



Act! Referral Partner Program Overview

The Act! Referral Partner Program provides Referral Partners with a powerful, low touch vehicle for generating software revenue through the sale of the Act! CRM. This document outlines the standard benefits a Referral Partner receives and defines the minimum participation requirements.

Program Benefits

Act! Referral Partners have obtained the right to receive a commission fee in exchange for referring new qualifying customers who purchase Act! CRM and related products.

Payout Schedule

The 2020/2021 Act! Referral Partner payout is:

- 25% commission payout on all qualifying transactions for the first year of an active subscription (paid monthly)
- 10% bonus on all qualifying transactions within a quarter if quarterly sales exceed \$20,000 of re-occurring revenue

Existing Act! customers already on a subscription plan are not eligible as Prospects, neither are customers of other Act! Resellers or those currently registered in the Act! sales system(s).

In addition, Act! will provide:

- Vendor managed customer onboarding
- Vendor managed customer billing and renewals
- Vendor managed customer support

Simple Order Management

Act! will provide the Referral Partner with a unique URL referral link for Prospects to start Act! trials. This URL will recognize the source of the Referral Partner and is the means for ensuring Referral Partners will be given credit for attracting Prospects and qualifying purchases. In the event that a Prospect would like to buy without a trial, there is a "Buy Now" pathway also available to Prospects via the trial account.

Act! will facilitate all billing, support, upgrades, renewals and communications directly with customers. A Prospect is considered attached to a Referral Partner for 90 days after the trial has been started. If the Prospect has not converted to a paying customer within 90 days, the Prospect will be considered an unattached Prospect and may be contacted and converted by another Partner or the Act! Direct Sales team.



Act! will remit Commission Fees to the Act! Referral Partner on a monthly basis for all bookings with received payments collected in the prior month as outlined in Exhibit A of the Act! Referral Partner Agreement.

Act! Referral Partner Resources

All Act! Referral Partners have 24x7 access the Act! Resource Center, which contains:

- Policies and Forms
- Training & Product related information
- Marketing Resources

Program Requirements

All Act! Referral Partners must:

- Complete the Act! Referral Partner Application & Agreement
- Complete the Act! Referral Partner Onboarding
- Submit the Acknowledgement of Completion form
- Adhere to Act! brand guidelines
- Maintain a professional relationship, as determined in Act!'s reasonable discretion, with end users, other partners, third party vendors of Act!, and Act! employees
- Maintain up-to-date personal contact information, including but not limited to, address, ACH banking deposit, phone number and e-mail address
- Pay Partner fees as outlined in the Terms section of the Act! Referral Partner Agreement
- Maintain compliance with the terms outlined in the Act! Referral Partner Agreement and policies located in the Act! Referral Partner Resource Center.
- Provide a completed Form W9 Tax Document

Preferred Experience & Expertise

- CRM & Marketing Automation related thought leadership and sales experience
- Business process consulting
- Strong website and overall digital presence
- Existing sales process
- Demonstrable cross sell, upsell or referral opportunities



Initial Onboarding & Program Enrollment

Qualified Act! Referral Partners must complete the initial onboarding course, outlined below, within 30 calendar days after signing the Act! Referral Partner Agreement.

Initial Onboarding Resources & Course

The Act! Referral Partner initial Onboarding Course is a self-paced course, which includes the review of all training and marketing resources provided in the Act! Referral Partner Resource Center including:

1. **Training Articles& Videos**
2. **Marketing Articles & Videos**
3. **Policies & Forms**

Acknowledgement of Completion: All Act! Referral Partners must sign the attached Acknowledgment of Completion within 30 calendar days of signing the Act! Referral Partner Agreement acknowledging their review, acceptance and understanding of the Act! Referral Partner Overview document and onboarding materials and resources.

All components of the onboarding are available 24 hours a day.

Default

If a Referral Partner fails to submit a signed Acknowledgement of Completion within 30 calendar days of signing the Act! Referral Partner Agreement, the relationship set forth in the Agreement shall be terminated. All survivability clauses in Act! Referral Partner Agreement will apply.

Annual Program Renewal

Annually, the Referral Partner shall pay the current membership fee outlined in the Act! Referral Partner Policies on or before the anniversary of the Effective Date. In the event that payment does not occur within thirty (30) days of the program renewal deadline, Act! may terminate this Agreement and Referral Partner's participation in the Act! Referral Program and access to all Referral Partner benefits will cease.



Acknowledgement & Acceptance

I acknowledge that I have read, understand and accept the above Act! Referral Partner Overview document and onboarding materials and resources.

| | |
|--------------------------------|--|
| Signature of Referral Partner: | |
| Printed or typed name: | |
| Company Name: | |
| Date | |