

## PROGRAM OPTIONS

### Corporate Program

Available to any technology, telecommunications, or professional services company. Corporate participation is led by an Executive Sponsor (typically the senior-most marketing or services marketing executive in the organization) and is designed to support the Executive Sponsor's marketing team with ITSMA's marketing research and insight, leadership community, and advisory guidance.

Corporate participation also includes unlimited access for anyone in the organization to ITSMA's Online Research Library of marketing research, thought leadership, tools, and new approaches; in-person and online briefings; executive roundtables; insight time; a seat to the Annual Marketing Conference; and special rates for ITSMA's conference, workshops, and add-on services.

### Additional Team Program

Available to any regional, functional, or business unit that has a Corporate Program. The Additional Team Program is designed to support a second Executive Sponsor and his/her team with their own access to ITSMA's personalized advisory support, annual insight time, local briefings, executive roundtables, and one seat to the Annual Marketing Conference.

**Note:** All participating teams receive principal support by an ITSMA team based in North America or Europe.

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### PROGRAM TERMS AND CONDITIONS

- The annual program term begins on the nearest quarterly start date (January 1, April 1, July 1, October 1).
- Program fees are due immediately upon joining or before the program term begins for renewals.
- Clients must designate an Executive Sponsor to serve as the lead management representative to ITSMA. Executive Sponsors are typically the senior-most marketing or services marketing executive. In addition, Clients need to designate a Coordinator to serve as the program liaison for the program year.
- This agreement may be cancelled at any time by either party.

### KEY CLIENT BENEFITS

- Unlimited staff access to ITSMA's Online Library including best practice case studies, updates on industry trends, viewpoints from thought leaders, and models and tools.
- Staff receipt of ITSMA's *Marketing Strategist* (monthly newsletter).
- Unlimited staff attendance to Online Briefings.
- 4 hours of Insight Time (for Category 1 & 2 Clients) or 2 hours of Insight Time via phone (for Category 3 & 4 Clients).
- Participation at local Briefings and Executive Roundtables.
- Reduced rate for attendance at ITSMA's Annual Marketing Conference.
- Participation in ITSMA's annual client surveys: benchmarking report on marketing budgets and benchmarks, ongoing coverage of customer selection behavior and perspectives.
- Reduced rate on ITSMA multiclient research studies.
- Opportunity to participate in ITSMA Executive Councils.
- Advisory guidance from ITSMA marketing professionals.
- The Executive Sponsor or Coordinator will be provided with one seat to each Executive-level Roundtable and the Annual Marketing Conference in North America, or one seat to each Inner Circle Meeting and the Thought Leader Series in Europe.

### NONDISCLOSURE STATEMENT

- ITSMA and the Client will have access to proprietary information and documents owned by the other party.
- Neither party has the right to disclose proprietary information, either during the term of this agreement or at any time thereafter, except as required to fulfill the obligations under this agreement.
- Neither ITSMA nor the Client shall publish, release, or otherwise make available to any other party the proprietary information or materials without specific written authorization from the other party.

### ONLINE LIBRARY ACCESS TERMS AND CONDITIONS

- ITSMA's Online Research Library includes all archived ITSMA publications previously distributed as part of the program. Access to sponsored (multiclient) research reports and custom research studies are not included.
- Employees at eligible companies may register online for individual passwords for the Online Research Library; passwords cannot be transferred or used by others.
- Online access passwords are only available upon full payment of the annual fee and will terminate upon nonrenewal.
- All documents in ITSMA's Online Research Library are covered by standard copyright laws, under which items cannot be copied or redistributed without permission from ITSMA. Sponsors and delegates are encouraged to distribute copies of research reports within their organizations but not externally.
- Information from the Online Research Library cannot be stored or displayed permanently within any Intranet site of any client company without a separate written agreement with ITSMA.

**Online Form Instructions:** First, save this document to your hard drive. To fill out this form online, simply tab to each cell and type in your response. There is no reasonable limit to the amount of data each cell can accept. Check boxes accept a typed "x" or mouse-click.

## ANNUAL PROGRAM FEES

Annual fees are based on the client's **total** company-wide revenue for the most recent financial reporting year. Fees are also based on the ITSMA office from which the client receives support: ITSMA's North American office or its European office. For example: XYZ Corporation in Category 1 based in the US with an additional team in the UK would pay \$25,000 plus €17,000.

### Fees for Clients Receiving North American Support

Category	Total Revenue	Corporate Fee	Initiation Fee	Additional Team Fee (For teams receiving support from North America)
1	> \$10B	\$25,000	\$3,500	\$18,000
2	> \$1B	\$20,000	\$3,000	\$15,000
3	> \$250M	\$15,000	\$2,500	\$11,500
4	<\$250M	\$12,000	\$2,000	\$9,000

### Fees for Clients Receiving European Support

Category	Total Revenue	Corporate Fee	Initiation Fee	Additional Team Fee (For teams receiving support from Europe)
1	> €7.5B	€ 23,000	€ 3,000	€ 17,000
2	> €750M	€ 18,000	€ 2,500	€ 13,500
3	<750M	€ 14,000	€ 2,000	€ 10,500

**Company Name:** \_\_\_\_\_

Category: \_\_\_\_\_ Annual Start:  JAN  APR  JUL  OCT

Corporate Fee: \_\_\_\_\_

Initiation Fee (*new clients only*): \_\_\_\_\_

Additional Team Fee: \_\_\_\_\_

Additional Offerings Fees: \_\_\_\_\_

**Total:** \_\_\_\_\_

### Billing Information

Accounts Payable Contact \_\_\_\_\_

Address \_\_\_\_\_ Mail Stop \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Post-Zip Code \_\_\_\_\_ Country \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

### Payment (Due Upon Receipt)

- Authorized Purchase Order. Purchase Order # \_\_\_\_\_
- Check Enclosed – Payable to ITSMA in \$USD (ITSMA Tax ID 04-2706960)
- Wire Transfer (contact ITSMA Accounting for details, Ext. 116)

**PLEASE RETURN COMPLETED AGREEMENT FORM TO ITSMA VIA  
FAX AT +1-781-674-1366 OR EMAIL TO CJEFFERSON@ITSMA.COM**

## CORPORATE PARTICIPATION INFORMATION

### Executive Sponsor

Name \_\_\_\_\_ Title \_\_\_\_\_  
Company \_\_\_\_\_ Dept/Division \_\_\_\_\_  
Address 1 \_\_\_\_\_  
Address 2 \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Post-Zip Code \_\_\_\_\_ Country \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

*I have read, authorized, and agree to abide by the terms and conditions stated herein for this program agreement.*

Signature [The email you've sent with this attached document is your legal signature authorizing the agreement.] DATE \_\_\_\_\_  
[MM/DD/YY]

### Coordinator

In addition to an Executive Sponsor, a Coordinator is often helpful to serve as program liaison for activities. This may be a member of the Executive Sponsor's team.

Name \_\_\_\_\_ Title \_\_\_\_\_  
Company \_\_\_\_\_ Dept/Division \_\_\_\_\_  
Address 1 \_\_\_\_\_  
Address 2 \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Post-Zip Code \_\_\_\_\_ Country \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

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## ADDITIONAL TEAM OPTION

*If your company elects to purchase an Additional Team Option, please fill in the following information.*

### Second Executive Sponsor

Name \_\_\_\_\_ Title \_\_\_\_\_  
Company \_\_\_\_\_ Dept/Division \_\_\_\_\_  
Address1 \_\_\_\_\_  
Address2 \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Post-Zip Code \_\_\_\_\_ Country \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

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[MM/DD/YY]

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Name \_\_\_\_\_ Title \_\_\_\_\_  
Company \_\_\_\_\_ Dept/Division \_\_\_\_\_  
Address1 \_\_\_\_\_  
Address2 \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Post-Zip Code \_\_\_\_\_ Country \_\_\_\_\_  
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