IBM Software ValueNet

Business Partner Operations Guide

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This guide and updated versions will be posted on the IBM PartnerWorld® website. Please check the “Apply” tab on: http://www.ibm.com/partnerworld/swvaluenet, for the most current version of this guide

PREFACE

Welcome to the Operations Guide for the IBM Software ValueNet program. The purpose of this guide is to provide detailed guidance for Business Partners who are interested in applying for enrollment in this program, as well as to Business Partners who have already been approved as one or more of the Relationship Types that make up the Software ValueNet program.

The Software ValueNet program is designed to apply to one or more software portfolios, and each software portfolio may have different requirements for enrollment approval, and different benefits may be available for Business Partners who are approved for that portfolio. For that reason, this document is structured in two major parts. The first part of this document describes elements of the program that are common to all software portfolios. The second part of the document contains a section for each specific software portfolio that is a part of Software ValueNet, and these sections describe the features that are unique to that particular software portfolio.

Note: Some links listed in this document require PartnerWorld membership and signing in to PartnerWorld to access the information. You can access IBM PartnerWorld at: www.ibm.com/partnerworld.

SECTION 1 – PROGRAM ELEMENTS WHICH ARE COMMON TO ALL SOFTWARE VALUENET PORTFOLIOS

Program Overview and Requirements

Program Overview

IBM Software ValueNet is a Business Partner program that provides unique relationships with IBM Business Partners and is designed to reward Business Partners who invest in skills and high value solutions based on designated IBM software. IBM software products announced as participating in the IBM Software ValueNet program may only be sold by IBM Business Partners approved under the IBM Software ValueNet program. Approval is given at the software portfolio level, so Business Partners will only be able to sell software in the portfolios for which they have been approved. Business Partners must meet program and portfolio requirements and be formally approved through the IBM Software ValueNet application process. This provides the IBM business segment the opportunity to review the sales and technical capability of each Business Partner candidate. Access to technical support, web content, sales and technical enablement and software downloads is restricted to approved Business Partners. Resale will be via a two-tier distribution model for channel sales and Software ValueNet Business Partners will build upon Passport Advantage offerings for end-users.

Relationship Types

The Software ValueNet Relationship Types are:

Independent Software Vendors
Independent Software Vendors (ISVs) are software and platform vendors delivering after-market, independent software applications that complement one or more products in a Software ValueNet portfolio. As an Independent Software Vendor, you possess either adjacent technologies to the Software ValueNet portfolio, or add-on technologies that extend the Software ValueNet portfolio capabilities. You can showcase these integrated products and verify interoperability of the stack.

Services Provider
Services Providers deliver consultative and implementation professional services to customers, including installation, configuration, performance tuning, application development and customizations related to Software ValueNet portfolio products. As a Services Provider, you provide specialized domain, industry expertise or supply regional services to customers**.**

Value-Added Reseller
Value-Added Resellers (VARs) sell the Software ValueNet portfolio products either independently or with IBM direct sales. Value-Added Resellers invest the time and resources to train both qualified sales personnel and solution delivery specialists on Software ValueNet portfolio products. Whether selling independently or with IBM direct sales, Value-Added Resellers provide value in the sales cycles through the use of qualified, trained sales and technical resources. Value-Added Resellers must also be capable of providing the same professional services as a Services Provider.

Solution Provider
Solution Providers aim to increase and accelerate leads and revenue of IBM software by leveraging vertical or horizontal expertise to differentiate with specific and focused solutions to meet customer needs. Solution Providers create repeatable, market or industry segment focused solutions that are based on Software ValueNet portfolio products, yet add a significant amount of Solution Provider's intellectual property. The intellectual property of the Solution Provider is not

sold independently, and Solution Providers do not market and sell their own software, but rather a pre-built application with IBM software as the foundation.

The Software ValueNet requirements may vary by Relationship Type and/or by portfolio. A particular Relationship Type may not be available for all Software ValueNet portfolios. Section 1 of this document defines the participation requirements and how to demonstrate that they are met. Section 2 identifies which Relationship Types are offered for each portfolio, which requirements apply to each portfolio by Relationship Type, and any portfolio unique requirements.

Program Definitions

Mutually Exclusive Programs

You are not eligible to participate in any other programs which entitle you or your distributor to receive on your behalf, specific discount levels on the same software as that included in your approved Software ValueNet portfolio(s). The excluded programs include, but are not limited to, the following:

- IBM Business Partner Agreement - Distributor Attachment for Workstation Software
- Programs established by companies acquired by IBM which have been transferred to IBM (exceptions may be listed in the Portfolio specific sections of this document)

The sole exceptions to this exclusion are OEM agreements which your company executes with IBM and the IBM Value Advantage Plus program.

In addition, programs which provide fee payments for the same software which is contained in approved Software ValueNet portfolio(s) are mutually exclusive with the Software ValueNet program. The excluded programs include, but are not limited to, the following:

- Global Systems Integrator Alliance Agreements (Local country contracts)
- Programs established by companies acquired by IBM which have been transferred to IBM (exceptions may be listed in the Portfolio specific sections of this document)

The sole exception to this exclusion is the IBM Software Value Incentive Program, which is complementary to Software ValueNet.

If any part of the Business Partner's Enterprise is participating in any of these excluded programs or offerings, for the same software which is contained in approved Software ValueNet portfolio(s), the Business Partner is not eligible for Software ValueNet.

When Business Partners are participating in one of these mutually exclusive programs or offerings and they have already been approved to participate in Software ValueNet they must notify IBM of the conflict with applicable approved software portfolio(s) by sending an e-mail to: "SVNET@us.ibm.com". Failure to notify IBM of your participation in one of these mutually exclusive programs is grounds for termination from Software ValueNet.

Eligible Program Portfolios

Eligible Software ValueNet program portfolios are listed on the IBM PartnerWorld® website, in the Software ValueNet section. See www.ibm.com/partnerworld/swvaluenet for further information.

Eligible Products

Eligible Products are limited to the products in the approved Software ValueNet portfolio(s) and that are ordered under the Passport Advantage program, either Passport Advantage or Passport Advantage Express, and that IBM has designated as “New License” part numbers.

New License part numbers are part numbers in the IBM Distributed Software Price Book with one of the following Part Types:

License + SW Subscription & Support

Trade Up License + SW Subscription & Support

Initial Fixed Term License + SW Subscription & Support

Subsequent Fixed Term License + SW Subscription & Support

On/Off Capacity on Demand

Note: Renewal part numbers are not eligible for IBM Software ValueNet.

In addition, your eligibility is limited to the products which are part of the Software ValueNet portfolio(s) for which you are approved. You may check the portfolio to which a specific Passport Advantage part number belongs in the distributed software pricebook which is one of the Passport Advantage online tools; see Appendix “Passport Advantage Overview and Reference” for further information.

Important Note: Some products have a Dual Pipe distribution method; that is, they can be ordered via either Passport Advantage or Entitled Software (ESW). Products fulfilled via ESW or any other vehicles other than Passport Advantage are not eligible for Software ValueNet.

For example:

IBM TotalStorage Storage Area Network (SAN) Volume Controller Software Terabyte (1-12) License + SW Subscription & Support 12 Months can be ordered two different ways:
a.) Via ESW as Program Identification (PID) Number 5639-VC3 Feature Code 3725
b.) Via Passport Advantage as Part Number D5579LL
An order for this product placed via ESW (5639-VC3 Feature Code 3725) would not be eligible for Software ValueNet.

Eligible Transactions for Resale

Eligible transactions are transactions placed through your preferred distributor, in the country(ies) in which you are approved for the Software ValueNet program portfolio. These transactions must be placed through the reseller customer number which you are given at the time of your IBM Software ValueNet application approval

Participation in the IBM Software ValueNet program does not exclude a Business Partner from other business-as-usual reselling activities for products available under IBM Passport Advantage or IBM Passport Advantage Express and not in Software ValueNet (open distribution products). The Business Partner may continue to participate in any of the following and earn basic discounts for open distribution products:

- Resell any IBM Passport Advantage or IBM Passport Advantage Express product in open distribution products
- Resell any open distribution product into any customer set.
- Offer Passport Advantage volume licensing through a Distributor of their choice to any customer for open distribution products.

- Resell subscription and support renewal business for open distribution products.

Responsibilities to an End User

Your responsibilities to End Users are documented in the applicable agreements you have/will have in place with IBM..

License Terms

The license terms for Software ValueNet Programs are contained in the License Documents located at http://www-03.ibm.com/software/sla/sladb.nsf, and your responsibilities with respect to those terms are documented in the applicable agreement(s) you have/will have in place with IBM.

Minimum Annual Attainment

Your minimum annual revenue attainment is set for each individual Software ValueNet portfolio for which you have been approved. Portfolio specific minimum annual revenue attainment amounts are given in Section 2 of this document.

Your performance against this minimum annual revenue attainment will be evaluated at the anniversary of your IBM Software ValueNet contract. The assessment period and amount that you will be assessed against are shown in the following table.

Elapsed Time since portfolio approval	Assessment period	% of Minimum Annual Attainment
12 months or more	Prior 12 months	100%
Greater than 6 months, less than 12 months	Elapsed time since portfolio approval	50%
6 months or less	Not Applicable	Not Applicable

Your eligible attainment for the portfolio is comprised of the following achieved during your assessment period:

1. The approximated Suggested Volume Price or approximated Suggested Retail Price of your eligible transactions for resale for the portfolio
2. The approximated Suggested Volume Price or approximated Suggested Retail Price of your Software Value Incentive opportunities for this portfolio for which you were approved for payment

Eligible attainment will be converted to US Dollars using the exchange rates current at the time of measurement.

Relationships with Other Programs

IBM Software ValueNet Business Partners are encouraged to take part in other IBM channel programs which are not mutually exclusive with IBM Software ValueNet. In some cases, these programs may not support Software ValueNet portfolios, details are provided in Section 2.

Software Value Incentive (SVI) is an IBM program designed to reward Business Partners for the value that they contribute across different phases of a sale of IBM distributed middleware licenses. SVI allows IBM Business Partners participating in the Identify and Sell phases to earn a fee payment (paid directly to the IBM Business Partner) for demonstrating a contribution in these phases. These fee payments are independent of any discounts and rebates earned by Business Partners participating in the fulfillment phase (paid through their Value Add Distributor). For further information, reference www.ibm.com/partnerworld/softwarevalueincentive.

Software Value Incentive may not include all Software ValueNet portfolios. Refer to the Software Value Incentive eligible product list and Operations Guide for eligible products and applicable criteria.

Value Advantage Plus is an IBM initiative designed to financially reward Business Partners who deliver solutions through applications and/or services. If these solutions are built around or designed to operate on IBM Software, they may be approved and qualify for financial incentives for the specific IBM software when it is sold by the Business Partner as part of their solution. For further details, check the IBM PartnerWorld® web site under the categories Selling Resources, Sales Incentives and Promotions, Value Advantage Plus. For further information, reference www.ibm.com/partnerworld/valueadvantageplus .

Eligibility for participation in Value Advantage Plus varies by Software ValueNet portfolio; see Section 2 for further information.

Refer to the IBM PartnerWorld website for other programs that may be interest to you, see www.ibm.com/partnerworld.

Application and Contract

IBM PartnerWorld

The first step in applying to become an IBM Software ValueNet Business Partner is to become a member of IBM PartnerWorld. The IBM PartnerWorld web site address is www.ibm.com/partnerworld . You must become a member of IBM PartnerWorld in every country in which you plan to apply for Software ValueNet and must maintain your PartnerWorld country membership in order to remain in the Software ValueNet program. Termination from PartnerWorld is considered breach of your Software ValueNet contract.

How to Apply for IBM Software ValueNet

Applications to IBM Software ValueNet must be made for every country in which you wish to conduct business under the IBM Software ValueNet terms and conditions. If approved, you will be asked to execute a separate IBM Software ValueNet contract for each applicable country. You must have a physical location in each country in which you apply.

The application form for IBM Software ValueNet may be found on the "Apply" tab of the website at www.ibm.com/partnerworld/swvaluenet. Instructions on where the form should be returned are provided at the same location. You select the Relationship Type(s) and specific Software ValueNet portfolios for which you are applying on the application. You will be asked to designate your preferred distributor on the application form. The website will also have a link to the list of IBM Value-add Distributors (VAD).

Application Process and Contract Acceptance

After you submit your application, each requested Relationship Type and Software ValueNet portfolio combination will be reviewed. The review will ensure that you have met all of the requirements for that Relationship Type and Software ValueNet portfolio combination, which are summarized by portfolio in Section 2 of this document. Further definition of how you will be expected to demonstrate that you have met the requirements is provided in "Participation Criteria".

When review of Participation Criteria is completed, you will be notified if you have met such criteria. Our objective is to respond with our decision within 30 calendar days after the receipt of all required information. If you have not met the criteria, you must wait at least 90 calendar days after receiving our decision before resubmitting your application. If you do meet the criteria, and if you do not already have an effective IBM Software ValueNet agreement, you will be sent the IBM Software ValueNet agreement for your signature. The address to which the executed agreement should be returned will be provided when it is sent to you.

The agreement becomes effective upon IBM acceptance. If you have been approved for either a Value-Added Reseller or Solution Provider relationship, you will be notified on what date you may begin to place orders with your preferred distributor.

If you meet the program requirements, and you have not purchased the IBM Value Package within the last year, you are encouraged to purchase the IBM Value Package. This is an important step to obtain access to software downloads and other benefits which are specific to your approved portfolio. See the Section in this document entitled "IBM Value Package" for further information on how to do this.

When IBM has confirmed that the IBM Software ValueNet agreement has been fully executed and that you have purchased the IBM Value Package within the last year, your access to the Value Package portfolio specific benefits will be enabled, and you will receive notification of how to access these benefits.

In addition, when IBM has confirmed that the IBM Software ValueNet agreement has been fully executed, you will be told the reseller customer number which you must supply to your distributor to use for all sales orders which include Software ValueNet software. This reseller customer number will not vary by Software ValueNet portfolio, so once approved for one portfolio, the same reseller customer number will apply to all others for which you may be approved.

Participation Criteria

The following are the criteria to be approved and to remain in the Software ValueNet program. Not all participation criteria apply to all relationship types; see Section 2 for further detail and any variances for your specific portfolio and Relationship Type**.**

Completed Application Form

For IBM to ensure the most qualified Business Partners are approved to participate in Software ValueNet, IBM requires proof of the Business Partner's qualification.

How Measured: Required information, as specified in the application the form, must be provided.

Time Frame When Required: At time of application submission.

Completed Revalidation Form

For IBM to ensure only the most qualified Business Partners continue to participate in Software ValueNet, revalidation of key requirements is required at each annual review

How Measured: Required information, as specified on the revalidation form, must be provided.

Time Frame When Required: Each annual review.

Signed Contract (per country)

Business Partners must hold a fully executed Software ValueNet agreement for each country in which they wish to participate.

How Measured: IBM receives and executes the IBM Business Partner Agreement for Software ValueNet.

Time Frame When Required: Prior to acceptance and then ongoing

IBM PartnerWorld Membership

Business Partners must register their company in IBM PartnerWorld in each country in which they wish to participate.

How Measured: You have an IBM PartnerWorld country enterprise ID for each country.

Time Frame When Required: At time of application submission and then ongoing

Approved Business Plan

A business plan is a recognized management tool that outlines exactly what your company will do and how it plans to succeed. Business Partners must submit for approval, and keep current, a business plan consistent with the template issued and maintained by IBM. Your business plan must also demonstrate that your business model is substantially aligned with the Relationship type (as defined in Program Overview and Requirements) for which you are applying. In addition, your business plan must demonstrate how you maintain resources and/or a process capable of generating sale opportunities.

How Measured: You must document the elements of your business plan in the template which can be found on the "Apply" tab on the website at http://www.ibm.com/partnerworld/swvaluenet. The business plan must be approved by IBM.

Items included:

- The products in the portfolio(s) that will be your primary or secondary focus
- The geographies and territories in which you plan to operate
- The market segments and industries within which you plan to engage
- Your methods to generate business opportunities
- Your sales projections for the portfolio
- Your sales and technical resource plans

Time Frame When Required: At time of application submission and then ongoing

Certified Technical Resources

IBM technical certification establishes an industry standard benchmark and validation of technical competence for professionals working with IBM technology, and provides a way for professionals to demonstrate their competence in a competitive marketplace. To ensure your qualifications, you are required to demonstrate that you have employees that hold IBM technical certifications for the portfolio in the country enterprise in which you have an agreement.

How Measured: The certifications must be registered to your employees in your IBM PartnerWorld® profile and count toward IBM PartnerWorld® membership levels. Each portfolio will provide information of which IBM Technical certifications are acceptable. See the "Apply" tab on the website at http://www.ibm.com/partnerworld/swvaluenet for the list of eligible certifications by portfolio.
***Note:** Proof of valid certifications outside of PartnerWorld® may be accepted for Business Partners for some Software ValueNet portfolios; see Section 2.

Time Frame When Required: At time of application submission and then ongoing

Customer References

References attest to the quality of your implementation, and/or product. References must be from customers for whom you have worked within the past two years.

How Measured: You will need to provide the following information about reference customers:

- Company name
- Country of the reference

- Contact name
- Email address of contact
- Telephone number for contact purposes
- Reference activity (i.e. describe the activity at the reference account which utilizes your solution – this is optional but beneficial)

Your reference customers will be contacted by the Software ValueNet operations staff, and they will be asked to describe your activities and to confirm your value add. For Solution Providers, references must also attest to your solution focus, repeatable assets and successful solution deployment.

Time Frame When Required: By first annual review and then ongoing

Available Sales Demonstration

For each portfolio, you must demonstrate that you have a sales demonstration available and visible to engage prospective customers. Solutions Providers must further be able to demonstrate their value-add or intellectual property that leverages IBM software.

How Measured: You will be asked to provide a copy of the demonstration or documentation for the demonstration.

Time Frame When Required: By first annual review and then ongoing

Preferred Distributor

Business Partners that fulfill orders must select an IBM software distributor (Preferred Distributor).

How Measured: You will be asked to provide the name of your Preferred Distributor in your application form for each country in which you are applying.

Time Frame When Required: Prior to acceptance and then ongoing

Net New Leads

To ensure our joint success and demonstrate complementary market coverage, you must demonstrate that you have net new, qualified sales opportunities.

How Measured: Registered opportunities in Global Partner Portal with a sales stage of 04 – 'Validated/Qualifying' that you are still pursuing and which were identified within the twelve (12) months prior to your anniversary date. For more information about Global Partner Portal, sign on to IBM PartnerWorld at www.ibm.com/partnerworld, select "Sales" and then "Sales Cycle Resources" from the left sidebar, and then scroll down to the "Leads and Opportunities" section of the resulting webpage, and select "Opportunity Management".

Time Frame to When Required: By first annual review and then ongoing

Minimum Annual Attainment

Minimum annual revenue attainment demonstrates your commitment to success in the marketplace. Minimum annual revenue attainment amounts for each portfolio are listed in Section 2 of this document.

How Measured: Your eligible attainment for the portfolio is comprised of the following achieved during your assessment period. IBM will pull from its systems the revenue for the following transactions and compare it against your minimum annual attainment.

1. The approximated Suggested Volume Price or approximated Suggested Retail Price of your eligible transactions for resale for the portfolio
2. The approximated Suggested Volume Price or approximated Suggested Retail Price of your Software Value Incentive opportunities for this portfolio for which you were approved for payment

Eligible attainment will be converted to US Dollars using the exchange rates current at the time of measurement.

Time Frame When Required: By first annual review and then ongoing**.**

Trained Sales Resources

To ensure your qualifications, you are required to demonstrate that you have employees that have successfully passed sales mastery tests for the portfolio and in each country in which you have an agreement. (As an additional consideration, the number of trained sales resources you have on staff at any one time should be driven by the business plan you review with your IBM contact.)

How Measured: The sales mastery completions must be registered to your employees in your IBM PartnerWorld® profile and count toward IBM PartnerWorld® membership levels. Each portfolio will provide information of which IBM sales mastery tests are acceptable. See the "Apply" tab on the website at http://www.ibm.com/partnerworld/swvaluenet for the list of eligible sales mastery tests by portfolio.
***Note:** Proof of valid sales training outside of PartnerWorld® may be accepted for Business Partners from acquired companies that are in transition and do not have sales mastery tests integrated into PartnerWorld®.

Time Frame When Required: At time of application submission and then ongoing

Branded or Market Identifiable Offering

You must demonstrate that your solution is represented and sold in the market as a packaged offering, complete with a product name that is branded or market identifiable and different than your portfolio software product name.

How Measured: External marketing materials or website content that clearly describes your solution with specific reference to requiring one or more product(s) from the portfolio for which you are applying. Marketing materials or website must include your company name and/or logo. In addition, your materials must indicate you resell the products in the portfolio in conjunction with your solution.

Time Frame When Required: At time of application submission and then ongoing

Specific Target Market

The solution you have developed must have a clear focus on solving a specific problem or problems, either in a specific vertical industry or market segment such as retail or finance, or in a defined horizontal segment such as security or system management, or in a defined line of business such as human resources or sales.

How Measured: External marketing materials or website content that clearly describes your solution with specific reference to your target market and or segment.

Time Frame When Required: At time of application submission and then ongoing

Demonstrable and Repeatable Solution Assets

Your branded or market identifiable offering contains pre-build assets requiring the use of the portfolio software, providing repeatability. Examples of pre-built assets include models, reports, scorecards, analytical applications, or extract and load scripts and industry-specific solutions or vertical solutions.

How Measured: External marketing materials or website content that clearly describes your solution with specific descriptions of the pre-build assets.

Time Frame When Required: At time of application submission and then ongoing

Services Deployment Methodology

The deployment of your solution or service offering into your target market or industry segment is guided by a defined and documented implementation methodology or specification.

How Measured: Copy of the documented services methodology for your solution.

Time Frame When Required: At time of application submission and then ongoing

Solution Support

In addition to the standard upgrades and support provided by IBM for IBM software, you have a documented process and resources to provide your customers with ongoing support of your solution, as built using IBM software.

How Measured: Copy of the documented process for your solution's upgrade and support.

Time Frame When Required: At time of application submission and then ongoing

ADDITIONAL NOTES:

Value Add Requirements for Each Transaction

It is expected that you will act in a value add role in selling and implementing Software ValueNet software. IBM reserves the right to review your available documentation of any specific transaction in order to verify that this is the case. Examples of documents that can show proof of value add include, but are not limited to, proposals for solutions, statements of work, proof of concept, architectural studies, and implementation plans. If IBM determines that you are not acting in the intended role, we reserve the right to terminate you from Software ValueNet or take other appropriate action.

Eligible Programs for Software ValueNet Portfolios

You may obtain a list of all Passport Advantage part numbers which belong to your specific portfolio(s) from the Passport Advantage Online tool; see Appendix “Passport Advantage Overview and Reference” for further information.

Relationship Types

Definitions of the Software ValueNet Business Relationship Types are given immediately after the Overview at the start of this document.

IBM Value Package

To obtain further information about the benefits of and directions for purchasing the IBM Value Package, access the following link on the IBM PartnerWorld® website: www.ibm.com/partnerworld/valuepack.

The IBM Value Package is purchased for use within a single country. If you decide to purchase an IBM Value Package you only need to purchase one IBM Value Package for all Software ValueNet portfolios for which you are approved in that country. This package needs to be renewed annually to sustain access to the benefits of your approved Software ValueNet portfolios. Refer to Section 2 for portfolio specific benefits which require the purchase of an IBM Value Package.

Annual Revalidation

The annual revalidation process for all software portfolios for which you have been approved for six months or more is performed at the anniversary of your Software ValueNet agreement. You are responsible for submitting a revalidation application with current information for each portfolio on or before your anniversary date. The elements which will be requested in your revalidation application and are revalidated by IBM for each portfolio are summarized in Section 2.

If you do not achieve your minimum annual attainment, or if one of the other portfolio revalidation elements for your Relationship Type is not met, then you are placed on probation. The probation period ends six months after your anniversary date. During that time, you will be expected to meet all revalidation elements in which you were previously deficient. If you failed to meet your minimum annual attainment, then you will need to meet 50% of your minimum annual attainment during the probationary period. If you fail to do either of those things, your approval for Software ValueNet will be terminated for the portfolio in question at the end of probationary period. You may not reapply for approval for the same portfolio and Relationship Type until 90 days have elapsed after you are notified of this portfolio specific termination under the Software ValueNet program

Contract Termination

If at any point approval is terminated for the last or only Software ValueNet portfolio for which you have been approved, then your Software ValueNet contract will be terminated in accordance with the contract terms. If your contract is terminated for breach of contract (as opposed to failure to meet participation criteria) you may not reapply for Software ValueNet for a period of one year from date of termination.

SECTION 2 – PROGRAM ELEMENTS WHICH VARY BY SOFTWARE VALUENET PORTFOLIO

IBM Cognos Portfolio

Cognos Portfolio Participation Criteria

Participation Criteria / Checks	Minimum Participation Criteria Required by Relationship Type				Time Frame When Required	Verified at Enrollment	Verified at Annual Review
	Independent Software Vendor	**Services Provider**	**Value-Added Reseller**	**Solution Provider**			
Completed Application Form	▪	▪	▪	▪	At Time of Application Submission	Yes	
Completed Revalidation Form	▪	▪	▪	▪	Each Annual Review		Yes
Signed Contract (per country)	▪	▪	▪	▪	Prior to Acceptance and then Ongoing	Prior to Approval	
IBM PartnerWorld Membership	▪	▪	▪	▪	At Time of Application Submission and then Ongoing	Yes	Yes
Approved Business Plan	▪	▪	▪	▪	At Time of Application Submission and then Ongoing	Yes	Yes
Certified Technical Resources	2 (see below)	2 (see below)	2 (see below)	2 (see below)	At Time of Application Submission and then Ongoing	Yes	Yes
Customer References	3	3	3	3	By First Annual Review and then Ongoing		Yes (only First Annual Review)
Available Sales Demo	1 per offering		1 per product represented	1 per solution	By First Annual Review and then Ongoing		Yes (only First Annual Review)
Preferred Distributor			▪	▪	Prior to Acceptance and then Ongoing	Yes	
Net New Leads			3 (see below)	3 (see below)	By First Annual Review and then Ongoing		Yes
Minimum Annual Attainment			specified in MAA table	specified in MAA table	By First Annual Review and then Ongoing		Yes
Trained Sales Resources			Minimum of 1 (see below)	Minimum of 1 (see below	At Time of Application Submission	Yes	Yes

					and then Ongoing		
Branded or Market Identifiable Offering				per solution	At Time of Application Submission and then for each new solution	Yes	
Specific Target Market				per solution	At Time of Application Submission and then for each new solution	Yes	
Demonstrable and Repeatable Solution Assets				per solution	At Time of Application Submission and then for each new solution	Yes	
Services Deployment Methodology				per solution	At Time of Application Submission and then for each new solution	Yes	
Solution Support				per solution	At Time of Application Submission and then for each new solution	Yes	

Eligible Relationship Types

Independent Software Vendor, Services Provider, Value-Added Reseller and Solution Provider are eligible Relationship Types for the Software ValueNet portfolio of Cognos.

Approved Business Plan – Cognos Specific Criteria

You must clearly specify in your approved business plan which products in the IBM Cognos software portfolio you wish to represent in the market. IBM Cognos product choices include; Cognos Business Intelligence, Cognos Planning, Cognos Controller, Cognos TM1 and Cognos Analytical Applications.

The business plan must be presented using the template for Cognos which is given on the "Apply" tab on the Software ValueNet website, http://www.ibm.com/partnerworld/swvaluenet.

Technical Certifications – Cognos Specific Criteria

How Measured: You must demonstrate that you have achieved, within your organization, two (2) or more different certifications from the list of qualifying certifications for the IBM Cognos portfolio. These certifications may be held by a single individual, or multiple individuals, and these individuals must be employees of your company, and must appear in your PartnerWorld profile. Note: If multiple individuals achieve the same certification then that only counts as one (1) certification for the purpose of determining eligibility for Software ValueNet.

The list of qualifying certifications for the IBM Cognos portfolio is available on the “Apply” tab on the Software ValueNet website, http://www.ibm.com/partnerworld/swvaluenet"

To facilitate quality pre-sales and post-sales service, and ultimately customer satisfaction, it is expected and recommended, but not mandatory, that you have certified technical resources in all the IBM Cognos software products that you most commonly represent in the market.

Time Frame When Required: At time of application submission and then ongoing.

Trained Sales Resources – Cognos Specific Criteria

How Measured: IBM Cognos requires you have a minimum of one (1) trained sales resource at the time that you submit your application for Software ValueNet. At the time of your annual review, this requirement will be that you must have the greater of either one (1) trained sales resource, or a trained sales resource for every USD 1M of annual attainment as measured by IBM against your minimum annual attainment for the prior year.

Your IBM PartnerWorld® profile will be reviewed to determine the number qualifying sales mastery completions registered to your employees. A list of the qualifying training modules/tests is available on the “Apply” tab on the Software ValueNet website, http://www.ibm.com/partnerworld/swvaluenet.

Time Frame When Required: Prior to acceptance and then ongoing

Net New Leads – Cognos Specific Criteria

How Measured: A minimum of three (3) opportunities in either SaleForce.com (SFDC), Siebel or Global Partner Portal (GPP), registered by you or by your Partner Manager on your behalf that meet the following criteria:

1. Have a sales stage of 04 –‘Validated/Qualifying’
2. Identified within the twelve (12) months prior to your anniversary date
3. Were found independently by you, and are incremental to IBM (not IBM generated and not IBM direct sales leads)

Time Frame When Required: By first annual review and then ongoing

Cognos Minimum Annual Attainment

Group	Region	Countries	Annual Revenue Commit (USD)	
			Value Added Reseller (Resell)	Solution Partner (Co-sell/Resell)
1	Americas	USA	$50k	$100k
2	Americas EMEA APJ	Canada European Economic Area (EEA) All countries	$20k	$50k
3	Americas EMEA	All of Latin America Outside of European Economic Area	$10k	$25k
4	All other countries		$10k	$25k

Cognos Portfolio Benefits

Cognos Portfolio Benefits List

	Independent Software Vendor	**Services Provider**	**Value-Added Reseller**	**Solution Provider**
Sales Benefits				
Sales Enablement	•	•	•	•
SVI Eligible (Co-sell)	•	•	•	•
Software Access	***VP**	***VP**	***VP**	***VP**
Access to Exclusive and Custom Web Content	***VP**	***VP**	***VP**	***VP**
Business Partner Manager (see Note 1)	•	•	•	•
Resell Discounts			•	•
Marketing Benefits				
Exclusive Partner Communications	•	•	•	•
Partner Playbook	•	•	•	•
Partner Summit	•	•	•	•
Powered by IBM Cognos	•	•	•	•
IBM PartnerWorld® Benefits and Membership	•	•	•	•
Technical Benefits				
Customer Support	***VP**	***VP**	***VP**	***VP**
Cognos Training	***VP**	***VP**	***VP**	***VP**
Certification	•	•	•	•
IBM Cognos Innovation Center	•	•	•	•

***VP = some or all of these benefits are contingent on the purchase of IBM PartnerWorld® Value Package**

Note 1: At IBM discretion

Cognos Sales Benefits

Sales Enablement

IBM provides numerous ways for you to gain confidence and expertise in representing IBM Cognos software in the marketplace. Specific programs and resources are available to give you the information and tools you need to reinforce and grow your sales and pre-sales proficiencies. Self-paced materials provide information for you to continue to build your knowledge and expertise with Cognos. Regional sales training events, offered through local channels teams as demand requires, can be made available to further develop and support your knowledge of product and solution positioning. Exclusive webinars for Business Partner sales and pre-sales personnel are held monthly, updating you on current topics. Annual events provide you with valuable sales, pre-sales, and product knowledge to keep up to date with IBM Cognos innovations and technology.

Software Value Incentive Eligible

IBM's Software Value Incentive (SVI) is an innovative incentive and rewards program for IBM Business Partners. SVI is designed to reward you for the role you play and the value your business brings when selling in conjunction with IBM direct sales ("co-sell"). SVI is a global, auditable program based on extensive market research from over 250 Business Partners around the world. There are three key factors that make SVI so significant:

- Designed to reward value through the sales cycle
- Protects Business Partner contribution using a secure web-based opportunity registration system
- Simpler structure and speedy payments making it easier to do business with IBM

Software ValueNet Business Partners who are approved for the Cognos portfolio may enroll in SVI, register SVI opportunities, and potentially earn SVI fees in the event that the opportunity is fulfilled by the direct IBM sales team. SVI fees will not be paid on sales of IBM Cognos software which are fulfilled by a Business Partner.

Software Access (Available with Value Package)

Software access allows IBM Software ValueNet Business Partners to download IBM software for purposes of demonstration, evaluation, development and testing.

Access to Exclusive and Custom Web Content (Available with Value Package)

You will receive access to a secure website that provides access to information and materials related to IBM Cognos products, marketing, sales, technical support, self-paced web-based training and important Business Partner communications.

Business Partner Manager

The Business Partner Manager is responsible for assisting you in driving success through the implementation and execution of a business plan that encompasses all areas of the joint business and engagement areas. The Business Partner Manager will also be your focal point in developing the necessary sales relationships critical to your success. In addition, your Business Partner Manager can help you obtain visibility into the IBM Cognos direct sales process to ensure understanding of field activities and how to work with IBM sales teams. The Business Partner Manager is provided at IBM's discretion.

Resell Discount

As a Value-Added Reseller or Solution Provider you are entitled to resell IBM Cognos Software, and provided with competitive discounts off of list price to help you grow your business.

Cognos Marketing Benefits

Partner Communications

Business Partners will be kept up-to-date with relevant information through a variety of communication vehicles. You will receive Business Partner Updates which contain information on new product releases, events and training, and Partner Newsletter which gives you a snapshot of the issues that relate to you as Business Partners.

Partner Playbook
As an IBM Software ValueNet Business Partner you will receive the IBM Cognos Partner Playbook. The IBM Cognos Partner Playbook serves as a sales enablement and education tool for the Business Partner community providing valuable information on Business Partner successes, product and solution updates, support, training, and marketing opportunities.

Partner Summit
Invitation to the annual IBM Cognos Partner Summit provides Business Partners with valuable sales, pre-sales, and product knowledge and training, including the latest updates on product and positioning, which are communicated in detailed training tracks.

Powered by IBM Cognos Software
Powered by IBM Cognos Software is a program for Business Partners who develop and deliver performance management solutions that combine Cognos technology with their deep domain expertise. Members of this program deliver solutions that focus on key business areas including industry groups, enterprise performance, and system infrastructure, all with the objective of enabling and engaging their customers worldwide to better manage company performance.

Powered by IBM Cognos Software offers greater market opportunity and exposure to Business Partners that develop, market, and sell solutions based on Cognos technology. Customers that adopt Powered by IBM Cognos Software solutions know that they are based on best practices and proven technologies designed to improve corporate and operational performance at leading organizations in their industry.

IBM PartnerWorld Benefits and Membership
PartnerWorld is the IBM Business Partner program providing benefits to help IBM Business Partners succeed globally. We encourage you to leverage the benefits of the PartnerWorld program and join today for IBM's many offerings. Starting in January 2009, we will also leverage many aspects of the PartnerWorld infrastructure and processes, which means that all Business Partners will need to register for PartnerWorld membership as an initial step to partnering strategically with Cognos, as a part of IBM. Utilize PartnerWorld's tools and resources to get your products and solutions to market faster, decrease the sales cycle, and win more profitable business.

Cognos Technical Benefits

IBM Cognos Customer Support (Available with Value Package)
As an IBM Software ValueNet Business Partner you have access to IBM Cognos Customer Support, including Technotes, a rich library of product information, Information Centers and Assisted Support via telephone or internet to resolve product issues.

IBM Cognos Training
As an IBM Business Partner, you are eligible for discounts on IBM public classroom and instructor-led online courses, technical conferences, and Cognos Certification Self-study packages enabling your organization to expand expertise in IBM Cognos products and solutions. The Self-Study packages are exclusive to IBM Business Partners. With the purchase of the IBM Value Package, you will also receive access to self-paced, web-based training delivered to your desktop and available when you need it in.

IBM Cognos Certification

The IBM Cognos Certification program establishes an industry standard benchmark and validation of technical competence for professionals working with IBM Cognos technology. The program provides a way for professionals to demonstrate their competence in a competitive marketplace, empowering businesses to leverage their performance management solutions from IBM Cognos with confidence. IBM Cognos Certification is the only authorized accreditation in the industry for benchmarking and validating IBM Cognos expertise.

To help prepare for certification, available exclusively to Business Partners are IBM Cognos Certification Self Study Packages. This offer includes student guides from the public classroom courses, set up instructions for workshops, a supplemental CD with the IBM Cognos 8 product documentation and a full text search engine to help you locate specific learning content.

IBM Cognos Innovation Center

The IBM Cognos Innovation Center is a forum and a resource center, dedicated to the understanding, adoption, and implementation of next-generation performance management practices. Dedicated to the advancement of technology-enabled performance management, the IBM Cognos Innovation Center is a strategic resource for organizations seeking to improve decision-making and operational effectiveness. The IBM Cognos Innovation Center offers its services, assets and thought leadership at no cost to the IBM Software ValueNet Business Partners to best enable success leveraging Cognos Solutions around an organization's performance management vision.

Value Advantage Plus – Cognos

The Cognos portfolio does not participate in the Value Advantage Plus initiative. e.g.(Value Advantage Plus Solutions are not available for Cognos portfolio software).

IBM Optim Portfolio

Optim Portfolio Participation Criteria

	Minimum Participation Criteria Required by Relationship Type					
	ISV	**Value-Added Reseller**	**Solution Provider**	**Time Frame When Required**	**Verified at Enrollment**	**Verified at Annual Review**
Completed Application Form	▪	▪	▪	At Time of Application Submission	Yes	
Completed Revalidation Form	▪	▪	▪	Each Annual Review		Yes
Signed Contract (per country)	▪	▪	▪	Prior to Acceptance and then Ongoing	Prior to Approval	
IBM PartnerWorld Membership	▪	▪	▪	At Time of Application Submission	Yes	Yes

				and then Ongoing		
Approved Business Plan	▪	▪	▪	At Time of Application Submission and then Ongoing	Yes	Yes
Certified Technical Resources	2 (see below)	2 (see below)	2 (see below)	At Time of Application Submission and then Ongoing	Yes	Yes
Customer References in Year 2	2	3	3	By First Annual Review and then Ongoing		Yes (only First Annual Review)
Available Sales Demo	1 per product represented	1 per product represented	1 per solution	By First Annual Review and then Ongoing		Yes (only First Annual Review)
Preferred Distributor		▪	▪	Prior to Acceptance and then Ongoing	Yes	
Net New Leads	6 annually (see below)	12 annually (see below)	12 annually (see below)	By First Annual Review and then Ongoing		Yes
Minimum Annual Attainment	specified in MAA table	specified in MAA table	specified in MAA table	By First Annual Review and then Ongoing		Yes
Trained Sales Resources	Minimum of 1 (see below)	Minimum of 1 (see below)	Minimum of 1 (see below)	At Time of Application Submission and then Ongoing	Yes	Yes
Branded or Market Identifiable Offering			per solution	At Time of Application Submission and then for each new solution	Yes	
Specific Target Market	Yes	Yes	per solution	At Time of Application Submission and then for each new solution	Yes	
Demonstrable and Repeatable Solution Assets	Yes		per solution	At Time of Application Submission and then for each new solution	Yes	
Services Deployment Methodology		Yes	per solution	At Time of Application Submission and then for each new	Yes	

			solution		
Solution Support	per solution	per solution	At Time of Application Submission and then for each new solution	Yes	

Eligible Relationship Types

Independent Software Vendor, Value-Added Reseller and Solution Provider are eligible Relationship Types for the Software ValueNet portfolio of Optim. The Relationship Type Services Provider is not offered / eligible for the Optim portfolio.

Approved Business Plan – Optim Specific Criteria

You must clearly specify in your approved business plan which products in the IBM Optim software portfolio you wish to represent in the market. IBM Optim product choices include; Optim Test Data Management, Optim Data Privacy, and Optim Data Growth

The business plan must be presented using the template for Optim which is given on the "Apply" tab on the Software ValueNet website, http://www.ibm.com/partnerworld/swvaluenet.

Technical Certifications – Optim Specific Criteria

How Measured: You must demonstrate that you have achieved, within your organization, two (2) or more certifications from the list of qualifying certifications for the IBM Optim portfolio. These certifications may be held by a single individual, or multiple individuals, and these individuals must be employees of your company, and must appear in your PartnerWorld profile.

At least one certification must be the Optim Technical Mastery. The second certification may be any certification from the list of qualifying certification for the IBM Optim portfolio, including the Optim Technical Mastery.

The list of qualifying certifications for the IBM Optim portfolio is available on the "Apply" tab on the Software ValueNet website, http://www.ibm.com/partnerworld/swvaluenet"

To facilitate quality pre-sales and post-sales service, and ultimately customer satisfaction, it is expected and recommended, but not mandatory, that you have certified technical resources in all the IBM Optim software products that you most commonly represent in the market.

Time Frame When Required: At time of application submission and then ongoing. ***

*** This requirement is waived until March 31, 2009. Business Partners with accepted contracts for Software ValueNet for the IBM Optim portfolio prior to March 31, 2009 must meet this requirement on or before March 31, 2009. Business Partners that do not meet this requirement by April 1, 2009 will be terminated for the IBM Optim portfolio effective April 1, 2009.

Trained Sales Resources – Optim Specific Criteria

How Measured: IBM Optim requires you have a minimum of one (1) trained sales resource at the time that you submit your application for Software ValueNet. At the time of your annual review, this requirement will be that you must have the greater of either one (1) trained sales resource, or a trained sales resource for every USD 1M of annual attainment as measured by IBM against your minimum annual attainment for the prior year.

You will be asked to demonstrate your trained sales resources by showing proof of attendance in the IBM Optim software in class or online, self-paced sales training, and successful completion of the associated test. A list of the qualifying training modules/tests is available on the "Apply" tab on the Software ValueNet website, http://www.ibm.com/partnerworld/swvaluenet.

Time Frame When Required: Prior to acceptance and then ongoing

Net New Leads – Optim Specific Criteria

How Measured: A minimum of twelve (12) opportunities annually, six (6) for ISVs, in IBM Global Partner Portal (GPP), registered by you or by IBM on your behalf that meet the following criteria:

1. Have a sales stage of 04 –'Validated/Qualifying'
2. Identified within the twelve (12) months prior to your anniversary date
3. Were found independently by you, and are incremental to IBM (not IBM generated and not IBM direct sales leads)

Time Frame to When Required: By first annual review and then ongoing

Optim Minimum Annual Attainment

Group	Region	Countries	Annual Revenue Commit (USD)	
			Value-Added Reseller (Resell)	Solution Partner (Co-sell/Resell)
1	Americas	USA	$50K	$100K
2	Americas APJ EMEA	Canada Australia European Economic Area (EEA)	$20K	$50K
3	Americas APJ EMEA	All of Latin America China, India, Korea, Singapore, Hong Kong, Taiwan Outside of European Economic Area	$10K	$25K
4	All other countries		$10K	$10K

Optim Portfolio Benefits

	Independent Software Vendor	Value-Added Reseller	Solution Provider
Sales Benefits			
Sales Enablement	•	•	•
SVI Eligible (Co-sell)	•	•	•
Value Advantage Plus		•	•
Software Access	*VP	*VP	*VP

	** Key	** Key	**Key
Access to Exclusive and Custom Web Content	*VP	*VP	*VP
Business Partner Manager (see Note I)	•	•	•
Resell Discounts		•	•
Marketing Benefits			
Exclusive Partner Communications	•	•	•
Partner Playbook	•	•	•
Partner IOD Conference	•	•	•
IBM PartnerWorld® Benefits and Membership	•	•	•
Targeted Marketing Campaigns	Co-funded	Co-funded	Co-funded
Technical Benefits			
Optim Training	*VP	*VP	*VP
Certification	•	•	•
Optim Support	*VP	*VP	*VP

***VP = some or all of these benefits are contingent on the purchase of IBM PartnerWorld Value Package**
****Key = Optim Software comes with a 30 Day Access key – contact your Channel Manger for additional information**
Note 1: At IBM discretion

Optim Sales Benefits

Sales Enablement

IBM provides numerous ways for you to gain confidence and expertise in representing IBM Optim software in the marketplace. Specific programs and resources are available to give you the information and tools you need to reinforce and grow your sales and pre-sales proficiencies. Self-paced materials provide information for you to continue to build your knowledge and expertise with Optim. Regional sales training events, offered through local channels teams as demand requires, can be made available to further develop and support your knowledge of product and solution positioning. Exclusive webinars for Business Partner sales and pre-sales personnel are held as required . Annual events provide you with valuable sales, pre-sales, and product knowledge to keep up to date with IBM Optim innovations and technology.

Software Value Incentive Eligible

IBM's Software Value Incentive (SVI) is an innovative incentive and rewards program for IBM Business Partners. SVI is designed to reward you for the role you play and the value your business brings when selling in conjunction with IBM direct sales (“co-sell”). SVI is a global, auditable program based on extensive market research from over 250 Business Partners around the world. There are three key factors that make SVI so significant:

- Designed to reward value through the sales cycle
- Protects Business Partner contribution using a web-based opportunity registration system
- Simpler structure and speedy payments making it easier to do business with IBM

Software ValueNet Business Partners who are approved for the Optim portfolio may enroll in SVI, register SVI opportunities, and potentially earn SVI fees in the event that the opportunity is fulfilled by the direct IBM sales team. SVI fees will not be paid on sales of IBM Optim software which are fulfilled by a Business Partner.

Value Advantage Plus Eligible

The Value Advantage Plus initiative provides substantial rewards to Business Partners who offer value-added solutions in all customer segments from large enterprise to midmarket. This incentive will increase your margins and protect your investment in your IBM solutions and value added services.

- Rebate - based incentive offering to all customer-facing Business Partners and Value Add Distributors who meet the acceptance criteria
- Incentive rewards those Business Partners for reselling IBM Passport Advantage Middleware in pre-approved IBM endorsed solutions
- Participation requires significant value added solutions or services built on IBM Middleware from the Business Partner to the End-User
- No revenue commitment or initial purchase requirements

The Optim portfolio does participate in Value Advantage Plus Initiative and may be approved for a value adding solution when the Business Partner is approved for the Software ValueNet Optim portfolio. The Software ValueNet Business Partner with an Optim approved portfolio may submit a Value Advantage Plus application to participate by going to **http://www.ibm.com/partnerworld/valueadvantageplus.**

Software Access (Available with Value Package)

Software access allows IBM Software ValueNet Business Partners to download IBM software for purposes of demonstration, evaluation, development and testing.

Access to Exclusive and Custom Web Content (Available with Value Package)

You will receive access to a secure website that provides access to information and materials related to IBM Optim products, marketing, sales, technical support, demo code, and important Business Partner communications.

Business Partner Manager

The Business Partner Manager is responsible for assisting you in driving success through the implementation and execution of a business plan that encompasses all areas of the joint business and engagement areas. The Business Partner Manager will also be your focal point in developing the necessary sales relationships critical to your success. In addition, your Business Partner Manager can help you obtain visibility into the IBM Optim direct sales process to ensure understanding of field activities and how to work with IBM sales teams. The Business Partner Manager is provided at IBM’s discretion.

Resell Discount

As a Value-Added Reseller or Solution Provider you are entitled to resell IBM Optim Software, and provided with competitive discounts off of End User entitled price to help you grow your business.

Optim Marketing Benefits

Partner Communications
Business Partners will be kept up-to-date with relevant information through a variety of communication vehicles. You will receive Partner Updates which contain information on new product releases, events and training, and Partner Newsletter which gives you a snapshot of the issues that relate to you as Business Partners.

Partner Playbook
As an IBM Software ValueNet Business Partner you will receive the IBM Optim Partner Playbook. The IBM Optim Partner Playbook serves as a sales enablement and education tool for the Business Partner community providing valuable information on Business Partner successes, product and solution updates, support, training, and marketing opportunities.

Information on Demand Conference
Invitation to the annual IBM Information on Demand Event provides Business Partners with valuable sales, pre-sales, and product knowledge and training, including the latest updates on product and positioning, which are communicated in detailed training tracks.

IBM PartnerWorld Benefits and Membership
PartnerWorld is the IBM Business Partner program providing benefits to help IBM Business Partners succeed globally. We encourage you to leverage the benefits of the PartnerWorld program and join today for IBM's many offerings. Starting in February 2009, we will also leverage many aspects of the PartnerWorld infrastructure and processes, which means that all Business Partners will need to register for PartnerWorld membership as an initial step to partnering strategically with Optim, as a part of IBM. Utilize PartnerWorld's tools and resources to get your products and solutions to market faster, decrease the sales cycle, and win more profitable business.

Targeted Marketing Campaigns
Optim Business Partners can leverage IBM software comarketing funds which are available in each geo. You will need to work with your local Optim sales rep to define your activities and request the marketing funds.

Optim Technical Benefits

IBM Optim Training
As an IBM Business Partner, you are eligible for discounts on IBM public classroom and instructor-led online courses, technical conferences, and Optim Certification Self-study packages enabling your organization to expand expertise in IBM Optim products and solutions. The Self-Study packages are exclusive to IBM Business Partners. With the purchase of the Value Package, you will also receive access to demo code.

IBM Optim Certification
The IBM Optim Certification program establishes an industry standard benchmark and validation of technical competence for professionals working with IBM Optim technology. The program provides a way for professionals to demonstrate their competence in a competitive marketplace, empowering businesses to leverage their performance management solutions from IBM Optim with confidence. IBM Optim Certification is the only authorized accreditation in the industry for benchmarking and validating IBM Optim expertise.

To help prepare for certification, available exclusively to Business Partners are IBM Optim Certification Self Study Packages. This offer includes student guides from the public classroom courses and set up instructions for workshops.,

IBM Optim Support (Available with Value Package)

As an IBM Software ValueNet Business Partner you have access to IBM Optim Integration and Implementation Support, including Technotes, a rich library of product information, Information Centers and Assisted Support via telephone or internet to resolve product issues.

IBM InfoSphere Portfolio

InfoSphere Portfolio Participation Criteria

Participation Criteria / Checks	Minimum Participation Criteria Required by Relationship Type				Time Frame When Required	Verified at Enrollment	Verified at Annual Review
	Independent Software Vendor	Services Provider	Value-Added Reseller	Solution Provider			
Completed Application Form	▪	▪	▪	▪	At Time of Application Submission	Yes	
Completed Revalidation Form	▪	▪	▪	▪	Each Annual Review		Yes
Signed Contract (per country)	▪	▪	▪	▪	Prior to Acceptance and then Ongoing	Prior to Approval	
IBM PartnerWorld Membership	▪	▪	▪	▪	At Time of Application Submission and then Ongoing	Yes	Yes
Approved Business Plan	▪	▪	▪	▪	At Time of Application Submission and then Ongoing	Yes	Yes
Certified Technical Resources	2 (see below)	2 (see below)	2 (see below)	2 (see below)	At Time of Application Submission and then Ongoing	Yes	Yes
Customer References	1	1	1	1	By First Annual Review and then Ongoing		Yes (only First Annual Review)
Available Sales Demo	1 per offering		1 per product represented	1 per solution	By First Annual Review and then Ongoing		Yes (only First Annual Review)
Preferred Distributor			▪	▪	Prior to Acceptance and then Ongoing	Yes	
Net New Leads			5 (see below)	5 (see below)	By First Annual Review and then Ongoing		Yes
Minimum Annual Attainment (MAA)			specified in MAA table	specified in MAA table	By First Annual Review and then Ongoing		Yes
Trained Sales Resources			Minimum of 1 (see	Minimum of 1 (see below	At Time of Application	Yes	Yes

			below)		Submission and then Ongoing		
Branded or Market Identifiable Offering				per solution	At Time of Application Submission and then for each new solution	Yes	
Specific Target Market				per solution	At Time of Application Submission and then for each new solution	Yes	
Demonstrable and Repeatable Solution Assets				per solution	At Time of Application Submission and then for each new solution	Yes	
Services Deployment Methodology				per solution	At Time of Application Submission and then for each new solution	Yes	
Solution Support				per solution	At Time of Application Submission and then for each new solution	Yes	

Eligible Relationship Types

Independent Software Vendor, Services Provider, Value-Added Reseller and Solution Provider are eligible Relationship Types for the Software ValueNet InfoSphere portfolio.

Approved Business Plan – InfoSphere Specific Criteria

You must clearly specify in your approved business plan which products in the IBM InfoSphere portfolio you wish to represent in the market. IBM InfoSphere product choices include**;** IBM Information Server (Business Glossary, DataStage, Information Analyzer, Metadata Workbench, QualityStage, FastTrack, Services Director), IBM InfoSphere Global Name Recognition, IBM Entity Analytic Solutions ,InfoSphere Change Data Capture, WebSphere Replication Server, WebSphere Data Event Publisher, WebSphere Federation, Server, IBM InfoSphere Traceability Server, and IBM InfoSphere Master Data Management**.**

The business plan must be presented using the template for InfoSphere which is given on the "Apply" tab on the Software ValueNet web site, http://www.ibm.com/partnerworld/swvaluenet.

Technical Certifications – InfoSphere Specific Criteria

How Measured: At the time of your application for Software ValueNet you must demonstrate that you have achieved, within your organization, a minimum of two (2) or more different certifications from the list of qualifying certifications for the IBM InfoSphere portfolio. At the time of your annual review, this requirement will be that you must have the either two (2) certifications or if your annual attainment as measured by IBM for the prior year exceeded 500,000 USD, then you must have two (2) certifications plus an additional technical certification for each full 250,000 USD of attainment in excess of 500,000 USD.

These certifications may be held by a single individual, or multiple individuals, and these individuals must be employees of your company, and must appear in your PartnerWorld profile.

The list of qualifying certifications for the IBM InfoSphere portfolio is available on the “Apply” tab on the Software ValueNet web site, http://www.ibm.com/partnerworld/swvaluenet"

Time Frame When Required: At time of application submission and then ongoing.

Trained Sales Resources – InfoSphere Specific Criteria

How Measured: IBM InfoSphere requires that you have a minimum of one (1) trained sales resource at the time that you submit your application for Software ValueNet. At the time of your annual review, this requirement will be that you must have the greater of either one (1) trained sales resource, or a trained sales resource for every USD 1M of annual attainment as measured by IBM against your minimum annual attainment for the prior year.

You will be asked to demonstrate your trained sales resources by showing proof of attendance in the IBM InfoSphere portfolio in class or online, self-paced sales training, and successful completion of the associated test. A list of the qualifying training modules/tests is available on the “Apply” tab on the Software ValueNet web site, http://www.ibm.com/partnerworld/swvaluenet.

Time Frame When Required: Prior to acceptance and then ongoing.

Net New Leads – InfoSphere Specific Criteria

How Measured: A minimum of five (5) opportunities annually, in IBM Global Partner Portal (GPP), registered by you or by IBM on your behalf that meet the following criteria:

1. Have a sales stage of 04 –‘Validated/Qualifying’
2. Identified within the twelve (12) months prior to your anniversary date
3. Were found independently by you, and are incremental to IBM (not IBM generated and not IBM direct sales leads)

Time Frame to When Required: By first annual review and then ongoing.

InfoSphere Minimum Annual Attainment

Group	Region	Countries	Annual Revenue Commit (USD)	
			Value Added Reseller (Resell)	Solution Partner (Co-sell/Resell)
1	North America	USA	$50k	$50k
2	North America EMEA APJ	Canada European Economic Area (EEA) Australia	$20k	$20k
3	Latin America APJ EMEA	Latin America China, India, Korea, Singapore, Hong Kong, Taiwan Outside of European Economic Area	$10k	$10k
4	All other countries		$10k	$10k

InfoSphere Portfolio Benefits

	Independent Software Vendor	**Services Provider**	**Value-Added Reseller**	**Solution Provider**
Sales Benefits				
Sales Enablement	•	•	•	•
SVI Eligible (Co-sell)	•	•	•	•
Software Access	***VP**	***VP**	***VP**	***VP**
Access to Exclusive and Custom Web Content	***VP**	***VP**	***VP**	***VP**
Business Partner Manager (see Note 1)	•	•	•	•
Resell Discounts			•	•
Marketing Benefits				
Exclusive Partner Communications	•	•	•	•
Partner Playbook	•	•	•	•
Partner IOD Conference	•	•	•	•
IBM InfoSphere Partner Solutions Catalog				•
IBM PartnerWorld® Benefits and Membership	•	•	•	•
Technical Benefits				
InfoSphere Support	***VP**	***VP**	***VP**	***VP**
InfoSphere Training	***VP**	***VP**	***VP**	***VP**

Certification	•	•	•	•

***VP = some or all of these benefits are contingent on the purchase of IBM PartnerWorld® Value Package**

Note 1: At IBM discretion
*

InfoSphere Sales Benefits

Sales Enablement
IBM provides numerous ways for you to gain confidence and expertise in representing IBM InfoSphere software in the marketplace. Specific programs and resources are available to give you the information and tools you need to reinforce and grow your sales and pre-sales proficiencies. Self-paced materials provide information for you to continue to build your knowledge and expertise with InfoSphere. Regional sales training events, offered through local channels teams as demand requires, to further develop and support your knowledge of product and solution positioning. Exclusive webinars for Business Partner sales and pre-sales personnel are held monthly, updating you on current topics. Annual events provide you with valuable sales, pre-sales, and product knowledge.

SVI Eligible (Co-sell)
IBM's Software Value Incentive (SVI) is an innovative incentive and rewards program for IBM Business Partners. SVI is designed to reward you for the role you play and the value your business brings when selling in conjunction with IBM direct sales (“co-sell”). SVI is a global, auditable and resourced co-sell plus lead identification program based on extensive market research from over 250 Business Partners around the world. There are three key factors that make SVI so significant:

- Designed to reward value though the sales cycle
- Protects Business Partner contribution using an web-based opportunity registration system
- Simpler structure and speedy payments making it easier to do business with IBM

Software ValueNet Business Partners who are approved for the InfoSphere portfolio may enroll in SVI, register SVI opportunities, and potentially earn SVI fees in the event that the opportunity is fulfilled by the direct IBM sales team. SVI fees will not be paid on sales on the IBM InfoSphere portfolio which are fulfilled by a Business Partner.

Software Access (Available with Value Package)
Software Access allows IBM Software ValueNet Business Partners to download or order IBM software for purposes of demonstration, evaluation, development and testing.

Access to Exclusive and Custom Web Content (Available with Value Package)
You will receive access to a secure web site that provides information and materials related to IBM InfoSphere products, marketing, sales, technical support, and important Business Partner communications. This web site is for Business Partners looking for a single place to find InfoSphere marketing and enablement information. This website is part of the Information Management Teaming with Business Partners.

Business Partner Manager (PM)
The Business Partner Manager (PM) is responsible for assisting you in driving success through the implementation and execution of a business plan that encompasses all areas of the joint business and engagement areas. The Business Partner Manager will also be your focal point in developing the necessary sales relationships critical to your success. In addition, your Business Partner Manager can provide you visibility and alignment with the IBM InfoSphere direct field activities. The Business Partner Manager is provided at IBM’s discretion.

Resell Discounts
As a Value-Added Reseller or Solution Provider, you are entitled to resell the IBM InfoSphere portfolio, and be provided with competitive discounts off list price to help you grow your business.

InfoSphere Marketing Benefits

Exclusive Business Partner Communications
Business Partners will be kept up-to-date with relevant information through a variety of communication vehicles. You will receive Business Partner Updates which contain information on new product releases, events and training, and a Business Partner Newsletter which gives you a snapshot of the issues that relate to you as Business Partners.

Partner Playbook
As a Software ValueNet Business Partner you will have access to Information Management Partner Playbooks in PartnerWorld. The IBM InfoSphere Partner Playbook serves as a sales enablement and education tool for the Business Partner community providing valuable information on Business Partner successes, product and solution updates, support, training, and marketing opportunities.

Information on Demand Conference
Invitation to the annual IBM Information on Demand Event provides Business Partners with valuable sales, pre-sales, and product knowledge and training, including the latest updates on product and positioning, which are communicated in detailed training tracks.

IBM InfoSphere Partner Solutions Catalog
The IBM InfoSphere Partner Solutions Catalog is an elite program for Business Partners who develop and deliver solutions that combine InfoSphere technology with their deep domain expertise. Members of this program deliver solutions that focus on key business areas including industry groups, enterprise performance, and system infrastructure, all with the objective of enabling and engaging their customers worldwide to better manage company performance.

This catalog offers greater market opportunity and exposure to Business Partners that develop, market, and sell solutions based on InfoSphere technology. Customers that adopt these solutions know that they are based on best practices and proven technologies designed to improve corporate and operational performance at leading organizations in their industry.

IBM PartnerWorld Benefits and Membership
PartnerWorld is the IBM Business Partner program, providing benefits to help IBM Business Partners succeed globally. All Software ValueNet Business Partners will need to register for PartnerWorld membership as an initial step to a strategic relationship with IBM for the InfoSphere portfolio. You are encouraged to utilize PartnerWorld's tools and resources to get your products and solutions to market faster, decrease the sales cycle, and win more profitable business.

InfoSphere Technical Benefits

IBM InfoSphere Support (Available with Value Package)
As an IBM Software ValueNet Business Partner you have access to IBM InfoSphere Integration and Implementation Support, including Technotes, a rich library of product information, Information Centers and Assisted Support via telephone or internet to resolve product issues

IBM InfoSphere Implementation Training (Available with Value Package)
You receive access to IBM InfoSphere implementation training enabling your organization to expand expertise in IBM InfoSphere products and solutions. As an IBM Software ValueNet Business Partner for IBM InfoSphere products, you have full access to a variety of training options including self-paced training courses to complement instructor-led training.

The We Pay offering is designed to help your company build IBM product skills by reimbursing some or all of your tuition and test fees when you achieve eligible certifications. The amount of your reimbursement benefit is determined by your membership level. There are two components of the "We Pay" offerings: "You Pass, We Pay," where reimbursement is available for education and certification tests and "You Test, We Pay," where reimbursement is available for certification tests, where no education is required because of prior knowledge or experience.

IBM InfoSphere Certification

IBM InfoSphere has certifications that establish an industry standard benchmark and validation of technical competence for professionals working with IBM InfoSphere technology. The program provides a way for professionals to demonstrate their competence in a competitive marketplace, empowering businesses to leverage their performance management solutions from IBM InfoSphere with confidence. IBM InfoSphere Certification is the only authorized accreditation in the industry for benchmarking and validating IBM InfoSphere expertise.

Value Advantage Plus – InfoSphere

The InfoSphere portfolio does not participate in the Value Advantage Plus initiative. e.g.(Value Advantage Plus Solutions are not available for the InfoSphere portfolio).

SECTION 3 – DOING BUSINESS WITH IBM

Finding a Preferred Distributor

A list of authorized IBM Software Value Added distributors can be found on the IBM PartnerWorld® website. To navigate to the appropriate page, select "Selling" from the left side bar, then "Sales Cycle Resources", then choose the "Propose" tab. On the "Pricing" section of that page, follow the link on "Software Value Add Distributors". Alternatively, there is a link to this page on the "Apply" tab on the IBM Software ValueNet website,, www.ibm.com/partnerworld/swvaluenet.

Quotation Tool

Your IBM Software Value Added distributor will provide you your pricing for all sales of Software ValueNet software. However, there may be circumstances where you wish to develop a quotation based on Passport Advantage pricing using the Price Quote Order (PQO) tool, which is one of the Passport Advantage online tools. Appendix "Passport Advantage Overview and Reference" contains some basic information on how to obtain an ID and access these tools.

Placing Orders with Your Preferred Distributor

You must place orders for Software ValueNet products using the reseller customer number provided to you upon your approval for Software ValueNet. Failure to use this particular reseller customer number will mean that the order will be rejected.

Reviewing your Certification Status

Your IBM PartnerWorld® authorized program administrator may review the status of your certifications at any time by signing on to your IBM PartnerWorld® profile. Detailed instructions to do this are as follows:

- Log on to your Business Partner Profile in the Partner Profiling System at www.ibm.com/partnerworld/partnertools.
- Go to your Country Enterprise record.
- Click on PartnerWorld® level Summary.
- Click on Click here to see how skills are counted towards level attainment.
- Click on View Skills Summary report for all employees for all locations within the enterprise.
- Find the Counts toward Premier/Advanced Level column.
- Scan the column for sales or technical software certifications.

Technical certifications which are current will have the world "Technical" next to the name of the certification on your employee profile. If the word "Technical" does not appear, then the certification is no longer current and does not fulfill your certification requirement for the Software ValueNet portfolio.

You can also contact www.ibm.com/partnerworld/contact for further help reviewing your certifications.

Changing your Distributor

In Software ValueNet, Business Partners may change their Preferred Distributor once in a rolling 12 month period from your agreement anniversary date. 30 calendar days advance written notice of changes is required.

Note: If you are enrolled in Value Advantage Plus and/or Software Value Incentive in addition to Software ValueNet, you must choose the same preferred Distributor. The 12 month rolling period during which you are eligible to change your preferred distributor applies to the programs in combination. For example, if you have just been approved for Software ValueNet, but you are already enrolled in Software Value Incentive, and you changed your preferred distributor three months ago, then you must wait nine more months to request a change to your distributor. When you do make that request, it must apply to all programs in which you are enrolled. Thirty (30) calendar days advance written notice of changes is required for Software Value Incentive and Value Advantage Plus as well as for Software ValueNet, so the request should be made for all programs at the same time.

Please send the Preferred Distributor change notification to:

International Business Machines Inc.
15 Wayside Road
Suite 2
Burlington, MA 01802-4623

Attention: Software ValueNet Operations Team

E-Mail: "SVNET@us.ibm.com"

Contacting IBM

If you have questions about becoming an IBM Software ValueNet Business Partner, please contact any of the following:

- IBM Authorized Value Added Distributor
- IBM Account Manager
- IBM Software ValueNet Operations Team, email address: "SVNET@us.ibm.com"

SECTION 4 – APPENDICES

Appendix A – Passport Advantage Overview and Reference

The URL for the sign on page of the Passport Advantage Online tools is:
https:/www-112.ibm.com/software/howtobuy/passportadvantage/paoreseller/

To obtain an IBM registration ID and password for the Passport Advantage Online tools, follow the following steps: If you have already created your IBM ID and password elsewhere on www.ibm.com, they are valid here. If you do not already have an IBM ID and password, you can create them as part of the registration process described below.

1. Go to the Passport Advantage for resellers website (use the URL shown above) and the 'Sign In' screen appears.

2. From the sign in page, a "Returning Reseller" can enter their IBM ID and password or for "New Resellers" you can register now.

3. Enter an IBM ID in the field shown. It is recommend that you use the user's business email address.

4. Enter a password in the field shown. This is the user's personal password. The IBM password guidelines must be followed.

5. Continue completing all the fields with a * (red star), as these are mandatory.

6. Select the 'Register' button.

When you are registered for Passport Advantage for Resellers, you may:

- Use the Price Quote Order (PQO) tool
- Use the Distributed Software Pricebook

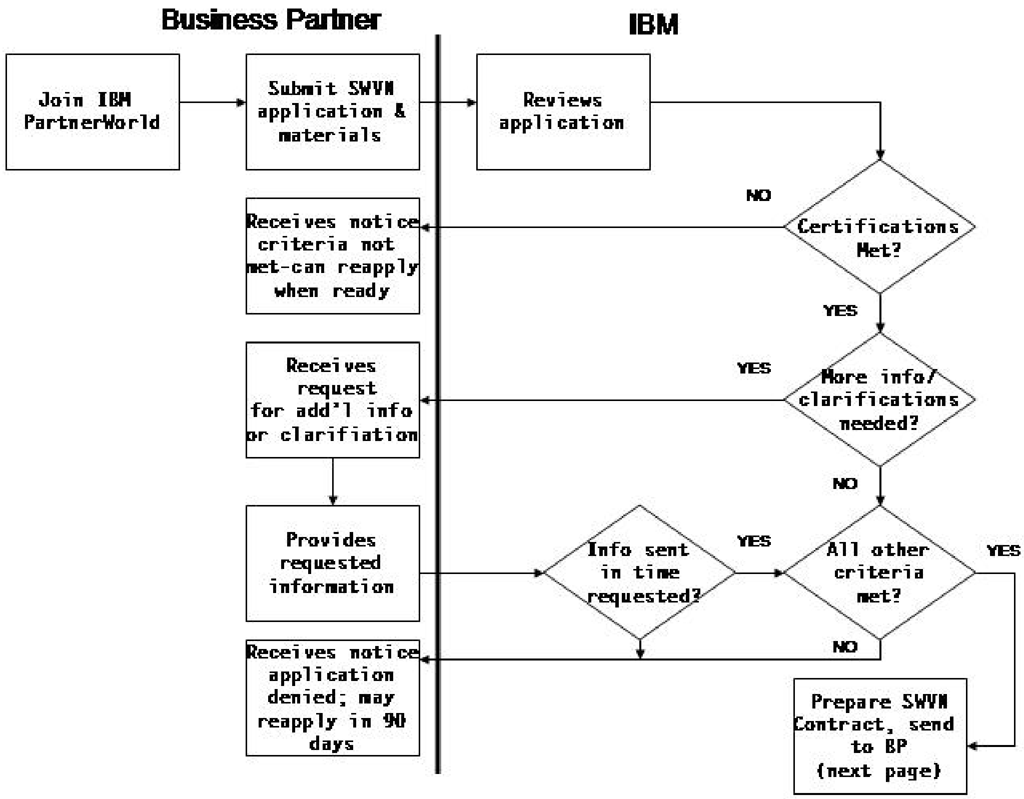
Further details of how to use these tools are provided on the web site.

To obtain a list of the part numbers that belong to your specific approved portfolios, select products within the distributed software price book for the Product Group for your portfolio. Until you are approved for the portfolio in question, you will not have access to this information.

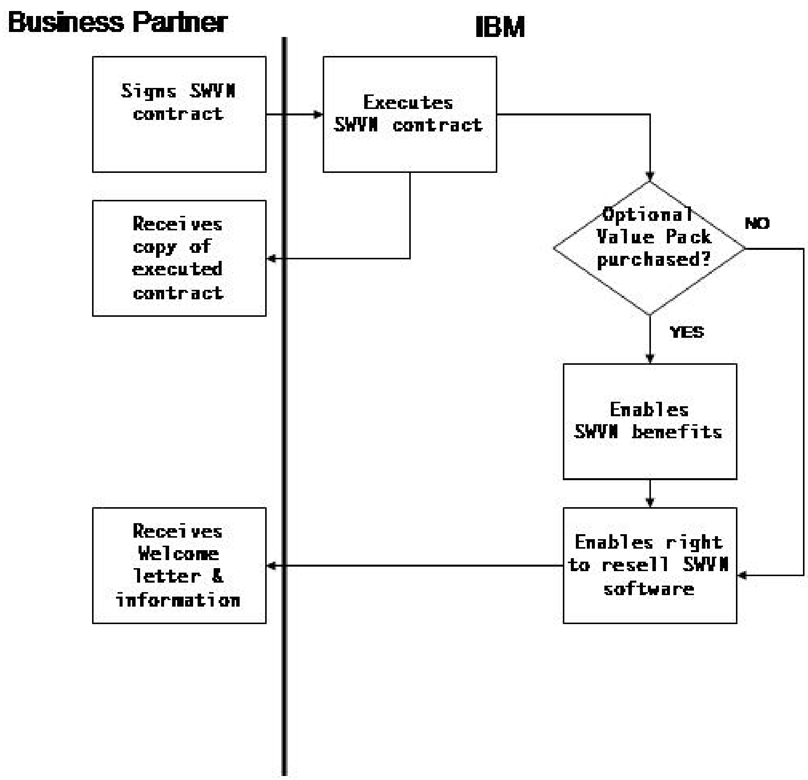
Appendix B – Enrollment process flowchart

This flowchart illustrates the major steps that take place at enrollment for the first portfolio/relationship type for a Software ValueNet contract.

This page illustrates up to the point at which the contract is created.



This page illustrates the contract acceptance process.



Appendix C – Revalidation process flowchart

This flowchart illustrates the annual review process for a single portfolio/relationship type for a Software ValueNet contract.