



Authorized Partner Handbook

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Welcome

Dear Authorized Partner,

We are delighted to welcome you to the Everything DiSC® Authorized Partner network! You are now part of a community of learning professionals dedicated to foster a more collaborative and engaged culture at work. Using our innovative products and solutions, you will be able to help individuals develop a better understanding of themselves and others, explore their potential, and realize success.

As an Everything DiSC Authorized Partner, you are able to deliver coaching and training using our best-selling Everything DiSC® tools. You are authorized to purchase products at wholesale prices, use our extensive Partner resources, receive dedicated Partner support, and access our exclusive EPIC and Catalyst™ platforms to enable customizable online profile delivery.

This handbook provides detailed information on the requirements and expectations of an Everything DiSC Authorized Partner. The primary purpose of the handbook is to explain our current policies and procedures—be sure to reference this handbook for any questions about the details of your Partnership.

Thank you for choosing to partner with us. We are excited to have you on board and look forward to working together to unlock human potential!

Sincerely,

Wiley's Professional Learning Team

Please note, this handbook is designed to provide guidance to Everything DiSC® Authorized Partners. It does not constitute Modified Terms as defined in the Wholesale Purchase Application and Agreement, and it is subject to all terms of that Agreement. Our parent company is Wiley. Therefore, all references to “Everything DiSC” in this document extend to Wiley and its brands.

Authorized Partner Benefits

As an Everything DiSC® Authorized Partner you have access to a number of benefits, including:

Tools:

- Wholesale pricing on the Everything DiSC® product suite, which allows you to sell the products at a markup
- An EPIC account, allowing you to deliver, customize, and manage online assessments and reports from anywhere in the world
- Access to MindLab™ Connect (www.MindLabConnect.com), our exclusive Authorized Partner news and resource site created to help you incorporate the Everything DiSC tools into your business
- Permission to market, advertise, and display Everything DiSC products using trademarked logos and product names

Community:

- Membership to our experienced and supportive Authorized Partner community, where you are encouraged to collaborate, network, and share best practices
- Ability to participate in the Authorized Partner Awards Program and earn additional benefits
- Access to Everything DiSC events and Partner conferences
- Opportunity to participate in product beta tests and promotions
- Exclusive access to official Everything DiSC Authorized Partner communications
- Access to our LinkedIn group available exclusively to Everything DiSC Authorized Partners

Education:

- One seat at the Everything DiSC new Partner training (JumpStart) at no charge; more seats are available for an additional cost
- Wholesale pricing on client certification courses, allowing you to ensure that your client organizations are educated on the Everything DiSC tools

For further details on any of the Partner benefits listed here, please speak with a member of the Partner Success team. You can also find more information in the “Authorized Partner Resources” section of this handbook.

Authorized Partner Guidelines

Authorized Partner Code of Conduct

We conduct our business in an ethical manner to promote a positive atmosphere for business relations. In turn, we expect you as an Authorized Partner to do the same.

Although we cannot cover all situations that may arise in the course of a Partner's daily work, by using this guide as a basis of professional conduct and decision-making, Partners will help uphold a high standard for the entire Partner network.

As an Authorized Partner, you should:

1. Maintain the integrity of Everything DiSC® and the Everything DiSC Authorized Partner Network. Never interfere with, or disrupt the business of, another Authorized Partner by means of misleading clients, intentionally creating confusion between the identity of your business and Wiley or that of another Partner or engaging in any illegal competitive practices. As we strive to maintain a professional community of Authorized Partners that respect Partner/client relationships, poaching of clients from other Partners will not be tolerated.
2. Never interfere with, or disrupt the business of, another Authorized Partner by advertising your services or attempting to poach clients from other Partners while participating in online communities or group communications (e.g., LinkedIn, Facebook groups, etc.).
3. Maintain and practice high ethical standards at all times in the treatment of clients and other Authorized Partners. You agree to conduct business with professionalism, integrity, and respect for all individuals, without regard to race, creed, color, gender, age, national origin, or any other classes protected by law.
4. Never solicit or promote non-Wiley products or services while attending or participating in Everything DiSC or Wiley-sponsored groups or events.
5. Never intentionally falsify or misrepresent information in any document pertaining to Everything DiSC or Wiley.
6. Never use, disclose, or transfer trade secrets or otherwise confidential or proprietary information of Everything DiSC, Wiley, its clients, or its vendors to unauthorized individuals.

7. Never share communications intended for Authorized Partner use with non-Partners. Communications intended for Authorized Partner use include emails, LinkedIn Partner Group postings, information from Partner events, and webinars. Marketing collateral, including digital brochures and product information, may be given to your clients for marketing purposes under the terms of the Trademarks and Copyright section of this handbook.
8. Never authorize the sale of Everything DiSC® products to employers for use as a pre-hire assessment, in candidate selection, or in any discriminatory manner. Employment practices are subject to laws that vary and change. Seek legal advice if questions exist about employment practices and procedures.

Authorized Partners are expected to follow the Code of Conduct. Failure to comply may result in legal action, financial penalties, and/or termination of your Wholesale Purchase Application and Agreement.

Questions

An open and honest dialogue on the issues within the Code of Conduct is essential to maintain and continuously strengthen the integrity of the Everything DiSC Authorized Partner Network. Direct any questions about compliance or the Code of Conduct to rights@everythingdisc.com.

Professional Marketing Standards

An important part of business ethics relates to marketing practices. As an Everything DiSC® Authorized Partner, we want you to have and develop your own brand identity. However, your marketing materials, websites, and any online presence that includes Everything DiSC products or trademarks must adhere to the following guidelines:

1. Partner Identity: Ensure that you and your company are positioned as an Everything DiSC Authorized Partner in all your marketing materials, including your website. You are not permitted to refer to yourself or your business as Everything DiSC, Wiley, or as an “exclusive,” “preferred,” “best,” or “top” provider, or any similar language.

- Always clearly identify yourself (or your company) as an independent Everything DiSC Authorized Partner and use the Everything DiSC Authorized Partner logo in all marketing materials. Your online presence should be distinct and not mistaken for an official Wiley product site. Always ensure that a readable Everything DiSC Authorized Partner logo is placed on every page that markets, advertises, or sells our products.
- Never claim to be, or imply that you are, an associate, employee, agent of Wiley, or a “Wiley Authorized Partner.”
- Never combine your company name or logo with any Wiley product name, logo, or trademarked image in any manner. Do not use names or logos that imply you are the originator, author, source, or publisher of our products or imply any relationship other than that of being an Everything DiSC Authorized Partner — e.g., “The Original Source for DiSC® Profiles” or “The exclusive provider of Everything DiSC or Wiley products.”
- If you choose to market the Everything DiSC tools, all approved Everything DiSC product descriptions, marketing images, and other collateral can be found on MindLab™ Connect. Never download and use, publish, reproduce, or plagiarize text or photos from any of Wiley’s public Everything DiSC websites or another Partner’s website.

2. Product Positioning: Position Everything DiSC products independently from non-Wiley DiSC products.

- Never include DiSC products from providers other than Wiley in the same marketing materials and/or websites that include Everything DiSC products.
- Always clearly identify our assessments and solutions as Everything DiSC products. Never combine our product names and logos with any third-party names and logos.
- You may not provide a link to or additional information about other DiSC products from the same website that includes our DiSC products.

3. Online Marketing: Ensure that all marketing materials, including your website and any other online activity, position our products as high-quality products. Wiley has invested heavily in brand recognition, and while we allow our Authorized Partners to determine their own selling price, Partners cannot position our products, including EPIC credits, as “low cost,” “best price,” “discount,” “xx% off,” “Sale Price,” “On Sale,” “Sale,” “Reduced,” “Special,” or other “price-off” strategies, including such references in metatags, search engine results, and/or website copy.

- Pricing on websites and shopping carts must be set to prevent pricing from displaying in search engine results.
- Never sell our products from a third-party commerce website, such as eBay, Amazon, etc. Use of shopping/listing directories that present pricing is forbidden.
- For Authorized Partners outside the United States/Canada only: The online promotion or sale of EPIC credits or EPIC Sub Accounts is strictly forbidden. Any pricing for the products should be listed in legal currency only.

4. Current Products: Ensure that you are promoting, advertising, and publicly marketing our current products. You cannot promote, advertise, or otherwise publicly market discontinued products (including offering discontinued products to other Partners via LinkedIn and other social media sites). Complete lists of our current products are provided in the current Confidential Wholesale Price Lists.

5. Use of Resources: Your Wholesale Purchase Application and Agreement grants you permission to download and use promotional marketing copy, product photos, videos, logos, images, and PDF files made available and specified for marketing purposes on MindLab™ Connect:

- You may include PDFs of sample Everything DiSC® reports, in their entirety, in your marketing materials and on your website. You do not have permission to use portions of any report, or extract copy or images from a report for inclusion in your marketing efforts.
- You may not include PowerPoint® slides, handouts, leader’s guides, course outlines, videos, or any other content from our facilitator kits or other Everything DiSC materials or classroom aids in your marketing efforts, including online activity, unless they are made available on MindLab Connect.
- Video segments that have been created specifically for Partner marketing purposes are available on MindLab Connect. You may embed and share marketing videos from MindLab Connect in your marketing initiatives.

- 6. Domain Names:** Your domain name(s), blog sites, and online identities should not cause confusion as to the ownership of the content or website. Your domain name(s) must not imply that your website is that of Wiley or Everything DiSC®. You may not use our trademarks, including company name and trademarked product names, as part of your domain name, blog site, or online identity. You may include the product name in your URL extension, for example: www.abccompany.com/everythingdisc. You must support all trademark, copyright, and ICANN rules when choosing a domain name. Use your best judgment before purchasing a domain name.
- 7. Certification:** Wiley reserves the right to offer certifications for our products. Wiley offers Everything DiSC certification that you can market and sell to your clients. To find out more, access MindLab™ Connect or contact Partner Success
- You may not offer any non-Wiley certification that uses our product titles, logos, or images or in any way causes confusion with the Everything DiSC Certification from Wiley.
 - You may not advertise or use the terms “accreditation” or “certification” in your training, or any service offers related to Everything DiSC or DiSC®, unless you have permission under the terms of a Licensing Agreement with Wiley.
- 8. Translated Products:** You may state in your marketing that “select Everything DiSC products are available in multiple languages.” You are not permitted to list and promote any translated Everything DiSC products unless otherwise specified in your Wholesale Purchase Application and Agreement.
- 9. Confidential Information:** Never include confidential Wiley information on your website (Confidential Wholesale Price List, Partner Handbook, etc.).

By embracing these standards, together we will continue to uphold the integrity of our Authorized Partner Network and Wiley’s reputation as a respected and responsible provider of high-quality learning and development solutions.

Intellectual Property: Trademarks and Copyright

Wiley has devoted significant time and resources to developing its Everything DiSC® brand and therefore places a high value on protecting its intellectual property rights.

Trademark Standards

As an Everything DiSC Authorized Partner, you are granted a non-exclusive, limited right to display Everything DiSC trademarks and logos for purposes of marketing products under the terms of the Wholesale Purchase Application and Agreement. Your use of these trademarks and logos is governed by Wiley's trademark guidelines set forth below.

1. Always use the complete product name and correct trademark (®, ™) designation. If the product name appears several times on a page, you are required to use the trademark designation the first time the product name appears in the headline and the first time the product name appears in the running copy. Please check the current price lists for the proper designations.
2. Always include a visible, printed notice identifying John Wiley & Sons, Inc., as the trademark holder on all materials using logos, icons, and/or products names. This notice should appear on the bottom of any page displaying or mentioning our products. Example: "Everything DiSC® is a registered trademark of John Wiley & Sons, Inc., or its affiliated companies."

Copyright Standards

As stated in your Wholesale Purchase Application and Agreement, Everything DiSC products, including but not limited to profiles, assessments, facilitation kits, videos, books and platforms, are copyrighted materials. You must never copy, upload, reproduce, or translate products in any written, visual, or audio form, or by any means.

1. We encourage and allow customization of our materials in our facilitation kits for the purposes of delivering live, synchronous training and coaching sessions. We do not allow you to create e-learning or other asynchronous learning content using our facilitation materials or copyrighted materials. You may not copy, upload, modify, translate, or tailor any of our Everything DiSC products for the purpose of resale.
2. Never upload product facilitation kit videos to platforms. To share these videos in live training sessions, please fill out [this form](#) to get access to streaming links. Please note that videos for promotional use are available on MindLab™ Connect. See the "Professional Marketing Standards" section of this handbook for more information on video guidelines.
3. If you have any questions about the use of copyrighted materials, contact rights@everythingdisc.com.

You must complete a Permissions Request Form if you want to:

- Reproduce any portion of Wiley copyrighted material, including, but not limited to, print publications, video, audio, software, or web-based products.
- Modify or adapt any Wiley copyrighted material for resale.
- Write a book or article in which you refer to Wiley products or the models on which they are based, even if you believe you are not directly using any Wiley materials. We will review for proper trademark use, any possible copyright violations, etc.

Permissions Request Forms can be found on MindLab™ Connect and should be submitted to rights@everythingdisc.com at least 30 days in advance of intended use. Each permissions request is considered on a case-by-case basis. Allow 10-15 business days to process requests. If Wiley decides to grant permission, you will receive information regarding terms and any associated fees. Once you have accepted the terms, a Permissions Agreement will be generated, which must be signed by you and Wiley before it is valid.

Noncompliance or infringement of Wiley's copyrights, trademarks, or proprietary rights may result in legal action, financial penalties, and/or termination of your Authorized Partnership. Copyright is secured in the United States and abroad.

Authorized Partner Resources

As an Everything DiSC® Authorized Partner, you are granted access to a number of resources that we have developed to help grow and support your Everything DiSC business:

EPIC (Electronic Profile Information Center)

www.admin.wiley-epic.com

EPIC is the technology behind our business together. It's the platform that supports our products and allows our Partners to manage the varied tasks associated with administering assessments to clients. EPIC allows you to administer access codes for online assessments, monitor profile completion, and manage your assessments from anywhere in the world.

MindLab™ Connect

www.mindlabconnect.com

MindLab Connect is a Partner-only website containing news and marketing resources that support the business of our Authorized Partners. Our customizable marketing materials and collateral are available to help effectively promote our solutions to clients. Information on Partner events, product launches, and previous announcements can all be found here. Access should not be granted to anyone outside of your Authorized Partner organization as this site allows direct access to your EPIC account and contains confidential information for Authorized Partner use only.

Education Opportunities

Our training programs offer an inspiring learning environment so you can develop confidence and competence in the application of our products and solutions.

JumpStart

Jumpstart is designed to help Partners get the most out of their Everything DiSC Partnership. New Everything DiSC Partners are required to complete JumpStart training per the terms of their Wholesale Purchase Agreement.

Check the Education section of MindLab Connect for more information on our course offerings.

Awards Program

The Awards Program is a way for Wiley to reward our top-performing Partners with a variety of benefits, from discounts on product purchases, complimentary registrations and travel reimbursement for conferences, and more.

Your purchases throughout each calendar year are used to determine your Award level for the following year. You can find more on EPIC.

MindLab™ Partner Events

www.mindlabevents.com

Designed exclusively for our Authorized Partners, our conferences merge high-quality learning with networking opportunities and inspiring speakers. While content is ever-evolving, product news and development sessions are constants. See MindLab Connect for more information.

Networking Resources

Our private LinkedIn Everything DiSC® Authorized Partner Group offers you a virtual way to network with other Everything DiSC Partners. Be sure to join this group to tap into the knowledge of your peers.

Partner Communications

We focus on keeping our Partner network engaged and informed, so you will have access to updates and announcements on a variety of topics, ranging from virtual training to new products. As our communications often contain important information regarding your Partnership, your consent to continued receipt of email communications is a condition of retaining your status as an Authorized Partner.

Partner Success

Our dedicated Partner Success team members are available to provide you with education and support. Whether you need help exploring potential product applications, have a tough client question, or need to place an order, we are here to help.

Partner Success Teams

Americas

Minneapolis, US, hours: Support 8 am–5 pm US Central Time; Orders 8 am–4:30 pm US Central Time

Email: partnersuccess@mindlabconnect.com

Call toll-free +1 800 653 3472 or +1 763 765 2255

Option 1: Place an Order or Renew your Partnership

Option 2: Support

Greater China

Beijing, CN, hours 9:30 am–5 pm China Standard Time

Email: partnersuccesschina@mindlabconnect.com

Call +86 10 8541 9357

Rest of World

Copenhagen, DK, hours 8:30 am–4:30 pm (4 pm on Fridays) Central European Time

Email: partnersuccessglobal@mindlabconnect.com

Call +45 46 33 12 50

Authorized Partner Renewal

Annual Renewal

In order to maintain your Authorized Partnership, you are required to pay an annual renewal fee before the end of each calendar year. This fee must be submitted **prior to** the renewal deadline. Although you will receive a renewal notice from us, ***it is your responsibility to adhere to this deadline.*** You may not use EPIC credits to renew your Partnership. We reserve the right to deny an Authorized Partnership renewal for any reason at our sole discretion.

Non-Renewal of Authorized Partnership

If either you or Wiley chooses not to renew your Authorized Partnership, effective January 1 you will:

- Lose Authorized Partner status
- Forego the right to purchase products at wholesale prices
- Forfeit rights to market and display Everything DiSC® products, trademarks, and logos
- Forego the right to access Authorized Partner Resources and other communications designed for Partners
- Forego the right to attend Everything DiSC Authorized Partner events such as conferences and training programs
- Forfeit the opportunity to purchase additional EPIC credits for your EPIC Primary Account and any EPIC Sub Accounts. You may still provide Sub Accounts with EPIC credits from your remaining inventory of EPIC credits in your Primary Account for up to one year after non-renewal, but you may no longer purchase additional EPIC credits. Non-renewing Partners will not have access to EPIC accounts, including EPIC Sub Accounts, after one year of non-renewal

If you choose not to renew and at a later time wish to become a Partner again, you will need to re-apply by submitting a new Wholesale Purchase Application and Agreement and paying the New Partner Fee.

If you have any questions concerning your renewal, please contact Partner Success.

Ordering and Shipping

We aim to make ordering and shipping of your products as simple and convenient as possible.

How to Place an Order

Online (recommended)

To order EPIC credits, facilitation kits, and other materials, you can easily place your order any time through our Store in EPIC: <https://store.wiley-epic.com/default.aspx>

Call

Alternately, you can contact us to place your order:

8 am–4:30 pm US Central Time

+1 800 653 3472 (US/Canada toll-free) or +1 763 765 2255

Make sure to have your specific order information, Authorized Partner ID and credit card information ready. After hours, please leave a message for Partner Success for processing the following business day. Do not leave personal credit card information on voice mail.

Payment

All orders must be paid in US dollars prior to fulfillment. We accept Visa®, American Express®, MasterCard®, and Discover® credit cards; certified checks; money orders; bank wire transfers; and personal checks.* Checks and credit cards are only accepted from companies owned by the Authorized Partner who is named in the original Wholesale Purchase Application and Agreement. Orders paid by check are held until we receive the funds.

*A \$40 USD fee (amount subject to change) will be charged for checks returned unpaid due to insufficient funds.

Please note that checks can take up to a week to clear. Orders will not be processed until funds are received.

Authorized Purchasers

Only the Authorized Partner and individuals specified by the Partner as Authorized Purchasers may place an order. Authorized Purchasers are required to supply Partner ID and payment information at the time of order. If you need to make a change to your list of Authorized Purchasers, go to EPIC under the “Manage Your Account” menu, choose “Manage Users,” and add them as a “Super Administrator.”

Authorized Partners and Authorized Purchasers may only pay for and place orders for EPIC credits for their own EPIC Primary or Sub Accounts. Authorized Partners may not pay for or place EPIC credit orders for the Primary or Sub Accounts of another Authorized Partner.

Shipping Guidelines

Orders are shipped the same day if received by 2 pm US Central Time.

United States and Canada

All shipments are sent using our preferred shipper UPS and can be delivered directly to you or your client. Allow five days for an order to reach any destination in the United States or Canada. Rush handling and overnight deliveries are offered at an additional charge.

Canada

To avoid customs delays, we recommend that you give UPS Power of Attorney to clear packages through Canadian Customs. Shipments to Canada may also incur bond fees when funds are not provided in advance to UPS. Information on how to avoid these fees by setting up a prepayment plan or electronic funds transfer (EFT) plan to pay any duties and taxes can be found on MindLab™ Connect or contact Partner Success for more information.

If you drop-ship anything directly to your clients in Canada, UPS has also introduced Paperless Invoice.

With this free service, all paperwork is sent electronically to UPS and customs, and there is no indication of the cost of the package. This will allow you to drop-ship directly from us to your clients, eliminating the cost and hassle of shipping the product again. You must have a UPS account and an EFT plan set up.

Shipping outside of the US and Canada

Products are shipped from our warehouse in the United States via our standard delivery service. Please note there is a shipping charge on each order. Current international customs rules require us to declare all shipped goods at the invoiced value. This means that all customs declaration forms and shipping documents will need to declare the value that matches the amount on the invoice, and you may be subject to applicable custom fees.

Lost, refused, and drop-ship orders are the responsibility of the Authorized Partner.

Pricing

Authorized Partners may purchase products at wholesale prices. Products and prices are listed in the current Confidential Wholesale Price Lists, which may be obtained on your EPIC account under "Partnership Information." There is no minimum order amount. Wholesale pricing is subject to change upon notice in the appropriate company communication.

Returns

To maintain low wholesale pricing, refunds, returns, and exchanges are not accepted. We will replace materials with the same product version only when the materials are defective or there are problems of workmanship. If you or your client receives a defective product, please contact Partner Success describing the problem and wait for instructions on how your product will be replaced. We will likely ask you to return the defective product to either our Minneapolis or Copenhagen office.

Translated Materials

Some of our products are available in multiple languages. If you have a client need for an additional language not covered by your Partner Agreement, you will need to complete a Language Request Form (found on MindLab Connect) and be subject to our terms and conditions. Contact Partner Success for more information.