

**INFUSIONSOFT PARTNER NETWORK**

# Partner Success Program Guide

December 2016



# INFUSIONSOFT PARTNER NETWORK

You want small businesses to succeed.

We want small businesses to succeed.

You want to grow your business.

We want you to grow your business.

Together we can make it all happen.

Creating opportunities for everyone.

Let's get started!

Innovate. Progress. Grow.



# INFUSIONSOFT PARTNER NETWORK

## Grow Your Business By Driving Small Business Success

### Enabling success for millions of small businesses worldwide

Do you have a passion for helping small businesses succeed? Infusionsoft's platform enables customers to scale and grow their business. However, most small business owners didn't start their business to become experts in sales and marketing. The challenge is they are busy. No matter how talented, brilliant, or capable they are. No matter how easy the software is to use. This makes it difficult for them to leverage the power of CRM and marketing automation. That's where you come in. Connecting small businesses with experts, builders, creators, innovators and connectors like you means more of them can grow their business. We share your passion and believe empowering an ecosystem of partners focused on small business success is the only way to move from serving tens of thousands of small businesses to serving *millions* of small businesses — creating opportunity for everyone involved and a big win for small businesses everywhere.

### A harmonized small business network that enables you to grow your business

The addressable market to help small business with digital marketing, relationship management, and marketing automation is tens of millions of small businesses worldwide. Successfully serving this market requires building a harmonized small business economy. Because most of these small businesses need access to experts to define a marketing strategy, design an effective customer journey, implement digital marketing campaigns, integrate key systems that help them scale, create content that converts and many other strategies required to successfully scale and grow their business.

## Partners + Infusionsoft = Small Business Success

A synchronized connection between partners, small businesses and Infusionsoft enables us to drive small business success, together. So that you can grow your business and more small businesses will realize success worldwide.



# Infusionsoft Partner Network

The Infusionsoft Partner Network expands the reach of our small business innovation culture — far beyond the walls of Infusionsoft offices — to dramatically transform, constantly innovate and improve how small businesses succeed. You are the face of Infusionsoft — enabling small businesses across the globe to scale and grow their business. This means Infusionsoft’s job one is helping you succeed.

## Multiple opportunities to grow your business

Three tracks — participate in 1, 2 or all 3.

### VALUE ADDED RESELLERS

Expand your product lineup by reselling Infusionsoft to empower your clients.

Learn more on page 7

### SERVICE PARTNERS

Grow your business by delivering amazing service & support to small businesses.

Learn more on page 11

### APP DEVELOPERS

Extend the Infusionsoft platform to meet the unique needs of small businesses.

Learn more on page 15

## Simple, easy to understand benefits that match your contribution

The Infusionsoft Partner Network is designed to uniquely recognize and reward all partners who:

- Resell Infusionsoft products that will help small businesses grow and scale their business
- Deliver support & services that drive small business success
- Build and distribute apps and integrations that extend the value and functionality of Infusionsoft

The program is designed for simplicity and transparency and has two tiers:

Certified Partner	Pro Certified Partner
Certified partners have access to standard program benefits by meeting a minimum set of requirements.	Partners that meet additional requirements, achieve “Pro” status and gain access to exclusive benefits.



# What You Should Expect

## Multiple opportunities for you to grow your business

1. Multiple partnership opportunities to help you achieve your business goals
2. Business strategy education to help you improve culture, strategy & operations
3. Be matched with new Infusionsoft clients through marketing programs and Marketplace

## Simple and transparent program w/ clear roles and incentives

1. Easy to understand, enroll and get started
2. Join once, eligible to take part in multiple aspects of the program
3. Transparency, clear roles, requirements and benefits for all partner types
4. Reward all partners for driving customer success

## Empowerment via program tools and resources

1. Provide tools, resources and templates that allow you to easily create and develop solutions that will help small businesses be successful
2. Product improvements that enable you to serve your clients better
3. Expand your expertise. Get certified on Infusionsoft, SBSM and other digital marketing with our training and certification program
4. Networking with other partners to share strategies and support each other

## Clear & relevant two-way communication

1. Listening post for partner feedback
2. Regular and relevant communication based on your engagement w/ Infusionsoft
3. Shared vision for product and program roadmaps

## Tailored & timely support

1. Dedicated Partner Success Coach that is your clear, single point of contact
2. Support tailored to your specific needs and goals
3. Resolve issues faster by getting answers you need quickly



# Partner Expectations

## Innovate to drive customer health

Driving customer success requires a harmonious relationship between the customer, you and Infusionsoft — all working together to identify the best way to enable customers to sustainably get value out of their investment in CRM and marketing automation — whether that's delivering services or building apps that extend the value of the Infusionsoft platform.

As a Value Added Reseller or Service Partner, you'll get exclusive access to see the Customer Health Score for each of your customers. Customer Health Score gives you visibility into the success of your customers giving you the insights you need to powerfully drive small business success in direct partnership with Infusionsoft and other partners. Learn more about Customer Health Score on page 43.

## Invest in the growth of your business

Our commitment is to fanatically help and empower you to grow your business in service to growing an ecosystem that helps more small businesses succeed — however, growing requires you to make deposits in your business — whether that's investing time, money or resources, building new relationships or go-to-market channels, innovating your products or learning a new skill set.

**Innovate. Progress. Grow.**



## PARTNER SUCCESS PROGRAM

# Value Added Resellers

### Expand your product lineup

Build and expand your business by reselling Infusionsoft products and services to your clients. Add value to your customers by sharing your marketing expertise, and generate revenue as an Infusionsoft Value Added Reseller (VAR).

### Grow your revenue

You'll have exclusive rights to resell Infusionsoft and bundle your services to create a unique offering for small businesses. By expanding your product offerings to include Infusionsoft, you will have an opportunity to grow your customer base, build a new recurring revenue channel, share your marketing and business knowledge and earn recurring commissions.

### Become an expert

You'll receive special training to become part of a community of Infusionsoft experts, so you can introduce Infusionsoft products to your clients with confidence and expertise.



## Program requirements for Value Added Resellers

### Minimum Requirements

Becoming a Value Added Reseller requires completing the certification program, which enables you to master your understanding of implementing digital marketing campaigns and strategies using Infusionsoft and the Small Business Success method.

All Value Added Reseller Partners must attend training and pass the certification to qualify for program benefits.

The certification fee is \$2000 (with a \$1500 annual renewal fee).

By completing certification, partners qualify for both the Valued Added Reseller and Service program tracks.

### Pro Status & Benefits

Earning Pro benefits requires you to sell 25\* or more customer accounts annually or reach \$5,000\* or more in monthly recurring revenue (MRR).

Qualifying for the Pro tier enables you to receive Pro benefits in the year you qualified and the following calendar year.

\*Customer accounts and MRR are calculated based on accounts that are active for more than 60 days

### Customer Health Score

Customer Health Score is a diagnostic reporting tool designed to help you — in collaboration with Infusionsoft — gain visibility into your customer's success and proactively identify customers who might need a little extra help. You'll have the opportunity to see the Customer Health Score for each of your customers, and for all of your customers in aggregate, on a regular basis.

Your Partner Success Coach is available to review your Health Score report with you as well as help you create actionable plans based on the Health Scores of your individual customers.

Customer Health Score is one indicator of customer success and is used in combination with other metrics to determine eligibility for some program benefits. Please refer to the detailed benefit guide for more details.

Learn more about Customer Health Score on page 43.

### Active Customer Target Scores\*

45 DAY ACTIVATION

55+

AFTER 90 DAYS

60+

\*Target health scores are based on the current median health score for active customers and correlate to customer retention.





## Program benefits for Value Added Resellers

### Incentives for sustained growth and customer success

#### Commissions

Standard commission rate for all partners based on percentage of MRR for a qualifying Infusionsoft subscription.

#### Eligible for 30% Commissions

Pro partners are eligible to earn a higher commission rate when meeting additional requirements.

Value Added Resellers	Pro Value Added Resellers
20% Recurring Paid Monthly	20% Recurring Paid Monthly
	30%  75+ Customers per year <b>OR</b> \$15,000+ MRR;

### Tailored & attentive support

#### Partner Sales Manager

Your trusted go-to-resource to create and execute an optimal go-to-market plan.

#### Partner Success Coach

Your Partner Success Coach is your go-to-resource to get help and get the most out of the partner program.

#### Premium Partner Technical Support

Get the help you need, when you need it.

	✓
✓	✓
✓	✓

### Help you expand your small business expertise

#### Partner Onboarding

Assess how to get the most out of the partner program, create a specific growth plan for your business and start executing on your plan.

#### Small Business Success Method (SBSM) Education

Learn how to create the perfect customer lifecycle that drives results for small businesses.

✓	✓
✓	✓



**ICON Discount**

Special partner rates for ICON tickets for you and your customers.

**PartnerCon Discount**

Special rates for Partnercon tickets.



**Provide marketing and selling support to optimize your go-to-market strategy**

**Connection Marketing Assets**

Leverage proven marketing content and strategies that will help you land new customers.

**Marketplace Listing**

Get leads from Infusionsoft customers who are looking for solutions in the marketplace.

**Elite Partner Growth Plan**

Create a growth plan for your business based on the principles taught in Infusionsoft's Elite programs.

**MDF Eligibility**

Eligible to leverage market development funds to execute your go-to-market strategy.

**Quarterly Business Review**

Review goals, progress and discover opportunities to accelerate your growth.



**Provide tools that enable you to scale and deliver amazing service**

**Partner Content Publishing**

Package your own custom campaigns and easily share them with your customers.

**SBSM Campaigns & Action Plans**

Leverage proven campaign templates that you can customize and deliver to your customers.



## PARTNER SUCCESS PROGRAM

# Service Partners

### Grow your business

Grow your business by delivering amazing service and support to small businesses. Multiply small business success by playing an instrumental role in helping to provide exceptional service to Infusionsoft customers.

### Match you with small business customers

Get started by designing and delivering services that drive small business success and are aligned to the challenges small businesses face. Then, you'll have opportunities to connect with thousands of small businesses that are already Infusionsoft customers.

### Reward you for driving customer success

As you drive customer success, you'll have access to more exclusive program benefits including becoming a fulfillment partner to deliver services on behalf of Infusionsoft. Take advantage of Customer Health Score to proactively identify opportunities to drive customer success.



## Program requirements for Service Partners

### Minimum Requirements

Becoming a Services Partner requires completing the certification program, which enables you to master your understanding of implementing digital marketing campaigns and strategies using Infusionsoft and the Small Business Success method.

All Service Partners must attend training and pass the certification to qualify for program benefits.

The certification fee is \$2000 (with a \$1500 annual renewal fee).

By completing certification, partners qualify for both the Valued Added Reseller and Service program tracks.

### Pro Status & Benefits

Earning Pro benefits requires you to have:

1. 10 or more Managed Customers\*
2. 65% of your customers exceed the “Target Customer Health Score (after 90 days)” for two consecutive quarters

\*Managed Customers are determined by being listed as an Active Service Provider (details on page 45) for a given customer.

### Customer Health Score

Customer Health Score is a diagnostic reporting tool designed to help you — jointly with Infusionsoft — gain visibility into your customer’s success and proactively identify customers who need a little extra help. You’ll have the opportunity to see the Customer Health Score for each of your customers, and for all of your customers in aggregate, on a regular basis.

Your Partner Success Coach is available to review your Health Score report with you and help you create actionable plans based on the Health Scores of your individual customers.

Customer Health Score is one indicator of customer success and is used in combination with other metrics to determine eligibility for some program benefits. Please refer to the detailed benefit guide for more details.

Learn more about Customer Health Score on page 43.

### Active Customer Target Scores\*

45 DAY ACTIVATION

55+

AFTER 90 DAYS

60+

\*Target health scores are based on the current median health score for active customers and correlate to customer retention.



## Program benefits for Service Partners

### Tailored & attentive support

#### Partner Success Coach

Your Partner Success Coach is your go-to-resource to get help and get the most out of the partner program.



#### Premium Partner Technical Support

Get the help you need, when you need it.



### Help you design services that will solve important problems for small businesses

#### Partner Onboarding

Assess how to get the most out of the partner program, create a specific growth plan for your business and start executing on your plan.



#### Small Business Success Method (SBSM) Education

Learn how to create the perfect customer lifecycle that drives results for small businesses.



### Provide you tools and support that will enable you to deliver amazing service

#### Partner Content Publishing

Package your own custom campaigns and easily share them with your customers.



#### SBSM Campaigns & Action Plans

Leverage proven campaign templates that you can customize and deliver to your customers.



### Enable you to launch your services and grow your customer base by connecting you with customers that are a good match for your solutions



**Connection Marketing Assets**

Leverage proven marketing content and strategies that will help you land new customers.

**Marketplace Listing**

Get leads from Infusionsoft customers who are looking for solutions in the Marketplace.

**Infusionsoft Customer Marketing Opportunities**

Partner with Infusionsoft to acquire new customers through integrated customer marketing programs.

**Eligible to Fulfill on Behalf of Infusionsoft**

Deliver services sold by Infusionsoft (formerly IKOP).

**Elite Partner Growth Plan**

Create a growth plan for your business based on the principles taught in Infusionsoft's Elite programs.

**Quarterly Business Review**

Review goals, progress and discover opportunities to accelerate your growth.

**Beta Programs for Partners**

As we continue to improve the partner program, get priority access to beta programs. For example: Services Leads Beta

**Other benefits****ICON Discount**

Special partner rates for ICON tickets for you and your customers.

**PartnerCon Discount**

Special partner rates for Partnercon tickets.



## PARTNER SUCCESS PROGRAM

# App Developers

### Extend your product with powerful marketing automation

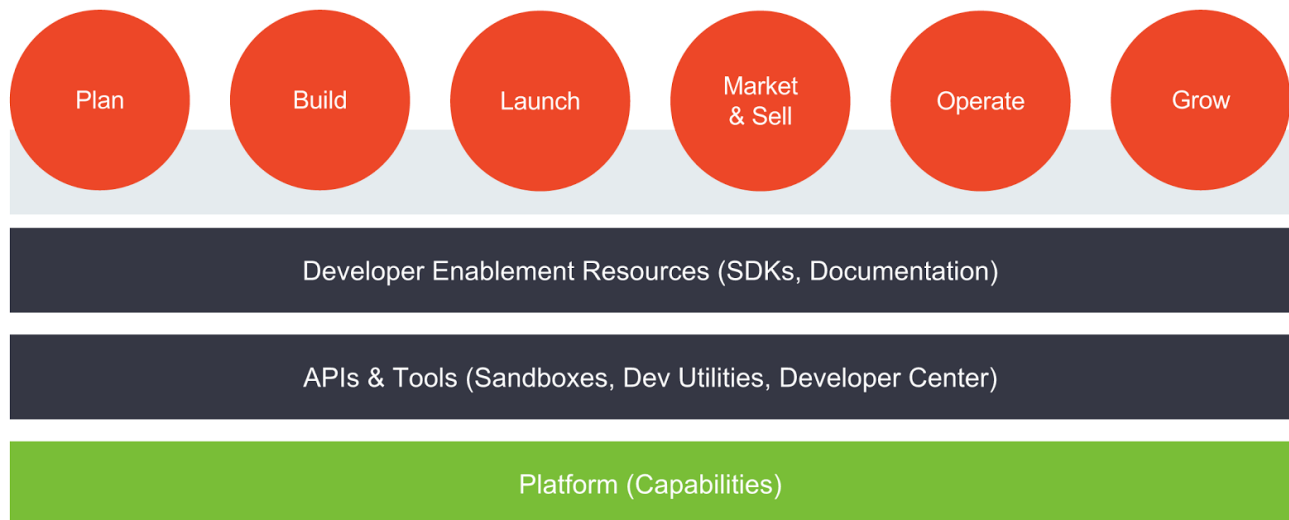
Integrate with the Infusionsoft platform to make it easy for your customers to grow and scale their business via powerful sales and marketing automation.

### Grow your business by reaching over 100K small business users

Build and distribute apps and integrations to over 100,000 small business users that rely on Infusionsoft to grow their business.

### Be part the next generation of small business software

Join hundreds of developers and ISVs who have already built apps on the Infusionsoft platform.



## Program requirements for App Developers

### Minimum Requirements

Apps must meet a set of security, technical, and functional requirements and are subject to a review process. App Developers must adhere to requirements continuously.

App Developers must have an approved Marketplace listing to receive program benefits. Listings must meet all listing policies and guidelines.

### Pro Status & Benefits

Earning Pro benefits requires you have more than 250 active Infusionsoft customers using your app or integration.

## High Level App Requirements

### Technical

<b>Browser Support</b>	Your application should support browsers according to Infusionsoft's Browser Support policy.
<b>RESTHooks</b>	If an object has a RESTHook available for any CRUD activity, you should use that instead of polling.

### Security

<b>Authorization</b>	You must authorize users using Infusionsoft's OAuth implementation.
<b>Storing User Credentials</b>	End user Infusionsoft account credentials should never be collected nor stored by an app developer.
<b>HTTPS</b>	Your app must use HTTPS for all API requests.
<b>Security Patches</b>	Ensure all OS, web server and app server security patches are up to date.

### Functional

<b>Sign Up Process</b>	The app sign up process should be intuitive for customers and not be misleading.
<b>Support</b>	Your app or customer support resources should provide a clear path for users to get help and technical support.





## Program benefits for App Developers

### Tailored & attentive support

#### Partner Success Coach

Your Partner Success Coach is your go-to-resource to get help and get the most out of the partner program.



#### Premium Partner Technical Support

Get the help you need, when you need it.



#### API & Developer Support

API and developer support to get answers to your questions and resolve issues quickly.



### Help you plan and solution your app/integration

#### App Planning & Solutioning

Trusted advisor while building commercial apps or integrations on the Infusionsoft platform.



#### Small Business Success Method (SBSM) Education

Learn how to create the perfect customer lifecycle that drives results for small businesses.



### Enable you to easily build your app or integration

#### Developer Enablement Resources.

SDKs, documentation, sample code, and sandbox accounts.



### Empower you to launch, promote & distribute your app by connecting with customers that are a good match for your solutions

#### Marketplace Listing

Get leads from Infusionsoft customers who are looking for solutions in the Marketplace.



**Infusionsoft Customer Marketing Opportunities**

Partner with Infusionsoft to acquire new customers through integrated customer marketing programs.

**Quarterly Business Review**

Review goals, progress and discover opportunities to accelerate your growth.

**Beta Programs for Partners**

As we continue to improve the API, platform and partner program, get priority access to beta programs.

**Other benefits****ICON Discount**

Special partner rates for ICON tickets for you and your customers.

**PartnerCon Discount**

Special partner rates for Partnercon tickets.



# Program Benefits Overview



## PROGRAM BENEFIT

# Commissions

Earning app sales commissions gives you the opportunity to add a recurring component to your revenue stream. All Value Added Resellers will earn commissions for each Qualified Sale at a 20% commission rate. Value Added Resellers are eligible to earn commissions at a 30% commission rate when reaching either 75 Sold Customers per year or \$15,000 in monthly recurring revenue (MRR).

### How do I get started?

Attend and complete all requirements to pass the Partner Certification.

### Who is eligible for this benefit?

All Value Added Resellers.

### What's required from me?

All app sales must be processed through the Partner Portal.

## Definitions

“Commission” will be calculated on the purchase price, not on the advertised price.

“Qualified Sale” means a sale of a Commissionable item to a valid end user customer pursuant to the Rules of Engagement.

“Sold Customer” means a new customer that purchases the Infusionsoft app through a Qualified Sale.

## FAQs

### Is the new commission rate applicable retroactively?

No. The new commission rates apply to Infusionsoft applications sold on or after December 1, 2016.



**How will I get paid?**

Commissions are paid in U.S. dollars only. Commissions are calculated on the purchase price, not on the advertised price. Partners can choose to receive commissions either by Direct Deposit (ACH for U.S. and Bank Wire for international) or through PayPal. Infusionsoft is not responsible for any fees charged to the Partner by their bank or PayPal. As required by US tax regulations, Infusionsoft must receive either (i) a US Internal Revenue Service (IRS) Form W-9 (for individual or company within the United States) or (ii) a US Internal Revenue Service (IRS) Form W-8 or W-8BEN-E (for individual or company outside the United States) for any person or company receiving commissions, even if that person or company resides outside the US.

**When will I get paid?**

Commissions will be paid by the 20th of the month following each month in which a customer pays in full for a Commissionable Item. Should the customer pay for a Commissionable Item in multiple installments, Partner's commission will be paid upon Infusionsoft's receipt of the final installment. Should the 20th of the month fall on a weekend or Infusionsoft US holiday, commissions will be paid the next business day following the weekend or holiday. If the amount of the Commission due to the Partner in any given month is less than USD \$100, Commissions will not be paid until the amount due to the Partner exceeds USD \$100 or upon the termination of Partner's relationship with Infusionsoft, whichever comes first.

**Will Infusionsoft pay someone other than the Certified Partner?**

Certified Partners may elect via written request to pay to another individual or company any amounts payable to the Certified Partner, provided that all payments on a given partner record in Infusionsoft's system must be paid to a single payee

**How do I bill my customers in the Partner Shopping cart?**

Partner's shopping cart will bill customer's credit card entered at time of sale for Subscription fees only. Partner may choose to bill their own credit card for Subscription fees and then bill their customer for the onboarding serviced fees. Partner is responsible for billing the customer directly for Service Packages and is eligible to retain 100% of the onboarding services collected.

**Are there refunds or "clawbacks"?**

Infusionsoft service fees and subscription fees are nonrefundable. Under the rare circumstance that (a) a Service Package fee is refunded back to a customer or (b) a customer cancels the monthly Subscription before 60 days have elapsed from the date of initial purchase, Infusionsoft may claw back the associated commission paid to Partner. Any resulting amounts owed to Infusionsoft by Partner may, in Infusionsoft's sole discretion, be deducted from the balance of any commissions earned by Partner that are unpaid as of the date Infusionsoft claws back the commission associated with the cancelled Service Package or monthly Subscription. Alternatively, Infusionsoft may, in its sole discretion, invoice Partner for any commission Infusionsoft paid Partner which was associated with a cancelled Service Package or monthly Subscription, and Partner agrees to pay such invoice promptly.



## PROGRAM BENEFIT

# Partner Sales Manager

Your Partner Sales Manager is a dedicated consultant that will work with you one-on-one to optimize your go-to-market strategy, identify opportunities to take full advantage of partner program benefits, and identify and implement business growth strategies. The Partner Sales Manager is part of the team designed to help you and will work closely with your Partner Success Coach to provide you the resources and support you need as you grow your business.

### How do I get started?

After earning Pro status, you will be assigned a Partner Sales Manager.

### Who is eligible for this benefit?

Pro Value Added Resellers.



## PROGRAM BENEFIT

# Premium Partner Technical Support

Get the help you need, when you need it. Premium Partner Technical Support provides you with specialized technical support to resolve issues related to the Infusionsoft app that helps you support your customers. As a partner, you'll get the level of support you need and expect by directly matching you with a support representative when you contact support that specializes in resolving advanced, partner-related issues.

### How do I get support?

Contact partner technical support two ways:

1. Chat live via the Partner Portal or within the Infusionsoft app
2. Submitting a partner support ticket via the Partner Portal or within the Infusionsoft app

### Who is eligible for this benefit?

All partners.

### What's required from me?

To ensure fast and complete issue resolution, please contact Premium Partner Technical Support through the supported channels.

When contacting support to resolve issues with your customer's app, you are required to have a partner login to the customer's account.

## FAQs

### When is Premium Partner Technical Support live chat available?

Live chat is available Monday through Friday from 6am to 6pm MST (GMT-7).



## PROGRAM BENEFIT

# Partner Onboarding

Launch your Infusionsoft practice faster with Partner Onboarding. A perfect complement to certification, Partner Onboarding enables you to assess how to get the most out of the partner program and create a specific growth plan for your business. Learn best practices to successfully creating, packaging, marketing and selling the Infusionsoft app and the services you design to solve key challenges your target customers face. Plus, your Onboarding Coach will help you co-create and execute your launch plan.

### How do I get started?

Your first onboarding call will be scheduled during certification training.

### Who is eligible for this benefit?

All new Value Added Resellers and Service Partners.

### What's required from me?

Simply schedule and participate in the calls with your Onboarding Coach, who will be your accountability partner, strategy consultant and implementation expert in helping you get started as a Certified Partner.

Because onboarding begins prior to completing certification, you must meet training requirements including but not limited to attending training and completing exercises to proceed with onboarding.





## PROGRAM BENEFIT

# SBSM Education & Campaigns

Learn how to create the perfect customer lifecycle that drives results for small businesses — so you can grow your business and help your customers grow theirs. Starting with your business in Partner Onboarding, you'll have the opportunity to learn and apply Small Business Success Method (SBSM) principles. As a partner, you have the opportunity to enroll in additional SBSM learning opportunities including an exclusive partner-only SBSM online training program and access to a library of proven SBSM campaign templates.

### How do I get started?

Contact your Partner Success Coach to discuss opportunities to leverage SBSM.

### Who is eligible for this benefit?

All partners.



## PROGRAM BENEFIT

# ICON for Partners

ICON is the premier small business growth event globally and places you at the center of the single largest community of small business owners and marketers from around the world. ICON is a key event for partners to connect face to face with Infusionsoft customers, strengthen the role you take in creating customer success, and generate customer loyalty between you and your customer. Whether you are connecting with your existing customers, finding new ones, or building alliances with other partners that serve small business, ICON is a must attend event.

All partners receive:

1. Additional \$75 off\* the ticket price at the time of purchase.
2. Additional \$75 off\* the ticket price at the time of purchase for all of the customers that use the Partner's discount code.

\*Does not include pre-ICON trainings or certifications.

## How do I get started?

You'll receive a special discount code that you can use and share with your customers. Contact your Partner Success Coach for more information.

## Who is eligible for this benefit?

All Pro Partners.



## PROGRAM BENEFIT

# PartnerCon

PartnerCon is a three day conference with the purpose and mission of growing your business to the next stage. Get ideas on how to sell more, close more leads, improve service, increase customer health and get clarity on Infusionsoft's company and product direction to better shape your plans. PartnerCon offers many formal and informal ways to network, connect, and learn from other partners — whether you are looking to form alliances, share best practices or stay in touch with partners on the same journey as you. PartnerCon is a celebration of the amazing accomplishments by you and where we reward and recognize partner performance.

All Pro Partners receive an additional \$75 off\* the ticket price at the time of purchase for up to 4 tickets to PartnerCon.

\*Does not include pre-PartnerCon trainings or certifications.

### How do I get started?

As a Pro Partner, you'll receive a special invite to PartnerCon with a discount code. Contact your Partner Success Coach for more information.

### Who is eligible for this benefit?

All Pro Partners.



## PROGRAM BENEFIT

# Connection Marketing Assets

Sell more apps and services faster with campaigns and other assets already designed to target your ideal customer — or modify them to match your unique audience. The library of Connection Marketing assets helps you educate small businesses on the value of using Infusionsoft so that they are ready to make a purchase decision. Assets available include:

1. Complete campaigns (built within Infusionsoft)
2. Company messaging guide
3. Buyer persona profiles & buyer's map
4. Connection Marketing story and presentation

### How do I get started?

Download campaigns and other assets in the Partner Portal.

### Who is eligible for this benefit?

All partners.

### What's required from me?

Campaigns must be used to promote Infusionsoft.

When launching campaigns, use the tracking links unique to you.

Register leads in the Partner Portal.

Distribution of provided assets outside your business is prohibited.



## FAQs

### **How should I use each type of asset?**

The assets provided are used to do one of two primary things:

1. Develop your understanding, as a marketer, of the Infusionsoft target customer's problems to be solved, where to find them, and how to talk to them.
2. Market and sell directly to the Infusionsoft target customer with complete Infusionsoft campaigns across the Buyer's Map

### **Do I have to write all my copy & do my own graphic design?**

Only if you wish to. The complete campaigns contain pre-built email copy and images and are ready to be published quickly.

### **Can I completely customize the assets (campaigns, etc.)?**

Yes, you can, but it's not required. We recommend adding your own branding and personalizing the tone and voice of the copy as you grow your audience and get to better know what resonates best with them.

### **Can I link the campaigns to my website?**

Yes. For campaigns that include a web form, you can add that form to your website to begin capturing leads so they are automatically added to your campaign.

### **Do I have to use my Infusionsoft account to use the assets provided?**

All of the complete campaigns provided are built in Infusionsoft and can only be used in your Infusionsoft account. However, non-campaign assets can likely be leveraged with other tools.



## PROGRAM BENEFIT

# Marketplace Listing

Infusionsoft Marketplace is a one-stop shop for hundreds of Infusionsoft integrations and add-on services. It's a growing marketplace of service and technology partners that helps customers extend the value of Infusionsoft and streamline their business. Marketplace enables partners to market your services and add-on apps to customers by creating multiple solution listings for specific verticals, business types, geographic locations, and customer solutions.

### How do I get started?

Log in to [marketplace.infusionsoft.com](https://marketplace.infusionsoft.com) to create, view, and manage your Marketplace listings. Contact your Partner Success Coach for assistance or more information.

### Who is eligible for this benefit?

All partners.

### What's required from me?

You must adhere to all Marketplace Guidelines (view the guidelines [here](#)) and maintain accurate information in listings.

## FAQs

### How long does it take for listing approval once submitted?

3-5 business days. Please contact your Partner Success Coach if a response is not received in this timeframe.

### Are there any reasons a listing would be rejected?

A listing may be rejected if the listing is incomplete, the listing includes inaccurate claims, the owner does not meet the criteria for a qualifying partner, the service or app is not relevant to Infusionsoft customers, the listing is too similar by another listing from the same owner, the listing does not offer a unique and valuable solution for customers, or the listing contains copyrighted content or images.



## PROGRAM BENEFIT

# Elite Partner Growth Plan

Grow your business by co-creating a growth plan with your Partner Success Coach — based on the principles taught in Infusionsoft's Elite programs and the Small Business Success Method.

### How do I get started?

Contact your Partner Success Coach to get started.

### Who is eligible for this benefit?

Pro Value Added Resellers and Pro Service Partners.



## PROGRAM BENEFIT

# Market Development Funds

Accelerate the growth of your business by co-funding value-added marketing activities that promote your Infusionsoft solutions resulting in new leads or new customer sales. Market Development Funds (MDF) are available to you for up to 50% of the total costs associated with qualifying marketing opportunities (for example, event marketing) up to \$2500/mo, subject to Infusionsoft's approval.

### How do I get started?

Contact your Partner Sales Manager.

### Who is eligible for this benefit?

Pro Value Added Resellers.





## PROGRAM BENEFIT

# Quarterly Business Review

Ensure your partnership with Infusionsoft is effectively enabling you to grow your business by meeting every three months for a Quarterly Business Review (QBR) with your Partner Success Coach (or Partner Sales Manager for Value Added Resellers) to evaluate progress toward your Elite Partner Growth Plan.

### How do I get started?

Contact your Partner Success Coach to schedule your QBR.

### Who is eligible for this benefit?

All Pro Partners.



## PROGRAM BENEFIT

# Partner Content Publishing

Build efficiency and improve consistency in delivering services to your customers. Partner Content Publishing is a tool that helps you save time by exporting custom campaigns to a private Marketplace so you can easily download it to your customer's Infusionsoft application — shortening the campaign creation and fulfillment time by allowing customers to quickly access and use your pre-built campaigns.

### How do I get started?

Contact your Partner Success Coach to assign the “Partner Publishing” role to your Infusionsoft ID. Then login to the Marketplace and set up a company to begin exporting campaigns.

### Who is eligible for this benefit?

All Service Partners and Value Added Resellers.

### What's required from me?

To fully protect your content, you should build all campaigns in an Infusionsoft app that you control, preferably a Sandbox app. This will ensure your app is listed as the “Author” of the campaign and will prevent others from exporting your content from a Customer's app.

## FAQs

### Can someone else export the campaigns I publish into a customer's account?

All private content is marked as “cannot be exported” unless you are the original author. Private content includes any campaign exported to the private marketplace using Partner Content Publishing.



## PROGRAM BENEFIT

# Customer Marketing Opportunities

Grow your business by leveraging additional channels and options to directly market your services, products and add-ons to Infusionsoft users to increase exposure and traffic to your Marketplace listing.

<b>New service and app launch promotions*</b>	<ol style="list-style-type: none"><li>1. Infusionsoft Marketplace listing (ability for customers to sort by newest apps and services)</li><li>2. Infusionsoft press release highlighting new services and apps (periodically)</li><li>3. Blog post highlighting new services and apps (monthly)</li><li>4. Social media posts linking to Marketplace (periodically)</li></ol>
<b>Additional marketing opportunities*</b>	<ol style="list-style-type: none"><li>1. Multiple ICON sponsorship opportunities</li><li>2. Infusionsoft customer-facing personnel “lunch and learns”</li><li>3. Infusionsoft.com banner ads promoting partner apps and services</li><li>4. PartnerCon “partner to partner” sponsorship opportunities</li><li>5. Speaking opportunities</li><li>6. Educational guest blog post</li><li>7. Joint customer success stories</li></ol>

\*inventory of specific marketing opportunities subject to change based on effectiveness of campaign/channel

## How do I get started?

Contact your Partner Success Coach to learn more and apply.

## Who is eligible for this benefit?

All Service Partners and App Developers can apply to participate in Customer Marketing Opportunities. Application decisions are based on criteria including but not limited to:

1. Customer retention
2. Alignment to current Infusionsoft marketing themes and key message fit
3. Marketplace ratings
4. Customer Health Score

## What's required from me?

Prepare and deliver marketing assets required to execute promotion by deadline provided



Perform QA on provided assets prior to submission and following deployment (as needed)

Maintain tracking system so all leads/clients generated from selected customer marketing opportunity can be easily identified

Provide data on campaign success as requested by Infusionsoft

## FAQs

### **How much does it cost to participate in these customer marketing opportunities?**

Some marketing activities are provided at no cost. Others are paid and fees vary.

### **Can I sign up for any of these customer marketing opportunities?**

There is an evaluation process prior to acceptance. Certain customer marketing opportunities have limited availability.



## PROGRAM BENEFIT

# Fulfill On Behalf of Infusionsoft

Deliver services sold by Infusionsoft (formerly IKOP) to earn fulfillment fees, land new customers and help them be successful by upselling ongoing services.

### How do I get started?

Contact your Partner Success Coach for more information about fulfilling on services sold by Infusionsoft.

### Who is eligible for this benefit?

Pro Service Partners can apply to fulfill on services sold by Infusionsoft. Application decisions are based on criteria including but not limited to:

1. Customer Health Score
2. Customer retention
3. Capacity to deliver services
4. Region served and/or location of partner office
5. Vertical/industry specialization

### What's required from me?

Must continue to meet customer activation goals

Must meet reporting responsibilities for all projects

Must maintain Customer Health Score requirements

## FAQs

### Is there a guaranteed number of “outsourced customers” I will receive each month?

No. However, efforts will be made to forecast the number of customers you receive each month so you can plan accordingly.



**How can I increase the amount of projects or services that are outsourced to my business?**

Outsourced allocation is based on customer performance. Customers with a higher healthscore create the opportunity for you to receive additional projects. You also have the opportunity to upsell additional ongoing services.

**What kind of services could be outsourced to my business?**

We currently outsource the Infusionsoft SBSM Kickstart. In the future, we plan to add additional services that Infusionsoft sells and partners deliver.

**How do I know if the outsourcing program is right for me?**

Contact your assigned Partner Success Coach who can initiate the interview process



## PROGRAM BENEFIT

# API & Developer Support

Get answers to your API questions and resolve issues quickly. The API & Developer support team is on call to investigate and troubleshoot API issues, develop resolution/next steps for complex API issues and escalate critical issues to the Infusionsoft product team when applicable. Your Partner Success Coach will provide regular updates on solving complex issues to ensure you receive an answer as well as follow-up on and close the loop on API enhancement requests.

### How do I get support?

Contact your Partner Success Coach or submit a ticket in the Developer Center.

### COMING SOON

Gain access to a new Infusionsoft developer community monitored by Infusionsoft API and integration experts to get answers easily, on-demand.

### Who is eligible for this benefit?

All Partners.



## PROGRAM BENEFIT

# App Planning & Solutioning

Easily plan, solution and build your app with access to App Planning & Solution resources. Talk to your Partner Success Coach about scheduling time with a Partner Solution Consultant.

<b>Plan</b>	Gain access to frameworks that guide you through the integration planning process and align to Infusionsoft's product direction.
<b>Solution</b>	Identify which Infusionsoft platform components will help you solve the customer challenges you are aiming to solve.
<b>Build</b>	Access best practices based on building common integration design patterns.

### How do I get started?

Coming soon.

### Who is eligible for this benefit?

All App Developers.





## PROGRAM BENEFIT

# Beta Programs for Partners

Get priority access to beta programs as we continue to improve the API, product and the partner program .

Examples of beta programs include:

1. New product feature early access (including API and platform enhancements)
2. New customer marketing opportunities
3. New program features to proactively improve customer health
4. New program features designed to improve partner support
5. New program features designed to increase partner exposure/leads

### How do I get started?

Contact your Partner Success Coach to learn about current beta opportunities.

### Who is eligible for this benefit?

All Pro Partners are eligible to apply to participate in beta programs.

### What's required from me?

An open mind and willingness to try something new and provide feedback in service to growing your business and identifying ways to make more customers and partners successful.



# Additional Information



# Customer Health Score

## What is Customer Health Score?

The Customer Health Score (CHS) is a diagnostic tool designed to help you — in partnership with Infusionsoft — drive customer success by identifying when your customers are successful and when they might need your help.

## How is Customer Health Score calculated?

The score is a comprehensive indicator of active usage and is based on account activity over the last 28 days. Customer Health Score is calculated based on weighted activities including but not limited to:

<i>Active contacts in campaigns</i>	<i>Contacts added/subtracted</i>	<i>User logins</i>	<i>Broadcasts sent</i>
<i>Campaigns Published</i>	<i>Emails sent</i>	<i>Tags applied</i>	<i>Tasks created</i>
<i>Opportunities created</i>	<i>Web forms submitted</i>	<i>API calls</i>	

Customer Health Score was formulated based on significant regression analysis looking at successful and unsuccessful customers. The score is highly correlated with customer success and the likelihood of a customer to continue using Infusionsoft.

## Who has access to Customer Health Score?

Customer Health Score is an exclusive benefit for Infusionsoft partners.

## Why is the Customer Health Score important?

The CHS gives you visibility into the success of your customers and helps you predict the likelihood of customers to renew. You'll have the opportunity to regularly review your customer's health scores individually and in aggregate to see the overall health of your customer base and to identify specific opportunities to proactively help unengaged customers. Your Partner Success Coach is available to jointly review and create actionable plans based on insights from your customer's health scores.

## How does Infusionsoft determine a good customer health score?

Customer Health Score targets are determined by using the median Health Score for all active Infusionsoft customers correlated to customer retention and historical trends.



## Does having low customer health scores limit my participation in the program?

The Customer Health Score is a diagnostic tool to help you proactively drive customer engagement and retention. Infusionsoft views driving customer success as a joint responsibility between you, Infusionsoft and other partners jointly serving customers. Because Customer Health Score is an indicator of customer success, trends in aggregate health scores are used in combination with other criteria to determine eligibility for some program benefits. Please refer to the detailed benefit guide for more details.

## What health scores should I target?

### Target Customer Health Scores

Health scores are tracked for two key milestones across the customer journey and include:

1. **45 Day Activation** — an indicator the customer is on the path to sustained success after successful onboarding
2. **After 90 Days** — an ongoing indicator of customer health correlated to the likelihood to renew over time

Target health scores are based on the median health score for all active Infusionsoft customers and correlate to customer retention.

### Active Customer Target Scores\*

#### 45 DAY ACTIVATION

55+

#### AFTER 90 DAYS

60+

\*Target health scores are based on the current median health score for active customers and correlate to customer retention.

## Will target scores ever change?

The goal is to provide you with an accurate measure that helps you see early indicators and understand the health of your customers so we can jointly drive customer success. As we accumulate more data, we will continue to perform extensive analysis to ensure target health scores are a strong indicator of customer success and retention.



# Active Service Provider

Being listed as an active service provider for a customer account gives you visibility into your active list of customers.

## Benefits

1. Visibility into Customer Health Scores (CHS) for your customers
2. Visibility into which customers you are actively serving
3. Opportunity to review and analyze Customer Health Scores and customer account activity with your Partner Success Coach

### **How does an active service provider get assigned?**

Active Service Provider is assigned based on active partner logins calculated by determining partner logins for an account in the previous 90 days.

### **Will there be other Active Service Providers tied to a customer account?**

Many times small businesses will work with more than one partner. Your customer list will include customer accounts you have logged into in the last 90 days even if other partners are also logging in. If you aren't working with the customer anymore, that's okay, just let your Partner Success Coach know so we can ensure that customer is getting the service they need.

### **Will I be penalized for low customer health scores of customer accounts that have more than one partner working with them?**

The Customer Health Score (CHS) is a diagnostic tool designed to help you — in partnership with Infusionsoft — drive active customer usage by identifying opportunities to increase customer engagement. The intent behind CHS is to ensure collaboratively (partners and Infusionsoft) we are driving customer success. Although CHS is used as one input to determine eligibility for some benefits, it will not be the only factor to determine eligibility.



# Additional Information

## Is there still an Infusionsoft Certified Consultants program?

The Infusionsoft Certified Consultant (ICC) program will continue to be an integral part of the Infusionsoft Partner network. These certified consultants must pass the Infusionsoft ICC certification and work with a registered Infusionsoft Certified Partner (ICP).

## What about the Trusted Advisor program?

The Trusted Advisor program has been updated and now comprises of two areas of focus.

### Influencer Partner:

Influencers (formerly known as Trusted Advisors) are thought leaders in the business industry who share their insights on marketing, sales, culture, and technology. Typically, our Influencer Partners invite us to participate in events where we sell and/or educate from stage. These relationships are paramount to our success in the sales and marketing technology world, because Influencer audiences are tuned into cutting edge strategies and methods to leverage technology for small business growth.

### Co-Marketing Partner (CMP):

Influencers that display a more comprehensive approach to engaging their audiences sometimes become Co-Marketing partners with Infusionsoft. The most successful CMPs are ones that have conditioned their audiences to consume content across multiple mediums (e.g., events, blogs, social, webinars, etc.). CMP content is fresh, topical, detailed and easily accessible. Additionally, our Marketing Team will create collaborative content that we cross-market to our respective audiences for mutual benefit.

If you have any questions about this program, please contact: [influencer@infusionsoft.com](mailto:influencer@infusionsoft.com)

## Is there still a Referral Program? (formerly Referral Partner Program)

Just as you do, we appreciate it when our customers tell others about how Infusionsoft can help their businesses grow and impact other lives. We will continue to have a way for you to refer potential customers to us. Partners and non-partners will be able to register as part of the program, and receive a one-time referral fee. We will be communicating more information soon about how this program is changing.

