Partner Marketing Program Guide

Liferay

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Welcome to Liferay Partner Marketing

The Liferay Partner Marketing program is a set of benefits designed to help you establish your brand as a Liferay partner, drive demand for your services and Liferay products, and build your pipeline. As your commitment to Liferay increases, so do your marketing program benefits.

The Liferay Partner Marketing Program consists of marketing strategy support, partner-friendly content, co-marketing opportunities, and market development funds (MDF) as defined in this document.

Partner Marketing Benefits Matrix

Abbreviations: GL-Global; D-Distributor; P-Platinum; G-Gold; S-Silver

Benefit	GL	D	P	G	S
Program Logo Usage	✓	✓	✓	✓	✓
Branding as Liferay partner on liferay.com and your website	✓	✓	✓	✓	✓
Case Study Support	✓	✓	✓	✓	✓
Quarterly Partner Marketing reviews	✓	✓	✓	✓	
Customizable marketing assets for co-branding	✓	✓	✓	✓	✓
Ability to participate with Liferay in marketing initiatives (road shows, webinars, guided case studies, etc.)	✓	✓	✓	✓	✓
Access to Liferay partner marketing initiatives (demand gen, thought leadership. etc.)	✓	✓	✓	✓	✓
Quarterly marketing strategy sessions with Partner Marketing	✓	✓	✓		
Ability to request MDF 2x per year based on approval of six-month marketing plan and approved business plan	✓	✓	✓	✓	

Partner Marketing Assets

Based on availability, Liferay provides the following types of campaign-related assets to partners in every tier of the program.

White Papers	Use Cases	Solutions Briefs
Videos	Blogs	Social Content
Infographics	Case Studies	Copy Blocks

Market Development Funds

MDF is a monetary resource available to qualified partners to subsidize the cost of joint (Partner/Liferay) demand generation activities. These funds and the associated marketing activities are vital to promoting your brand as a Liferay partner, helping to build a lead pipeline, and developing new business opportunities with Liferay.

- Any Liferay Distributor or Global, Platinum, Gold, or Silver partner may submit an MDF proposal for funding consideration.

- Partners must have appropriate Liferay branding and status as a Liferay partner on their websites.

- Partners must have provided required Pre-Approval and Proof of Performance documentation for prior MDF requests in order to receive funding for subsequent requests.

MDF Funding per Partner Tier

Partners accepting MDF allotments are confirming they are capable of executing approved plans. Liferay may provide support by participating in strategic planning sessions, providing supporting content, and contributing speakers and other support as resources are requested and available.

Partner Type	Potential Allocation	Percentage Reimbursed
Global and Distributor	Up to $15,000 USD per half	Up to 75% of total
Platinum	Up to $10,000 USD per half	Up to 75% of total
Gold	Up to $5,000 USD per half	Up to 50% of total
Silver	Up to $2,500 USD per half. Allocation and approval will be granted on a case-by-case basis.	Up to 50% of total

MDF Process

1. Partner meets with Liferay Alliance Manager and Partner Marketing to create marketing plan (2x/year)

2. Partner submits MDF request with marketing proposal to Liferay via the Partner Portal. Liferay reviews the proposal and submits questions or approves

   a. Partner provides answers or makes adjustments as requested

   b. Liferay team submits approval or declines request

   c. Liferay team submits approval via the Partner Portal

3. Partner executes marketing program(s) as indicated in the plan

4. After program completion, Partner submits proof of performance (original documents, images, etc.), lead list, and invoices in order to make a claim for reimbursement

MDF Eligible Activity Guidelines and Proof of Performance Requirements

Type of Activity	Tactics	Proof of Performance
Demand Generation Events	• Partner Produced Customer Events/ Road Shows • Industry Conferences, Trade shows, Workshops, etc. • Webinars	1. PDF of invitation with approved Liferay branding 2. Photos that show Liferay representation at event 3. PDF of collateral/presentations used at events 4. Any 3rd party invoices for which reimbursement is being requested 5. Lead list generated with a follow up / conversion plan
Digital Marketing Demand Generation programs, including but not limited to the items listed in the Tactics column.*	• Email • Blogs • Search engine marketing (Paid and organic SEM and SEO keywords must be approved by Liferay) • Social • Advertising	1. PDF of all content (collateral, email, landing pages, etc.) used with approved Liferay branding 2. Digital marketing metrics as appropriate (Impression, Clicks, opens, etc.) 3. Social media metrics as appropriate (followers, likes, shares, etc.) 4. Key word lists as appropriate 5. PDFs of digital advertising 6. Any 3rd party invoices and rate card for which reimbursement is being requested 7. Lead list generated with a follow up / conversion plan

Traditional Marketing Demand Generation programs, including but not limited to the items listed in the Tactics column.*	• Direct Mail • Outbound Telesales/ Telemarketing • Print Advertising (if a part of a larger marketing campaign) • Prospect List Purchase	1. PDF of all collateral/advertising with approved Liferay branding 2. Call script used for telemarketing 3. For telemarketing, number of calls made and number of appointments set 4. Any 3rd party invoices and rate card for which reimbursement is being requested 5. Lead list generated with a follow up / conversion plan
Content Creation (for use in demand gen campaign; including but not limited to the items listed in the Tactics column.*)	• Web Content • Video • Infographic • Social Content • Blogs • Success Story/ Case Study • White Paper	1. PDF of all collateral/ advertising with approved Liferay branding 2. Links to videos produced 3. Any 3rd party invoices and rate cards for which reimbursement is being requested 4. Lead list generated with a follow up / conversion plan
Other	• Co-branded Merchandise/ Promotional Items (≤ 10% per funding cycle)	1. PDF of item with approved Liferay partner logo visible 2. Any 3rd party invoices for which reimbursement is being requested

*All exceptions require prior approval

Activities Not Eligible for MDF

1. Expenses associated with multi-vendor ads, signage, or marketing in which a Liferay competitor is also included

2. Expenses associated with telesales/telemarketing where an appointment is set with a partner or Liferay existing customer

3. Expenses associated with telesales/telemarketing that are not part of an MDF approved campaign

4. Expenses associated with accommodations, travel, entertainment, or other related expenses at industry or partner-produced events

5. Expenses associated with accommodations, travel, entertainment, or other related expenses at Liferay-produced events

6. Sponsorship fees for Liferay-produced events

7. Expenses associated with Liferay or third party training

8. Sales contests, incentives, or other sales performance incentives/SPIFFs

9. Memberships and subscriptions

10. Advertisements on referral sites, adword campaigns exclusive the partner's brand, and other partner only branded ad campaigns

11. Partner sales meetings

Partner Brand Guidelines

1. Partners should use the appropriate Liferay partner logo in all co-branded, MDF-supported marketing materials and assets. Please reference the Partner brand guidelines document.

   a. The Liferay corporate logo should not be used for Partner programs. If partner feels the Liferay logo is more appropriate, partner must submit a detailed request to Partner Marketing for approval of the exception.

MDF Terms and Conditions

1. Proposal submittal does not guarantee allocation of Marketing Development Funds (MDF). MDF is offered locally to drive specific campaigns and initiatives. Funding will be based on alignment of the marketing program with lead generation and partner sales goals along with partner standing in the region. The actual amount allocated to the partner for marketing initiatives may vary based on the geography and the initiative.

2. To qualify for MDF, partners must have appropriate Liferay branding and partner relationship status on their websites.

3. A Platinum, Gold or Silver partner with a physical presence in more than one country, may request MDF for each country. Allocation will be based on the discretion of the Liferay team.

4. Partners can use MDF to cover both marketing activities and agency support of execution as necessary. A 3rd party invoice and rate card is required for reimbursement of such support.

5. Partners requesting exceptions to any Liferay Partner Marketing guidelines must submit the exception in writing to Liferay Partner Marketing. (partner-marketing@Liferay.com)

6. Reimbursement for marketing activities is contingent upon meeting all specific guidelines and requirements as specified by the MDF Eligible Activity Guidelines and Proof of Performance Requirements section of this document.

7. Liferay reserves the right to refuse reimbursement for marketing activities that do not meet MDF Eligible Activity Guidelines and Proof of Performance Requirements, contain errors, are improperly positioned, are in poor taste or reflect unfavorably on Liferay or any company identified as part of the Liferay ecosystem.

8. Liferay will not reimburse any third party directly on behalf of a partner. Funds must be claimed as a reimbursement directly to the partner.

9. Liferay reserves the right to adjust claim reimbursement when a claim does not properly reflect actual costs based on local net rates minus any discounts the partner may have received.

10. Advertising must not be misleading as to price, features or specifications, or be in violation of any country or state laws, municipal ordinance, or administrative agency rules and regulations.

11. Whenever the Liferay name or partner logo is used in a marketing activity, Liferay usage guidelines must be followed. Liferay partner logo usage guidelines can be found in the Partner Brand Guidelines document on the partner portal.

12. MDF cannot be used to cover marketing activities that also promote Liferay competitors.

13. MDF amounts will be prorated where cooperative/noncompetitive vendors are included in marketing tactics.

14. Liferay must receive the completed partner claim, including required performance documentation no later than 30 days after the published posted funding period close date. If the completed claim is not received within the 30-days, Liferay reserves the right to deny reimbursement. Required proof of performance must be received with all claims. Proof of performance documentation includes third-party vendor invoices of expenditures and specific documentation as listed under each eligibility description. Please see page 3 of the Partner Marketing Program guide.

15. Liferay may change, modify, or terminate this program with a 30-day notice. All valid claims due to expenses incurred before the change, modification, or termination will be unaffected.

Questions?

Need more information? Please contact your Regional Partner Marketing Manager, Regional Alliance Manager, or partner-marketing@liferay.com.

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