

AUTHORIZED BLACKBAUD SOLUTION PROVIDER GUIDE

Get the information, training, and support you need to expand your business around Blackbaud solutions.

"As a proven leader in the nonprofit space when it comes to online and integrated solutions, the Blackbaud Solution Provider program has been an integral part of our success that simply can't be ignored. Our partnership has helped us drive immense international growth while ensuring we always set the bar for our clients when it comes to consistent, high-quality service. Since joining the program, we've never looked back."

-Michael Johnston, CEO, HJC New Media

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OVERVIEW: BLACKBAUD SOLUTION PROVIDER PROGRAM

Blackbaud is the world's leading cloud software company powering social good. To help ensure that our customers get a consistent, quality experience with their Blackbaud products, we've created the Blackbaud Solution Provider (BSP) program.

The goals of the program are simple:

- Deliver our online marketing and CRM products to more nonprofit organizations
- Help those organizations be more successful using our products

As a company serving the entire social good community, your expertise combined with Blackbaud software and services through the BSP program can help you bring a complete solution to the market. As a Solution Provider, you'll give a growing base of Blackbaud customers the help they need to reach their goals and make the most of their investment in Blackbaud products. We'll give you the information and knowledge you need to offer a superior consulting and implementation experience.

To ensure you get the most from your BSP partnership with Blackbaud, we'll provide you with ongoing support, exclusive educational resources, marketing/co-marketing opportunities, and an "Authorized Solution Provider" seal that you can display on printed and web-based materials as long as you maintain your BSP authorization.

To maintain the integrity of the program, we require you to sign the BSP Agreement. To ensure a consistent level of quality service for our customers, we also require you to have authorized individuals on staff for each product under your BSP agreement with Blackbaud.

This guide gives you more detail about benefits and requirements of the BSP program.

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BENEFITS: WHAT'S IN IT FOR YOU?

The Blackbaud Solution Provider program gives you the resources needed to help your business uncover new growth opportunities and strengthen your brand. Your success will help to ensure that nonprofit organizations are successful in delivering their missions.

Resources at a Glance

Resource	BSP Benefit
Training	Partner certification completed via online self-learning. Training tracks include Deployment Specialists (<i>Product Training and Implementation Methodology</i>) and Project Managers (<i>Product Training and Selling & Positioning training</i>). Final exam requires a passing grade of 70% to become certified.
Product Support	Training platform logins remain active after successful completion of training track unless login remains unused for 6 months. Additional product resources available on the Blackbaud website: Luminate Online How-To Documentation Luminate CRM How-To Documentation Blackbaud Online Knowledgebase
Lead Referral Reward	10% of 1 st year subscription cost upon close of sale. All partner referral payments are reconciled in the quarter <i>after</i> the close date of the sale.
Partner Directory Listing on Blackbaud.com	Partner logo, website link, description, and contact information - searchable by specialization
Use of "Authorized Solution Provider" Logo	Logo image provided for use on partner website and in print
Product Sandbox	Sandbox environment for authorized products provided at no cost to be used for learning, demonstrations, and testing.
Software Access for Client Deployment	Client grants Advanced Authorized Administration access to Luminate staging site for active deployment projects via Luminate Support case.
Technical Support	Three (3) Support-authorized individuals will have the ability to submit cases via Luminate Support for assistance with deployment enablement and/or bug reporting.
Partner Development Manager ("PDM")	Managed BSP's ¹ receive a dedicated PDM for annual and quarterly business planning. Partner and PDM work in cooperation to ensure goals, objectives, and metrics are achieved for the mutual success of both parties in the partnership.
Partner Portal	Access for one (1) user per partner. Partner Portal used for tracking of revenue pipeline, and management of partner deployment projects for customers.
Marketing	Opportunities to lead marketing and co-marketing efforts including speaking engagements, webinars, case studies, articles, and advertisements with Blackbaud
Communication	Receive access to quarterly Blackbaud update series on product roadmaps, invitation to Blackbaud's annual Partner Summit. Managed BSP's receive regular, quarterly business reviews.
Blackbaud Annual Conference ("bbcon")	Promote your company to prospective and current Blackbaud clients at bbcon by sponsoring a booth ² . Additional opportunity for speaking engagement ³ at conference breakout sessions.
<p>¹ Managed BSP's are defined by total software bookings achieved through partner referrals during the previous calendar year – exceptions on a case-by-case basis</p> <p>² At minimum, Bronze level sponsorship required of active, managed BSP's</p> <p>³ Applications for the Call For Speakers are reviewed and selected for approval by Blackbaud Events team</p>	

REQUIREMENTS: WHAT DO YOU NEED TO DO?

Your company can be authorized as a BSP on Luminate Online™ and/or Luminate® CRM.



Blackbaud Products and BSP Authorizations

To be a Blackbaud Solution Provider you must maintain authorized individuals on staff. The BSP authorization cannot be held by an individual that is not a part of a firm because BSP is a firm-level authorization. There are two types of authorizations for individuals at your firm and, at minimum, each BSP is required to have two (2) of each:

Business Development Manager

Business Development Managers are trained on best practices, product fundamentals, and selling & positioning. These individuals are *not* trained to perform the implementation tasks for Blackbaud products. This training track is recommended for client-facing members of your team serving in the roles of project manager, business analyst, strategy consultant, or in business development/sales.

Deployment Specialist

Deployment specialists are trained on product fundamentals and the advanced technical skills needed to implement Blackbaud solutions and provide related post-deployment services. This training track is recommended for the members of your team behind the scenes serving in the role of web developer or implementation consultant.

Two (2) full-time Business Development Managers and two (2) full-time Deployment Specialists on staff ensures that you have the expertise to deploy Blackbaud products with a consistently high level of quality. If a BSP employs or contracts an individual to work on a project that involves a Blackbaud product, the individual working on the project must be authorized as a Deployment Specialist and/or Business Development Manager for the product on which they are working.

Ongoing Maintenance of Your Authorization

To maintain authorization, Blackbaud Solution Providers are required to keep current with each release for the product on which they are authorized. Staff will be required to go through a truncated, annual recertification process to ensure all authorized individuals are up-to-date with the most recent product releases and functionality.

Blackbaud holds partner webinars and makes additional online training available, including process and product updates. Blackbaud reserves the right to remove BSPs from the program if they are not current with maintenance training. New staff is required to go through training and become authorized once joining your firm.

Authorizations are provided at an organization level, not an individual level. Prior partner authorizations are not transferable to a new organization should an individual leave your company. If your firm has an individual on staff that was previously authorized at another firm, all BSP requirements must be satisfied to become designated as authorized.

Additionally, Solution Provider will be required to successfully complete an annual re-certification test, developed by Blackbaud Professional Services, in order to ensure all partners remain up-to-date on all product releases.

Evaluation Criteria

Blackbaud wants the BSP program to remain valuable for all members and our customers. Therefore, we will periodically evaluate strength indicators for each partner. The following indicators will be used:

- Ability to market and grow business with Blackbaud
- Generation of mutual net new customers
- Frequency and success of partner marketing activities
- Scores on client satisfaction surveys and percentage of surveys returned
- Maintaining ongoing product and implementation certifications
- Feedback from Blackbaud personnel on BSP performance

Authorization Training

Authorization is based on passing exams for the level of authorization (project manager or deployment specialist) sought. Blackbaud offers online training to prepare for the examination.

We've separated training into the following product areas. Your project manager and deployment specialist must successfully pass the test for each product area for authorization.

1. Luminate Online™ and TeamRaiser™
2. Luminate CRM™

Luminate Online

Training for Luminate Online is offered as online recorded training. Training for the project manager authorization examination consists of Product Training and Selling & Positioning Training. Training for the deployment specialist examination consists of Product Training and Implementation Methodology and Advanced Technical Training.

Luminate TeamRaiser

Luminate TeamRaiser is included within the Luminate Online training curriculum (both project manager and deployment specialist) and TeamRaiser specific proficiency assessments are needed to complete the Luminate Online certification training.

Luminate CRM

The cornerstone of BSP authorization for Luminate CRM is authorization on Salesforce.com. Your company is required to be a Salesforce® Cloud Alliance Consulting Partner¹ with Service Cloud Consultant Certification and Advanced Administrator or Developer Certification. To note, a minimum of 3 full Salesforce licenses are required for your LCRM sandbox for training purposes. LCRM cannot be deployed using a Salesforce Developer license. We require that your company take training specific to Luminate CRM—available online—and pass exams for the level of authorization (project manager or deployment specialist) sought. Training for the Project Manager authorization examination consists of Product training and Implementation Methodology. Training for the Deployment Specialist examination consists of Product Training and Advanced Technical Training.

¹ See http://www.salesforce.com/assets/pdf/datasheets/DS_ConultPartnerRequire.PDF and the Study Guide linked from <http://certification.salesforce.com/Implementation-Experts> for details.

Training and Program Fees

Your Business Development Manager(s) and Deployment Specialist(s) must successfully pass the test for each product area for authorization.

The training for each product you choose to authorize is included at no charge. You also receive one (1) login to the Blackbaud Partner Portal and one (1) staging site (sandbox environment) for each product you choose to authorize. Supplementary product sandboxes that Blackbaud deems as outside of the normal requirements of a BSP Partner will incur an additional charge, depending on product type and functionality required.

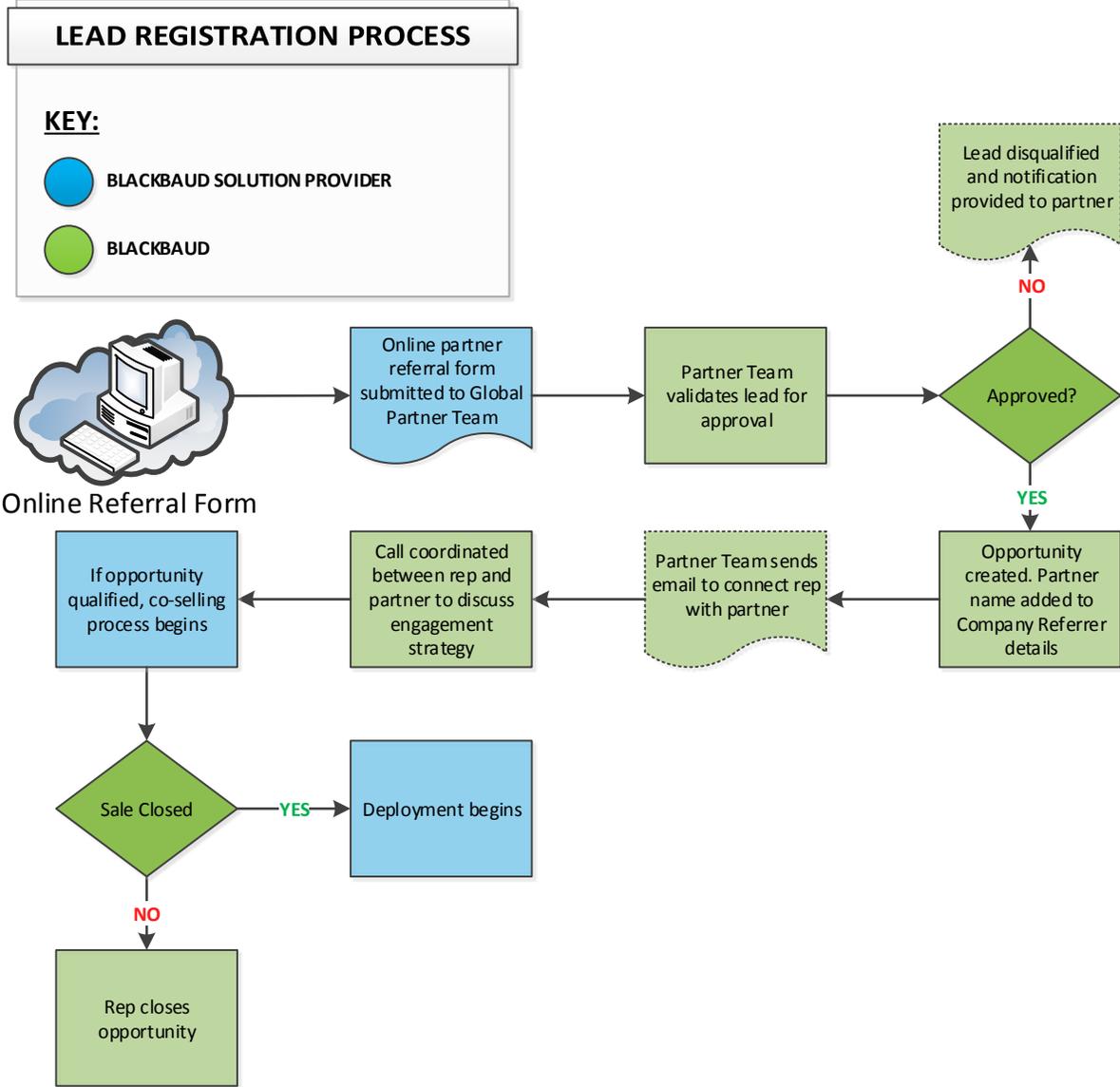
There are fees associated with Salesforce.com training and authorization, and Salesforce.com user licenses are required. The fees that Salesforce.com charges are controlled by Salesforce.com—Blackbaud cannot negotiate these for you. Please contact Salesforce.com for details about their fees.

A few important notes about fees:

- Business Development Managers and Deployment Specialists will take tests to maintain their authorization as a part of their ongoing maintenance training. There is not a separate fee for maintenance training and testing as this is included as part of the program. Training in multiple authorization areas and subsequent contract periods may include additional areas of competency and could result in fees for those training areas at Blackbaud's discretion with prior notice.
- Individuals with prior authorizations may wish to bypass training to gain initial BSP authorization at a new company; however, this option is at Blackbaud's discretion on a case-by-case basis and a fee may be assessed to take the exam without completing the associated training track.

PROCESS: BECOMING A BLACKBAUD SOLUTION PROVIDER

Partner Lead Referrals



Deal Registrations (Within Authorized BSP Service Area)

When Solution Provider identifies opportunities to provide services to clients within their authorized service area and the client does not currently own the Blackbaud software, the BSP is required to register the lead referral with Blackbaud using the online [Blackbaud Partner Referral Form](#).

BSP Services for Deal Registrations

For leads initiated by Solution Provider, and within the BSP authorized service area(s), the BSP will be the sole provider of deployment services for accepted BSP leads, upon close. Services will not be provided by Blackbaud, nor will Blackbaud engage in pricing of services to BSP qualified leads.

Registration and acceptance of the lead referral indicates the Solution Provider is the designated and sole services delivery vehicle for this opportunity, upon close. Failure to do so may result in BSP not listed at the provider of record, at which time Blackbaud and/or other service providers may be included in the delivery of services required. Upon receipt of the *full* lead information included in the Partner Referral Form, Blackbaud shall have five (5) business days, in its sole discretion, to accept the lead and convert to an active opportunity.

Co-Selling Process

The Solution Provider Program is not a Reseller (VAR) channel and upon BSP lead being accepted and converted to an active opportunity, the BSP will engage with the Blackbaud Account Executive on record of the client account. BSP and AE shall coordinate call together to discuss details of lead and engagement strategy for co-selling of opportunity. All software sold on BSP opportunity will be provided to the client on Blackbaud's paper. Deployment services sold for Blackbaud software will be provided to the client on Solution Provider's paper.

Lead/Opportunity Expiration

Deal registrations will expire within 6 months of acceptance by Blackbaud and at this time, Solution Provider is no longer guaranteed as the eligible and designated sole services vehicle for opportunity. Blackbaud, in its sole discretion, can review expired opportunities on a case-by-case basis.

Lead Referral Awards

Solution Providers qualify for referral award compensation upon close of all accepted and eligible leads. As referenced in the Resources table on Page 4, Lead Referral Award compensation is 10% of the value of the 1st year subscription fees on Blackbaud SaaS solutions (and/or 10% of on-premise software licensing fees). The payment of the Lead Referral Award owed to BSP shall occur within the following fiscal quarter reconciliation, provided the customer has been invoiced and remitted payment in full for the items subject to compensation.

Deal Registrations (Outside Authorized BSP Service Area)

Solution Providers may submit lead referrals using the online [Blackbaud Partner Referral Form](#) for solutions outside of their authorized areas of service, with the exception of Blackbaud CRM. For leads outside of authorized service area(s), BSP services are not designated as the sole provider of deployment services for accepted leads, however Lead Referral Awards are eligible upon close of sale.

Blackbaud Provided Leads

In certain instances, Blackbaud may engage the Solution Provider with an opportunity to provide BSP services on an opportunity which was not “Partner Initiated” deal registration. These types of leads are labeled as “Partner Instrumental in Close” opportunities in which BSP is eligible as the sole provider of deployment services but are not eligible for Lead Referral Awards.

Solution Provider Projects

Blackbaud Salesforce Partner Portal

As referenced in the Resources table on Page 4, Solution Provider will be granted one (1) non-exclusive, non-transferable user license to access and use Blackbaud’s Salesforce Partner Portal (“SFPP”). The SFPP is integrated with Blackbaud’s instance of Salesforce.com and is used solely for the facilitation of tracking the progress of BSP services projects and reviewing revenue pipeline of submitted BSP opportunities for forecasting purposes (see “Solution Provider Responsibilities” section hereunder).

Client Satisfaction Surveys

Blackbaud, and/or independent third parties engaged by Blackbaud, develops client satisfaction forms to ensure consistent and high quality services are provided by the Solution Provider. Blackbaud may conduct satisfaction surveys of client personnel with respect to BSP services provided on any opportunity where Solution Provider has been designated the sole provider of deployment services.

Upon indication of a level of satisfaction being less than desired, Blackbaud will share results with the Solution Provider to help resolve the issue(s) with the client. Feedback is used to:

- a) Analyze and report on the root cause of user dissatisfaction
- b) Develop an action plan to address and improve client level of satisfaction
- c) Present action plan for review, commentary, and approval
- d) Take action in accordance with the action plan to improve the level of satisfaction

Solution Provider Responsibilities

Planning is an essential part of any successful partnership. All Managed Solution Providers with a dedicated Partner Development Manager (“PDM”) will go through annual business planning and subsequent quarterly business reviews (“QBR”). The guiding principle behind the Solution Provider responsibilities are to ensure consistent communication of mutual goals, outcomes, and metrics to achieve prosperity for both parties. Solution Provider responsibilities include:

1. **QBR’s** – quarterly meetings to be conducted with PDM within the first 3 weeks of each fiscal quarter to review projects, sales, and pipeline forecasts.
2. **Marketing** - activities to market and promote Blackbaud solutions and BSP services for authorized service area(s) across all channels. These include, but are not limited to, blogs, social media, print, webinars, and events.
3. **Resources** – investment in reasonable resources for joint marketing campaigns to promote one another when mutually agreed upon.
4. **Communication** – all employees of Solution Provider must permit receipt of email concerning program benefits, updates, and/or changes to requirements
5. **Certification** – maintain annual certification of authorized products

Becoming a Partner Checklist

Please fill out the online [Partner Inquiry Form](#). This application comes directly to the Blackbaud Partner Team and if your company qualifies, we will contact you to review details of the program and determine if the program is an appropriate fit with your firm.

Below is a checklist for you to follow as you go through the process of becoming a Solution Provider partner:

Checklist for BSP Authorization

- Fill out the online [Partner Inquiry Form](#).
- Prior to initial conversation, Blackbaud will send non-disclosure agreement (NDA) for you to sign and return
- Review program with Blackbaud Partner Team and provide additional information about your organization.
- Sign Blackbaud Solution Provider agreement (provided as an electronic agreement via Adobe Sign)
- Receive initial Partner Welcome Email package. Complete and return required information.
- Provide employee contact information for registration on the partner training platform. One (1) employee for Project Manager Track and one (1) employee for Deployment Specialist Track.
- Receive access to solution staging site to configure as sandbox environment for the product on which you are gaining authorization¹.
- At minimum, one (1) Project Manager and one (1) Deployment Specialist(s) complete authorization training.
- Each staff member wishing to become authorized will need to successfully pass the authorization exam(s) for Project Manager or Deployment Specialist certification.
- Once authorized, obtain the Authorized Solution Provider logo and Blackbaud Corporate Style Guidelines along with additional onboarding information. Each authorized provider is required to display the Blackbaud Authorized Solution Provider logo on their respective website.

¹ If becoming authorized on Luminate CRM we will need confirmation your company is a Salesforce Cloud Alliance Consulting Partner with Service Cloud Consultant Certification and Advanced Administrator or Developer Certification. Additionally, you'll need to secure a minimum of three full Salesforce.com user licenses have been obtained for deployment of your LCRM sandbox environment