



# Partner Marketing Fund (PMF) EMEAR Terms and Conditions

## 1. Introduction

The Partner Marketing Fund (PMF) process is intended to provide Cisco partners with the means to market their companies and the Cisco product lines they carry. PMF is managed through the Cisco Fund Manager platform. PMF is a consolidated fund that supports marketing activities performed by Cisco partners to help increase bookings through approved co-marketing initiatives. The process supporting PMF is designed to distribute funds based on the maximum expected return on investment. Cisco allocates the funding, reviews and approves payments upon the partner meeting pre-established proof of execution criteria.

## 2. Budget Allocations

Cisco EMEAR allocates Contra (Contra Revenue) budget down to the required operating level which may be by theatre, country or segment. These methods will vary based on the opportunity, capacity and budget available in EMEAR. Once the funds are allocated to the required operating level, they will be available for the partners to claim after successfully executing agreed plans within the agreed Cisco fiscal quarter.

Budget allocated to partners is determined by the Cisco partner marketing leads in cooperation with their partner sales counterpart in country/theatre and based on the EMEAR overall budget and marketing plans agreed by Cisco. Field teams and other sales leadership may act as advisors for the budgeting process. The minimum claim threshold per partner per quarter is defined based on country size. If there is a request for less than the minimum spend, an approval is required from EMEAR marketing operations. Cisco contribution per partner cannot exceed \$50,000 per each fiscal quarter. If there is a request for more than \$50,000 per fiscal quarter, an approval is required from EMEAR Marketing Operations. Cisco will not refund more than 50% of the total cost of the activity, except for DMR (Direct Marketing Reseller) for which 100% refund applies.

Small Countries: minimum of \$2,000 per quarter per partner	Large Countries: minimum of \$5,000 per quarter per partner
<b>South</b>	<b>South</b>
Greece, Cyprus, Malta, Portugal, Israel	France, Italy, Spain
<b>North</b>	<b>North</b>
Lithuania, Latvia, Iceland, Estonia, Luxembourg	Norway, Sweden, Denmark, Finland, Belgium, Netherlands
<b>Central</b>	<b>Central</b>
Albania, Bosnia&Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Kosovo, Macedonia, Montenegro, Romania, Serbia, Slovakia, Slovenia	Austria, Germany, Switzerland, Poland
<b>UKI</b>	<b>UKI</b>
Ireland	United Kingdom
<b>Emerging</b>	<b>Emerging</b>
Egypt, Bahrain, Kuwait, Qatar, Yemen, Oman, Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon Central African R., Chad, Congo, Congo D.R, Ivory Coast, Egypt, Equatorial Guinea, Eritrea, Ethiopia, Gabon,	Turkey, South Africa, Russia, Saudi Arabia, United Arab Emirates



Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Mali, Mauritania, Mauritius, Mayotte, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Sudan, Tanzania, The Gambia, Togo, Tunisia, Uganda, Zambia, Zimbabwe, Iraq, Jordan, Lebanon, Palestine, Pakistan; Afghanistan; Georgia, Moldova, Azerbaijan, Kyrgyzstan, Kazakhstan, Uzbekistan, Belarus, Ukraine	
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### PMF Project Agreements

PMF fund will be allocated to the theatre/country and distributed to partners through the Cisco Fund Manager platform (see chapter 4). Cisco partners must conform to the present terms and conditions in order to receive funding from this budget.

If partners are given a budget at the start of the Cisco fiscal quarter the partner should use it to promote the Cisco business within that quarter. All requests for funding must be approved by Cisco prior to the execution start date. PMF projects will be opened and approved for the maximum reimbursement amount. They will be managed by the EMEAR marketing operations and finance teams in accordance with Cisco standard guidelines (i.e. Sarbanes-Oxley Act compliance and Cisco payment policy). Partners will have to accept the present Terms and Conditions prior to activity execution through an online acceptance process.

The execution end date determines when the funding liability is accrued for accounting purposes.

If the partner notifies Cisco that the partner is unable to execute and claim the money, Cisco reserves the right to take the money back and re-allocate to another partner.

### **3. Partner Marketing Plans**

The Cisco partner organisation requires the theatre/country to have developed a business plan with the partner. The business plan is overlaid with a marketing plan - down to tactical level - developed by the Cisco marketing manager in conjunction with the partner. Funding is allocated to the tactics according to the EMEAR commercial business priorities.

Cisco's PMF offers co-marketing funding to assist the partners in generating demand for Cisco and partners' products & services. The execution of these plans is partners' choice whether executed in house or through vendors.

Cisco Partner Demand Center (PDC) can provide co-marketing demand generation services for all partners who choose to use them.

They range from:

1. Lead collection, formatting and processing for KPI reporting, campaign evaluation and proof of execution for all activities that partner chooses to execute in house.
2. On-boarding and management of partner agencies by the PDC (providing training on Cisco campaign content, systems & processes including lead collection, formatting and processing for KPI reporting) for partners who choose to execute through their chosen vendors.
3. Full demand generation activity management through the PDC (including access to Cisco trained and approved agencies) offering a range of demand and lead generation activities at preferential rates for partners who require end to end demand generation management and support for some or a number of activities.



Activities vary by country and may include but are not limited to:

- Telemarketing
- Digital campaign tactics, search engine optimisation, search engine marketing, banner advertising incorporating real time bidding, re-marketing and social selling
- Social media activation and enablement
- Third party content syndication and sales alerts
- Integrated, multichannel campaigns – email, landing page, digital and telemarketing using an automated marketing approach
- Call Blitz – sales enablement and incentive days
- Bullseye – high impact direct mail with automated notifications to sales
- Smart Opportunity Days – sales enablement supported by a Customer ICT Diagnostic Smart Discussions tool

#### **4. Cisco Fund Manager Platform**

The Fund Manager platform provides a consistent and uniform software tool to manage the PMF fund and features virtual access to Cisco marketing and Cisco partners. The platform will also be used to manage payment transactions. The primary objective of the Fund Manager is to support the administrative processes around payment of funds for marketing plans that promote Cisco products and services designed to drive business growth. The engine supporting the tool allows managing contra budget and provides visibility of the activities the funding is going towards.

Reporting will be available at various levels including but not limited to partner, country, technology, partner activity and segment as well as sales priorities.

#### **5. Project Claim and Poof of Execution (POE)**

Proof of Execution (POE) including Proof of Cost (POC) and Proof of Performance (POP) requirements are clearly established for all approved activities. As soon as an activity is completed Partners can request to receive funds from Cisco by submitting the required POE via a Fund manager activity claim to Cisco for review. Payments to a partner will only be made once the POE has been validated. POE requirements and appropriate support items are outlined in Appendix A and need to be met as soon as the execution is completed and at the latest on the activity claims expiration dates, 60 days after the activity funding Cisco fiscal quarter.

For demand generation activities, partners must submit marketing qualified leads for upload to Cisco Leads & Prospects (L&P) or Cisco Salesforce.com. Leads can be uploaded by partners directly into Leads & Prospects using the PLUT (Partner Lead Upload Template) or submitted to their Partner Marketing Manager for upload using the MLUT (Marketing Lead Upload Template). 3<sup>rd</sup> Party Marketing Agencies trained by the Partner Demand Center on Cisco's lead management process can submit leads on behalf of partners and Partner Marketing Managers. Leads should be submitted as and when they are generated or no later than 5 days after a demand generation activity is completed.

Partners should make tax compliant invoices available to Cisco to substantiate the Cisco payments. All invoices need to provide proof for 100% of the activity cost. Total activity cost is calculated based on net amounts.

The POE will have to be submitted directly by the Partner.

When a partner executes in-house, without the support of third party agency, the POP will follow the POE guidelines outlined in Appendix A. However, the partner will be responsible for providing their own POC instead of the third party agency invoice. Here POC could be outlined on a letter headed paper with the activities and estimated cost detailed.



For demand generating activities, partners need to upload marketing qualified leads to Cisco Leads and Prospects (L&P) or Cisco Salesforce.com. Those leads need to be assigned to the partner's sales representatives for qualification. Any opportunities which convert to bookings should be recorded in Cisco Commerce Workspace (CCW) using the functionality available within the L&P platform. Partner's customer information loaded into L&P or Cisco Salesforce.com does not enter Cisco's marketing database and is not used by Cisco for future marketing purposes unless the customer's permission is given.

The number and value of marketing qualified leads entered into the Fund Manager platform when creating a PMF project claim must match those delivered to Cisco SFDC within the PLUT/MLUT.

Currency to request project funding and for activity and claim amounts approved is USD. For local currency conversions of POC provided by the partner, Cisco will use the rate on the day of the invoice date.

### Operating Contra Revenue ("Contra")

All execution needs to be supported by the appropriate POE required for the specific type of execution as defined in Appendix A and submitted by the partner.

Activities resulting in Cisco or an agent on behalf of Cisco paying a partner directly are considered to be Contra revenue. Payments are made exclusively to the partner. It is the partner's decision how he executes.

## **6. Project Claim Approvals**

The Cisco marketing operations team (or agent on behalf of the team) will review the claim (including the payment substantiating tax invoice issued by the partner) and if POE is in line with Terms and Conditions Appendix A, will approve payment to the partner. If POE is not sufficient, the Cisco marketing operations team (or agent on behalf of the team) will request more information from the partner or appropriate party.

## **7. Payment Claims and Payment**

Payments for an activity must be claimed with the appropriate POE. Once a claim is approved the partner has to confirm bank details and provide a VAT invoice issued by the partner where required (see chapter 11) with the online payment submission. Payments are based on meeting full pay-out criteria.

Payments are made to the partner. The partner will be responsible for any payments owed to vendors for activities associated with expired applications.

Partner can expect to receive payment within 30 days upon receipt of confirmation that all required POE information has been submitted and upon submission of a tax invoice where required.

### Partner Payment Policy on Co-Marketing payments (Contra)

One or more partner legal entities may execute a PMF project.

Cisco assigns each legal entity that executes a project to a country group. Cisco, in its discretion, maintains the country group mappings.

Cisco makes co-marketing payments based on the country where the partner enrolled in this program or the partner's assigned country group, if applicable.



Partner must ensure to have a legal entity located in the country or the country group that receives the payment. The benefitting entity and the entity receiving the Cisco payment must have the same name and be situated in the same country or country group.

The partner may not nominate third parties to receive payments. Partner payments to a payment aggregator will not be allowed.

Individuals may not receive payments. Only corporate entities may receive payments.

## **8. Project Claims, Payments and Funding Expiration**

If the partner executes the activity as per the start and completion dates defined in the PMF activity, the partner has sixty (60) calendar days after the funding Cisco fiscal quarter ends to submit the complete activity claim and the sufficient POE to support the activity claim. If this timeline is not met or if at that point in time the activity claim does not hold sufficient information as defined in Appendix A, the approved PMF activity will expire and the associated funding will be forfeited. Finance will reverse the associated accruals upon expiration of funding.

Partners are responsible to have the correct bank details on file, these can be managed directly in the Fund Manager platform.

Where the partner is eligible the partner may request a VAT payment. In such cases a VAT invoice will have to be provided no later than thirty (30) calendar days after the activity claim deadline, which is ninety (90) days after the funding Cisco fiscal quarter ends.

Partners are responsible for the follow-up of their payments using the Fund Manager platform and identifying potential discrepancies. Payment discrepancies must be reported no later than ninety (90) calendar days after the Cisco fiscal quarter ends.

If Cisco cannot make payments to a Cisco partner because of the partner's failure to either respond to Cisco's requests for payment details or provide Cisco with correct payment details, Cisco will retain the payment for thirty (30) calendar days after Cisco's first attempt to notify the partner that additional information is needed to process the payment. If the partner does not remedy its failure by providing correct payment details in that 30-day time period, the partner will forfeit any right to that specific payment.

**9. Deadlines for Activity Execution, Activity Claim VAT invoice Submission and Discrepancy cases**

Activity Duration	Funding Quarter	Activity Execution	Activity Claim Submitted and Complete	VAT Invoice Submission (where eligible)	<u>Payment Discrepancy</u> in case of reported discrepancies
90 days	Q1FY16	From 26 Jul 2015 to 24 Oct 2015	23 Dec 2015	22 Jan 2016	22 Jan 2016
180 days	Q2FY16	From 26 Jul 2015 to 23 Jan 2016	23 Mar 2016	22 Apr 2016	22 Apr 2016
90 days	Q2FY16	From 25 Oct 2015 to 23 Jan 2016	23 Mar 2016	22 Apr 2016	22 Apr 2016
180 days	Q3FY16	From 25 Oct 2015 to 30 Apr 2016	29 Jun 2016	29 Jul 2016	29 Jul 2016
90 days	Q3FY16	From 24 Jan 2016 to 30 Apr 2016	29 Jun 2016	29 Jul 2016	29 Jul 2016
180 days	Q4FY16	From 24 Jan 2016 to 30 Jul 2016	28 Sep 2016	28 Oct 2016	28 Oct 2016
90 days	Q4FY16	From 1 May 2016 to 30 Jul 2016	28 Sep 2016	28 Oct 2106	28 Oct 2016



## 10. Value Added TAX (VAT)

If partner's principal place of business is located in one of the countries listed in below table in column "BV", "**Cisco**" is defined as Cisco Systems International B.V. (CSI BV), a corporation organized under the laws of the Netherlands having its principal place of business at Haarlerbergpark, Haarlerbergweg 13-19, 1101 CH, Amsterdam, the Netherlands.

If partner's principal place of business is located in Italy, "**Cisco**" is defined as Cisco Systems Italy S.p.a., a corporation organized under the laws of Italy having a place of business at Via Torri Bianche, Palazzo Acero 8, 20871 Vimercate (MB), Italy.

If partner's principal place of business is located in one of the countries listed in below table in column "CIL", "**Cisco**" is defined as Cisco International Limited (CIL), a company organized under the laws of the United Kingdom having its principal place of business at 9-11 New Square Park, Bedfont Lakes, Feltham – Middlesex, TW14 8HA, United Kingdom.

BV Countries	CIL Countries
Netherlands, Russia	Afghanistan, Albania, Algeria, Andorra, Angola, Armenia, Austria, Azerbaijan, Bahrain, Belarus, Belgium, Benin, Bosnia and Herzegovina, Botswana, Bulgaria, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Congo (Brazzaville), Congo D.R., Côte d'Ivoire, Croatia, Cyprus, Czech Republic, Denmark, Djibouti, Egypt, Equatorial Guinea, Estonia, Ethiopia, Faroe Islands, Finland, France, Gabon, Gambia, Georgia, Germany, Ghana, Gibraltar, Greece, Greenland, Guinea, Guinea-Bissau, Hungary, Iceland, Iraq, Ireland, Israel, Jordan, Kazakhstan, Kenya, Kirgizstan, Kosovo, Kuwait, Latvia, Lebanon, Lesotho, Liberia, Libya, Liechtenstein, Lithuania, Luxembourg, Macedonia, Madagascar, Malawi, Mali, Malta, Mauritania, Mauritius, Mayotte, Moldova, Monaco, Montenegro, Morocco, Mozambique, Namibia, Niger, Nigeria, Norway, Oman, Pakistan, Palestine, Poland, Portugal, Qatar, Reunion, Romania, Rwanda, San Marino, Sao Tome And Principe, Saudi Arabia, Senegal, Serbia and Montenegro, Seychelles, Sierra Leone, Slovakia, Slovenia, South Africa, South Sudan, Spain, Swaziland, Sweden, Switzerland, Tajikistan, Tanzania, Togo, Tunisia, Turkey, Turkmenistan, Ukraine, Uganda, United Arab Emirates, United Kingdom, Uzbekistan, Yemen, Zambia, Zimbabwe



## Provisions on VAT

- Any tax invoice issued by a partner to Cisco must be issued in conformity with local VAT requirements. Invoices not issued in conformity with these requirements will be rejected and returned to the Partner. Contact your local tax adviser for additional information.

Cisco regards these payments that it makes to the partner under the PMF agreement to be remunerations for marketing services performed by the partner to Cisco. As such, these services fall in the scope of article 44 of EU VAT Directive 2006/112/EG and therefore are subject to VAT in the country where the recipient (i.e., the partner's principal) of these services has its seat of business.

Where CSI BV is the partner's principal, the services are VAT taxable in the Netherlands. Consequently, where the partner's principal is CSI BV and the partner does not have its seat of business in the Netherlands, Cisco will be obliged to account for VAT per the reverse charge mechanism in the Netherlands, and the partner should then not charge VAT.

Where CIL is the partner's principal, the services are VAT taxable in the UK. Consequently, where the partner's principal is CIL and the partner does not have its seat of business in the UK, Cisco will be obliged to account for VAT per the reverse charge mechanism in the UK, and the channel partner should then not charge VAT.

Where Cisco Italy is the partner's principal, the services are VAT taxable in Italy. Consequently, where the partner's principal is Cisco Italy and the partner does not have its seat of business in the Italy, Cisco will be obliged to account for VAT per the reverse charge mechanism in Italy, and the partner should then not charge VAT.

- Should there be any circumstances at any time whereby either of the parties believes the VAT treatment should be different, this change will need to be justified in writing (by a justification letter in which all relevant regulations and laws leading to this changed conclusion are brought forward) by the party claiming this change in VAT treatment and will need to be accepted by the other party in writing prior to the issuance of invoices with this altered VAT treatment. If there is no agreement on the VAT treatment between the parties, the parties may jointly appoint an independent external expert for a final (binding) decision on the treatment. Costs for such external advice will be borne by the party wishing to change the VAT position as set out above.
- Partners are responsible for assuring that any PMF payment request that they submit to Cisco is treated correctly for indirect taxes. In case local legislation requires a formal tax invoice to be issued, this will be the responsibility of the partners.

Cisco cannot be held liable for any costs, including but not limited to penalties or interest assessed by tax authorities following an incorrect VAT treatment on invoices issued by the partner. Cisco reserves its right at all times to request a VAT Credit Memo in cases whereby VAT was incorrectly charged. Please be informed that if it is determined by an external expert that any indirect taxes (e.g., VAT, GST) and similar taxes are due for marketing services supplied to Cisco, all payment amounts to the partner are deemed to be inclusive of such indirect and similar taxes.\* Furthermore, as a local indirect taxpayer, the partner is responsible for assuring that any payment claim to Cisco is treated correctly in the broadest sense of the word for indirect tax purposes. If, based on an external expert's opinion, VAT is due Cisco requires a formal tax invoice to be issued, on which the local VAT charged is stipulated separately.

\* With the exception of Dutch partners claiming from CSIBV, UK partners claiming from CIL and Italian partners claiming from Cisco Italy.

The VAT invoice should include the below mentioned address. There is no need to send a physical invoice but to upload a copy in the Cisco Fund Manager once the claim amount is confirmed by Cisco.



The address the partner should use is based on the Cisco Legal Entity their country belongs to:

<b>Partner Country</b>	<b>Address</b>
For partners receiving payment from Cisco International Ltd.	Cisco International Limited 9-11 New Square Park Bedfont Lakes Feltham – Middlesex TW14 8HA United Kingdom
For partners receiving payment from Cisco Systems International BV	Cisco Systems International BV Haarlerbergweg 13-19 1101 CH Amsterdam The Netherlands
For partners receiving payment from Cisco Systems Italy S.r.l.	Cisco Systems Italy S.r.l. Via Torri Bianche Palazzo Acero, 8 20871 Vimercate (MB) Italy



## Appendix A – Proof of Execution (POE) Matrix

<b>Broadcast Media Advertising (Radio/Television/Video)</b>	
<b>Description:</b>	Advertising placement within broad-based, digitally distributed media, but excluding Web/Online Advertising. Includes all forms of TV, radio, and video advertising including co-branded videos at events, etc.
<b>Reimbursable Expenses:</b>	Development and production costs, advertising media placement costs.
<b>Proof of Cost:</b>	A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.
<b>Proof of Performance:</b>	<ul style="list-style-type: none"> <li>• <b>Proof-of-Performance of Broadcast Media</b> - Verification of all final-produced broadcast media assets must be submitted in digital format (digital file or URL link to final produced version of the file). Full media schedule (including start and end dates and stations Web sites, or events where the broadcast media ran) must also be provided. If the produced asset contains text, it must be legible. If the produced asset contains a hyperlink to a Web (landing) page, the full URL and access to the live Web page must be provided.</li> <li>• <b>Cisco Representation</b> - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.</li> <li>• <b>Proof of Activity Start and Completion Date</b> - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.</li> </ul>
<b>Collateral</b>	
<b>Description:</b>	Refers to a broad range of printed material or digital files used to support sales/marketing of a Partner's Cisco solutions. Includes Cisco-centric sales brochures, product guides, data sheets, visual aids, white papers, promotional flyers, success stories, testimonials, reference guides and other visual aids. May also include electronic (DVD) toolkits or other kits used as informational giveaways or sales support resources.
<b>Reimbursable Expenses:</b>	Development and production costs, postage/delivery costs
<b>Proof of Cost:</b>	A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.
<b>Proof of Performance:</b>	<ul style="list-style-type: none"> <li>• <b>Proof-of-Performance of Printed Marketing</b> - Verification of all final-produced marketing materials must be submitted in digital format (photograph, scanned copy of original, or PDF file). If applicable, full media schedule (including start and end dates and stations Web sites, or events where the materials were used) must also be provided. If the produced asset contains text, it must be legible. If the produced</li> </ul>



asset contains a hyperlink, the full URL and access to the live Web (landing) page must be provided.

- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Corporate Events (Trade Shows, Vendor Days, Seminars)

### Description:

Specific investment to allow the participation and promotion of Cisco's presence at events and activities that are not driven by Cisco but are owned and executed by third parties. There should be a strong promotional benefit to Cisco. Includes participation in conferences, trade shows, seminars, vendor days, floor shows, launch events, exhibitions and other Cisco business-oriented activities held at a physical location. For PMF this does **not** include sponsorships and tickets to Cisco Connect, Cisco Expo or any other Cisco owned events.

### Reimbursable Expenses:

Development and production costs, event costs, marketing program costs. Note: excludes alcohol and other non-reimbursable expenses like travel and accommodation cost.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Event** - Adequate supporting documentation of the event must be provided including: copy of the invitation, event audience and number of attendees, event description (including Cisco involvement), event agenda, copy of the presentation(s), (if live event) photo or event recording or (if online Webinar) screen capture or event recording.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.
- **Lead Upload to Cisco SFDC** - Leads must be uploaded through PLUT or MLUT process against the activity ID and visible in SFDC. Please work through your assigned Cisco Partner Marketing Manager for the lead upload.



## Customer Intelligence/Analytics

### Description:

Customer (either existing or prospective) information and insight derived from customer data collected and analyzed from both internal and external sources. Includes purchase, rental or subscription of customer intelligence and/or analytics, including any consulting efforts focused on customer profiling and propensity to buy.

### Reimbursable Expenses:

Data Mining, analysis and consulting costs.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Consulting Services** - The final version of the Statement-of-Work (SOW) for the service must be provided. The SOW must outline the scope and purpose of the services performed as well as the consulting engagement start and completion date. In some cases, the invoice will contain the breakdown of the costs and will therefore serve as an acceptable SOW.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Direct Mail

### Description:

Production and delivery of printed marketing material to a targeted list of recipients via postal mail. Please note that this activity includes mailing list procurement/rental when directly part of the direct mail campaign. Includes the design and development of collateral and the distribution of direct physical mail pieces.

### Reimbursable Expenses:

Development and production costs, postage/delivery costs

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Printed Marketing** - Verification of all final-produced marketing materials must be submitted in digital format (photograph, scanned copy of original, or PDF file). If applicable, full media schedule (including start and end dates and stations Web sites, or events where the materials were used) must also be provided. If the produced asset contains text, it must be legible. If the produced asset contains a hyperlink, the full URL and access to the live Web (landing) page must be provided.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start



date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

### List Purchase/Rental for Direct Marketing

**Description:**

Purchase, rental or subscription of contact lists used for development of client base, event attendance generation, and similar.

**Reimbursable Expenses:**

Mailing list procurement and subscription costs

**Proof of Cost:**

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

**Proof of Performance:**

- **Proof-of-Performance of List Purchase/Rental** - The final version of the Statement-of-Work (SOW) for the service must be provided. The SOW must indicate the number of names purchased or rented, specific data attribute fields purchased (e.g. name, address, email,...), geography and customer segment. In some cases, the invoice will contain the breakdown of the costs and will therefore serve as an acceptable SOW. Additional documentation that outlines the scope of the activity (what the list was used for) and start and end date must be provided.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

### Outdoor Advertising/Digital Signage

**Description:**

Advertising via printed billboards or digital signage within a targeted geographic area. Includes: outdoor billboards, interior or exterior signage, moving billboards (posted on vehicles), indoor signage, printed banners, posters and advertising on LCD/plasma screens.

**Reimbursable Expenses:**

Development and production costs, advertising media placement costs.

**Proof of Cost:**

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

**Proof of Performance:**

- **Proof-of-Performance of Printed Marketing** - Verification of all final-produced marketing materials must be submitted in digital format (photograph, scanned copy of original, or PDF file). If applicable, full media schedule (including start and end dates and stations Web sites, or events where the materials were used) must also be provided. If the produced asset contains text, it must be legible. If the produced



asset contains a hyperlink, the full URL and access to the live Web (landing) page must be provided.

- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Pre-Event Planning

### Description:

This activity refers specifically to event-related deposit fees required to secure event location, speakers, equipment, etc., prior to actual event date. This activity type is NOT intended to cover the full cost of event and does not include the purchase of demo equipment.

### Reimbursable Expenses:

Event deposit costs. Note: excludes alcohol and other non-reimbursable expenses like travel and accommodation cost.

### Proof of Cost:

A third party invoice issued to the partner reflecting the cost of the deposit.

### Proof of Performance:

- **Proof-of-Performance of Pre-Event Planning** (Refers solely to the Pre-Event Planning activity) - The final version of the Statement-of-Work (SOW) for the event deposit from the third-party vendor must be provided. The SOW must indicate the start and end date of the event. In some cases, the invoice for the event deposit will contain the breakdown of individual costs covered by the deposit and will therefore serve as an acceptable SOW.
- **Planned Cisco Representation** - Project plan needs to indicate that event will include Cisco representation

## Print Advertising

### Description:

Refers to advertising that uses physically printed media, such as magazines and newspapers, to reach consumers, business customers and prospects. Includes display advertising and paid editorial placed within newspapers, trade magazines, business journals, and other published media vehicles.

### Reimbursable Expenses:

Development and production costs, advertising media placement costs.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Printed Marketing** - Verification of all final-produced marketing materials must be submitted in digital format (photograph, scanned copy of original, or PDF file). If applicable, full media schedule (including start and end dates and stations Web sites, or events where the materials were used) must also be provided. If the produced asset contains text, it must be legible. If the produced



asset contains a hyperlink, the full URL and access to the live Web (landing) page must be provided.

- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Sales & Marketing Training

### Description:

Sales or Marketing training conducted by an authorized Cisco training Partner or consultant. Includes sales and technical "deep-dive" trainings.

### Reimbursable Expenses:

Course and Event Costs. Note: Excludes alcohol and other non-reimbursable expenses like cancellation fees or travel cost.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Trainings** - Verification of completion of the training activity must be provided, including: documentation that outlines the specific training/specialization name and level achieved, objective/purpose of the training, overview of training material (needs to be training on Cisco content), full list of participants, start and end dates.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.



### Sales Incentives (non-cash)

**Description:**

Contest, incentive and promotion activity that targets eligible sales individuals within the Partner organization. Awarded in the form of prizes or other non-cash payouts. Includes sales contests or other sales incentives paid in the form of non-cash rewards, prizes or giveaways including product gift cards that are not redeemable for cash - i.e. restaurant gift cards, retail store credit gift cards, etc.

**Reimbursable Expenses:**

Contest and administration fees, cost of incentives and prizes awarded.

**Proof of Cost:**

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

**Proof of Performance:**

- **Proof-of Performance of Sales Incentive Program** - Verification of completion of the incentive program, including documentation of the incentive description and objective, incentive program eligibility and rules, list of winners, itemized list of prizes and quantities, start and end date.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

### Search Engine Optimization/Paid Search

**Description:**

Aims to increased visibility of your company website in search engine results. Includes search engine optimization and paid search results in common search engines such as Google, Yahoo! and MSN Live Search.

**Reimbursable Expenses:**

Marketing program and sponsorship costs

**Proof of Cost:**

A third party invoice issued to the partner reflecting the cost of the deposit.

**Proof of Performance:**

- **Proof-of-Performance of Search Engine Marketing** - Adequate supporting documentation of the campaign must be provided including: full list of key words/ad words purchased, screen capture of search engine web results including date of screen capture, the full URL and access to the Web (landing) page, start and end date of campaign (if applicable).
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.



## Seminars and Events with External Audience

### Description:

Partner hosted event at a rented space with formal presentations. Partner-led event in which end customers are invited to hear a subject matter expert speak to a Cisco related topic.

### Reimbursable Expenses:

Event costs. Note: excludes alcohol and other non-reimbursable expenses like travel and accommodation cost.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Event** - Adequate supporting documentation of the event must be provided including: copy of the invitation, event audience and number of attendees, event description (including Cisco involvement), event agenda, copy of the presentation(s), (if live event) photo or event recording or (if online Webinar) screen capture or event recording.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.
- **Lead Upload to Cisco SFDC** - Leads must be uploaded through PLUT or MLUT process against the activity ID and visible in SFDC. Please work through your assigned Cisco Partner Marketing Manager for the lead upload.

## Social Media and Social Selling

### Description:

Management and development of content used in social media marketing. Includes both direct and indirect advertisements. Includes marketing via social media such as Twitter, Facebook, LinkedIn, YouTube, and tools used for Social Media in various countries.

### Reimbursable Expenses:

Development and production costs, advertising media placement costs and marketing program & sponsorship costs.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Digital Marketing** - Verification of all final-produced Web pages, content, banners, emails and other digital assets must be submitted in digital format (screen capture, digital file, URL link to live page or PDF file). Full media schedule (including start and end dates and stations Web sites, or events where the broadcast media ran) must also be provided. If the produced asset contains text, it must be legible. If the produced asset contains a hyperlink to a Web (landing) page, the full URL and access to the live Web page must be provided.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco



partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.

- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Telemarketing

### Description:

Outbound telephone calling campaigns.

### Reimbursable Expenses:

Agency or call center charges, development and production costs.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Telemarketing Campaign** - Verification of completion of the telemarketing campaign must be provided, including: copy of script (must reference Cisco products, solutions or technologies), number our outbound calls performed, outbound call campaign start and end dates.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.
- **Lead Upload to Cisco SFDC** - Leads must be uploaded through PLUT or MLUT process against the activity ID and visible in SFDC. Please work through your assigned Cisco Partner Marketing Manager for the lead upload.

## Translation and Localization

### Description:

Includes any efforts around modifying content to make it usable for a new locale. Usually includes translating the text (also know as "copy") to local language, but may also includes modifying country-specific references, images and jargon.

### Reimbursable Expenses:

- Translation and localization costs.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Translation/Localization Services** - The final version of the Statement-of-Work (SOW) for the service must be provided. The SOW must indicate which languages the marketing materials were localized to and the completion date of the localization services. In some cases, the invoice will contain



the breakdown of the costs and will therefore serve as an acceptable SOW. Electronic copies of both the original and the final translated document must also be provided.

- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Web Advertising

### Description:

Refers specifically to the subset of Internet advertising that entails the use of banner and other advertising and/or paid editorial content or content syndication on specific Web sites. Please note that Search Engine Marketing and Social Media are treated as separate categories. Includes all forms and sizes of Web banner advertising (banner, sidebar, pop-ups and full-page ads), Web collage, campaign website content and content syndication.

### Reimbursable Expenses:

Development and production costs, advertising media placement costs, content development and content syndication costs.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Digital Marketing** - Verification of all final-produced Web pages, content, banners, emails and other digital assets must be submitted in digital format (screen capture, digital file, URL link to live page or PDF file). Full media schedule (including start and end dates and stations Web sites, or events where the broadcast media ran) must also be provided. If the produced asset contains text, it must be legible. If the produced asset contains a hyperlink to a Web (landing) page, the full URL and access to the live Web page must be provided.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.  
**Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Web Newsletters & E-Mail Communications

### Description:

Refers to the design, development and delivery of e-mail or Web-based publications providing a sales/marketing message to a targeted list of recipients. Please note that printed newsletters should be submitted as Direct Mail. Includes E-Mail and Web-based newsletters and e-mails focused on a Cisco technology, promotion, product/service, solution or event.

### Reimbursable Expenses:

Development and production costs, advertising media placement costs, marketing program and sponsorship costs, postage/delivery costs.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Digital Marketing** - Verification of all final-produced Web pages, content, banners, emails and other digital assets must be submitted in digital format (screen capture, digital file, URL link to live page or PDF file). Full media schedule (including start and end dates and stations Web sites, or events where the broadcast media ran) must also be provided. If the produced asset contains text, it must be legible. If the produced asset contains a hyperlink to a Web (landing) page, the full URL and access to the live Web page must be provided.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.
- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.

## Webinars

### Description:

Refers to any Cisco-focused presentation, lecture, workshop or seminar that is transmitted over the web.

### Reimbursable Expenses:

development and production costs, event costs, marketing program and sponsorship costs. Note: excludes alcohol and other non-reimbursable expenses.

### Proof of Cost:

A third party invoice issued to the partner for the full amount of the activity or a breakdown of the internal cost on letter headed paper if partner is executing in-house.

### Proof of Performance:

- **Proof-of-Performance of Event** - Adequate supporting documentation of the event must be provided including: copy of the invitation, event audience and number of attendees, event description (including Cisco involvement), event agenda, copy of the presentation(s), (if live event) photo or event recording or (if online Webinar) screen capture or event recording.
- **Cisco Representation** - All produced marketing materials (including both printed and digital assets) need to include appropriate Cisco representation, including Cisco partnership logo (co-branding) usage. All funded activities must reference Cisco products, services, solutions and/or technologies.



- **Proof of Activity Start and Completion Date** - In order to qualify for funding reimbursement, activities must be approved by Cisco in advance of the activity start date. Additionally, reimbursement requires that the marketing activity be completed (cost for an activity must have been incurred) within the fiscal time period in which it was approved (activity start and completion date). Approved activities that do not occur within of the designated time period will result in the approval being withdrawn.  
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