

FileBound Partner Program



FileBound Partner Tiers

Our Program is designed to reward partners with price margin benefits and services based upon their level of engagement and participation with FileBound. Since every business is unique, the FileBound Partner Program has three tiers designed to fit the needs of the individual partner.

Executive Partners

Executive Partners have a very high level of transparency and engagement with FileBound, and fully support the FileBound brand as a critical part of their business. In turn, Executive Partners receive top discounts, priority support, and a much deeper engagement from the FileBound Leadership and Customer Success teams. As an exclusive group, they are afforded a wide range of executive level support, including Customer Success Program participation, marketing assistance, and eligibility to participate in the FileBound Partner Advisory Board, which helps to drive the FileBound vision and road map.

Premier Partners

Premier Partners support the FileBound Product at a strong level and the FileBound brand is an important part of their business. Premier Partners receive discounts on product and services in addition to dedicated support from an assigned member of the FileBound Partner Success team.

Business Partners

Business Partners support the FileBound brand while selling and servicing their customers as needed. These partners receive a discount off MSRP on product sales, and assistance from the FileBound Partner Success team. Business Partners are eligible to move to a higher tier as they achieve sales revenue goals and attain education requirements throughout the year.

Referral Partners

Referral Partners find FileBound opportunities in the course of business and receive a 10% commission on the first-year product and service revenue. This tier is perfect for a partner whose business model doesn't justify the investment in training and support staff specific to FileBound, but wants the ability to service prospects when opportunities arise. Referral Partners can also earn commissions for referrals for other Upland products.

Executive, Premier or Business Partners can also be act as a Referral Partner for other Upland Software products. To qualify, referral deals must be registered through the Opportunity Registration process.

Please see the “Partner Program Requirements and Benefits” chart (page 5) for a complete listing of benefits.

Opportunity Registration

The FileBound Opportunity Registration Program allows partners to earn additional margin by registering their opportunities and following the program guidelines. Registering opportunities also protects your position with the prospect from other partners.

What is an opportunity?

To be a qualified opportunity, the partner needs to have engaged in at least one sales conversation with the prospect, and has identified that the prospective customer has a problem with a willingness to spend money to solve. An “opportunity” is more than a lead or cold call; an opportunity signals the potential of real business.

How it works

1. In the [Upland Partner Community](#), find the FileBound Partners menu and navigate to Sales Information > Register Opportunity
2. Complete the form. All required information must be entered for the opportunity to register.
3. Only one partner may register an opportunity for a prospect. If another partner has previously registered the opportunity, you’ll be notified by a FileBound sales team member and your registration will be cancelled.
4. With a confirmed purchase order for the opportunity, you’ll receive an additional 5% margin in addition to your tier margin, while unregistered deals will receive the base margin for the respective tier.

Example: An Executive Partner will receive a 45% discount off of MSRP for unregistered deals. An Executive Partner who registers their deal will receive the base margin of 45%, plus 5% for deal registration, for a total 50% discount off MSRP.

Items of note

- Only registered opportunities are provided with complete pre-sales support, and demo support. Provide your FileBound Account Manager with regular information about the opportunity and engage them for assistance throughout the sales cycle.
- An opportunity may only be registered one time and is valid for 6 months. At the end of 6 months, the registration will expire and may not be re-registered.
- FileBound reserves the right to cancel registrations on opportunities that are not, in the opinion of the Account Manager, being actively engaged by the partner.

Training, Implementations, and Support

Product Training and Certifications

Appropriate product training and certification is required to implement FileBound customers. As a result, your team must maintain the required FileBound certifications, renewing them annually, as outlined on page 5.

New Business Partners must use FileBound services team for new implementations until sales and certifications requirements are met. Existing Business Partners must qualify to perform implementation services through attainment of certification requirements and FileBound leadership approval. Without these in place, all implementations will be performed by FileBound's Professional Services team and the partner will be billed appropriately.

Standard and Priority Customer Support

Our Technical Support Team stands ready to assist you when issues arise. Executive and Premier Partners are expected to handle all Level 1 technical support issues* with their customers before engaging the FileBound Support Team. All partners will have standard email support available to them, while Premier Partners will have added call center support and Executive Partners will have elevated call center and priority support, including:

- All emails coming into the support queue from Executive Partners will receive priority over other calls.
- FileBound Senior Management will have visibility of all open cases.
- Unresolved calls from Executive Partners will be automatically escalated to Level 2 technical support after the initial call.

**Any Executive or Premier Partner found not supporting Level 1 technical support issues are subject to a maintenance surcharge.*

Maintaining FileBound Partner Status

In addition to maintaining a “current” status in accounts receivables, we have set forth minimums in terms of revenue, new customer acquisition, FileBound accreditations, brand usage, and Executive Partner/Customer Success engagement levels for partners to maintain their current partner tiers.

Please see the “Partner Program Requirements and Benefits” chart (page 5) for a complete listing of criteria.

This criterion, measured annually from January 1 through December 31, can also be used as a guidepost for partners looking to advance their current tier status, however partners generating less than \$35,000 in revenue are subject to termination. As always, we encourage you to work closely with your account manager to ensure you meet the minimum requirements while developing plans to advance in tier.

Partner Program Requirements and Benefits

	TIER 3 Business Partner	TIER 2 Premier Partner	TIER 1 Executive Partner
	FileBound Business Partners represent the FileBound brand in a high quality manner.	FileBound and Premier Partners engage in a collaborative selling and service effort with the end-user customer.	FileBound Executive Partners receive the highest level of support and service. FileBound and Executive Partners sell collaboratively.

What FileBound Provides You

PARTNER SALES SUPPORT			
Partner Margin Discount	20% off MSRP	35% off MSRP	45% off MSRP
Opportunity Registration Discount	5%	5%	5%
Partner Account Manager Support	LIMITED	YES	YES
Personalized Business & Sales Planning	LIMITED	YES	YES
Pre-Sales Demonstration & Opportunity Support	YES	YES	YES
MARKETING & SALES ENABLEMENT SUPPORT			
FileBound Community Access	YES	YES	YES
FileBound Go-To-Market Toolkit Support	YES	YES	YES
Marketing Discretionary Funding Support		LIMITED	YES
Co-Branding of FileBound Marketing Materials		LIMITED	YES
Prospect Lead Eligible			YES
PRODUCT SUPPORT, SERVICES & EDUCATION			
FileBound Email Support	YES	YES	YES
FileBound Knowledgebase Access	YES	YES	YES
FileBound Standard Call Center Support	NO	YES	YES
FileBound Priority Email Support	NO	NO	YES
FileBound Professional Service Support	YES	YES	YES
FileBound University & Certification Access	YES	YES	YES
PARTNER & CUSTOMER SUCCESS			
FileBound Executive Customer Success Program Access	LIMITED	LIMITED	YES
Partner Customers Eligible for Customer Advisory Board		LIMITED	YES
Partner Advisory Board Eligible		LIMITED	YES
FileBound Solutions Board Eligible (Solution Architect certification required)		LIMITED	YES

What We Ask of You

FILEBOUND SALES SUPPORT			
Annual Sales Minimum (Revenue)	\$35,000	\$75,000	\$175,000
Minimum yearly customer acquisitions	2	3	4
Yearly Strategic Planning & QBR Participation	NO	YES	YES
Participate in monthly new and expansion opportunity pipeline review	PREFERRED	YES	YES
Participate in monthly customer renewal pipeline review	PREFERRED	YES	YES
Deal Registration	REQUIRED	REQUIRED	REQUIRED
FILEBOUND MARKETING & SALES ENABLEMENT			
Follow all FileBound Branding Guidelines	REQUIRED	REQUIRED	REQUIRED
Brand Promotion	REQUIRED	REQUIRED	REQUIRED
PRODUCT SUPPORT, SERVICES & EDUCATION			
FileBound Introduction/End-User, Workflow Assignment Management Certification	1*	2*	3*
Admin 101 & 102 Certification	1*	2*	3*
FileBound Forms & Workflow Certification	1*	2*	3*
Installation Specialist Certification	0	1*	2*
FileBound Solution Architect Certification	0	1*	1*
Provides Level 1 Customer Support		ALL	ALL
New Customer Implementations Performed By FileBound	REQUIRED		
FILEBOUND EXECUTIVE PARTNER/CUSTOMER SUCCESS PROGRAM PARTICIPATION			
Executive Outreach Participation		Must submit 2 candidates	Must submit 3 candidates
Customer participation in FileBound Customer Advisory Board		Must submit 2 candidates	Must submit 3 candidates

* number of certifications required

About Upland Software

Upland Software [Nasdaq: UPLD] is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.

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