



# HOW TO GUIDES

Applying for Marketing Co-Op



[www.exclusive-networks.com.au](http://www.exclusive-networks.com.au)

# Applying for Marketing Co-op Funds

## Marketing Process

Your marketing plan should complement the business plan discussed and agreed with your Exclusive Account Manager and Fortinet Channel Account Manager. Ideally, your quarterly marketing plans should be sent before the 10<sup>th</sup> day of the first month of the calendar quarter. ie. 10<sup>th</sup> Jan, 10<sup>th</sup> April, 10<sup>th</sup> July and 10<sup>th</sup> October but exceptions can be made. The plan can cover a quarter, six months, or a year but bear in mind for longer term plans, once the funds are approved, they're locked in to the activity outlined in your plan and need to be executed as such.

The process for applying for co-op funds is as follows:

- 1) Complete a CRF form (Click here to download the [Co-op Request Form](#)) along with a proposal and copies of all 3rd party quotes\* or pro forma invoices to [sduce@exclusive-networks.com](mailto:sduce@exclusive-networks.com) and copy your Fortinet Channel Account Manager (CAM).
- 2) The Fortinet CAM completes supporting information such as pipelines, forecasts, fiscal year revenue, accreditation level etc and sends to UK Channel Director for approval.
- 3) Once this has been approved it is added to a central Fortinet smartsheet planning document by Exclusive Networks along with all supporting documentation.
- 4) This is approved by the Fortinet UK Channel Marketing Manager, then entered by Exclusive Networks into the Fortinet co-op portal for sign off by EMEA. Any requests over \$5k may need to go through multiple levels of authorisation.
- 5) No later than 3 weeks after the activity has completed we need to submit documentation for claiming which includes:
  - a. 3rd party invoices only showing proof of cost\*
  - b. Photographs of offline activity (events/promotional items/adverts) and copies of related activity (emails, social media posts, mailers, landing pages, infographics etc)
  - c. List of leads/attendees ideally using the attached CRF form – tab 3
  - d. Details of potential pipeline, forecasts and any deal reg information
  - e. Your invoice to Exclusive Networks for the amount agreed

\*Please note 3rd party invoices must be external supplier not a partner or distributor. No partner rate cards accepted as proof of cost. For events, Fortinet will also ask for agenda and whether Fortinet staff will be attending.

\*\* If the activity is multi-vendor, Fortinet will only pay a proportionate amount. Eg. If you have an event that promotes your services plus Fortinet plus 2 other vendors, the cost should be split 4 ways and Fortinet will fund 25% of the total costs.



## What types of activity are covered by co-op?

Below are the activities covered by co-op, and those that are not:

Approved Activities	Description	Includes	Doesn't include	Claim Requirements
Advertising	Online or offline advertising promoting Fortinet and the partner value proposition.	<ul style="list-style-type: none"> <li>Design fees</li> <li>Media plan costs</li> <li>Space</li> </ul>	Reseller only branding	<ul style="list-style-type: none"> <li>All 3rd party invoices</li> <li>Copy of advert (JPG/PDF)</li> <li>Circulation information</li> <li>Partner invoice to EXN</li> <li>Leads in CRF template</li> </ul>
Collateral	Fortinet brochures, flyers or documentation with the partners co-branded added.	<ul style="list-style-type: none"> <li>Design and co-branding fees</li> <li>Print costs</li> </ul>	Partner developed documentation	<ul style="list-style-type: none"> <li>All 3rd party invoices</li> <li>Copy of collateral (PDF)</li> <li>Partner invoice to EXN</li> </ul>
Emailing	Creation and sending of an email to database of partner or end users including a Fortinet related call to action	<ul style="list-style-type: none"> <li>Copywriting</li> <li>Design</li> <li>Agency fees</li> </ul>	Newsletters	<ul style="list-style-type: none"> <li>All 3rd party invoices</li> <li>Copy of email</li> <li>Partner invoice to EXN</li> <li>Leads in CRF template</li> </ul>
Giveaways	Gadgets or promotional items to increase Fortinet mindshare	<ul style="list-style-type: none"> <li>Design</li> <li>Production costs</li> <li>Shipping costs</li> </ul>	Any activities which do not comply with Code of Business Conduct & Ethics	<ul style="list-style-type: none"> <li>All 3rd party invoices</li> <li>Photos of items</li> <li>Partner invoice to EXN</li> </ul>
Integrated Campaign	Lead generation campaign built from multi-touch activities – email, telemarketing, event, digital marketing, social media, online advertising etc.	<ul style="list-style-type: none"> <li>Design</li> <li>Telemarketing</li> <li>Copywriting</li> <li>Agency fees</li> <li>Media plan</li> <li>Event costs</li> </ul>	Multi-vendor campaign that includes Fortinet competitors	<ul style="list-style-type: none"> <li>All 3rd party invoices</li> <li>Copy of assets</li> <li>Partner invoice to EXN</li> <li>Leads in CRF template</li> <li>Revenue/pipeline</li> </ul>
Partner Enablement	Activity to train partners on a theme or technology, in the form of an event, a brochure, email, video etc.	<ul style="list-style-type: none"> <li>Design</li> <li>Copywriting</li> <li>Agency fees</li> <li>Event cost</li> </ul>	Any activities which do not comply with Code of Business Conduct & Ethics	<ul style="list-style-type: none"> <li>All 3rd party invoices</li> <li>Photos of event</li> <li>Copy of training material</li> <li>Partner invoice to EXN</li> <li>Attendee names</li> </ul>

Approved Activities	Description	Includes	Doesn't include	Claim Requirements
Seminar/Workshop	Event to introduce Fortinet technologies to a group of partners or clients – 1 day maximum	<ul style="list-style-type: none"> <li>• Invitation design</li> <li>• Location costs</li> <li>• Catering</li> </ul>	Any activities which do not comply with Code of Business Conduct & Ethics	<ul style="list-style-type: none"> <li>• All 3rd party invoices</li> <li>• Photos of event</li> <li>• Copy of presentation material</li> <li>• Partner invoice to EXN</li> <li>• Attendee names</li> </ul>
Tradeshow	Trade fair for partners or customers including Fortinet branding on booth	<ul style="list-style-type: none"> <li>• Floor space</li> <li>• Booth building</li> <li>• Branding</li> <li>• Shipping</li> </ul>	Fortinet can not be represented on more than 3 different booths at any one tradeshow	<ul style="list-style-type: none"> <li>• All 3rd party invoices</li> <li>• Photos of event</li> <li>• Leads in CRF template</li> <li>• evenue/pipeline</li> <li>• Partner invoice to EXN</li> </ul>
Telemarketing	Use of a telemarketing agency to generate demand from partners or end users about Fortinet	<ul style="list-style-type: none"> <li>• Telemarketing</li> <li>• Agency fees</li> <li>• Data purchase</li> </ul>	Multi-vendor activities	<ul style="list-style-type: none"> <li>• All 3rd party invoices</li> <li>• Partner invoice to EXN</li> <li>• Leads in CRF template</li> </ul>
Webinar	Organisation of a remote event to train or inform end users about Fortinet	<ul style="list-style-type: none"> <li>• Invitation cost</li> <li>• Webinar platform</li> </ul>	Multi-vendor webinar	<ul style="list-style-type: none"> <li>• All 3rd party invoices</li> <li>• Copy of webinar invitation</li> <li>• Partner invoice to EXN</li> <li>• Attendee list</li> <li>• Leads in CRF template</li> </ul>

## Activities not covered by co-op

- Spiffs
- Promotion
- Sales Contests
- Demo Products (NFR)
- NSE Training or Exams
- Hospitality Events



### Contact us

Level 5, 20 Rodborough Road,  
Frenchs Forest  
NSW, Australia 2086

Phone 1300 137 993

Email [fortinet@exclusive-networks.com.au](mailto:fortinet@exclusive-networks.com.au)

Join the conversation  
#WeAreExclusive



**FORTINET**®



PH: 1300 137 993  
[fortinet@exclusive-networks.com.au](mailto:fortinet@exclusive-networks.com.au)