

SMART Partner Branded Services Program

1.0 Overview

The program provides Platinum Channel partners the opportunity to deliver high quality, consistent, SMART supported services to Enterprise customers.

The SMART Partner Branded Services (“**PBS**”) program is an advanced authorization program within the SMART Technologies EDGE Partner Program available to interested SMART Platinum level channel partners who meet the minimum service delivery requirements defined in this document.

1.1 Purpose

This document defines the requirements for the SMART PBS program.

1.2 Definitions

Channel Partner: Channel Partner, as used in this document, means the organization seeking PBS authorization or reauthorization within the SMART EDGE Partner program.

1.3 Selling Partner Branded Support Services

SMART PBS partners sell their own branded support services to their end customers and, in turn, purchase the Basic SMART Support Services from SMART.

1.4 Terms and Conditions for PBS support

The terms and conditions for PBS support, sold as a PBS SKU, are between SMART and the Reseller. If a PBS SKU is sold to the reseller by SMART, the reseller is responsible for any terms and conditions for support Service Level Agreements (“**SLAs**”) associated with the reseller’s own branded support services sold to the end customer. SMART will provide reseller support as defined by the escalation process in Schedule B and the Service description in Schedule C.

2.0 PBS Certification Requirements

The chart below provides a high-level view of the certification requirements of the SMART PBS program. Requirements apply to all Channel Partners seeking PSB certification for support services authorization.

SMART shall determine a Channel Partner’s eligibility in its sole discretion based on these requirements and other relevant factors. SMART may modify these requirements from time to time upon notice to PBS program partners.

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PBS Support Authorized Requirements	PBS Support Authorized Partners	Standard Platinum EDGE Channel Partners
Pre-requisite SMART EDGE Certifications required	<ul style="list-style-type: none"> Required: Complete all EDGE Enterprise Platinum sales and SCTP training Required: Complete SRS Authorization training 	Standard EDGE Platinum training requirements
PBS-specific training requirements	<ul style="list-style-type: none"> Required: ENT – SMART Certified Technical Professional (SCTP): Partner Branded Services (FY17) Course ID: 34017 Required: 100% of all front line support agents and field technicians or specified percentage of total agents must complete above PBS course (8 hrs online) - ENFORCED 	N/A
Online support	<ul style="list-style-type: none"> Required: Link to SMART's Support website (support.smarttech.com) on partner support webpage 	N/A
Level 1 technical support	<ul style="list-style-type: none"> Required: Local business hour support for end customer (9-5 pm business days, minimum), < 2 hour live qualified response time on level 1 tickets. See details in section 2.5 First contact resolution rate of at least 65% 	N/A
Help Desk – non-SMART certifications:	<ul style="list-style-type: none"> Recommended: One Microsoft Lync certified support resource (MCITP or MCSE) available for escalated support 	N/A
Support lab	<ul style="list-style-type: none"> Required: SRS and kapp IQ/Pro unit for troubleshooting 	N/A
Elevation to SMART PBS Tier Two	<ul style="list-style-type: none"> Required: Follow SMART standard PBS support elevation process Elevation volumes not to exceed 15% of contacts 	N/A
Call management ticket/CRM and voice interaction systems	<ul style="list-style-type: none"> Required: Ticket/CRM system 	NA

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	<ul style="list-style-type: none"> Retain customer interaction records for at least one year. 	
Attach rate for first year support packages on SRS (purchased from SMART)	<ul style="list-style-type: none"> 100% - mandatory attach (minimum 1 year basic PBS) 	100% mandatory attach minimum 1 year basic
Support package renewal rate	<ul style="list-style-type: none"> Second year renewal rate targets to be established in FY18 	NA
ECCHO & CSAT survey participation	<ul style="list-style-type: none"> As required by SMART 	NA
Reporting and governance	Required: Call management reporting- Support metrics reporting as required by SMART	NA
Ongoing training and certification	Annual – Certified technicians complete 100% of training within 45 days of EDGE program roll-out	Annual

2.1 SMART Channel Partner Agreement (EDGE)

In order to qualify for PBS certification, Partners must be in good standing with SMART and hold a current fiscal year SMART EDGE Partner Agreement for the Enterprise market at the Platinum level, and the SMART Room System Advanced Specialization.

2.3 Warranty and Post-Warranty Support

Terms are as stated in the SMART Reseller and Distributor Agreements.

2.4 Electronic Support

The Partner must provide end-user access to a web-enabled knowledge base that will contain an easy search feature for retrieving solutions to technical queries. The Partner can satisfy this requirement by providing a link to the SMART Support site (support.smarttech.com).

2.5 Technical / Help Desk Support

The Partner must be able to accept technical support incidents via phone and email. Web-based support is recommended but not required. The Partner's technical support must be available five days per week, 10 hours per day. The Partner must make contact with the customer within two hours of receiving a call, voice mail, email or web notification of a problem. If authorized for elite services, the response time must be under one hour within local business hours (e.g. 9 am – 5 pm) for the customer site.

All support personnel must complete the required SMART certification training and provide customers with general product information, hardware and software troubleshooting support, as well as installation and upgrade support in accordance with the SMART defined Level 1 support requirements (see Schedule A). When handling technical problems, personnel are required to document relevant details including: problem history, hardware information and configuration.

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Support personnel must also determine product specification defects in training and testing requirements as outlined in section 2.8.

2.7 Field Support

Channel Partners are required to provide, within the PBS application, a description of their field support and geographic coverage strategies to resell SMART products and services within their authorized territory. Should the partner choose not to deliver their own field support they must sell SMART branded Plus services to customers who require onsite support.

Partner personnel who provide field support for SMART products must meet certification, training and testing requirements as outlined in section in the Requirements charts and section 2.8.

2.8 Certification, Training and Testing Requirements

The following are requirements for Channel Partner support personnel:

- Take SMART certification training, product technical training courses, and product technical tests through the SMART Learning Space and not through any other SMART training organization, unless specifically directed by SMART.
- Complete training for new technical support hires and certify per the PBS requirements within 45 days.

Channel Partners can access course registration, detail and availability on the SMART Learning Space Web site via the SOURCE.

SMART PBS Training Requirements:

Pre-requisite training required:

- Enterprise Platinum and SRS certification training must be completed for current fiscal EDGE year prior to initiating PBS training.

PBS Authorization Training:

The PBS training will be made available at no cost online in the SMART Learning Space. Partners who have PBS applications accepted by SMART will be directed to complete the following training requirements in their organization in order to become PBS authorized:

- Course Path Name: ENT – SMART Certified Technical Professional (SCTP): Partner Branded Services (FY17)
- Course Path ID: 34017
- Required Personnel to complete: 100% of front line support agents and technicians – or per SMART’s direction
- Course details: see below chart:

Course Name	Approximate Duration
ENT – SMART kapp™ Technical Training	1 hour
ENT – SMART kapp iQ™ Technical Training	1 hour
ENT – SMART kapp iQ™ Pro Technical Training	1 hour

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ENT – SMART MeetingPro™ Technical Training	1 hour
ENT – SMART Board® 8000-G5 Technical Training	1 hour
ENT – SMART Board® 8084-G4 Technical Training	1 hour
ENT – SMART Bridgit™ Technical Training	1 hour
ENT – SMART Room Systems Technical Training	1 hour
Total Duration of PBS training	8 hours

2.9 Outsourcing

Channel Partners must identify in the application form if they wish to use an outsourced third party to deliver any of the services. They must then ensure personnel meet the certification and training requirements outlined in section 2.8. SMART retains the right to refuse authorization at its discretion to third party service partners.

2.10 Support Lab Equipment

SMART Channel Partners are required to have at least one fully configured product in their support center from each authorized product line. Products must be available to support personnel for timely troubleshooting purposes.

2.11 Escalation Policy and Process

In their PBS application, the Channel Partner must submit a documented escalation policy. The escalation policy must meet SMART's escalation policy requirements as defined in Schedule B.

The escalation policy describes problem escalation through the Channel Partner's support and management structure, and when necessary to SMART. The following criteria must be included:

- Priority /Issue definitions
- Internal escalation process and timeframe for each priority/issue type
- External escalation process to SMART. See appendix for SMART PBS policy

2.12 Call Management Database

The Channel Partner must maintain a call management system that contains customer information, case history and enables support personnel to communicate with the call management system from multiple locations. Minimum requirements are as follows:

- Reseller support case number and creation date and time
- Clear identification of the product requiring support (full product model number(s), serial numbers of all serialized components of the product, etc.)
- Clear identification of the trouble symptom and steps taken to reproduce the trouble symptom (including photos or videos visually demonstrating the trouble symptom)
- Clear identification of system wiring, including cable lengths, use of extensions, list of connected 3rd-party hardware, etc.
- An itemized list of all troubleshooting steps completed (parts isolated, etc.) prior to requesting further assistance

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- An itemized list of all resources (product documentation, KB articles, training resources, websites, YouTube videos, etc.) referenced prior to requesting further assistance
- Copies of any log files or other diagnostic information collected during troubleshooting
- An itemized list of any other incident reference numbers related to any history of issues with this product at this customer location

2.13 Customer Satisfaction Survey

SMART will frequently administer end-user customer satisfaction surveys to determine customer satisfaction with the Channel Partner's technical phone/email and field support. The survey is an agreed set of consistent questions and the Channel Partners must achieve 75% satisfied or very satisfied on a final overall customer satisfaction question "How satisfied are you with the service and support that you receive from [enter name of partner]?"

Each Channel Partner must provide SMART with contact information for their end users who received service on their SMART products in the period of time defined by SMART. This information must include the contact name and phone number of the individual who requested the service. To ensure a reasonable and statistically significant measurement, SMART requires a minimum number of records that will be determined by the size of the Channel Partner's end-user database.

SMART will release final Customer Satisfaction survey results to the Partner, keep customer information confidential, and will not merge Channel Partner records with other records.

2.14 Service Program Attach Rates

The Channel Partner is required to attach services on all products requiring mandatory Support packages, such as SMART Room Systems. SMART will outline service attachment requirements as part of SMART EDGE partner program authorizations.

2.15 Service Program Renewal Rates

The Channel Partner is required to meet the minimum service renewal rates for net new sales as specified in the FY17 Partner Program. For the second year (FY18) of PBS authorization service renewal attach rate targets will be set.

3.0 PBS Application Process

Once Platinum channel partners complete the current fiscal year EDGE training, they will submit an application using the online form on the SOURCE.

The PBS program manager will acknowledge receipt of the application and complete a review. If the application is accepted, the PBS program manager will schedule an initial interview. SMART may require an on-site audit. If this is the case, the PBS program manager will schedule the audit and a SMART certification team will conduct an on-site audit. Upon successful completion of the audit and required training within the 30-day window, the PBS program manager will notify the Channel Partner of acceptance into the PBS program.

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4.0 PBS Requirements Audit Frequency

SMART expects PBS Authorized partners to meet program requirements throughout the certification year. SMART, at its discretion, may conduct periodic audits of PBS certification requirements. If required, SMART will set up a program compliance review to discuss audit findings and any remedial actions required.

5.0 Get Well Plan

In cases where the Channel Partner does not meet program requirements the Channel Partner will prepare a “Get Well Plan” which describes actions planned to ensure future program compliance. SMART will work with the Channel Partner to determine a mutually agreed upon limited period to make the required improvements to ensure compliance with the program.

During the course of a Get Well Plan, the Channel Partner will maintain the current authorization level, if they meet all other PBS certification requirements. Failure to meet the requirements documented in the Get Well Plan may result in loss of authorization and associated benefits including access to PBS pricing and SKUs.

6.0 Program Support

SMART will provide PBS Partners with the following:

- A PBS pricelist from which specified PBS Services SKUs can be ordered at a PBS margin
- The SMART PBS technical support escalation policy
- Direct access to SMART level 2 technical support as per PBS elevation policy
- Direct access to the SMART Channel Support team

7.0 Termination

The term of a PBS authorization is one year. At the expiry of its authorization, the Channel Partner must re-apply to the program for a subsequent year.

If SMART terminates the Channel Partner as a SMART Reseller or Distributor, they will also terminate the partner from the PBS program. As such, the partner will not receive PBS program benefits, including access to PBS pricing and SKUs.

SMART reserves the right to terminate or modify this PBS program at any time, for any reason, upon prior written notice to PBS partner. SMART reserves the right to suspend or terminate a partner from this program for any reason, upon 30 days written email notice to the partner.

8.0 Reporting

SMART may request call and email management reporting and metrics as required.

9.0 Pricing

SMART will give the partner PBS Services SKUs and pricing from the distributor upon PBS approval. SMART shares its PBS SKU and recommended pricing with the distributor, who then resells these SKUs and pricing to the reseller. SMART determines which resellers have access to

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the PBS pricing and SKUs, updates the SMART master reseller list and shares the PBS program approval status with the distributor.

10.0 Program Contact

For additional PBS program information, please contact your SMART Channel Manager.

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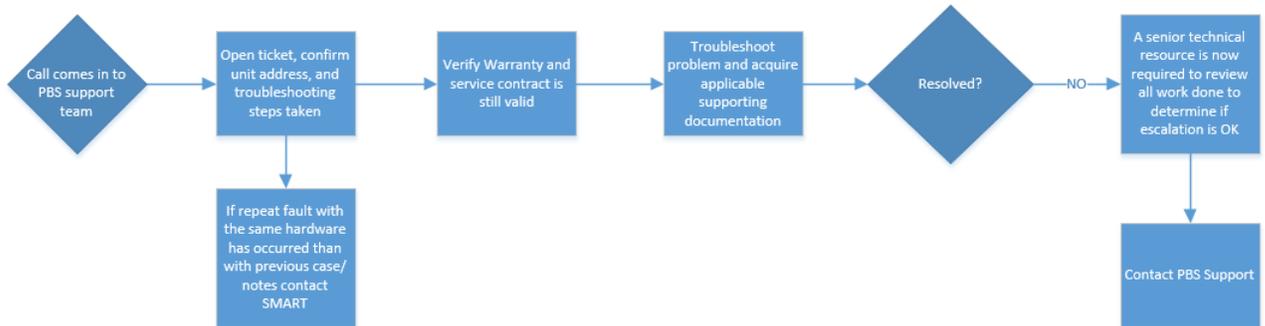
Schedule A: Level 1 Support information requirements for cases passed on to SMART level 2

Equipment installation location	
Name:	
Address:	
Business type:	
Primary contact	
Name:	
Phone:	
Alt. phone:	
Email:	
Secondary contact	
Name:	
Phone:	
Alt. phone:	
Email:	
PBS information	
PBS partner:	
Primary support technician:	
Primary contact main phone:	
Primary contact cell phone	
Primary contact email:	
Secondary support technician:	
Secondary contact main phone:	
Secondary contact cell phone	
Secondary contact email:	
Additional contacts:	
Product(s) requiring support	
Model:	
Serial number:	
Model:	
Serial number:	
Model:	
Serial number:	
Case numbers:	
Product symptoms:	
List of troubleshooting steps:	
List of materials or documents used for troubleshooting:	
List previous support incident numbers for this installation:	
Attach log files and any other diagnostics:	
Attach a system wiring diagram:	
Identify any third-party equipment installed:	

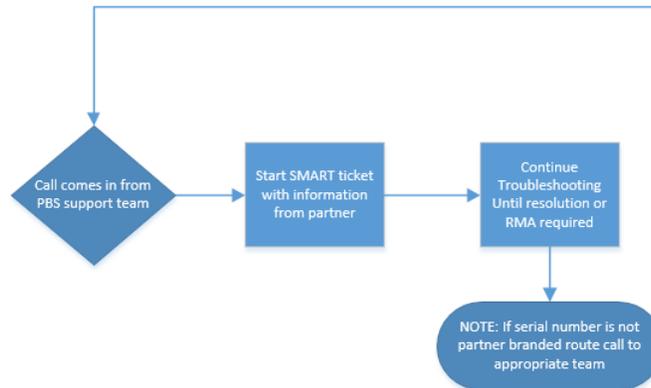
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Schedule B: SMART PBS Escalation Process

PBS Customer calls Partner for Support



PBS Partner calls SMART for Support



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Schedule C: PBS Service Description and Terms and Conditions:

The below Service Description and Terms and Conditions outline the Service level objectives between SMART and the reseller partner for Partner Branded Support Services sold. SMART is not obligated to any terms and conditions or support SLAs to the end customer for Partner Branded Services. All customer SLAs set by the reseller when selling SMART Partner Branded Services are solely between the reseller and the end customer.

SMART’s Partner Branded Services Program provides PBS Authorized Partners with technical telephone support for level 2 elevations and advanced parts replacement.

Enterprise SMART Partner Branded Support	PBS-Basic
Product Info and self-serve	
Knowledge base access	24 x 7
RMA	
Advanced hardware replacement	Yes
RMA order processing	24 hours
Advanced hardware shipping guarantee – door-to-door or port of entry *NA only	10 days max
Support	
PBS support initiation via phone	✓
Expert level remote support (Level 2 – 4)	✓
Hours of support response	6 am–5 pm (GMT)
Support on weekend and holidays	not available
Fast qualified response time	< 30 minutes
Incident prioritization – Levels 1-3 as defined by SMART PBS program	Set by partner in initial ticket (1-3)
Software maintenance (solutions with Meeting Pro and MPPE only)	
Software updates – major and minor version releases	included

Technical Telephone Support

Availability and Operation

- SMART will make available technical telephone support during business hours (6 am to 5 pm, Monday to Friday, excluding weekends and holidays recognized in Canada and US) for technical support of SMART products covered by the Partner Branded Program.
- SMART will provide tier two diagnosing and troubleshooting technical support to the Service Partner's organization (the “Service Partner’s Contact(s)”) with escalation contact volume not to exceed 15% of PBS customer initial contact volume.

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- SMART support engineers will remotely provide assistance in English only through a PBS phone number extension.

All Service Partner's contacts must meet the following criteria:

- PBS Service personnel contacting SMART must complete SMART training as defined in the program above.
- Support calls to SMART must originate from the Partner's centralized help desk location.
- SMART will redirect any support incidents logged directly by the PBS customer back to the reseller.
- Priority Management: SMART will classify a reported Service Partner problem based on the following methodology:
 - **Escalation Management** - SMART has established formal escalation procedures to resolve complex technical support problems. SMART's support management team coordinates the escalation of problems through tiers of technical expertise, rapidly engaging the right specialists throughout SMART.
 - **Response Objective** - SMART technical contact response objectives are determined based on the Priority Level of the reported problem. SMART's response objective is defined as the duration of time between when a SMART Partner contacts SMART to report a problem and when a SMART support engineer is in contact with the Service Partner and begins the troubleshooting process.

SMART's Technical Support Response Objective*

Priority Levels 1 to 3: under 30 minutes

*SMART calculates Response Objective timeframes within business hours (e.g. a SMART support engineer will respond to a Priority 1 problem reported at 5 pm by 6 am the following morning (excluding weekends and holidays). SMART meets response objectives on a best efforts basis.

Advanced Hardware Repair/Replacement

If the Partner has purchased a PBS Support Services Plan, then SMART will provide replacement Hardware to the Partner or their end customer's loading dock in accordance with the PBS Basic Hardware Replacement Support Plan. The PBS reseller is responsible for delivery of the hardware to the end customer's installation site/room.

Advanced Hardware Replacement unit means that SMART will ship a replacement product or component to the location designated by the partner (NA only) in advance of receiving the failed unit back. This provides a significant value because there is no wait time for SMART to first receive the failed unit before shipping a replacement. If the partner does not return the failed unit to SMART within 30 calendar days, starting from the Ship Date, SMART will bill the Partner for a new unit at the applicable list price. A restocking fee of 15% of the applicable list price may also apply. It is recommended that defective units are returned as soon as possible to avoid any fees.

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PBS Partner responsibilities when selling SMART PBS services:

- I. Partner is responsible for delivery of all support services and SLAs to its end users. This includes but is not limited to telephone support, on-site labor, hardware and parts replacement, and assisting with software updates and upgrades.
- II. Partner is responsible for documenting and creating a support contract and SLAs with the end customer.
- III. All Partner technical personnel must have completed SMART training for those SMART Products which they service. As a minimum, all personnel that are required to service SMART Products must become SMART Certified Technical Professionals under the PBS certification course pathway, as defined in the Partner agreement.
- IV. Partner technical personnel and completed SMART Product training must be registered on the SMART Learning Space registration and reports.
- V. Partner must provide at the time of order all serial numbers and end customer contact information for all SMART products covered by the Partner Branded Program.
- VI. Partner must provide the contact information for Partner's designated technical representative(s) who will assist SMART with the initial classification of a reported problem and subsequent troubleshooting steps.
- VII. Partner is responsible for installation of all replacement parts provided by SMART as part of the Partner Branded Program.
- VIII. Partner is responsible for assisting the end customer with installing any software upgrades or updates that are made available to the Service Partner or customer for products covered by the Partner Branded Program.
- IX. Partner must notify SMART of any changes made to the SMART products if such changes were made using hardware or software purchased from a vendor other than SMART. SMART is not obligated to provide support for any third party hardware, software or components.
- X. Partner is responsible for replacing, at its own expense, any and all consumable items used in connection with the covered SMART product, including without limitation, non-SMART cabling, bulbs and batteries.
- XI. Partner will have the continuing obligation to keep all SMART products under the Partner Branded Program at either the then-current software version or previous major software version release.
- XII. In the event of a conflict between the terms and conditions of a Partner's own Branded Service description and SMART's PBS program Terms and Conditions, the SMART PBS Support Services Terms and Conditions will apply.

SMART Partner Branded Service Program Availability

At this time, SMART's Partner Branded Program is available in North America only. PBS SKUs may only be sold by a reseller for use with end customers in their regional area of coverage. SMART Support Service coverage for end customers outside of North America must be purchased from the regular SMART support plans.