

# POLYCOM® GRANT ASSISTANCE PROGRAM

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## POLYCOM® Grant Assistance Program Partner Opportunity Engagement Guidelines

### Objective

To encourage and develop a relationship of mutual trust between the Polycom Grant Assistance Program (PGAP) Team and our Partners with an overall objective of continually improving customer satisfaction and providing the ultimate team approach to our customers for their grant needs.

### Strategy

Develop a mutual understanding of roles, objectives and expectations between the PGAP Team and our certified Polycom Channel Partners.

### Overview

The Mission of the Polycom Grant Assistance Program (PGAP) is to assist public, private and nonprofit organizations in every aspect of preparation, funding selection and application for telecommunications solutions. To accomplish our mission, the Polycom Grant Assistance Program Team will:

- Manage our relations with Partners to assure a mutually beneficial partnership
- Train, educate and coach Partners on techniques to leverage the PGAP to build pipeline and increase revenue
- Communicate the appropriate manner in which to position the PGAP to customers to ensure the customer understands the benefits of the program
- Assist and support the Polycom sales organization and Partners in customer sales calls as needed
- Engage our Partners in respectful, two-way communications that promotes achievement of mutual objectives
- Provide education and training to Partners on the Polycom 7-Step Grant Assistance Process™
- Promote and utilize the Grant Ready Assessment and Navigational Tool (GRANT) to determine “grant readiness” of customers
- Lead and manage the customer grant application and management process that leads to a successful award

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## **Guidelines for Customer Engagement**

### *Polycom Partner introduces a new Customer to the PGAP*

Q: Who should the Polycom Partner contact to coordinate the pursuit of a customer grant lead?

A: The customer should first contact the PGAP Area Grant Manager for the territory in which the customer resides. The Partner may also contact the PGAP Channel Relations Manager or the Director. The Partner will remain a part of the “grant team” for the customer, and will be fully involved in the grant process.

Q: How does the PGAP support a Partner that introduces a new customer?

A: The Polycom Grant Assistance Program team will first consider the customer for eligibility for the Polycom Grant Assistance Program by determining if the customer is “grant-ready”, and if they meet minimum program enrollment requirements. If the customer is eligible for services, the PGAP team will fully support and assist the Partner and customer to navigate the grant process.

Q: Is the Partner authorized to utilize the Grant Ready Assessment and Navigational Tool (GRANT)?

A: Only the PGAP Area Grant Managers, the Channel Relations Manager, and the Director are authorized to conduct an assessment with a customer using the Grant Ready Assessment and Navigational Tool (GRANT). However, the Customer may choose to share their results with the Partner once the assessment has been completed.

Q: How does the PGAP protect customer information provided by the Partner?

A: Customers that are brought to PGAP by a Partner are designated as such in the program’s customer relationship management system, and customer information is not shared with other Partners or organizations. Customer information is kept confidential.

### *Polycom Partner wants to engage in co-marketing efforts with the PGAP*

Q: Who should the Polycom Partner coordinate co-marketing efforts with?

A: All co-marketing campaigns involving the PGAP are ultimately approved by the Director. The development of any co-marketing campaigns must involve the Channel Relations Manager with final approval from the Director. The PGAP and Partner can decline participation in a co-marketing campaign. For example,

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campaigns that are not mutually beneficial, diverge or conflicts with a current corporate strategy, etc.

Q: Can the Partner use tools, logos and other copyrighted information of the PGAP?

A: Partners must not use the PGAP tools, logos or other trademarked or copyrighted information in Partner collateral, on websites, and other documents without express written permission from the PGAP Channel Relations Manager or the Director.

Q: Who should the Partner contact if they want to include information about the PGAP and/or a program link on their company website?

A: The Partners should contact the PGAP Channel Relations Manager or the Director to develop acceptable content for Partner websites and to receive approval for establishing a link.

## *The Partner has its own grant assistance program*

Q: How will the PGAP work with a customer already engaged with a Partner's Grant Assistance Program?

A: The Polycom Grant Assistance Program provides all customers with a consistent and comprehensive assessment process to ensure the customer will be successful with their grant application process. Regardless of prior grant assistance by another organization, the PGAP will take customers through the 7-Step Grant Assistance Process™ and will utilize the Grant Ready Assessment and Navigational Tool (GRANT). The PGAP will work in tandem with the Partner's grant assistance program.

## **Polycom® Grant Assistance Program Team Roles**

*Director:* Responsible for driving the PGAP as trusted advisors on grants for telecommunications solutions, and oversees all aspects of customer satisfaction with the grant process. Responsible for channel go-to-market strategy as it relates to grant identification, grant forecasting, vertical and horizontal positioning and conflict resolution. Works directly with Channel Managers and Partners to develop channel specific strategy, co-marketing campaigns, and educational and training materials about grants.

*Area Grant Manager:* Works directly with Territory Account Managers, Channel Managers and Partners to provide best-in-class customer service for those that need grant assistance. Grant specifications, grant forecasting, organizational (customer) assessment, grant project management, customer education and project positioning.

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*E-Rate Manager:* Works directly with PGAP Director, Channel Relations Manager Area Grant Managers, and Partners to develop a strategic and comprehensive approach for identifying eligible participants for the E-Rate program. Provides education and training to Partners on eligibility and compliance issues related to the E-Rate program.

## **Caveat**

These guidelines are intended to build a healthy partnership between the Polycom Grant Assistance Program and its certified Partners. As in most real world positive partnerships, there will be grey-area situations, in which case Polycom's intent is to use open communications and common sense when partnering. Again, these are meant as guidelines to successful partnering with the overall objective of customer satisfaction and mutual success.