



# PARTNER PROGRAM

April 1, 2022- March 31, 2023



## STRATEGIC FOCUS ON PARTNERS

Creatio is a channel-driven business fully committed to building strong relationships with partners. Therefore, partners' success is our top priority. We help partners to establish sustainable revenue growth and deliver value to our joint clients through our innovative low-code platform. Creatio partner program is focused on providing partners with a clear understanding of what to expect from a collaboration with Creatio, as well as empowering them with our platform, incentives, benefits, and ongoing support to create a joint success.

We want to make sure our partners are empowered to help companies globally in growing their low-code capabilities and improving their customer-facing functions. The main benefits of partnering with Creatio are:

- ▶ **Joint go-to-market** strategy tailored for the needs of your business
- ▶ **The highest commission** rates in the industry
- ▶ We make sure that **all prospects and clients are assigned to partners**
- ▶ Dedicated teams with **one single mission to make you successful**
- ▶ **Infinite Marketplace opportunities** to grow your business

## GENERAL TERMS

Creatio partner program provides 5 levels for its partners. To advance from level to level a partner needs to sign a new subscription contract for ARR Bookings or renew the clients that are assigned to the partner to contribute to the Renewal volume. The commission for the signed contract is calculated according to the current level of a partner at the moment of the contract signature. The commission is paid after the funds are received to the Creatio account. To be eligible for the commission, a partner should have an active partnership agreement. In addition to the commission, Partners are eligible for additional benefits based on the assigned level.

Commissions	Level 1	Level 2	Level 3	Level 4	Level 5
New bookings	20%	30%	40%	45%	50%
Renewals	10%	15%	20%	22,5%	25%
Reference commission	15%				

A partner can advance through levels by growing its ARR Bookings or by growing its Renewal Volume. The assigned level is defined as the highest between two levels: the level in the ARR Bookings table and the level in the Renewal Volume table.

**ARR bookings** are the annual contract value (ACV) of the recurring products in the contract. ARR bookings are calculated as the Total contract value of the recurring products divided by the Contract duration. ARR bookings include sales to new customers and expansion of the existing customers.

	Level 1	Level 2	Level 3	Level 4	Level 5
ARR Bookings, \$	0 - \$14,999	\$15,000 - \$74,999	\$75,000 - \$149,999	\$150,000 - \$499,999	\$500,000+

The following services are included in ARR Bookings: subscription for the basic products of Creatio (cloud and on-site), technical support for all products, recurring revenue from the marketplace solutions, add-ons, and connectors. Partner commission is not deducted from the ARR Bookings and the full volume is credited to the level of partner if the partner operates under the standard partner agreement.

**Example 1:**

A partner signs a 3-year contract for Sales Creatio and Business support package of \$180,000. ARR Bookings that will be credited to the Partner level are \$60,000.

**Renewal Volume:** Renewal Volume is a recurring revenue retained from the existing customers in a defined period. Renewal Volume includes both (1) revenue retained from the expiring contracts, and (2) renewal payments collected in long-term contracts on the anniversary dates. Expansions are not included in the Renewal Volume.

	Level 1	Level 2	Level 3	Level 4	Level 5
Renewal Volume, \$	0 - \$29,999	\$30,000 - \$149,999	\$150,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000+

For the Renewal Volume calculation, the following coefficients are used per each client:

- 100-90% renewal volume – 100% of the recurring revenue is credited to the Renewal Volume.
- 89,99-80% renewal volume – 50% of the recurring revenue is credited to the Renewal Volume.
- Less than 80% renewal volume – 0% of the recurring revenue is credited to the Renewal Volume.

**Example 2:**

Partner renews its 3 assigned clients during one fiscal year. The volume for each renewal will be different based on the renewal percentage:

	Expected renewal, \$	Actual renewal, \$	Renewal, %	Ratio	Renewal Volume, \$
<b>Customer 1</b>	10,000	10,000	100%	1	10,000
<b>Customer 2</b>	10,000	8,500	85%	0.5	4,250
<b>Customer 3</b>	10,000	5,000	50%	0	0

As the partner’s business grows, the program offers the ability to transition to higher levels offering more attractive commissions and additional services at each level:

- New Partners are assigned to Level 1;
- Partner Level can be increased, but cannot be decreased throughout one fiscal year. Creatio fiscal year starts on April 1 and ends on March 31;
- To advance to the next level a partner has to sign subscription contracts that will contribute to the partner ARR Bookings or renew a customer to boost Renewal volume performance;
- Partner Level for the next fiscal year is determined by the partner's performance in the current fiscal year;

## SPECIAL PROMOTION

A special promotion of 50% commission on new sales and cross/up-sales to customers who started the subscription for Creatio products in **FY2022-2023** is provided to partners on the following conditions:

- Partner agreement FY 2023 is signed/renewed;
- Partner status in the opportunity is Sales Partner.

The promotion is valid until March 31<sup>st</sup>, 2023.

Renewals commission is regulated by the current level of partner and other regulations of this Partner Program.

## SALES COLLABORATION

Partners hold one of three statuses in an opportunity:

**Sales Partner status:** a partner generates a lead, or a lead is assigned to a partner by Creatio at the Plan stage. A Partner is primarily responsible for driving the sales process and closing the deal.

**Sales Partners** perform the following activities:

- Orchestrate the sales cycle and manage key deal milestones;
- Conduct detailed discovery sessions to identify pain/goals, strategies & metrics;
- Identify buying process, decision criteria, & key players;
- Create, agree and execute a joint engagement plan;
- Orchestrate tailored demo(s), workshops and POCs;
- Engage Champion(s) and Power Sponsor on personal and professional wins;
- Deliver competitive proposal/budgetary guidance;
- Hold primary responsibility for closing the deal.

100% of ARR Bookings and Renewal Volume are credited to the level growth of Sales Partner.

**Implementation Partner status:** a lead was generated by Creatio and a partner was assigned to the deal at any stage of the opportunity. The Partner and Creatio jointly close the deal.

**Implementation Partners** perform the following activities:

- Orchestrate tailored demo(s), workshops and POCs;
- Provide detailed and thorough competitive analysis (battle card preparation and presentation);
- Assist with reference visits and/or calls;
- Organize and conduct the executive alignment engagements with Power Sponsor to promote the joint solution;
- Conduct additional meetings with a Sponsor/Power Sponsor to support the sales engagement and provide a high level of confidence in the joint solution;
- Deliver thorough value materials, including individual ROI analysis, business case, etc.

50% of ARR Bookings are credited to the level growth of Implementation Partner.

100% of Renewal Volume volume is credited to the level growth of Implementation Partner.

**Reference Partner status:** a partner generates and registers its leads with Creatio. If these leads result in a transaction, the Partner will receive a one-time commission equal to 15% of ARR Bookings. No ARR Bookings are credited to the Reference Partner. Reference partners are not eligible for the commission from renewals or cross/upsells.

Partner Status	First Sale Commission	Renewal Commission	Cross/upsell
Sales Partner	Current Level Commission	50% of Current Level Commission*	Current Level Commission*
Implementation Partner	10%	10%*	10%*
Reference Partner	15%	-	-

\*if a client is assigned to the partner.

## ADDITIONAL CONDITIONS

- The minimum annual purchase volume per customer is \$5,000, which consists of the Creatio products subscription, technical support, and Marketplace solutions (both cloud and on-site deployment options).
- A minimum contract period for all products and editions is 3 years.
- If 2 partners are involved in a deal, there will be an adjustment to the commissions paid to each Partner.
- All discounts granted to customers reduce Partner's commission, subject to minimum commissions:
  - **Sales Partner** will receive a minimum 10% commission on the final contract price;
  - **Implementation Partner** will receive a minimum 5% commission on the final contract price. The discount of the Implementation Partner is provided by Creatio without the consent of the Implementation Partner;
  - **Reference Partner** will receive a one-time minimum 10% commission on the final contract price.
- If a customer has already selected a solution before a partner enters a deal, the Partner will not be granted Implementation Partner Status.
- A partner does not receive Implementation Partner Status when Creatio has engaged the Partner as a subcontractor.
- Creatio keeps the right to discuss and verify the project estimation given by the Implementation Partner before it is presented to a client.
- Creatio discloses the names of all partners in a deal to all involved parties.
- For multi-year contracts where the customer pays in full at the beginning of the contract, the Partner's first-year commission is calculated according to the Partner's current level. The commission for additional years of the contract is treated as renewals.
- Commission for Marketplace products sales is calculated based on the [Marketplace Partner Program regulations](#).
- Compensation for any particular order is entirely determined by the Partner's current level at the time of the order.

### Example 3:

Two partners are involved in an opportunity. The partner who registered the lead first is designated as the Sales Partner. The partner who registered the lead second is designated as the Implementation Partner.

If the **Sales Partner** closes the deal:

1. The Sales Partner receives full commission according to the current Partner Program and 100% of ARR Bookings are added to the level of the partner.
2. The Implementation Partner is not eligible for commission and no ARR Bookings are added to the level of this partner.

If the **Implementation Partner** closes the deal:

1. The Implementation Partner receives a 10% commission and 50% of ARR Bookings are added to the level of the partner.
2. The Sales Partner receives the status of Reference partner, a 15% commission, and does not receive ARR Bookings are added the partner level growth. This commission applies only to the first year of

~~contract and not to any subsequent transactions with the customer.~~

## LEAD REGISTRATION

- When registering a lead, Creatio confirms to a partner that the lead is not currently in the vendor's pipeline. In case the lead is already in the vendor's pipeline, a partner can work on the opportunity in the status of **Implementation Partner** with the approval of Creatio.
- Creatio will not work directly with a prospect for 3 months following the date a lead was registered (SQL). During this period, a Partner should provide Creatio with the following information:

- BANT-qualified opportunity;
- Opportunity Evaluation Plan.
- If the conditions are met and the lead has been converted to an opportunity the partner is assigned to this opportunity for additional 6 months. If the conditions have not been met after the 3 months, Creatio has the right to disqualify the lead or assign it to another partner.
- If the lead has already been registered by another partner, Creatio is to inform the Partner about that registration. However, if the Partner desires to work on the opportunity, the Partner can participate in this deal only as an Implementation Partner, except if it is not an Open RFP.
- If several partners enter the deal with an Open RFI/RFP then the role of Sales Partner is assigned to all tender participants to ensure equal competition. To get the status of Sales Partner a partner has to register the lead within the period of RFI/RFP submission as defined by the tender organizer.
- The Partner who wins the deal is eligible to receive the commission as per its current Partner Level. Other partners that participated in the RFP will not be eligible for any commission and will not be credited towards their ARR Bookings. If the lead had been registered before the RFI/RFP by a Partner who was assigned to this lead as a Sales Partner, the other partners who participate in this RFI/RFP will be in the status of Implementation Partner only.

## RENEWAL EXTENSION

- When a Sales Partner or Implementation Partner closes a deal, this Partner is assigned for the Renewal of the client for the first calendar year.
- Each year a customer should confirm to Creatio its desire to continue working with the partner. In this scenario, the Partner will be assigned to renew the customer for the next calendar year.
- Creatio has the right to cancel the Partner's assignment for renewal/cross-up sale of the customer if the written notice is not received 30 days before the Renewal Date from the customer.
- Partner is advised to receive the written confirmation from the client 60 days before the renewal date of the client subscription, to secure assignment for the renewal, support, and cross/up sale.
- A client may request to change (or reassign) the assigned partner to a different partner who will provide professional services to the client. The previous partner will be automatically reassigned and neither commission nor ARR Bookings/Renewal volume will be contributed to the Partner account for the renewal, technical support, and cross/upsells during the calendar year.
- The newly assigned partner will be eligible for:
  - Renewal commission – only if the license renewal is planned after 180 days from the date of the Partner assignment to the client;
  - The commission for the cross/upsell - only for the deals that were originated during the period when the partner was assigned to the client.

### Example 4:

A client requests to change an assigned partner:

1. The previously assigned partner is no longer eligible for commission or volume to its level for the renewal, support and cross/upsells.
  2. A newly assigned partner is eligible for the renewal commission only if the renewal is planned after 180 days from the date of the Partner assignment to the client. Otherwise, none of the partners get a commission for the client's renewal.
  3. A newly assigned partner is eligible for the commission and ARR Bookings volume to its account for the cross/upsells that were originated during the period of time when the partner was assigned to the client.
- If a renewal is assigned to a partner, but there was no renewal contract received by Creatio before the date of the licenses renewal, the partner will not be eligible to receive the commission and the contract volume will not be added to the partner's Renewal Volume for this renewal. Creatio also has all rights to engage with the client directly, reassign the current partner assigned to the client, and assign another partner to provide the support, renewal, cross/upsell services.

- If a partner is involved in a cross/up opportunity with the existing client of Creatio, and there is no assigned partner with this account, the right to assign this client to the involved partner remains with Creatio.
- For on-site subscriptions, a partner is responsible for upgrading a client to the latest version.
- If a renewal is assigned to a partner, the first and second line of support services to be provided by the assigned Partner.
- If a partner renews Marketplace products, the commission will be calculated in accordance with the [Marketplace regulations](#).

## PARTNER SUPPORT

Creatio provides significant sales and [marketing](#) support, as well as [technical support](#) to help partners be successful. Support services and benefits to partners per each level are detailed in the table below:

Support Services to Partners						
	Services	Level 1	Level 2	Level 3	Level 4	Level 5
SALES SUPPORT	Dedicated Partner Account Manager	+	+	+	+	+
	Monthly Pipeline Review	-	+	+	+	+
	Pre-Sales Service with Corporate/Enterprise Customers	+	+	+	+	+
	Proof of Concept Development for CE Customers	+	+	+	+	+
	Sales Kit	+	+	+	+	+

Creatio is committed to supporting partners in their marketing activities aimed at driving demand and increasing brand awareness of Creatio products. All questions related to marketing can be emailed to [partner.marketing@creatio.com](mailto:partner.marketing@creatio.com). More information about marketing support is available in a [separate document](#).

	Services	Level 1	Level 2	Level 3	Level 4	Level 5
MARKETING SUPPORT	Marketing Development Fund	1.00%	1.50%	2.00%	2.00%	2.00%
	Co-investments	+	+	+	+	+
	Partner's hour promo	+	+	+	+	+
	Marketing Club eligibility	+	+	+	+	+
	<a href="#">Marketing Playbook</a> and Kit	+	+	+	+	+

Services	Level 1	Level 2	Level 3	Level 4	Level 5
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<b>PARTNER ECOSYSTEM</b>	Partner Page in Creatio Channel Catalogue	+	+	+	+	+
	Access to Partner portal	+	+	+	+	+
	Access to Partner Community	+	+	+	+	+
	Channel Administrator support	+	+	+	+	+

Services		Level 1	Level 2	Level 3	Level 4	Level 5
<b>BUSINESS SUPPORT</b>	Quarterly Kick-off Meetings	+	+	+	+	+
	Annual Management meeting	-	+	+	+	+
	Joint GTM strategy	-	-	-	+	+

Services		Level 1	Level 2	Level 3	Level 4	Level 5
<b>ACADEMY SUPPORT</b>	Guided Learning courses, \$	No limits	No limits	No limits	No limits	No limits
	Certification attempts	No limits	No limits	No limits	No limits	No limits
	NFR subscription/licenses cloud/on-site (list prices), \$	\$1,000	\$3,000	\$6,000	\$15,000	\$30,000

Services		Level 1	Level 2	Level 3	Level 4	Level 5
<b>TECHNICAL SUPPORT</b>	Customer <a href="#">Success Portal access</a>	+	+	+	+	+
	Partner Success Manager	+	+	+	+	+
	Support via email	+	+	+	+	+
	Support via phone (for 1 <sup>st</sup> priority cases)	+	+	+	+	+
	Number of cases on the product functionality and Citizen development per year	30	50	70	100	No limits
	R&D expert consultations per year	0	1	2	3	5
	Free Advisory Hours	-	-	-	100	300
	Access to Creatio Academy	+	+	+	+	+
	Access to <a href="#">Customer Success Playbook</a>	+	+	+	+	+

## PREPAID PACKAGES

The purchase of a prepaid package is mandatory for the activation and renewal of a partnership with Creatio. Packages are outlined below and provide a 50-55% discount on the Creatio services mentioned below in the table:

Products and Services	Option 1	Option 2	Option 3	Option 4
NFR Cloud Subscription (list prices)	+	+	+	+
Corporate Training Budget (list prices)	+	+	+	+
Guided Learning Budget (list prices)	+	+	+	+
Advisory Hours	+	+	+	+
Annual Partner Conference Free Passes	2	3	4	5
<b>List Price</b>	\$5,500	\$11,000	\$17,000	\$22,000
<b>Partner Price (Prepaid Package)</b>	<b>\$2,500</b>	<b>\$5,000</b>	<b>\$7,500</b>	<b>\$10,000</b>

If a partner joins the program from January 1 until March 31 and purchases a prepaid package, the next purchase is not required until the end of the following fiscal year. Partners are expected to purchase a prepaid package within 15 business days of the effective date of the contract. The purchase of a prepaid package is not required for the Reference partner. For the partnership renewals, prepaid packages are expected to be purchased within 15 business days of the renewal date.

A partner also has an option to convert its Prepaid Package fund to Marketing Development Fund (MDF) in a 1:1 ratio. The partner can either convert all or a part of its Prepaid Package fund into MDF.

**Example 5:**

If the partner purchases Prepaid Package Option 1 for \$2500 the partner can either keep it as a Membership fee fund in the amount of \$5500 or convert it into MDF of \$2500.

**Example 6:**

If the partner purchases Prepaid Package Option 1 for \$2500 and wants to use only \$1000 for MDF, the remaining balance of \$1500 in the prepaid package will be converted into Membership fee fund based on a specific ratio. For example, the remaining balance of \$1500 would be multiplied by 2,2 (for prepaid package option 2) that equals \$3300.

## PARTNERSHIP RENEWAL

- By the end of the financial year, a partner is expected to indicate the intention to continue the partnership for the next fiscal year and purchase the annual prepaid package by March 31<sup>st</sup>. In case a prepaid package is not paid a partner can enjoy reference commission only.
- The Partner-level for the following year is determined by the Partner's performance in the current year.
- Not-for-Resale subscription is provided to the Partner during the term of the agreement. All NFR licenses are activated on April 1 or at the start date of the partnership. The renewal or termination of the licenses is done on March 31 which is the end of the financial year and the renewal of the partnership contract.

## PARTNER BOARD

The Creatio Partner Board is a committee of partners that are invited to the board on the annual basis. The Partner Board is assembled by the leading Creatio partners and Creatio executives. Partners provide non-binding strategic advice and feedback on channel strategy, sales, marketing, and product roadmap. The selection of partners to the Partner Board is done by Creatio.

## REGIONAL LANGUAGE PARTNERSHIP

Regional Language Partnership is a model of partnership between Creatio and a partner targeted to deliver training, certification, and localization of Creatio product and website in the native language. More information about this model of partnership is available upon request.

## WE THANK YOU FOR YOUR COOPERATION!

USA office:  
+1 617 765 7997

UK office:  
+44 20 3384 0040

Australian office:  
+61 261 452 888

[info@creatio.com](mailto:info@creatio.com)  
[www.creatio.com](http://www.creatio.com)