



 connectedbusiness

**2019 Partner Support Guide**

## Welcome To Connected Business.

As a Connected Business Partner, you will be offering your clients a completely unified solution (CRM/ ERP / eCommerce / POS) designed to help your customer grow their sales and operate more efficiently. Because we understand that every business is as unique as the people running them, Connected Business is built on a powerful “Business Platform” that can be customized to meet the exact needs of the client.

There has never been a better time to become a Connected Business partner. Our product is proven, stable, and scalable, with hundreds of successful implementations around the world. As a Connected Business partner, you have a ground floor opportunity to promote the solution in your local community or industry.

As a 100% Employee / Customer owned company, we are committed to your success.

## Connected Business Products

Connected Business is an “Omni-Channel ERP” Solution designed for SMB Retail, Distribution and eCommerce Companies. The solution is powerful, flexible, customizable, and mature; resulting in many companies using the solution worldwide. Connected Business is available in a yearly subscription that can be hosted either in our cloud environment, in a client’s private cloud environment (i.e. dedicated servers) or installed locally on the client’s premise. Systems, Apps, and Modules currently available for Connected Business include;

**The Core Application** - Our core application is a desktop application that is designed to connect to data either locally or over the Internet via web services (like Skype). The core application includes the following modules;

- Customer Relations Manager (CRM)
- Customer / Supplier / Shipping / Inventory
- Banking / Accounting
- Reporting / Business Intelligence

**Connected Business eCommerce** – Our ecommerce application is one of the most powerful and sophisticated in the marketplace. Completely integrated with the rest of the Connected Business solution, our eCommerce module allows you to provide a shopping experience that cannot be matched by using separate “synchronized” solution

### Connected Business COOP Products

The Connected Business COOP is a collection of open source applications designed for Connected Business. These products are partially supported by Connected Business as well as our ecosystem of Partners. Customers that want modifications, new features, or support for Connected Business COOP Products are encouraged to work through our Partners that are active in the COOP.

**Connected Point of Sale** – Connected Point of Sale is completely integrated with the Connected Business solution.

**Connected Warehouse** - Connected Warehouse is an iOS app (iPod Touch, iPad) that provides functions typically found in a warehouse management system.

**eShopCONNECTED:** eShopCONNECTED connects our solution with 3rd party shopping carts (i.e Magento / Volusion / AspDotNetStorefront / etc) and marketplaces (i.e. Amazon / eBay / Channel Advisor) as well as the importing of orders from other systems via a standardized xml file.

## How We Partner

**Referral Partners:** Referral partners provide Connected Business with the contact information of companies that wish to learn more about Connected Business products. If the Referral results in the sale of an Annual Subscription for the Connected Business Application; the Referral Partner receives 15% of the first year Connected Business Subscription for that referral sale.

**Solution Providers:** Solutions providers take an active role in promoting Connected Business to prospective customers. They are expected to;

1. Comply with terms and conditions of the Connected Business Solution Partner Agreement (the “Agreement”) and the Solution Partner Program Guidelines in this document.
2. Promote the Connected Business Products on their Website and Social Media.
3. Have the proper number of certified employees based on their member level.

Solution providers can extend their role with Connected Business by obtaining the following competencies;

- **Implementation:** Solution providers with implementation competency have completed the relevant online training program, as well as verifies this competency with the Connected Business technical team.
- **Developer:** Solution providers with developer competency have completed the relevant online training program, as well as verifies this competency with the Connected Business technical team.
- **eCommerce:** Solution providers with eCommerce competency have completed the relevant online training program, as well as verifies this competency with the Connected Business technical team.
- **Point of Sale:** Solution providers with Point of Sale competency have completed the relevant online training program, as well as verifies this competency with the Connected Business technical team.
- **COOP:** Solution providers with COOP competency have completed the relevant online training program, as well as verifies this competency with the Connected Business technical team.

## Expectations of Channel Partner

It is important to the entire Connected Business ecosystem that prospects and customers experience professional service from their Channel Partner. The professional service begins with the initial contact with a prospect and extends through supporting customers as their business grows and changes.

### Working with prospects to close a sale

When working with prospects; Channel Partners are expected to follow the general guidelines as outlined in the Online Channel Partner Courses. Channel Partners may access the Questionnaire Guide and the Proposal Template on the “Partner Home” Tab of the MyConnectedBusinessUniversity Page. Connected Business provides an introductory PowerPoint Presentation that is a template for the Channel Partner to use to create their own PowerPoint.

#### Initial Contact

The Channel Partner is expected to do an initial qualification of the prospect on the first contact if possible. Qualifying the prospect requires asking some of the questions during the first contact to determine: 1) will the prospect benefit from using Connected Business, 2) is there enough budget to pursue the sale, and 3) is

the go-live time frame within six months (or longer if a very complex implementation). If all three qualifying steps are not met, major time should not be spent on Presentations, Demonstrations, or Proposals. Contact calls to stay in touch with a prospect should be made until either the prospect is disqualified; or all the qualifying tasks are met.

### Presentation

The Presentation is the next step after the initial contact. The Connected Business Demonstration PowerPoint presents the basic information about Connected Business, the benefits of the application, ability to modify, and significant selling points. This PowerPoint was designed for the Channel Partner to use as a template. Slides can be added to show Channel Partner specific information or slides may be removed.

The full presentation may take more than one session. Qualifying questions, presenting Connected Business, and some discovery may be accomplished in one session. Then if the prospect is still qualified; a next session may be scheduled to conduct a demonstration of the application. If the solution will require modifications or major configuration; a Discover session will be required. Especially in the case of larger sales, the Channel Partner will need a Discovery Session to determine estimated costs and to prepare for the demonstration. If the Discover session will require multiple hours, it should be billable for time and travel. Billing for the initial step is a way to create a business relationship which may help the final close.

The final session of the Presentation is a prepared demonstration of Connected Business. There should be few surprises during the demonstration if the Discovery was completed properly. It is critical to get a commitment for a decision date prior to scheduling the Proposal. If the decision date is two months out; do not schedule to present the proposal until you are within a couple of weeks of the decision.

### Discovery

As mentioned earlier, in the case of a small prospect; the Discovery step may just be a thirty-minute phone call (it could be part of the Presentation Step). However, with more complex implementations where data must be moved from another application, server configuration is required, matrix inventory items are used, they have complex workflows, and the prospect does not plan to use the default chart of accounts for accounting; the Discovery could require significant work to do it properly. We recommend that the prospect receive a detailed report that outlines all their requirements. If the proposal is too high or the prospect decides not to use Connected Business; the prospect can use the report to communicate with another vendor. The benefit to the prospect is they will receive a much more accurate cost estimate and they will see what work is required. The cost of the Discovery will probably be recovered because some of the work required for the implementation will be complete.

### Proposal

The Proposal Template is designed for Channel Partners to use as a starting point. It is very important to show the prospect what is expected of them, what will be delivered, and what tasks are billable. We recommend that Channel Partners require an initial Retainer that is about 50% of the middle of the estimated cost range. Then the Channel Partner would normally bill weekly against the initial retainer. As required, additional retainers would be collected as the current retainer balance approaches \$0. It is critical to have a "Change Management" clause that defines the hourly rate for all work that is added to the signed Proposal.

As you can see in the Proposal Template; the payment is divided into two parts:

- Connected Business will send a quotation directly to the customer for Annual Subscription
- Channel Partner will invoice for the initial retainer.

It is important that there is no confusion regarding what deliverable services are committed to the customer and that the Change Management Policy is in force. Do not sign the Proposal if there is any confusion regarding what will be completed by the Channel Partner and what will be completed by the customer.

#### Close the Sale

As soon as the sale is closed and both the customer and the Channel Partner signed the proposal; send a copy of the signed agreement to Chloe at [chloe.gaco@connectedbusiness.com](mailto:chloe.gaco@connectedbusiness.com). Connected Business will send a quotation to the customer for the annual subscription for the application and online training. Revenue Sharing will be sent to the Channel Partner by or before the fifth working day of the month following Connected Business receiving payment from the customer.

### **Working with the Customer during the implementation or Development Project**

Many companies today do not achieve successful software implementations or major development projects on the first try. Most of the time, the reason for failure has little to do with the actual software itself. In the US, a recent study estimates that over half of all Accounting, ERP, and CRM implementations fail to meet their objectives. In Europe, the corresponding statistic is 70%–80 % (!!!). When reviewing many of the implementation failures for ERP/Ecommerce Implementations there were eight major Challenges:

- 1. Not defining clear objectives for the project.** The Proposal and supplement documents must be complete and list all tasks committed by the Channel Partner and the Customer. Review all project requirements prior to beginning the Implementation.
- 2. Poor planning and project management.** Use an online Project Management System that both the Channel Partner and the Customer access. It must be updated every day and projected completion dates adjusted as quickly as possible.
- 3. Believing the software will solve your problems when software is just a tool or enabler.** It is important the Customer understands that the software add efficiency; but the Customer still must make sure all their required workflows are supported with Connected Business. Do not allow the Customer to think the application will solve everything if the customer has not spent the time to verify.
- 4. Trying to Use or Add Every Feature in the New Software Right Away.** There is a reason major ERP Implementations can take two years. Many of the features in Connected Business are not required to Go-Live. Implement what is required to operate initially and schedule future configuration after the application has successfully launched.
- 5. Insufficient Training and Support.** Connected Business offers detailed online training for the customers. However, the customer may require training for specific workflows the Channel Partner implemented for that customer.
- 6. Not Getting Buy-In from Employees Ahead of Time.** For larger implementations it is important to review the application with the key staff members and get their support prior to beginning the implementation. One negative staff-member can cause devastating damage to the entire implementation.
- 7. Incomplete, Erroneous, or Bogus Data in New Software.** When you are importing data from another application be as clear as possible that data needs to correct prior to the import. Many customers do not understand how important it is to have accurate inventory counts and accurate accounting balances. Customers, Suppliers, Sales Reps, Inventory, Inventory Categories, Units of Measure, and many others must be accurate prior to the Go-Live Launch.

- 8. Not Planning for Change or Handling Out of Scope Issues.** It is critical for the Channel Manager to define the “Change Management” process and make sure the customer understands exactly what work the Channel Manager committed to complete. If the scope of the project varies because the Customer changed or added defined work; the change must be documented, hours associated with the change tracked, and the Customer billed. Many implementations fail because the Channel Partner can not afford to complete the project because they are not receiving payment for work required because of changes to the scope.

At Connected Business we expect the Channel Partners to successfully complete implementations and major development projects in reasonable amounts of time. It is understood that the Channel Partner will professionally: Plan, communicate, execute, test, complete, and collect payment for all implementations.

The following are requirements for a Channel Partner to maintain the Seal for Implementation Competency:

- Plan implementation with detail tasks for Partner and Customer. Make sure there is Customer signature on the detailed tasks.
- Conduct a “Kick-off Meeting” and make sure the key staff members from the Customer attend. Make sure every key staff member supports the project and is willing to do the tasks assigned them. If for any reason a Customer does not commit to a required task; do not continue until the issue is resolved (either another Customer Staff-Member will do the task or the Channel Partner. It must be clear.
- Use an online project management system to manage the project. All staff members from both the Channel Partner and Customer must have access to the system. Tasks and scheduled completion dates must be updated daily.
- All “Change Management” Tasks with details must be added as quickly as possible
- Project is reviewed with the Customer weekly
- Customer verifies opening values prior to Go-Live Launch
- Testing is completed by Channel Partner and Customer prior to Go-Live Launch

### **Working with Customers after the implementation is complete**

The Channel Partner of record is the Channel Partner that successfully processed the customer through the Connected Business Sales Process. It is the responsibility of that Channel Partner to maintain communication with the customer and provide the Customer with all updated Connected Business information.

Connected Business recommends that when possible the Channel Partner provide direct support to the customer for an annual fee. The Channel Partner would create an email address with the Customer domain and create support tickets for their customer. This would allow the Channel Partner to maintain a working relationship with the Customer and identify opportunities for billable work.

It is the responsibility of the Channel Partner to notify their customer of Connected Business version upgrades and announcements. It is important that the Channel Partner update Connected Business any time the customer contact information changes. Connected Business will contact customers on a regular basis and verify the Channel Partner is keeping them informed. In order for a Channel Partner to qualify for their recurring revenue sharing; they must stay in communication with their customers and the customer must verify that the communication with the Channel Partner is satisfactory.

## Channel Partner Sales Process

The sales process for Connected Business Channel Partners is designed to make all terms of sale among the Client, Connected Business Channel Partner(s), and Connected Business very clear. There are three steps to the process: (1) “Connected Business Subscription Sales Form” is sent via email to the Channel Partner, (2) the Channel Partner completes the “Connected Business Subscription Sales Form” and emails the form to Connected Business, (3) after Connected Business approves the terms defined on the completed Sales Form; Connected Business will create a Quotation and send to the client through the Connected Business Customer Portal for the initial Subscription and charges directly from Connected Business such as training, and (4) Connected Business pays the Channel Partner the appropriate revenue sharing by the fifth working day of the month following Connected Business receipt of payment from the client.

**“Connected Business Subscription Sales Form”:** The Channel Partner will complete a “Subscription Sales Form” and send to Connected Business. It is important that all the client information such as company, contact, address, and email address are included on the completed Form. The Form will also include the amount of revenue share the Connected Business Partner will be paid on the fifth working day of the following month after Connected Business receives payment from the client. Only include the items and the pricing directly offered by Connected Business such as the Annual Software Subscription and Training. Do not include services offered directly from the Connected Business Channel Partner such as implementation, custom reports, consultations, business analysis, or any other services or products. Make sure all terms are very clear such as the beginning and ending dates of the subscription, initial pricing and subscription pricing the second year if different than the first year; and include renewal dates.

**Connected Business Response:** Connected Business will review the complete form and contact the Channel Partner to review the form. Any terms listed on the form that are not acceptable by Connected Business will be discussed. After the terms of the sale are agreeable both by the Channel Partner and Connected Business; Connected Business will send a quotation to the client based on the agreed terms.

**Connected Business Channel Partner Revenue Sharing:** Connected Business will pay the revenue share amount agreed on the “Subscription Sales Form” to the Connected Business Channel Partner by the fifth business day of the month following Connected Business receiving payment from the client. Every month Connected Business receives payments from a client; the Channel Partner will receive a monthly statement that includes all invoices with revenue share for each line item. The Channel Partner will receive the revenue share payment by the fifth working day of the month following the client payment to Connected Business.

The Revenue Share Statement will include all funds owed to that Partner. It includes all referral fees as described later in this document.

## Connected Business Partner Member Levels

Connected Business has three (3) different member levels based on a partner's sales activity and competency.

Requirements	Bronze	Silver	Gold
New Revenue Generated <sup>1</sup>	\$2,000 - \$14,999	\$15,000 - \$49,999	\$50,000+
New Revenue License Margin	40%	50%	50%
Renewal / Add-on Revenue License Margin <sup>2</sup>	30%	35%	40%
Support Revenue Margin	15%	15%	15%
Certified Sales Representative <sup>3</sup>	(1)	(1)	(2)
Certified Sales Engineer <sup>3</sup>		(1)	(1)
Certified Application Specialist <sup>3</sup>			(1)
Promote Connected Business on Website and Social Media	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[1] "New Revenue" is defined as the subscription license revenue associated with the initial entry of an end customer into a Connected Business Services Agreement. [2] "Renewal Revenue" is defined as the subscription license revenue associated with an end-customer renewing an existing Connected Business Services Agreement or Subscription License Agreement scheduled for expiration. "Add-on Revenue" is defined as the subscription license revenue associated with an end-customer under an existing Connected Business Services Agreement or Subscription License Agreement that adds additional services to their existing agreement. [3] One person may qualify for multiple roles.

Member status will be reviewed on a quarterly basis, allowing Solution Partners the opportunity to move to the next Member Level four (4) times a year, but the margin level will not be decreased within the calendar year giving the Solution Partners an entire year (or more) to maintain member status. Solution Partners must qualify annually for their member status. Renewal and Extended Term Renewal revenue does not qualify for tier achievement.

## Other Revenue Sharing Opportunities

### Referral Partner

When a Partner provides Connected Business with a Referral for a company that has expressed interest in the Connected Business Application; Connected Business will contact the referred company and pursue a sale directly or assign another Partner. If the process results in the sale of an Annual Connected Business Subscription; Connected Business will compensate the Referring Partner 15% of the annual subscription price for the first year. This cost for the referral fee will be deducted from the revenue sharing if the sale was completed by another Partner.

### Connected Business Subscription Pricing

Connected Business requires a support plan and the cost of the support plan is bundled into the Retail price. The breakout of the subscription price and support price are as follows;

### Connected Business Cloud Version (Monthly Plan)

Cloud Express Edition*	Subscription License	Support / Hosting	Retail Price
Base System – SAAS	\$0	\$299.99	\$299.99/mo
Remote Login (Add-On)	\$0	\$24.99	\$24.99/mo
eCommerce Live Chat Server	\$0	29.99	\$29.99/mo

\*Up to 5 Logins and 1,000 Orders /mo

Cloud Professional Edition*	Subscription License	Support / Hosting	Retail Price
Base System – SAAS	\$299.99	\$200.00	\$499.99/mo
Additional Login – Local Client	\$59.99	\$10	\$69.99/mo
Remote Login (Add-On)	\$0	\$24.99	\$24.99/mo
eCommerce Live Chat Server	\$0	29.99	\$29.99/mo

\*Up to 5 Logins and 5,000 Orders /mo

### Connected Business Cloud Version (Annual Plan)

Cloud Express Edition*	Subscription License	Support / Hosting	Retail Price
Base System – SAAS	\$0	\$2,999.99	\$2,999.99/yr
Remote Login (Add-On)	\$0	\$239.99	\$239.99/yr
eCommerce Live Chat Server	\$0	\$299.99	\$299.99/yr

\*Up to 5 Logins and 1,000 Orders /mo

Cloud Professional Edition*	Subscription License	Support / Hosting	Retail Price
Base System – SAAS	\$2,599.99	\$2,400.00	\$4,999.99/yr
Additional Login	\$608.00	\$100.00	\$708.00/yr
Remote Login (Add-On)	\$0	\$239.99	\$239.99/yr
eCommerce Live Chat Server	\$0	\$299.99	\$299.99/yr

\*Up to 5 Logins and 5,000 Orders/mo

Cloud Enterprise Edition*	Subscription License	Support / Hosting	Retail Price
Base System – Virtual Private Server	\$4,439.99	\$3,560.00	\$7,999.99/yr
Additional Login	\$608.00	\$100.00	\$708.00/yr
Remote Login (Add-On)	\$0	\$239.99	\$239.99/yr
eCommerce Live Chat Server	\$0	\$299.99	\$299.99/yr

\*Up to 5 Logins

### Connected Business On Premise Version (Paid Annually)

Professional Edition*	Subscription License	Support	Retail Price
Base System – On Premise	\$2799.99	\$1200	3999.99/yr
Additional Login	\$608.00	\$100.00	\$708.00/yr

\*Up to 5 Concurrent Logins

Enterprise Edition*	Subscription License	Support	Retail Price
Base System – On Premise	\$4439.99	\$1560	\$5,999.99/yr
Additional Login	\$608.00	\$100.00	\$708.00/yr
Multi-Location Accounting	\$2748	\$840	\$3,588/yr

\*Up to 5 Concurrent Logins

Enterprise Unlimited Edition	Subscription License	Support	Retail Price
Base System – On Premise	78%	22%	\$24,000 - \$48,000
Multi-Location Accounting	\$229	\$70	\$299/mo

For new sales; Channel Partner Revenue Sharing includes the “Member Level” % (based on Bronze, Silver, or Gold Competencies) of the Subscription License and 15% of the Support Cost and On-Line Training.

For renewal and add-on revenue margin; Channel Partner Revenue Sharing includes the “Member Level” % (based on Bronze, Silver, or Gold Competencies) of the Subscription Renewal Fee or Add-on Fee and 15% of the Support cost and On-Line Training.

### Connected Business Partner Benefits

Connected Business has three (3) different member levels based on a partner’s sales activity and competency. The Requirements for these member levels are as follows;

Benefits	Bronze	Silver	Gold
Access To Connected Business Partner Portal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Free Access To The Connected Business Online University	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Free Connected Business Perpetual License For Internal Usage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Free Connected Business Demo Licenses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Free Sales Assistance On Demos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Use Of The Connected Business Logos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Listing On Connected Business Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Free Connected Business Developer SDK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Free Connected Business Source Code			<input checked="" type="checkbox"/>

Eligible To Receive Connected Business Leads			<input checked="" type="checkbox"/>
Bonus Margin On Self-Generated Lead			5%
Discount On Developer Support	30%	40%	50%

## Marketing the Connected Business Solution

### **Channel Partner Expectations**

Each Solution Provider is expected to market the Connected Business Solution within their geographic area or vertical market expertise. Attending Industry Trade Shows, conducting email campaigns, joining appropriate Chamber of Commerce organizations, and conducting webinars are among the marketing efforts expected from Solution Providers. Connected Business is making major efforts to enhance the Connected Business Brand. Connected Business will provide each Solution Provider with the Introductory PowerPoint, PDF versions of brochures / catalogues, and logos/artwork for the Channel Partner Website.

### **Connected Business Marketing Support**

Connected Business is committed to working with all Certified Channel Partners. Connected Business will generate sales leads for Certified Solution Providers. The source of the leads will come from trade shows, third party partners and marketing campaigns. The leads will be qualified at a very basic level (interested in learning more about the Connected Business Solution including pricing). When a lead meets the very basic qualification; the contact information and notes are sent to Certified Channel Partners. Connected Business will continue to communicate with the Channel Partners working the lead. Connected Business expects the Channel Partner to advance the Lead through the Process defined in the On-line Channel Partner training. It is the responsibility of the Channel Partner to qualify the lead based on feature requirements, system requirements, budget, decision date, and other solutions the lead is considering. Connected Business will provide support to the Channel Partner through the Partner Channel in the Connected Business Collaboration Tool. It is critical that all Certified Channel Partners are registered in the Collaboration Tool and use the solution to post questions or help. All the development, support, and sales staff of Connected Business monitors the Collaboration Tool and responds to inquiries posted in the Partner Channel.

## CB Credits – Partner Affiliate Program

A Solution Provider may earn CB Credits by referring a new Solution Provider. The amount of the CB Credit is 25% of the Connected Business portion of the first year Annual Subscription. All sales that qualify for CB Credits must close within six months of the original Channel Partner referral. Once the CB Credits are earned; they may be applied to the subscription license portion of the Solution Provider's next sale provided the sale is closed within six months of the date in which the CB Credits were earned. For example: if you earned \$2,000 of CB Credits and you sold a system within six months; you would receive additional revenue share on that sale up to \$2,000 taken from the Connected Business share of the first year Annual Subscription Fee.

## Demonstration Environments

Demonstration downloads are available for Solution Partners and qualified prospects to promote the Connected Business solution. Cloud demonstration environments are available on fee basis. The fee for the cloud environment will be discounted.

## Technical Support

Our solution includes 24 hours / 5 days a week basic technical support. Solution Partners may submit and follow-up on support tickets in behalf of a customer that has an active support agreement with Connected Business. Details of our technical support policies are contained in our technical support brochure which can be downloaded at <http://support.connectedbusiness.com> or a successor URL designated by Connected Business.



connectedbusiness



### US Office

17412 Ventura Blvd #590  
Encino, CA 91316  
Phone: 310-734-4290

### UK Office

12A Altona Road East,  
Lisburn, Co. Antrim, BT27 5QB  
Phone: +44 (0) 28 9278 0600

[www.connectedbusiness.com](http://www.connectedbusiness.com)