

PROGRAM OPTIONS

Corporate Membership Program

Corporate Membership 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, studies, and add-on services.

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 and peer organizations with ITSMA's marketing research and insight, leadership community, and advisory guidance.

Additional Team Program

Available to any regional, functional, or business unit that has a Corporate Membership. 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.

PROGRAM TERMS AND CONDITIONS

- The annual program term begins on the nearest quarterly start date (January 1, April 1, July 1, October 1). Or, as agreed on the completed, authorized Agreement Form.
- 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 for cause only.

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, & 3 Clients) or 2 hours of Insight Time via phone (for Category 4 & 5 Clients).
- Ask ITSMA time with ITSMA marketing staff and associates.
- Participation at local Briefings and Executive Roundtables.
- The Executive Sponsor or Coordinator will be provided with one seat to each Executive-level Roundtable and the Annual Marketing Conference in North America.
- Reduced rates at ITSMA's Annual Conferences, Forums, and Workshops.
- 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.

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 desktop. 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 2 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	> \$25B	\$30,000	\$4,000	\$20,000
2	> \$10B	\$25,000	\$3,500	\$18,000
3	> \$1B	\$20,000	\$3,000	\$15,000
4	> \$250M	\$15,000	\$2,500	\$11,500
5	<\$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)	ITSMA Europe Credits
1	> €7.5B	€25,000	€3,000	€17,000	20
2	> €750M	€20,000	€2,500	€13,500	15
3	< €750M	€15,500	€2,000	€10,500	11

ITSMA European Additional Team works on a credit system. You may choose a number of services from the list below by utilizing your ITSMA Credits. Credits must be used within the current annual program year and cannot be carried over. Once all credits have been used, further credits may be purchased by contacting ITSMA.

ITSMA Services	Price per Service	ITSMA Credit per Service	ITSMA Services	Price per Service	ITSMA Credit per Service
Thought Leader Series—per seat per meeting	€350	0.5	Best Practice Information and Update Session	€2,800	4
Insight Session	€7,000	10	Roundtable—per seat per meeting	€350	0.5
Inner Circle Meeting—1 seat per meeting	€700	1	Competency Assessment—up to 12 staff	€2,800	4

Unless otherwise stated, all prices exclude VAT or any other local applicable taxes.

Company Name: _____

Category: _____

Corporate Fee: _____

Initiation Fee (*new clients only*): _____

Additional Team Fee: _____

Special Interest Council Fee/s: _____

Additional Offerings Fees: _____

Total: _____

Membership Start: the annual program term begins on the nearest quarterly start date (January 1, April 1, July 1, October 1) or as agreed:

JAN APR JUL OCT

Billing Information

ACCOUNTS PAYABLE CONTACT _____

ADDRESS _____

CITY _____ COUNTY/REGION _____

POST-ZIP CODE _____ COUNTRY _____

PHONE _____ FAX _____ EMAIL _____

Payment

Authorized Purchase Order. Purchase Order # _____

If registered in Europe, a VAT number is required. Please inform ITSMA if reverse charging applies.

Wire Transfer (contact ITSMA Accounting for details, Ext. 116)

Check Enclosed – Payable to ITSMA in \$USD (ITSMA Tax ID 04-2706960)

**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 _____

County _____ 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 _____

County _____ Country _____

Phone _____ Fax _____ Email _____

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