit.



## **Assignment of Partner Account Manager**

Partner Account Managers are PBBI employees charged with helping you be successful as a partner. A Partner Account Manager is assigned to each Platinum and Gold partner, while Silver partners share a pool of Partner Account Managers.

Your Partner Account Manager is your spokesperson and advocate within PBBI, and your primary point-of-contact. Your Partner Account Manager helps you with all sales related questions, and provides you with all of the resources you need to be successful. As you join the PBBI Partner Community, your Partner Account Manager will coordinate your orientation and training, helping you become successful in the shortest time possible.

## **Eligibility to Participate in Product Roadshows**

Periodically, PBBI conducts multi-city seminars that highlight new products and solutions. Partners are regularly invited to participate as co-sponsors of these events, providing the opportunity to promote the event to your customers and prospects.

## **Access to Customer Evaluation Software**

Partners qualify for access to evaluation copies of software and data, known as Software Product Evaluations (SPE). These SPEs are provided to prospects and existing customers to evaluate the fit and function of the software in their environment. By using SPEs to construct a demonstration pilot of a planned solution, a partner has the opportunity to close a large deal more rapidly. Evaluation products will only be available to the partner's customer for a short period of time and must be uninstalled and returned to PBBI if a purchase is not made.

## **Participation in PBBI Press Releases and Case Studies**

PBBI encourages partners to undertake a range of public relations activities based on a recent sales win or the development of a specific solution or application. PBBI's Channel Marketing team can assist partners with the joint development of customer case studies. In addition, as part of PBBI's corporate public relation activities, we occasionally ask for partners or partner customers to be included in press releases and articles.

## Attendance at the Insight User Conference

Each year, PBBI sponsors a gathering of end-customers from around the world, now known as the Insight User Conference. At this conference, PBBI Product Managers discuss product features and product roadmaps. User communities of interest meet and discuss their use of PBBI products. PBBI Executives and entertaining guest speakers discuss thought-provoking, timely topics. These conferences are a great time to network, learn, and have some fun.



We encourage our partners to attend the Insight User Conference and to bring their customers and prospects.

## Attendance at the PBBI Partner Conference

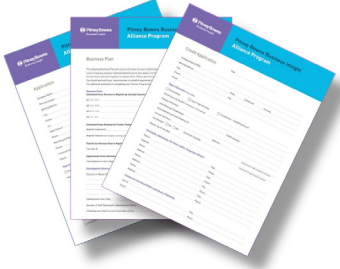
In conjunction with the Insight User Conference, PBBI holds a partner only event. During this event, partners gain insight from PBBI Executives, Product Managers, industry leaders, and peers on more effectively selling and supporting PBBI products and solutions. Depending on your partner tier and subject to availability, you may receive complimentary passes for the Partner Conference. Travel and other expenses are the responsibility of the partner.

## Availability of Not-for-Resale (NFR) Software Licences

As a PBBI Partner, we encourage you to use our products and to make them available to your customers and prospects for demonstration purposes. To achieve this goal, we provide you with a limited number of licences of selected products, at no charge. To take advantage of this offer, partners simply request, through their Partner Account Manager, the number and type of licences needed. The Partner Account Manager ensures that the proper agreements are complete, and coordinates the delivery or availability (for SaaS offerings) of the requested products.

## Listing in Partner Locator on PBBI Web Site

To promote your business to the world and to generate leads for your sales organisation, PBBI has a Partner Locator on our website. A prospect can search by geography, specialty, or name to find a partner to help them solve their business problems. All you have to do is create and maintain an accurate profile of your business through the Partner Portal.



## Availability of Marketing and Sales Literature

PBBI provides a rich array of marketing and sales literature to help educate the customer and facilitate the sales process. We publish customer case studies, product data sheets and brochures, article reprints, white papers, and other literature. All of these documents are conveniently located in the Partner Portal, and are available to you after you formally join the Partner Program. Platinum and Gold Partners may order a limited quantity of printed PBBI marketing and sales literature per year at no cost. Additional literature may be ordered by any partner at an additional cost.

## Use of PBBI Partner Branding

The PBBI brand brings value and credibility to your organisation. As a PBBI Partner, you are able to use branding designations for your partner tier on business cards, marketing materials, or advertising. To help you understand the guidelines for logo usage and branding, PBBI publishes a Corporate Identity and Style Manual. This manual helps your marketers and graphic designers adhere to the legal and usage guidelines for the PBBI brand.

## Access to On-Demand Seminars

To help you better understand our products, partners have access to a variety of On-Demand seminars through the Partner Portal. These 10- to 30-minute recorded sessions cover product overviews, current regulatory information, value propositions, positioning, and messaging. They are not intended to replace technical or sales training, but instead provide an introduction, refresher, or “quick reference” to these topics.

## Loan of Trade Show Banners

As a PBBI partner, you have access to PBBI’s product and company banners (on an as-available basis). This trade show loan program works to support your organisation in promoting PBBI or PBBI’s products and solutions at a tradeshow, conference, or seminar.

## Preferred pricing for Salesforce.com Internal user licences

For those partners that are considering implementing a new, or replacing an existing, CRM system, PBBI has arranged preferred pricing with Salesforce.com for your licences. If you use Salesforce.com as your CRM system, we can implement the Salesforce-to-Salesforce connector to make information sharing easier between our companies. Please contact your Partner Account Manager if you are interested in this program.

## Technical Enablement

Enterprise software products and solutions are sophisticated, highly-configurable tools. They usually operate in complex environments, interacting with other systems and processes. As a result, customers expect knowledgeable providers who understand their needs and who can describe how the tool will solve their specific problems. Customers also expect that if you don't have the resources yourself, you know how to obtain and coordinate other providers to meet their needs.

PBBI provides a broad range of services to help you prepare your sales, marketing, technical, implementation and support personnel to provide the highest value to your customers. These services include training, professional services and support delivered to, through or with your organisation. A key part of our business planning process with you is to determine how, when and where we deliver your customised plan to fully enable your organisation. This technical enablement process allows you to fully understand the features and functions of our software products and solutions so that they can be effectively and reliably sold and deployed.

Technical Tools and Resources	Platinum	Gold	Silver	Bronze
Ramp-up phase employee training	3 attendees permitted in any public class in the first 90 days	2 attendees permitted in any public class in the first 60 days	1 attendee permitted in any public class in the first 30 days	
Standard technical support	✓	✓	✓	✓
On-line webinars	✓	✓	✓	
Solution mentoring	Up to 2 hours per quarter	Upon request		
Participation in beta programs	✓	✓	By invitation	
Pre-Sales engineering support	Upon request	Upon request		
Demo software and demo data	✓	✓	✓	

## Ramp-up Phase Employee Training

To encourage rapid learning, we provide training credits for internal use during the ramp-up phase of our partnership. These complimentary training credits can be used to attend public instructor-led classes. The number of training credits varies by partner tier.

After your ramp-up phase, or for additional employees who need training, you can attend our public, instructor-led classes at a discount. PBBI is also working on a web-based training and certification program that complements our instructor-led classes.

## Standard Technical Support

For many partners—and customers—technical support is *the* key characteristic in evaluating the viability of a software vendor. It's easy to be on your best behaviour in the early stages of the relationship but what happens when the dust settles and you have a problem days, weeks or months after implementation team has gone home? Technical support is usually the answer, and we believe that PBBI has a great answer for you and your customers.

As a diversified, global provider, PBBI has invested in 24 by 7, follow-the-sun, multi-lingual support for most of our products. Our experts support these mission-critical solutions with professional, expert Level 2 and Level 3 support. Most partners provide Level 1 support and use PBBI to escalate problems and situations that they can't handle.

PBBI Technical Support makes telephone and email support available to partners for all PBBI products covered by a maintenance and technical support agreement.

As with all of our service offerings, PBBI is constantly evaluating new tools and techniques to improve our technical support. We will keep you posted on changes and upgrades through our various communication vehicles.

## On-line Webinars

We offer frequent Internet-delivered webinars and occasional in-person seminars, which overview new products and solutions or provide deep-dive technical analyses for existing products. During these sessions, hosted by members of our Professional Services team, by Product Managers and by other industry experts, we share insights, proprietary knowledge and implementation experience to improve your organisation's expertise.

## Solution Mentoring

We offer solution mentoring, which allows you to get one-on-one access to our Professional Services experts for specific customer situations or for product integration. Your partner tier determines the number of hours available for this valuable service.

## Participation in Beta Programs

An excellent way to get familiar with our products is through our beta programs. When you participate in the program, beta participants have specific roles and responsibilities, but through the experience you can gain in-depth product knowledge which can give you a distinct competitive advantage as products are released to the market. Partner participation is dependent on your partner tier.

## Pre-Sales Engineering Support

Another important technical enablement service is access to the PBBI Pre-Sales Engineering team. These professionals can help you during the sales process to properly position the product and to highlight the key features and functions which will have the greatest benefit to the customer. Your partner tier determines the frequency and number of hours available for this valuable service.

## Demo Software and Demo Data

As a PBBI Partner, we encourage you to use our products and to make them available to your customers and prospects for demonstration purposes. To achieve this goal, we provide you with a limited number of licences of selected products, at no charge, to meet these needs. To take advantage of this offer, partners simply request, through their Partner Account Manager, the number and type of licences needed. The Partner Account Manager ensures that the proper agreements are complete, and coordinates the delivery or availability (for SaaS offerings) of the requested products.

## Other Technical Enablement Benefits

### Customer Training

PBBI offers a broad range of training programs for your customers. They can attend these public, instructor-led classes to gain the knowledge and expertise necessary to effectively use the products.

As you gain in-depth knowledge of PPBI products, you can deliver your own training to customers. If you choose not to make that level of commitment or don't have the facilities to conduct a training class, we offer private training classes on your behalf for a single customer or group of customers.

You can also purchase training credits at a discount from customer pricing. These credits can be used by you or your customer to attend public, instructor-led training or for private training classes. Each training credit provides you with one student day for most of publicly available classes.



PBBI is committed to a rich, diverse training curriculum that helps you gain and maintain the skills necessary to effectively sell, implement and support our wide range of software products and solutions. We are constantly evaluating our current training offerings and providing new curriculum and classes as business needs evolve.

### Professional Services

PBBI has an extensive, global professional services organisation with expertise in our products and solutions and within selected industries. The goal of our professional services organisation is to ensure that a customer has taken advantage of the right set of features and benefits and deployed them in a way that actually solves their problems. The professional services team benefits from having seen the problem, or something quite close to it, before. They understand how our products work in complex environments, how they interact within the customer's business systems and how they extend to their suppliers, customers and other stakeholders. This wide-ranging experience and deep expertise helps create satisfied customers, customers likely to come back should other problems arise.

PBBI Professional Services are intended to complement—not compete with—our partner's offerings. In many cases, partners have a local presence, a bundled solution, or industry expertise that is a better fit for the customer. Our professional services team is there to help you, to fill the gaps or to extend the team. In some situations, you may subcontract us for an engagement. In other situations, we may be the general contractor and subcontract your team to complete the job. Our Professional Services organisation is very flexible and willing to work together in almost any way that makes economic sense and that works for you and your customer.

PBBI offers Professional Services in the following areas:

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*"The PSG team at PBBi really helped out. We got a much bigger sale by engaging them on the front end and then having them help us with the implementation."*

OEM Partner

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- **Industry Consulting:** PBBi is focused on six key vertical markets: Insurance, Financial Services, Retail-Restaurants-Real Estate, Communications, Public Sector and Natural Resources. We've developed deep industry knowledge and know how to solve specific problems in these industries. Our Professional Services industry experts will work with your team to find the best way to configure and deploy our products so that we can meet your customer's most pressing business challenges.
- **Location Intelligence:** Location intelligence is more than putting points on a map. It all about using geographic information to help companies make better decisions about risk, opportunity, resource allocation and profitability. We can help you and your customers connect into existing databases, write interface code, or integrate with new or existing systems.
- **Customer Communication Management:** Our CCM team know documents: how to create them, how to customise them to most effectively communicate your message, and how to store and retrieve them quickly and efficiently. We have mastered multi-channel communications including print, fax, email, SMS, and others.
- **Data Quality:** PBBi has been in the data quality business for over 20 years. Data quality is the foundation for many enterprise initiatives today. Master Data Management (MDM), Customer Data Integration (CDI) and other data quality initiatives depend on tools that we provide and have deployed hundreds of times. Our Professional Services team knows data and how to create *and* maintain the highest quality data for your organisation.
- **Communications Intelligence:** Our Mailing Efficiency experts know how to wring the last penny out of the cost of mailing a marketing piece, a bill, or a letter. After all, Pitney Bowes knows mailing. We can help you streamline your operations, save money, and improve your communication effectiveness with our Communications Intelligence products.
- **Predictive Analytics:** Our Predictive Analytics experts can take current or historical data and help you project the impact of your decisions into the future. Predictive analytics can help you help your customers answer the what-ifs about customers, facilities, resource allocation, competitors and other market dynamics. Our Predictive Analytics Professional Services team will guide you and your customer to a set of likely outcomes given a strong base of historical information.

## Summary

Pitney Bowes Business Insight is committed to preparing you to be the most effective and efficient partner in the marketplace. Our technical enablement services prepare your sales, marketing, technical, implementation and support personnel to deal with a wide range of technical complexity, from simple desktop installations to multi-company, cross-platform enterprise deployments. We are dedicated to giving you the tools to make your job easier and to help you solve customer problems with ease and professionalism.

## What We Expect

Successful partnerships require a mutual commitment to success, to revenue generation and to growth. PBBI expects that our partners will commit resources, time and money to the partnership. With your investments and the investments from PBBI described in the rest of this guide, we will both reap the rewards of a long-lasting, profitable business relationship.

PBBI's major requirement for the Partner Program is commitment; a commitment to business planning and to preparing your organisation to sell and support our products and services. There are up-front and annual program fees that help us defray a small portion of the Partner Program costs. Finally, we expect you to share information about your business opportunities and the sales pipeline for PBBI products and services.

## Business Planning

In our experience, business planning is *the* key to a successful, long-lasting partnership. The business planning process aligns our two organisations, establishes specific goals and objectives, and sets expectations of what each party will do and when each organisation will act. Planning also needs to anticipate the unexpected. These events may come from the outside in the form of shifts in market demand, the emergence of competitors, economic peaks and valleys, as well as a myriad of other factors. They may come in the form of internal factors such as changes in personnel, the ebb and flow of business economics or an adjustment in focus.

The business planning process begins when you apply to become a PBBI Partner. Our planning documents gathers basic demographic information and key business characteristics so that we can get to know you and your team better. We also ask what markets and product specialties you are interested in pursuing. We look at your current and planned marketing activities for generating demand and increasing product awareness. Finally, we look at your expectations for revenue for the first year of our relationship.

These factors not only help us determine if there is a good fit for your organisation in our program, but it establishes the foundation for our annual business planning process. To make sure that we are meeting your expectations, and you are meeting ours, we conduct a simple, quantitative quarterly review using our Partner Scorecard. This scorecard helps us review the past quarter and set or revise plans for the upcoming quarters. We consistently get favourable reviews from our partners for this quick, simple yet comprehensive formal review process.

An important aspect of the business planning process is the feedback we get from you during this process: what's working, what's not, and how we can get better. Partners have a number of ways to provide feedback including the Ideas feature of our Partner Portal. You can also call or email us to let us know how we are doing.

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*"We've always worked closely with PBBI. In the last few years, we've formalised our planning and grown faster as the result of it."*

SI Partner

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Business planning is the foundation for our partnership. From this foundation, we build tactical marketing campaigns, training plans, detailed financial blueprints and other departmental plans to create success both today and in the future.

## Organisational Preparedness

Preparing your team and your business to sell and support a new product or product line can be a major undertaking. Under any circumstance, without this preparation, your chance of success is significantly limited. However, PBBI offers a wide range of resources for you to address this need. What we need is a commitment from you to use these resources to prepare yourself for success.

The first step in preparing your company is an organisational assessment. This can be a formal or informal process that identifies your strengths and weaknesses with the goal of identifying the gaps in your organisational preparedness for selling and supporting your PBBI product set. From this gap analysis, we can jointly create an organisational development plan that will address the shortcomings. For your partnership, this may as simple as attending a webinar to prepare your sales team or it may require a series of instructor-led classes to prepare your technical resources. Some steps may be required before you can sell or install products while other steps can be accomplished over time.

Preparing your organisation is not a onetime event. Products get upgraded, new environments emerge, and innovation solutions are created. Evaluating and preparing to sell and support these opportunities is part of the on-going business planning process. We are constantly looking for more effective, cost-efficient ways to help you meet the needs of an increasingly complex and demanding marketplace. Your Partner Account Manager will support and guide you through the process and help you maximise your success with PBBI products and services.

## Financial Commitment

The PBBI Partner program has two financial commitments: revenue targets and annual program fees.

Revenue targets are one of the key factors in determining your partner tier and, therefore, your product and services discounts. These revenue targets are reviewed during the Quarterly Business Review to make sure that both companies are executing the established business plan. After the first year, partner revenue performance is based in the sales over the most recent calendar year. A partner's tier can be changed annually based on your overall revenue performance.

PBBI charges program fees when you join the PBBI Partner Program. These fees are another sign of the commitment you are making to the program. They also cover some of the costs of bringing a new partner on-board. The first year fees are higher than subsequent years, and partners at higher tiers pay more than partners at lower tiers. The fee structure is described in depth in the Partner Agreement.

## Information Sharing

Information sharing from you to PBBI takes many forms:

- Discussions of market trends, the competitive landscape and other macro level issues
- Feedback on new products and services, product features, or new product uses
- Discussions of sales pipelines and revenue forecasts

All of these information sources are important to us but the most important is *the sales pipeline and revenue forecast*. This pipeline helps us understand what we can do to help you close sales and, in many cases, how we can manage our resources to help you meet your business objectives. Because we consider you an important part of our sales organisation, the pipeline and sales forecast is a critical management tool. For our higher tier partners, we request a weekly or bi-weekly forecast. For the remaining partner tiers, we request an updated forecast at least monthly.

## Summary

As you can see from this Guide, PBBI has a wide range of benefits and few requirements for participating in the PBBI Partner Program. However, what we expect from you is very important to us. We have systems and processes in place to help with business planning, to support getting your organisation prepared and to share information all with modest financial commitments. Our goal is to be easy-to-do-business with and to put in place the building blocks for a long-term, successful business partnership.

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*"Our partners are an extension of our own sales force. Their sales efforts and market insights are critical to growing our business."*

**Brian Lantz,**  
SVP, Americas  
Pitney Bowes Business Insight

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## Getting Started

Once you have evaluated the PBBI Partner Program and decided to join our program, the next steps are easy:

- Contact the PBBI Australian Channel Sales team to be guided through the process:
  - Telephone: +61 3 9694 3300
  - Email: [partner@pbbusinessinsight.com](mailto:partner@pbbusinessinsight.com)
- Complete the following PBBI Partner Program documents:
  - Program Application
  - Credit Application
  - Business Plan
  - Software Product Evaluation Agreement
  - Partner Agreement
- Submit your completed paperwork along with any program fees to your Partner Account Manager.
- Once accepted, we will work together to complete the Operational Preparedness Assessment and your Business Plan.
- Complete the required training and certifications.

We look forward to working with you. Thank you for joining the Pitney Bowes Business Insight Partner Program.

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One Global View, Troy, NY 12180

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*"Getting started was very straightforward. We were up to speed in a matter of weeks and sold our first deal within two months."*

*VAR Partner*

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