CERTIFIED PARTNERS PLAYBOOK

MAY 2018

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Welcome to the Grow.com Certified Partner Program! We couldn't be more thrilled that you've chosen to work with our team. We believe that as we work together to help SMBs win with data, we will help each other win and our businesses will thrive!

The purpose of this playbook is to act as a quick reference guide for all things related to the partnership. While we certainly can't cover every possible scenario that may come up, we have been very thoughtful about what to include in this guide. We hope you will use it when questions come up related to the partnership, handling of customers, and more. And, we're always open to your thoughts and opinions about how to make this guide even more helpful!

ABOUT GROW

Our mission at Grow is to be the #1 BI solution for small-medium size business. Our heart and soul is with SMBs everywhere that fight day in and day out to make their dreams become a reality, and there is nothing that we love more than helping SMBs grow by harnessing the power of their data to drive the business forward.

Grow makes it easy and affordable for SMBs to visualize and share business performance in real time by uniting data from hundreds of sources, including spreadsheets, databases, and SaaS applications. With Grow's business intelligence software, companies and leaders can become data-driven and accelerate growth to reach their full potential.

Grow Core Values

We have the GRIT to WIN

We are HUNGRY to IMPROVE

We have the HUMILITY to LEARN

We are DEDICATED to GROW

PROGRAM GOALS & OBJECTIVES

Goals and Objectives

The goal of Grow.com's Certified Partner Program is two-fold:

1. Build strong alliances with service provider partners that possess the skills and abilities to help us increase retention and help customers find value.

2. Provide Certified Partners with all the training, support, and assets to build and scale their own business with sustainable revenue by servicing Grow customers.

Objectives

- Grow and expand a network of skilled individuals who are advocates of Grow and understand our mission and direction
- Build a strong ecosystem of partners with diverse expertise that solves core business problems for our customers
- Provide product and company training that ensures our partners are experts on the Grow platform
- Engage regularly with partners in a way that provides value and helps them leverage their Certified Partnership
- Reduce customer churn and increase retention by leveraging Certified Partners
- Create a program that helps Grow and our partners acquire new customers

Partner Program Values

- We obsess over customer success which drives LTV.
- We win together, we lose together, we learn and get better together.
- We will never 'arrive'. We are always looking for new, better, more innovative ways to help our customers and partners be successful.
- We always ask, 'What's in it for our partners, and why should they care?'

Grow's Partner Types

This section outlines the three partner programs we currently have at Grow. This will help you understand where the Certified Partner Program fits within Grow's broader partner strategy.

Certified Partners

Grow's Certified Partners play a critical role in helping customers get the most out of their Grow experience. Since business intelligence (and data in general) is inherently complex, many customers require skilled service to achieve maximum value with Grow. We rely heavily on our Certified Partners to provide the skilled service work that helps our customers be successful.

When you join the Grow Certified Partner Program, in addition to getting access to sales collateral and co-marketing opportunities, you will get advanced platform training, enablement, and certification giving you the ability to earn revenue by servicing Grow customers. Additionally, earn recurring revenue when you bring your own customers to Grow!

Affiliate Partners

Grow's Affiliate Partner Program is for people and businesses that recommend Grow to their network and make a commission when deals close. Participating in this program gives you access to sales collateral, training material, and a dedicated Account Executive to help you close deals and get a revenue share from those referrals.

Technology Partners

Grow's Technology Partner Program is for software companies that want to integrate with Grow to enhance the reporting and analytics capabilities for their customers. The foundation of a strong technology partnership is a world-class integration that exposes the data that is most impactful to our mutual customers. Technology partners have the benefit of connection with our engineering team to build the best integration possible.

CERTIFIED PARTNER PROGRAM OVERVIEW

We're dedicated to making this a successful program and network for our partners. This section will help you understand how to get the most out of your partnership.

Roles & Responsibilities

The roles and responsibilities described below will help establish clear expectations and ensure that both parties have a positive, effective experience through the partnership.

Grow	Certified Partner
• Provide training, product support, and materials required for successful service work • Match customer type/need with partner expertise • Remove barriers to increase Grow customer awareness of and access to partners • Provide compensation for service work with Grow customers, as defined in partner agreement	• Certify in our product training, acquiring any product knowledge and skills required to successfully service Grow customers • Participate in ongoing training to stay current on Certified Partner Program and product updates • Make servicing Grow customers part of your business model • Meet established quality standards and best practices for servicing Grow customers

• Establish quality standards and best practices for servicing Grow customers • Make adjustments to the program to adjust to learnings and needs	• Maintain adequate customer service documentation • Help us build a world-class Certified Partner Program!

Assigning Service Work

We are committed to making this a high-value partnership for your business. One of the ways we will make this happen is by sending you customers to work with that are good fits for your business. We intend to be strategic in the way we go about referring customer service work to our Certified Partners. We believe this will create a better overall experience for our customers and our partners.

Here is an outline of the process we follow:

1. Evaluate progressing deals based on the Partner Eligible Criteria.
2. Prospects that are Partner Eligible are vetted by Partner Success Manager and assigned to potential partners.
3. Sales rep lets the prospect know they will be onboarded by a Certified Partner.
4. When deal is finalized, your PSM will send an email to partner with the customer information.
5. Partner will contact the customer within 24 hrs and begin the onboarding process.

"Partner Eligible" Criteria

- Customer's primary use case is in our Center of Solvency (i.e. customer acquisition dashboards)
- Customer's primary data sources are Tier 1 Data Sources (Google Analytics, Google Adwords, Facebook Ads, Hubspot CRM, Salesforce, QuickBooks Online, File Sharing Platforms, etc.)
- Invested Project Owner (QB)
- Customer vertical falls in Marketing, Ecommerce, SaaS/Tech, etc.

Assigning Service Work

The clearer information you can provide us on your business and ideal customer, the more likely it is that we will assign deals that have a high probability of converting into ongoing service. The PSM will work with partners to understand their bandwidth for taking on new customers.

Sales Handoff Language

The sales team will communicate to the customer that they will be onboarded by one of our Certified Partners. They will communicate that this is a great opportunity for the customer because our Certified Partners have more industry expertise than our internal team. They will also communicate that the partners will be able to help the customer tailor their metrics and dashboards to be powerfully relevant to their business needs. Here's a sample script that our sales team uses:

> *Grow has both internal onboarding specialists and a network of Certified Partners that provide onboarding and other enablement services. Based on your business type, use case, and goals/objectives with Grow, we will select an onboarding specialist that is best suited to help you get the most out of your onboarding experience. In many cases our Certified Partners can provide a superior onboarding experience because they bring more subject-matter expertise and more experience with particular use cases than we have internally. Our Certified Partners have received specialized training related to our product, our onboarding methodology, and the Grow way so that they are ideally suited to help you get the most out of your Grow implementation.*

Introductory Email

The introductory email to partners will be an email that contains the customer use case, sales notes, contract terms (metric/dashboard limit, add-ons, etc.) and customer contact information.

Onboarding Grow Customers

Read more details on this process in the Grow Onboarding Section of this playbook. We will do our best to assign customers to partners that best match the partner's profile, but partners will be expected to handle any customer handed off to them.

Ongoing Customer Support

At the end of a successful new customer onboarding, we want to ensure that our customers are cared for and receive the support needed to be successful. This support could range from answering questions to building metrics. Regardless of who provides support, all Grow customers that chat or email Grow will be responded to in a timely and professional manner.

Determining Ongoing Support

We hope that these customers will have such a strong relationship with the partner that they choose to continue, and pay for, ongoing service by the partner. Here are two possible scenarios:

> **Customer buys ongoing support plan from partner.** If customer purchases ongoing support from a Certified Partner, the partner will retain support responsibilities and be the first line of defense for support resolution. When support situations arise that cannot be resolved by the Certified Partner, the

Certified Partner should contact their PSM to determine the best path to resolution.

At the end of the onboarding period, customers return to Grow for support. If a partner-onboarded customer does not purchase an ongoing support plan from a partner, Grow will handle all support responsibilities for the customer.

Transferring Customer Back to Grow

Grow is happy to provide continuing support to any customer that isn't a fit for your business.

Onboarding Must be Complete: Prior to transferring a customer back to Grow, the onboarding process should be complete. Any work agreed to during onboarding period should be fulfilled by partner unless authorized by your Partner Success Manager. Even if a customer is approaching the end of their kick off period, if the work expected by the customer is not complete, the partner will maintain that customer until completed.

Submit Transfer Form: When the customer is ready to transfer back to Grow, the partner will submit the form found here. In the notes section, please include:

- A summary of the experience
- Challenges faced (data availability, customer readiness, etc.)
- Ongoing customer needs

Account Manager Support Provided by Grow

If a customer is transferred back to Grow for ongoing support, our Account Manager team provides the following services. This is subject to change.

- **Initial Post-Onboarding Strategy Session:** To maintain momentum from onboarding
- **Quarterly Business Strategy Calls:** To check in with customer and ensure they're finding value from Grow
- **BI Consulting and Dashboard Strategy**: To help focus the customer's dashboard strategy
- **Occasional Metric Building:** To help build customer metrics if needed by customer (under 1 hr of build time)
- **Professional Services:** If a customer requires ongoing build support they can pay for additional services from our team as needed.

Support Disclaimer

Grow reserves the right at any time for any reason to take back support responsibilities for Grow customers. Likely scenarios where Grow would take back support responsibilities include unhealthy customer metrics, repeated customer complaints about partner professionalism, complaints about timeliness responding to questions, etc. Where possible, Grow will make every effort to notify and discuss the situation with the partner if it is taking back support responsibilities.

Grow Emails and Communications

All Grow customers will be opted in to communications from our teams. This includes:

- Invites to Grow webinars (topics range from business strategy, product training and updates, data source training, etc.)
- Grow's monthly newsletter
- Invite to Grow's Data Driven Summitt
- Product updates and notifications
- Partner feedback calls/surveys as needed
- Other

If Grow promotes a new service offering to customers that will compete with any service agreement a Partner provides, we will remove any customer that is being serviced by a partner from the communication list.

Partner Communication to Customer

After the onboarding period, whether or not the customer chooses to receive ongoing support from the partner, the partner is eligible to maintain that relationship with the customer and offer service options that the customer who is free to accept. If a new service agreement is made between a Grow customer and a Certified Partner, that customer will return to be managed and supported by the Partner.

Certified Partner Evaluation

All partners will be evaluated yearly to ensure that they are still complying with the standards and objectives of the Grow Certified Partner Program. This section will review the various elements of evaluation.

Partner Health Score

The definition around the Partner Health Score will be refined as we identify the metrics that are truly indicative of partner success. Grow will take into consideration the following elements as we determine a partner's contribution.

- Grow customers feel supported

    - Customer's Grow account contains useful business metrics they use regularly
    - Partners respond quickly to customer needs
    - Customer usage activity in the platform
- Product knowledge (tools, features, data sources, etc.)
- Retention of all onboarded customers or customers receiving ongoing support
- Activity within the partner community (sharing of ideas, tips, best practices, etc.)

The primary factor considered will be customer feedback. If we receive any feedback from customers that is not satisfactory, we will make sure to inform the partner so they can make necessary adjustments.

Ongoing Customer Feedback

To ensure our customers are receiving the support they need, we will periodically check in directly with them to ensure they feel supported. This will take place between 60-90 days of their becoming a customer, as well as every few months if the partner is providing support.

As we collect feedback, we will provide insight back to the partner on the customer's level of satisfaction. Questions may include:

- Was Certified Partner professional, knowledgeable, and helpful?
- Did you receive adequate training to successfully use Grow long-term?
- Were ongoing support services offered?
- Would you recommend this partner? Why or why not?
- Overall satisfaction with onboarding experience?

Recertification

Each year a partner will be required to do the following prior to recertifying as a Grow Certified Partner:

- Successfully pass the Certified Partner Test
- Attend Grow's Data Driven Summit
- Maintain requisite Partner Health Score
- Attend continuing partner training through quarterly webinars
- Pay annual partner fee

PARTNER TRAINING AND SUPPORT

As an extension of our brand, we expect you to be experts on our product and know how to help customers find lasting success on the platform and work through the nuances of their data needs. To ensure you meet the expectation as Certified Partners and are successful, we will provide the following training and support:

Ongoing Partner Training

Partner Training Event: At the annual Partner Certification training, we will focus on the following:

- Certified Partner Program: goals and objectives, partner resources and workflows
- Grow's Platform Training: tools and features, advanced metric building, onboarding standard, successful BI strategies, data source literacy
- Building relationships with other partners and Grow's team

Grow Partnership Certification

The Certification Test contains a written and application portion. Once these have been successfully completed, the partner will receive their official Grow Certified Partner Certificate. Test must be complete within one week after the onsite training and will cover the following:

- Product User Interface
- Metric Builder Interface, tools and functionality
- Basic SQLite
- Grow Onboarding Standard
- Advanced Dashboard Build

Completing the Partner Certification: After your initial product training, we will provide ongoing training on the actual onboarding process to verify your understanding of the process and ensure the experience provided to the customers is meeting the Grow standard. You will complete the following:

- **First customer onboarding:** The PSM will take you through the first onboarding process. We'll coordinate the calls between the three parties. While the PSM will lead the calls with the customers, both the partner and Account Manager will work together to train and build any metrics the customer needs..
- **Second and other customer onboardings:** Led by the partner, supported by the PSM

Ongoing Partner Support

Product Training Webinars: Each quarter we will offer a Partner focused webinar where we will cover any process or product updates as well as discuss and share lessons learned from the partner community.

Quarterly Strategy Sessions: To ensure that partners are taking advantage the partnership program, you will meet with your PSM each quarter, in a 45 min strategy session where we will cover the following, and other, topics:

- Wins and losses of prior quarter
- Success level in selling ongoing service work
- Challenges and partner needs
- How to better package Certified Partnership offerings
- Review of commissions paid out

Periodic Call Recording via Zoom: Occasionally we'll set up a call recording for the PSM to review and offer feedback.

Other Communication and Support: As needed we will send updates to all certified partners with additional updates and useful resources.

Ongoing Training and Communication Channels

Partner Slack Channel

The purpose of the partner slack channel is to give partners a forum to communicate with each other; to ask questions, to share ideas, share success stories, ask for help, etc. We encourage you to be active in the community by engaging, sharing, asking, and helping where possible.

Always be professional, courteous, and helpful. Remember, a rising tide raises all ships!

The use of foul, derogatory, demeaning, and/or offensive language is not permitted. Offenders will be banned immediately, there is zero tolerance for this behavior.

Grow Partner Dashboard

We hope to provide our partners with a Grow dashboard dedicated to evaluating and tracking success metrics for their service work. Once this is complete, we will provide more details on how to access and utilize the insights.

LEVERAGING YOUR GROW CERTIFIED PARTNERSHIP

One of the primary goals of our Certified Partner Program is giving our Certified Partners exposure to our customer base. We believe that more customers working with more Certified Partners will lead to better retention, higher LTV, and happier customers. As our program develops, we hope that the Partner community will be able to offer unique insights and ideas to each other on how to take advantage of this relationship.

The following are some ways that you can leverage your Certified Partnership:

Recurring Revenue: As a Certified Partner, when you refer/resell Grow, you create a residual revenue stream for your business. We will share revenue in perpetuity on accounts that you bring to Grow, so long as account is active and billings are current.

Attend and Sponsor Grow's Annual Data Driven Summit: This is a great opportunity to promote your business to our customers and get quality face-time with individual customers. It's also a great opportunity to mingle with the Grow team, brush up on your BI skills at our Boot Camp, and be inspired by great business leaders.

Use Brand Assets to Promote your Partnership: We've created a repository for you to access approved trademarks, case studies, e-books, dashboard images, and much more. Our goal is to make it easy for you to promote Grow and your status as a Certified Partner. These assets can help you acquire new customers, upsell existing customers, and generally make it easier for you to promote Grow on brand.

Leverage Your Partner Success Manager: Only our Certified Partners have access to a dedicated Partner Success Manager (PSM). The role of Partner Success Manager at Grow exists to help you be successful in supporting and servicing Grow customers. Leverage your PSM for training, bugs, help with challenging customer problems, etc.

Selling Additional Services to Grow Customers

It is our hope that customers that we send your way for initial training and onboarding will turn into great leads for your core business offerings. We also believe that our customers will want to engage your team for ongoing BI services as you provide great service during the onboarding phase. We know that ongoing support is a driving factor in customer success and ongoing customer retention.

We encourage you to create your own value-added packages to better support our mutual customers. During the initial onboarding process, please use common sense and be courteous in the approach you take to offer additional services. **While we certainly want our customers to buy additional services from you, we need to avoid aggressive and overt sales pitches that make customers uncomfortable, or that make them think our Certified Partner network is just another attempt to get them to spend money.** Use your good taste and best judgement for how and when to bring up additional services.

Packaging Additional Services

We know that the expertise and value you bring as a partner can be much more impactful to our customers. You have insight from your years of experience that we simply may not have internally. Here are a few examples of service packages you could offer to customers.

Data Analyst for Hire (Outsourced BI engineer): In the SMB business intelligence space, many companies would benefit greatly from having a data analyst or BI engineer on staff, however, many don't have the resources.

Packages that allow companies to outsource their data analyst or BI engineer needs for a fraction of the cost of a FTE or a full team of data analysts is a possible approach to leverage your partnership with Grow. A simple way to offer this service is in blocks of hours. For example:

- 5 hours per month - $750
- 10 hours per month - $1,500
- 20 hours per month - $2,500

Feel free to customize your own bundles based on your hourly rate, blocks of hours, or by offering a "pay as you go" option where customers buy hours to be used as needed.

Typical data analyst projects may include the following:

- Consulting on recommended industry specific KPIs
- Complex metric building
- Dashboard planning & strategy
- Data modeling
- Dashboard maintenance
- Data cleansing and enrichment
- Help with specific data projects

Dashboard Strategy Audit: On a scheduled basis (monthly, quarterly, bi-annually, etc.) you come in and audit the company dashboards and look for ways to improve. Areas of focus could include:

- KPI Strategy: Is the company focused on the most impactful KPIs?
- Dashboarding Best Practices: Are the dashboards and KPIs visualized in the most impactful way?
- Dashboard Adoption: Are the dashboards shared with the right people inside the org to get alignment and establish a truly data-driven culture?
- Data Source Review: Are the right data sources connected, and is the data source being used to its full potential?

Data Cleansing/Modeling: Offer a project-based service to help companies organize, cleanse, and prep their data to create richer data insight. This would usually be quoted on an ad hoc basis according to the size of the data project.

Marketing & Sales KPI Audit: Offer a marketing and sales KPI audit where you help companies specifically focus and design dashboards around the most impactful marketing and sales KPIs for their stated business objectives. There are probably several packages with varying degrees of time/cost/thoroughness that could be designed around this concept.

Referrals to Grow

We hope that as you expand your business, you will find value in offering Grow as a BI solution to your customers. We have provided some Grow-specific sales information in the Grow Messaging section to help you prep customers. With your knowledge of the platform and data sources, you'll be able to vet out which customers will most likely be successful.

Making a Referral to Grow

Send an email to Joe (joe@grow.com) with the relevant details about the potential customer, or loop Joe in on warm email introduction. Joe will respond and copy a Grow Account Executive that will work with you and your referral throughout the sales process. Grow will log the referral in our CRM, tagging you as the partner of record.

Your email should include the following information:

- Company name
- Prospect name (first & last)
- Prospect contact info (phone & email)
- Relevant details about use case and goals/objectives related to BI

- Known data sources

Acceptance of Referral

Within a reasonable period of time following your submission of a new referral, Grow will review the details of the referral to determine whether to accept the lead as a commissionable referral and will provide you with a written confirmation (email accepted) of its acceptance or rejection.

Acceptance Considerations:

- Referred lead is a good use case for Grow
- Referred lead is entered in our CRM (with attribution to partner)
- Prospect agrees to evaluate Grow including participation in sales meetings, demos, etc.

The following are scenarios where a lead could be rejected:

- Use case is not a good fit for Grow
- The proposed lead is already in our database and actively being worked by an Account Executive
- The proposed lead is already a paying Grow customer
- The proposed lead has already been submitted by another partner
- For any other reason deemed necessary by Grow

In order to receive commission for a referred lead that closes, the account must be active and all billings current.

Handling Pricing

For any referral made by a Certified Partner to Grow, the partner and the AE will work on an optimal pricing package for a Grow license. While pricing is fairly standard, on occasion we will offer special pricing based on need, use case, etc. Please be sensitive and use discretion when discussing pricing.

Servicing Referrals

We assume that any referral made to Grow by a Certified Partner will be served by that partner. Post onboarding the customer can choose to remain with the partner for ongoing service. If a customer chooses to not pay for ongoing partner support, the customer will receive Grow's standard support offerings for the duration of the contract.

The partner will still receive the rev share for the remainder of the contract. Partner will not receive any payment for onboarding service work. The assumption is that they will have a separate service agreement that covers that work.

Overview of the Grow Agreement

While most contract questions will be handled directly by Grow, it will be helpful for you to understand how the contract is currently structured.

Contract Length: The typical Grow agreement is a 12-month agreement paid monthly unless the customer ops for an up-front annual payment. There is no opt-out period.

Annual Payment: If a customer pays the annual amount up-front, there is a set discount on the contract.

Pricing: Most of our standard customers spend between $600 and $800 per month. Customers who use Grow as a client reporting tool will pay between $1200 and $1500 per month. These prices will vary depending on the scope of their metric or client reporting needs.

Unlimited Users: All Grow customers get unlimited user access. We want customers to freely share their data between all departments and employees. The pricing model is either based on a metric limit or a dashboard limit.

Metric-Based Accounts: Typical contracts include 50 metrics with unlimited dashboards. As their metric usage expands, they are charged for the additional metrics in bundles of 5. We offer custom pricing for power users with lots of metrics.

Dashboard-Based Accounts: Base license for dashboard-based pricing typically includes 12 dashboards with unlimited metrics. As their dashboard usage expands, they are charged for any additional dashboards. Power users on Grow may choose to have their account set up this way to not run into metric limitations. This structure is most common for a client reporting use case.

Client Reporting: The option to use Grow as a client reporting solution is an add-on to the standard package. This includes the removal of clients from any Grow marketing emails as well as removing the chat option from their dashboard. Typically this is a per-dashboard plan with one dashboard per client Occasionally, we'll have customers who do client reporting on a metric-based account.

Branding: If a customer wants to customize the branding of their Grow account, they can pay for an add-on to set up a custom URL, custom login page, replace the logo, and add a website icon.

Contract Signing: Clients sign their contracts via a contract platform. This contract is emailed to them and saved in our system where it can be referenced. If a customer can't find their contract in their email, we're happy to resend the viewable link.

Marketing Resources

As a Grow Certified Partner, we want you to be equipped to explain and sell Grow. We also want you to know how to best prepare people you're working with to understand Grow's space in the BI market, so when they come to Grow, they're ready to see its value and potential. See Appendix A for additional elevator pitches, benefit statements, and sales scoping questions.

Grow Elevator Pitch

- Grow.com empowers businesses to become data-driven and accelerate growth with custom data dashboards. Grow is the simplest way to unite data from hundreds of sources.
- Grow.com is powerfully simple business intelligence software that helps companies accelerate growth by aligning and engaging the entire team with real-time data.
- Grow.com empowers businesses to become data-driven and accelerate growth by aligning team objectives and inspiring strategic decisions. Grow data dashboards are the simplest way to unite data from hundreds of sources, including spreadsheets, databases, and SaaS applications. With Grow's business intelligence software, enterprise-quality data insights are attainable for any business.
- Grow.com is the #1 BI for SMBs. Grow makes it easy and affordable to visualize and share business performance in real time by uniting data from hundreds of sources, including spreadsheets, databases, and SaaS applications. Grow data consultants get in the trenches with you to implement your data dashboard and solve your unique challenges. With Grow's business intelligence software, companies and leaders can become data-driven and accelerate growth to reach their full potential.

Grow's Competitive Advantage/Benefits

Here are some product positioning statements that we use to explain and sell our product offering.

- Simplify and automate the reporting process. Stop wasting time with outdated, time consuming, laborious reporting processes that keep you from spending time on higher ROI activities.
- Sleek look and feel. Customers and prospects tell us all the time that aesthetically, Grow's dashboards blow the competition away.
- Don't break the bank. Get real BI for your SMB for less than $15k annually.
- Ease of use. Grow is the simplest way for SMBs and growing teams to get unique insights and visualize your most important KPIs.
- Shareability. Easily share dashboards with team members, clients, investors, etc.
- Unlimited users. Put your entire team on the platform without the worry of paying more each time you add a new team member.
- Professional onboarding. Grow onboarding provided by certified professionals with specialized training to help you get the most out of Grow.

Marketing Assets

You can easily access a variety of Grow branded marketing and sales assets from our partner resources page. You can also reference some interesting customer case studies on our website.

https://www.grow.com/partner-resources/
Password: gogrowpartners

Materials include:

- Grow Certified Partners Badge
- Grow branding guide and logos
- Partners sales guides
- Lead magnets for ecommerce, marketing verticals
- Customer stories and case studies
- And more!

Co-Marketing Activities

We love to participate in co-marketing activities with our partners. The following list includes examples of activities we are willing to participate in. If you're interested in any of these options, please contact to Joe Durfey (joe@grow.com) for more information.

- Blog Posts

- Webinar
- Press Release
- Events
- Newsletter
- Social Media

THE GROW ONBOARDING STANDARD

One of Grow's key differentiators is our onboarding experience and support. We understand that working with data is a challenge. Data is always complex. Our team goes above and beyond to help our customers be successful and find value from their business data.

As you work with new customers in the onboarding process, we welcome and encourage you to be creative in thinking of new and better ways to help customers get the most out of their onboarding experience and any ongoing service plans.

This section will go into depth on the Grow onboarding standard and what we know will help our partners be successful as they onboard their customers on the platform.

What does success with Grow look like?

Our successful customers have TV monitors around the office with sales and customer acquisition data. The company drives towards adoption of data and KPIs throughout their teams.

Not all happy customers are necessary successful customers. Some customers are extremely successful on the platform but may be unhappy because their expectations (well founded or not) are misaligned. Our goal is to align expectations and help all customers find value by meeting their business goals.

If a customer innately has a vision, desire, and drive to apply data-driven practices, it's much easier to help them experience success. We know that we can explain a vision that can create a desire and drive.

Adoption Indicators

Some usage metrics are key indicators for whether or not customers will find long-term success with Grow. We encourage our CS team to evaluate their customers on these metrics. If a customer is not doing these things, we challenge their company to find ways to start incorporating these adoption measures:

- Daily logging in to platform

- Dashboards up on TV monitors
- Stakeholders regularly referring to dashboards and key metrics
- PDF Reports emailed to key team members
- Total number of Active Users
- Dashboards with 6-10 relevant metrics
- Utilization of dashboards in meetings
- Total # of dashboards
- Total # of custom metrics (not prebuilt)
- Total # of connected data sources
- Quality of connected data

The Grow Onboarding Standard

When customers purchase Grow, they are usually seeking help to create an internal BI strategy and ideas on how to deploy their data strategy internally. In the onboarding are expected to receive the following as a minimum:

- 90-day onboarding support
- 4-6 onboarding/strategy sessions with Onboarding Engineer
- 12 custom metrics built (relevant and custom to their business)
- Email, Chat, Phone Support

While the above items are told customers as a minimum service offering, a successful onboarding includes helping a customer find long-term value from a BI tool:

- Key data sources connected
- Useful, relevant, and custom metrics built
- A structure and strategy to the dashboards
- A high percentage of active, daily users exploring data
- Data shared freely between individuals and departments

Onboarding Engineers & Account Managers

A key factor in successful onboarding is the way our Onboarding Engineers champion their customers. They often make the difference between success and failure for our customers. Here are the attitudes and approaches to a successful onboarding engineer or customer success manager.

> **Customer Advocate:** A successful Onboarding Engineer is empathetic to the customer and understands their needs and goals. They advocate for what a customer needs and helps refine their vision. They are keen to remember the experience of a first-time user and sympathetic to the customer's experience.

Problem Solver: Company data is often not very straightforward and requires a lot of creative thought and problem solving. Onboarding Engineers have to be skilled in finding creative solutions.

Positive: There are many variables at play when working with data. Sometimes things may go wrong. Onboarding Engineers need to be able to handle product or data challenges in a positive light, look for solutions, and demonstrate confidence in the product and the customer's team and company.

Knowledgeable: With so many scenarios possible when working with data, it's essential that the Onboarding Engineer is knowledgeable of the product so they are able to demonstrate the power of the tool, establish clear expectations, and quickly build value for the customer.

Grow Systems & Security

We are committed to keeping our customer's data secure and protected. You can review this help article with more information about our platform security.

We are serious about keeping our customers' data secured and will immediately terminate any partner misusing access to customer data in any way other than on a "need to know" basis or as otherwise outlined in our Terms and Conditions.

Accessing Customer Data: We are currently scoping out building a partner portal to easily access various customer accounts. In the meantime, partners will access a customer's account by a username and password. This user will be given admin permissions to the customer account. Here is the process:

1. Grow will create a user on the customer account utilizing your email.
2. Because Grow users must have unique user emails, we will "alias" your email by adding +1, etc to your email. Ex: youremail+1@yourcompany.com, youremail+2@yourcompany.com, etc.
3. An activation email will be sent to your email and you will be asked to create a password.
4. Make sure to save that password and user email. Grow will provide you a Google sheet with your user email for each assigned customer..
5. If a partner terminates their service of that customer, we will remove your user from that account. If the customer chooses to create a new user for you, they are free to do so.

Kickoff Call

The goal of this first call is to "wow" them on the product, help them feel it is a positive investment toward achieving their BI goals, and assure that they will receive a lot of great help and value from the professional support package.

Prep for call:

- Familiarize yourself with their company and market
- Review notes from the Grow AE on the customer
- Review the data sources and any related challenges
- Prepare a few metrics you can build with them

Questions you can ask:

- Introductions for anyone on the call
- What is something I wouldn't know about your business by reviewing your website?
- What are your BI goals?
- Which data sources are priority to you?
- Contract Details (Trial end date if applicable, metric/dashboard limit)

Action on the Call:

- Answer any customer questions
- Build 3-4 metrics they need, preferably with one that includes financial or spend information

Kick Off Call documentation: Make sure to submit your documentation to Grow. Use the following form. Read more on how to submit this form in the Call Documentation section.

Build Review Calls

The goal of a Build Review Call is to review work accomplished between calls, provide training, troubleshoot any problem a customer is facing and sync up on the next set of action items.

All customers will come to these calls with varying level of preparedness. You will need to adjust your training and focus on the call to meet the level they're at. See the Customer Scenarios section for more examples and recommendations on what to do.

Prep for call:

- Check their activity since the last call. Have they sent you questions? Have they created additional metrics or dashboards?
- Come prepared with an update on any technical questions they asked in the last call or throughout the week.
- Have you built the metrics you promised?
- Do you have a plan of something to go over if they are unprepared?

Goal:

- Review any metrics built between calls
- Plan for next steps
- Leave customer with an adoption challenge, encouraging them to share a PDF with a boss, use a dashboard in a team meeting, etc.

Build Call Pro Tips:

- **Building metrics:** You will find the number of completed metrics per call varies based on the complexity of metric and the data source used. Add as much value as you can on the call and be prepared to do additional research or building off the call as needed.
- **Building in the same metric:** If two users are in the same metric at the same time, it will start to throw errors and not save. Either make a copy of the metric the customer is asking about, or one user will need to close and save that metric before the other can use it.
- **Ongoing training:** Always explain why you are doing what you are doing, i.e. Why did you rotate chart labels? Why did you add the filter where you did? Calls should be sprinkled with dashboard/metric training as you go along so customers are always engaged with learning best practices.
- **Navigating the platform when the customer is "driving":** This is hard to do! Give them reference points, use tool names, etc. Hopefully in the calls where you drive, you are able to train on naming conventions and the UI of the product.

Build Call documentation: Make sure to submit your documentation to Grow. Use the following form. Read more on how to submit this form in the Call Documentation section.

Ongoing Contact

We know that time in the platform will be the best indicator on how well the customer is adopting the Grow platform. To keep up the momentum, we frequently reach out to customers to keep them engaged and focused on the next action item.

You will find something that works for you and your customers. The cadence is different between the onboarding phase and ongoing support.

- **Minimum Cadence:** At a minimum, you should have weekly call scheduled with a customer. While this is ideal, these weekly meetings may be more spaced out depending on schedules, customer priorities, and many other things that may arise.
- **Engagement Emails Between Calls:** These emails are more than just a "how are things" email. We try to include updates on questions, new metrics you built for them to review, useful blog content, or relevant help articles. Ideally, at the end of the first month, customers should have had 4 calls and 4 engagement emails.
- **Response Time on Questions or Requests:** We respond within 24 hours to any question. Ideally, if an email comes in before EOD, you reply by EOD. If it's a time-consuming request, at least respond to the customers to let them know you received the request and will be able to fully address the issue by X time.

Call Documentation

To document the calls you have with clients, you will use the following form. It's essential that we have this information so that we can make sure to know how our customers are doing and what support we can provide to you.

You can save your submission responses for your own records. Until we have a Partner Portal built out, to store this information, we'll have to use this method. However, to help you see your notes, we'll include a metric with this information on your Partner Dashboard.

SFDC Id: You can find the Salesforce ID for your client in the customer list provided to you in your Google Drive partner folder. This is a required field because this is how we are able to sync your documentation to the customer's account in our CRM. An ID looks like this: 00Q1N00000ctPabUBE

Call Type: You'll be submitting documentation for different call types. Here are the definitions:

- **Kick Off Call:** The first call you have with the customer. While you do build metrics on this call, it is considered the Kick Off Call.
- **Build Review Call:** These are used for the calls following the first Kick Off call. In these calls you're primarily building calls with a customer.
- **Service Handoff:** This is to document the hand off from the partner to Grow when the onboarding is complete an the partner is no longer providing support.
- **Other:** This is a "catch all" category to use in rare circumstances.

Call Attendance: This is to help us know how engaged a customer is in attending their calls. Even if a customer misses or reschedules a call, please lets us know in this form.

Notes: We like to know what was covered, what challenges you ran into and any action items to be completed prior to the next call. Be thorough, but we don't want you to feel like you have to spend a ton of time gathering this information.

Suggested Tools

Here are a few tools you may find in your work with customers

Web Conference Tools: Zoom, UberConference, Google Hangout—whatever is reliable and easy for the customers to use. Uber conference is free and it's easy to do a screenshare, but runs as a chrome extension, which, combined with the Grow app, can slow down Chrome browser performance. Zoom, while it requires users to download seems to be much faster and reliable. .

Calendly: A quick and easy way to have your customers book time on your calendar. Basic accounts are free.

Skitch: An easy and quick way to grab a screenshot of an area of the platform and annotate it.

Recordit/Loom: Used to make a quick video and screen recording to answer a customer question via email, or to record a product issue to explain the situation

and steps to the Grow product team or others. Verify with the customer before recording a session or a portion of the call.

Spectacle: Allows you to resize windows quickly on your computer when working on dual screens.

WORKING WITH CUSTOMERS

Clients will come in various states of preparedness, technical understanding, and vision of how Grow can be utilized effectively. This section will review some tips for handing their concerns and training needs.

Customer Support

Ongoing support resources for Grow customers include:

Certified Partner: During the 90-day onboarding period, the Certified Partner will be the first point of contact for a customer seeking any help. In turn, that partner can reach out to Grow to receive help on specific needs.

Help Center: Our Help Center contains numerous articles on how to use our tools, features, connect data and use the data source connectors native on Grow. These articles are constantly updated. Visit the Help Center here: help.grow.com.

Integration Pages: These are a useful customer facing tool to help customers know the data available by each connector. They also include links to the Help Center and an overview doc. The overview docs include a summary of all the known limitations and nuances of a specific data source.

Grow Chat: Accessed on www.grow.com or on the bottom right screen of the Grow app. This doesn't include Grow branded accounts.

User Forum: Forthcoming! We are hopeful to build out a user community early Q4 of 2018. This will be useful to document user questions and give partners exposure to our customer base. In the meantime, you can use the our partner Slack channel to ask questions.

Product Fixes and Improvements

We're constantly working hard to improve the functionality, stability, and ease-of-use of our platform. If you have a question about the platform, just chat in! These are guidelines for replicable product issues and bugs:

Weekly Releases: Product fixes and new code are pushed weekly on Thursdays. Update notifications are delivered in-app or occasionally via email to all users. Partners will be included in any beta test group so you have early access to new tools and features. You can review our weekly release notes on our website.

Product Fixes and Improvements: We're committed to addressing the issues that our users face. All bugs will be reported and submitted to the product team where they will be vetted, evaluated, and prioritized. Following are guidelines that will help in this process.

Managing Expectations: Don't commit to do any new features or integrations fixes without prior approval from Grow's product team. Regarding features requests, we like to gather individuals interested in beta testing new features. We usually respond with: "That's a great idea, I'll submit it Grow's product team. They frequently evaluate the feature requests, and if this becomes part of the product, can I let them know you'd be interested in beta testing the feature?"

How to Report a Needed Improvement:

- Submit via Grow's chat function
- Let them know you are a Grow Certified Partner
- Provide enough detail that would allow us to isolate the issue:
    - Description of the issue
    - Steps to recreate the issue
    - Description of how it should work
    - Name of account/user
    - Browser, data source, trends you've noticed
    - Screenshot or video recording
- Request a reference number from the CS rep on the chat so you can easily ask for an update later.
- Reach out to your Partner Success Manager so that they can stay up-to-date on the issue as well.

Definitions:

- Bug: Anything on the app that is going wrong. Not related to any data source connection.
- API Bug: Anything going wrong related to a data source.
- API Update: Anything it would be nice to have related to a data source, ex. a new field, a new endpoint, etc.
- Feature: Anything that would be nice to have in the Grow app that doesn't yet exist. Not related to a data source.

Data Source Credentials: Whenever an issue involves a data source, our product team requires a customer's credentials to that data source to verify the issue in our dev test environment. There are so many factors to consider and each account may be unique, so to isolate the known issue in that customer's account, we need to replicate it with their data. Admin creds should be provided if possible.

- **Why?** We need credentials to make the connection and test. It's like a requirement for a transaction: we don't like giving our credit card number, but we do give it when we want to buy something. The concept is the same with providing credentials.
- **My credentials are stored in Grow, why is that not enough?** We need to replicate in a test/dev environment so if something doesn't solve the issue, we can resolve it before it's live on our app for all customers.
- **Can we trust you?** We can provide mutual NDAs to ensure safety of credentials. We do not store the credentials and we encrypt them.
- **Can we use someone else's credentials?** There could be something very specific to your customer's account and data, hence testing with another customer's creds may not help at all.
- **Will you change something in our account?** No. We may enter your account to verify settings and see if that is causing an issue. But primarily credentials are used to connect the data source to Grow in our backend where we can thoroughly test the written code and verify the solution.
- **What level of permission do the credentials need to be?** Admin creds are ideal as it allows us full access to verify the issue. View-only users limits our visibility to the data and API settings.
- **What if the customer won't provide creds?** On some data sources such as Google Analytics, you can add a user (dev@grow.com) to your account instead of providing a username and password. Make sure to notify your PSM. Unfortunately, without user login creds we will be unable to resolve the ticket.

Responding to Product Objections

Occasionally customers will have questions and objections to the product or how data comes in from a data connector. We trust your judgement and your ability to resolve customer concerns while upholding the benefits of the Grow product and partnership. Here are a few tips:

- **Don't make it a problem unless it is a problem:** Give them the answer and move on. Be confident in your answer and in the product. If it is a real problem, it will surface again, and we'll do what we can to fully resolve the issue.
- **Understand the level of priority for them:** Ask to know how critical this issue is for their business practice. It will help you know how to proceed as you seek a resolution
- **Acknowledge their concerns:** Customers need to feel heard and know that you're doing what you can to get them a result. Make sure they know the next step and that you'll keep them informed as the issues is resolved.
- **Uncovering the real concern:** Often a customer may state a concern, but it's not the real issue. Ask questions to uncover their real issue so that we can address it.
- **Provide an alternative:** The customer may be asking for data we don't have a connection with or a visual we don't provide. In these scenarios, try not to come back empty handed. Suggest an approach to accomplish their goal in a different way. Always brainstorm other options if possible before coming back with a "no."

Responding to Billing and Contract Questions

While pricing is fairly standard, there may be unique circumstances that lead to custom pricing for a customer. Here are some guidelines on how to handle billing or contract questions.

Billing Questions

If a customer has a question about billing, first direct them to their Grow account where they can view the specifics in Settings >> Billing. This page explains their base package price as well as any metric bundles they're paying for based on their metric usage.

If a customer notes any discrepancy on this page, let us know so we can verify the package details.

Contract Questions

If a customer has questions regarding their contract, first refer them to their Grow contract and agreement. All further questions regarding can be handled by their Account Executive. Our Partner Success team is also happy to help facilitate any conversation and resolve any concerns.

In cases where the customer was referred to Grow, a partner may have more insight into the contract details and pricing. In that situation, the partner is welcome to answer initial questions.

Account Expansion: If a partner sees a need to upgrade a customer's contract with Grow, the partner will need to communicate with Grow and the determine the new pricing model jointly. Scenarios may include:

- Expanding account's base metric limit and seeking a bulk discount
- Purchasing an add-on (i.e. branding, client reporting, etc.)
- Switching from a metric-based account to dashboard-based account

Account Downgrade or Termination: Customers will be expected to fulfill the contract agreed to with Grow. Any changes or termination of the Grow licence cannot be approved by a partner and must be handled and approved by Grow. Scenarios may include:

- Decreasing base package price
- Termination of contract, early buy-out, etc.

Customer Scenarios

Clients will come in various states of preparedness, technical understanding, and vision of how Grow can be utilized effectively. Here are some basic scenarios and possible ways to respond or handle the situation.

Customer comes ready to learn, but no goal or metric list.

- Review data sources and make sure they're connected in Grow.
- Share an example dashboard to show them what they could do in their business space.
- Ask what's something they look at every day when they come into work and try to build that out in Grow.
- Explain that the best KPIs will be tracking something that relates directly to their company/department goals.

Customer has used Grow before call.

- Congratulate them! They're already ahead of the game.
- Evaluate how far they got into the platform (prebuilts vs. custom metrics) and check to see if the person who actually built the metrics is on the call.
- Once on the call, confirm who did the building, if they are prebuilt vs. custom metrics, and what their impressions were of the product.
- Depending on their level of exposure to the product, we might speed up the walk-through of the Metric Builder.
- Fast track to what questions they have if they've built a lot, since it's likely they want those addressed quickly.

Customer hasn't used Grow at all.

- Get them logged in and add at least one data source
- Guide them to a data source that is a bit easier to work from that has prebuilt metrics they can add and a basic custom metric you're confident in building.
- Check to see if they have a strategy or vision around their dashboards. If not, review their business and encourage them to spend some time developing this strategy.

Customer project owner has a list of metrics from the CEO, but is an intern and is not familiar with company data.

- Teach the intern how to build metrics.

- Build 3-8 metrics, show them the options for sharing the dashboard, and ask them to run the dashboard by the CEO for feedback.
- Often the intern (or project owner) will not know the company data, and if the CEO isn't going to be involved at all, this will be a challenge. The intern will build simple metrics and the CEO may not be impressed. Make sure to get the customer's team communicating!

CEO is the project owner and doesn't have time to provide direction.

- Ask if there is anyone else they could put in charge of the project. Explain that BI (especially in the beginning) does take a time investment in order to be successful.
- Sell them your ongoing support and service!

Customer is excited on the first few calls, but then gets busy/fades out.

- Maintain a weekly email cadence. Call after an email or two.
- Get the Grow Account Executive involved if needed to see if they can get in touch with them.
- Build a couple metrics from one of their data sources. Make the metrics look really good. Send the customer the shareable link to the dashboard in an effort to demonstrate the value.
- Offer professional services again.

Customer data isn't as straightforward as they thought, and they're waiting on external factors to get it ready.

- Explore other potential solutions in the meantime.
- See if they have another data source (database or other) they didn't mention in the sales process that you can leverage and work from.
- Identify what specifically they need to know/see in order to be successful on Grow, and try to demonstrate with export data.

Customer's priority data is only found on spreadsheets.

- Spreadsheets can be inherently messy, poorly structured, and manual.
- Set the expectation with the customer from the first call so they're not surprised about the things they need to do on their end to cleanse the data or restructure things prior to getting useful metrics.
- See the Product Handbook section on File Sharing Platforms.

Customer requests a product feature that is priority for them but didn't come up in the sales process.

- Verify with Grow on whether or not the feature was mentioned during the sales process
- Explain that the product feature isn't supported, that we can make the request to the product team, but all things product are vetted and prioritized.
- Find a workaround to the feature and offer alternative solutions

Grow doesn't have a native connection with customer's requested data source.

- Occasionally a customer will not bring up all of their data sources on a sales call and then identify it as a priority data source once they've started onboarding. In those cases, we are still bound to any way of accessing the data in Grow, either through exports, file sharing platforms, a database, or (in very rare instances) a Custom REST connection.
- Explain the process of each approach, the pros/cons, and provide any help they may need to get the file sharing platforms or exports set up.

The API doesn't provide access to the data the customer wants to see.

- If a platform's API doesn't include some key data, there isn't much we can do. If that data is included in reports or exported provided on the user end of the platform, we may be able to access that data through manual export reports.
- Gauge a customer's priority with that data source and refocus them on what data we can successfully access.