

FERTINET®

HOW TO GUIDES

Applying for Marketing Co-Op



Applying for Marketing Co-op Funds

Marketing Process

Your marketing plan should complement the business plan discussed and agreed with your Exclusive Account Manager and Fortinet Channel Account Manager. Ideally, your quarterly marketing plans should be sent before the 10th day of the first month of the calendar quarter. ie. 10th Jan, 10th April, 10th July and 10th October.

The process for applying for co-op funds is as follows:

- 1) Complete CRF form (Click here to download the master [Co-op Request Form](#)) along with a detailed proposal and copies of all 3rd party quotes* or pro forma invoices to sduce@exclusive-networks.com and copy your Fortinet Channel Account Manager (CAM).
- 2) The CAM completes supporting information such as pipelines, forecasts, 2017 revenue, accreditation level etc and sends to UK Channel Director for approval.
- 3) Once this has been approved it is added to a central Fortinet smartsheet planning document along with all supporting documentation.
- 4) This is approved by the UK Marketing Manager, then entered into the Fortinet co-op portal for sign off by EMEA. Any requests over \$5k may need to go through multiple levels of authorisation.
- 5) No later than 3 weeks after the activity has completed we need to submit documentation for claiming which includes:
 - a. 3rd party invoices only showing proof of cost*
 - b. Photographs of offline activity (events/promotional items/adverts) and copies of related activity (emails, social media posts, mailers, landing pages, infographics etc)
 - c. List of leads/attendees ideally using the attached CRF form – tab 3
 - d. Details of potential pipeline, forecasts and any deal reg information
 - e. Your invoice to Exclusive Networks for the amount agreed

*Please note 3rd party invoices must be external supplier not a partner or distributor. No partner rate cards accepted as proof of cost. For events, Fortinet will also ask for agenda and whether Fortinet staff will be attending.

** If the activity is multi-vendor, Fortinet will only pay a proportionate amount. Eg. If you have an event that promotes your services plus Fortinet plus 2 other vendors, the cost should be split 4 ways and Fortinet will fund 25% of the total costs.

What types of activity are covered by co-op?

Below are the activities covered by co-op, and those that are not:

Approved Activities	Description	Includes	Doesn't include	Claim Requirements
Advertising	Online or offline advertising promoting Fortinet and the partner value proposition.	<ul style="list-style-type: none"> • Design fees • Media plan costs • Space 	Reseller only branding	<ul style="list-style-type: none"> • All 3rd party invoices • Copy of advert (JPG/PDF) • Circulation information • Partner invoice to EXN • Leads in CRF template
Collateral	Fortinet brochures, flyers or documentation with the partners co-branded added.	<ul style="list-style-type: none"> • Design and co-branding fees • Print costs 	Partner developed documentation	<ul style="list-style-type: none"> • All 3rd party invoices • Copy of collateral (PDF) • Partner invoice to EXN
Emailing	Creation and sending of an email to database of partner or end users including a Fortinet related call to action	<ul style="list-style-type: none"> • Copywriting • Design • Agency fees 	Newsletters	<ul style="list-style-type: none"> • All 3rd party invoices • Copy of email • Partner invoice to EXN • Leads in CRF template
Giveaways	Gadgets or promotional items to increase Fortinet mindshare	<ul style="list-style-type: none"> • Design • Production costs • Shipping costs 	Any activities which do not comply with Code of Business Conduct & Ethics	<ul style="list-style-type: none"> • All 3rd party invoices • Photos of items • Partner invoice to EXN
Integrated Campaign	Lead generation campaign built from multi-touch activities – email, telemarketing, event, online advertising etc.	<ul style="list-style-type: none"> • Design • Telemarketing • Copywriting • Agency fees • Media plan • Event costs 	Multi-vendor campaign that includes Fortinet competitors	<ul style="list-style-type: none"> • All 3rd party invoices • Copy of assets • Partner invoice to EXN • Leads in CRF template • Revenue/pipeline
Partner Enablement	Activity to train partners on a theme or technology, in the form of an event, a brochure, email, video etc.	<ul style="list-style-type: none"> • Design • Copywriting • Agency fees • Event cost 	Any activities which do not comply with Code of Business Conduct & Ethics	<ul style="list-style-type: none"> • All 3rd party invoices • Photos of event • Copy of training material • Partner invoice to EXN • Attendee names

Approved Activities	Description	Includes	Doesn't include	Claim Requirements
Seminar/Workshop	Event to introduce Fortinet technologies to a group of partners or clients – 1 day maximum	<ul style="list-style-type: none"> • Invitation design • Location costs • Catering 	Any activities which do not comply with Code of Business Conduct & Ethics	<ul style="list-style-type: none"> • All 3rd party invoices • Photos of event • Copy of presentation material • Partner invoice to EXN • Attendee names
Tradeshow	Trade fair for partners or customers including Fortinet branding on booth	<ul style="list-style-type: none"> • Floor space • Booth building • Branding • Shipping 	Fortinet can not be represented on more than 3 different booths at any one tradeshow	<ul style="list-style-type: none"> • All 3rd party invoices • Photos of event • Leads in CRF template • evenue/pipeline • Partner invoice to EXN
Telemarketing	Use of a telemarketing agency to generate demand from partners or end users about Fortinet	<ul style="list-style-type: none"> • Telemarketing • Agency fees • Data purchase 	Multi-vendor activities	<ul style="list-style-type: none"> • All 3rd party invoices • Partner invoice to EXN • Leads in CRF template
Webinar	Organisation of a remote event to train or inform end users about Fortinet	<ul style="list-style-type: none"> • Invitation cost • Webinar platform 	Multi-vendor webinar	<ul style="list-style-type: none"> • All 3rd party invoices • Copy of webinar invitation • Partner invoice to EXN • Attendee list • Leads in CRF template

Activities not covered by co-op

- Spiffs
- Promotion
- Sales Contests
- Demo Products (NFR)
- NSE Training or Exams
- Social Media
- Hospitality Events



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