



DMF Guidelines

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Eligible Marketing Activities

The Palo Alto Networks Distributor Marketing Fund (DMF) program helps authorized Palo Alto Networks NextWave Distributors and Innovator and Diamond Partners by arming them with the tools and resources they need to perform marketing activities that promote Palo Alto Networks solutions. The DMF program gives authorized Palo Alto Networks NextWave Distributors and Partner marketing funds to help grow their business by creating new marketing programs and campaigns.

To participate in the DMF program, authorized Palo Alto Networks NextWave Distributors and Partners should read and accept all terms and conditions set forth in the DMF agreement. Proposed co-marketing activities and co-funding particulars are at the sole discretion of Palo Alto Networks.

Marketing Plan Submission	Approval	Execution	ROI and Reporting
Submit your marketing plan/DMF requests into the portal at least 2 weeks before the start of the new quarter using the DMF template Provided.	DMF team can take up to 10 business days to review the request.	Once formal approval has been received the activity can then take place.	All DMF requests must be tracked for Proof of Performance (POP) and ROI. Please see POP requirements provided below in this document.

Marketing Plan Submission

The DMF Application process starts with submitting and discussing the quarter marketing plan with your respective Palo Alto marketing contact. The proposed marketing activities should tie into the Distributor & Partner business plan targeting an increase in sales performance and to generate Palo Alto Networks revenue.

At least two weeks before the previous quarter ends, Distributors & Partners should submit their marketing plan and apply for DMF for the next period which is defined as the DMF usage period. The purpose of the marketing plan is to support the sales plan in place to meet targets.

The DMF belongs to a particular fiscal quarter (three months) and must be used within this period (DMF Usage period). If it's not used within the quarter, the DMF will expire and will no longer be available during that DMF Usage period. In case the approved activity for a particular quarter is canceled or postponed at a later time, you will then need to reapply for funding in the next quarters DMF planning period.

Approval

The proposed marketing activity cost will be estimated and approved by the Palo Alto Networks MDF alias/team based on several metrics, including but not limited to: reach expected, participants/attendees expected, quality of leads/contact details, potential opportunities and/or expected revenue, costs and ROI. Each activity should be approved separately.

Each time the marketing activities need to be modified, the Distributor or Partner must resubmit the plan to the DMF alias for approval. A minimum of 4 weeks lead time is required for approval before the activity start date.

Palo Alto Networks reserves the right to request additional documents before issuing an approval. The partner should not commence any activities until a formal approval is received from Palo Alto Networks. No verbal commitments will be honored.

Execution

The partner confirms that the executed marketing activity will be organized professionally. For each marketing activity, Palo Alto Networks may provide the partner with different types of support, depending on the activity. Please see the List of Eligible Marketing Activities to understand Palo Alto Networks' contribution.

Claims for Reimbursement from Distributor

The Partner should provide the Distributor with claims for marketing funds as soon as an activity is completed. Claims should not be submitted in advance of the campaign or event. When submitting claims, the Partner should provide:

1. Proof the marketing activity was completed.
2. Proof of costs (including third-party invoices).
3. A list of opt-in attendees (where applicable and compliant for data sharing).

List of opt-in attendees

It is the full responsibility of the Distributor & Partner to make sure that an event attendee is aware and agreed that his/her contact details will be shared with a sponsor.

The list of opt-in attendees must be provided and be consistent with claims after the physical and online events.

With respect to all personally identifiable information that it collects during marketing activity, the Distributors & Partners should understand and follow all applicable privacy laws and regulations. It is the full responsibility of the Distributors & Partners to make sure that an event attendee is aware and agreed that his/her contact details will be shared with a third party. Any reimbursement claim submitted without observing the mentioned conditions and/or after the stated claim period will be rejected, the DMF will be lost, and Palo Alto Networks does not guarantee reimbursement of funds (even if activity was approved and a valid PO is provided).

Detailed reimbursement requirements for each marketing activity can be viewed below in the list of eligible marketing activities.

Eligible Marketing Activities and Required Proof of Performance

Online Event - Including but not limited to: Webinars, enablement sessions, UTD's, EBC's, CyberUp's etc	Purpose: Solution introduction, lead generation, increasing sales performance, partner recruitment.
Description	Webinar helps showcase our products and programs. Webinars can be conducted jointly with other parties.
Palo Alto Networks Contribution (on Request)	<ul style="list-style-type: none"> ● Presentation ● Speaker
Proof of Performance (POP)	<ul style="list-style-type: none"> ● Proof of costs (including third-party invoiced) ● List of opt-in attendees (with contact details) ● Copy of invitation (including agenda) ● Invoice with PO number and name of activity ● Pictures of the event ● Lead follow up plan (SLA for lead update is (within 5 business days post event) <p>If using a guest speaker, please submit the proposal of their content prior to approval of the activity.</p>

Telemarketing/Call Blitz (Power Play Days)	Purpose: Lead generation and identifying opportunities, Partner recruitment.
Description	Call-outs related to Palo Alto Networks solutions, promotions or event invitations. Organized by a Distributor, Partner or external telemarketing agency. Using Distributor or Partners own or external database.
Palo Alto Networks Contribution (on Request)	<ul style="list-style-type: none"> ● Pre-call consulting ● Talking points ● Presentations or product-related materials

Proof of Performance (POP)	<ul style="list-style-type: none"> ● Campaign goals and timeframe ● Copy of the telemarketing script ● Database qualification report: the format and the information provided in the report will depend on the campaign goal and target. Example of mandatory data set to be provided in a spreadsheet: company name, country, city, domain name, identified need in Palo Alto Networks, next action, current install details, comments ● Telemarketing agency report (including number of calls, contacts made, expected success rate) ● Invoice with PO number and name of activity
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Advertising (online/offline)	Purpose: Brand Awareness, lead generation, partner recruitment.
Description	All kinds of printed, outdoor or online ads.
Palo Alto Networks Contribution (on Request)	Graphics and co-branded materials.
Proof of Performance (POP)	<ul style="list-style-type: none"> ● An itemized invoice showing ad date, rates and total cost of media space ● A copy of finished artwork ● Invoice with PO number and name of activity

Sales Incentive/SPIFF	Purpose: Sales enablement, increasing sales performance, partner activation/ reactivation.
Description	Create a promotion or team-building incentives for your sales team. Such activities can help you to increase your margin, deal size and number of new partners/ customers.
Palo Alto Networks Contribution (on Request)	Guidance on content.

Proof of Performance (POP)	<ul style="list-style-type: none"> ● Revenue targets and other metrics ● Interim results (on request) ● Final report with achievements including list of participants, targets and metrics ● Proof of costs (including third-party invoices) ● Invoice with PO number, name of activity
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Offline Event	Purpose: Increase brand awareness, increasing sales performance.
Description	This includes but is not limited to; seminar, roadshow, exhibitions, user groups, enablement sessions, lunch & learn, roundtables, conferences. Events can be Palo Alto Networks only or multi-vendor focused.
Palo Alto Networks Contribution (on Request)	<ul style="list-style-type: none"> ● Speakers ● Presentations ● Product Promotions and Materials ● Branded graphics
Proof of Performance (POP)	<ul style="list-style-type: none"> ● Third-party invoices ● Copy of invitation (including agenda) ● List of opt-in attendee (with contact details) ● Invoice with PO number and name of activity

Any other activity requests will be considered upon proposal.

Non-Qualifying DMF activities

Activities that do not qualify for DMF reimbursement from include, but are not limited to, the following:

- Customer travel and expenses
- Incentive in the form of cash i.e. Visa Gift Card;
- Rebate to partners: where rebate is defined as a deduction from an amount to be paid or a return of part of a payment amount; and
- Standalone Entertainment and Meals activities: the usage of DMF must be tied to either enablement or marketing activities.
- Distributor Operating Expenses and Facilities: DMF cannot be used to reimburse a partner's day-to-day operating expenses and/or cost of facilities.
- Consulting Expenses: Expenses incurred by Distributor sales engineers or consultants are not covered. Consulting expenses for lobbying (legislative or procurement) or sales generating consulting for public sector customers are not permitted and will not be approved.
- Standalone Merchandise: Merchandise should be tied to a marketing activity not submitted as a sole activity for example; if you are running an event or an enablement activity then merchandise can be included in the activity costs.

Co-Marketing Program Guiding Principles

1. Make Business Sense and Meet our Branding Requirements Any marketing activity related to the DMF/Co-Marketing Program must have clear business value that drives demand for Palo Alto Networks products, solutions and services. Should the event require multi-vendor participation, the partner must prorate the request and highlight the Palo Alto Networks products, solutions and services promoted. Palo Alto Networks reserves the right to decline the request for pre-approval or reimbursement if funds are used to promote competing products, solutions or services.

2. Ethics, Legal & Compliance

DMF/Co-Marketing activities must accurately represent Palo Alto Networks products, solutions and services, including pricing, features/specifications and capabilities. Palo Alto Networks takes compliance with applicable laws very seriously, including the U.S. Foreign Corrupt Practices Act (FCPA), UK Bribery Act and other anti-corruption regulations, and we expect the same of our NextWave channel partners. All Palo Alto Networks NextWave channel partners must comply with, and in no way violate or be seen to violate, any such applicable laws or regulations. All requests to the DMF/Co-Marketing Program for approval of qualifying activities or reimbursement must state if any government or quasi-government officials, agencies or related bodies ("Government Official") are eligible to participate in such activity, and each request will require certification that the proposed activity does not violate applicable laws. The term Government Official is interpreted broadly and includes, but is not limited to: (1) any employee, director, or officer of a foreign or domestic government or any department, agency, or instrumentality of a government; (2) a state-owned or controlled entity, including, in many countries, telecom, health care, and educational institution employees; (3) a public international organization, such as the Red Cross or World Bank; (4) any person acting in an official capacity for or on behalf of such governmental bodies or public organizations, including entities hired to review and accept bids for a government agency; and (5) foreign or domestic political parties, candidates for political office, and members of royal families.