

UPDATE

NCR Marketing Development Fund Program (MDF) Replaces Marketing Co-op

May 19, 2014

The former Retalix and StoreNext “Marketing Co-op” program has been replaced with a new process and program from NCR designed to help Channel Partners drive more business and revenue through more powerful and inventive marketing activities.

Since the old program is replaced by NCR MDF, the former co-op policy has been retired and replaced as well. Channel Partners will work with their CAMs and use NCR PartnerCentral to manage the program.

The former Retalix Marketing Co-op ended with the 2013 Program. All valid Co-op Credit Applications for 2013 have now been entered and the Channel Partners notified. All 2013 co-op credits are now in process and should be received shortly.

Please see the current NCR MDF Program document and presentation are attached to this Update, and make the most of the opportunities.

NCR INTERACT MARKET DEVELOPMENT PROGRAM



MDF Program Manual and Guidelines
Interact Solution Providers
Interact Distributors



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1 Program Overview

The NCR Interact Market Development Fund Program's purpose – to reimburse a portion of a partner's marketing and demand generation activities. The Interact MDF Program is a discretionary financial program benefit and only available to our valued Premier and Advanced level solution providers in addition to our authorized Distributors who have been approved to participate in the NCR Interact Global Partner Program. Solution Providers should pre-plan their activity budget to ensure they have allocated enough funds for deposits or preliminary work required for the requested activity.

The NCR Interact MDF Program is a proposal-based reimbursement program that can be used to support external marketing campaigns and/or business development initiatives which:

- 1) Generate demand for NCR products, solutions and services
- 2) Benefit both NCR and the Solution Provider or Distributor
- 3) Deliver a return on investment (ROI) greater than either party could achieve on their own

Eligible activities have been enhanced and clarified (see Section 7) to encourage sales enablement and to help our partners focus on business development, sales and marketing activities.

It is highly recommended that each proposal is linked to a corresponding element in the annual business plan. MDF Pre-Approval Applications are a competitive process. Proposals and costs will be reviewed and approved by the Channel Sales Leaders with the assistance of the Global Channel Operations Team. In order to qualify for funding consideration and approval, partners are advised to present compelling proposals based on sound, business plans that clearly exhibit convincing Return on Investment (ROI) for each event or activity.

MDF is a joint effort of both NCR and the channel partners who can look to NCR to share costs with partners for approved marketing activities. Any additional approval for funds could be considered, however these will require a more extensive business case and are heavily dependent on the ROI that is proposed and expected. Please discuss with your Channel Account Manager and the Regional Channel Leader.

Ultimately our shared goals are to:

- Grow or acquire market share with NCR software-driven, services-led, hardware-enabled solutions
- Develop new business in partners' markets with incremental revenue growth beyond committed target and forecast for the current calendar year

These guidelines are specifically designed to help Interact partners, with the support of their Channel Account Manager (CAM) to develop, plan, and execute their funded programs within the goals of their business plan.

Contained in this document are helpful hints, process guidelines, web links, eligible and non-eligible activities, legal requirements and much more.

Additional Program Conditions

Submitting an MDF request and partner business/marketing plan does not guarantee approval or reimbursement of any claim in any amount.

All claims must be made in good faith and truthful. Any false or misleading claims will result in a rejected claim.

NCR reserves the right to audit all claims and to make a final decision on whether or not a request is compliant with the program guidelines.

Advertising must contain approved NCR logos, product illustrations, product descriptions and meet any conditions specified in the program guidelines.

Advertising and marketing activities must comply with applicable laws and ensure they are in good taste. No payment will be made if any marketing activities are misleading as to price, product features or specifications or are in violation of any law.

All NCR products featured in printed media must meet approval requirements and recommendations regarding inclusion of descriptive copy, illustrations, logo and trademark usage. In broadcast media NCR must be mentioned at least as often as the reseller and other manufacturers. The time devoted to NCR must be proportionate to NCR spend.

Payment of claims for any activity that contains products from other manufacturers will be based only on the actual cost of the NCR-related space or time devoted to NCR products, which includes a proportionate share of the heading and reseller logo/signature.

All MDF payments are in US Dollars (USD). Local currency should be converted into USD at the standard market exchange rate on the day the partner submits the MDF request. NCR is only responsible for the USD amount approved and not for any currency fluctuations.

Please refer to the latest guidelines and forms which can be downloaded from NCR PartnerCentral.

NCR reserves the right to assign reimbursement values on a case by case basis.

NCR reserves the right to immediately disqualify partners/vendors who abuse this program.

NCR reserves the right to modify the MDF program at any time.

Program Web and Mailbox Links

NCR Interact Partner Central: [Here](#)

MDF Pre-approval Web Site Form: [Here](#)

MDF Claim Web Site Form: [Here](#)

NCR Interact MDF Global Mailbox: [Here](#)

MDF Manual Guidelines available on NCR PartnerCentral: [Here](#)

4 Branding Requirements and Guidelines

Only an organization with an NCR agreement that contains specific terms and conditions for the use of NCR Marks may use a partner signature image, and must abide by the NCR Partner Guidelines as well as any other terms and conditions specified by NCR. Your marketing materials should not give the impression that NCR owns or has a financial interest in your company. Partner Guidelines are posted [here](#)

Please refer to these guidelines before producing any marketing materials, whether print or digital, where you contemplate using the NCR Brand Block or referring to your association with NCR. If you have questions or need assistance, please contact your NCR Channel Account Manager.

All new co-branded communications and materials being produced by Interact partners to use NCR brands or marks in conjunction with any other company's products or services, must be reviewed and approved by NCR Corporate Branding. For assistance and approvals, contact your CAM. (See Partner Brand Guidelines for complete details posted on PartnerCentral.)

5 Eligible Marketing, Business Development and Sales Activities

Marketing activities eligible for consideration

MDF Activity and Requirements Matrix, section 7 contains a more detailed summary and reference of activities currently eligible in the MDF Program for reimbursement.

NCR reserves the right to change this list from time to time. Partners should always refer to the MDF Program Manual and Guidelines published on Partner Central to ensure they are using the latest information located at the following link [here](#)

Examples of acceptable activities, eligible for reimbursement:

- Customer visits to one of the NCR Executive Briefing Centers
- Partner-hosted customer training events
- Funded sales/marketing associate
- Sales Training and certification courses
- Advertising (print and online)
- Collateral: brochures, datasheets, displays, translations
- Demand generation: direct mail, newsletters, e-marketing, telemarketing activity
- Tradeshow/Conference events
- Seminar/webinar/roadshow

Submissions will be evaluated based on the viability of the event or campaign, which should reflect:

- An integrated approach that leverages the most efficient and effective use of the marketing mix
- Measurable metrics and results

Any activity funded under this program must involve the promotion of NCR products to generate increased sales, expand market coverage and grow business opportunities. The MDF Program is designed to partially support and defray costs, not to fully fund an event, activity or program.

Activities included herein do not guarantee the right to funding nor the right to the full amount requested; all requests are subject to approval by NCR Channel Sales and NCR Channel Programs Team. See Non Eligible Activities, Section 8 for disallowed expenses.

6 Pre-Approval, Claim Process and Timeframes

Table 1 MDF Program Overview

Summary of the roles of the partner, the CAM and the NCR Channel Operations Team in the MDF Program.

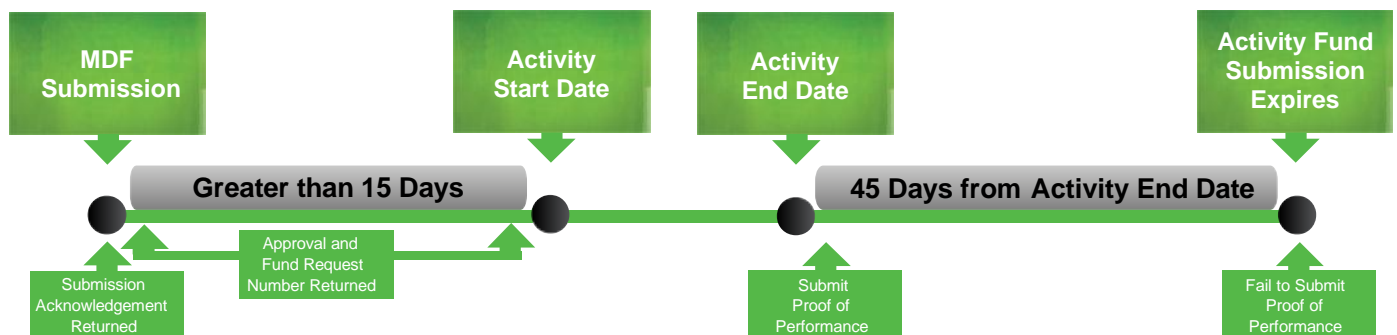
PLAN	PRE-APPROVAL	ACTIVITY	CLAIM	PAYMENT
<p>Partner and CAM agree to business plan</p> <p>Partner and CAM agree to sales development and marketing plan</p> <p>Prepare MDF requests and proposals for Q1/2 and Q3/4 activities</p> <p>Partner submits using web for pre-approval, submission process begins January 1 each year</p>	<p>Channel Operations Team reviews requests and proposals for approval or non-approved</p> <p>Non-approved requests are given an opportunity to correct and resubmit</p> <p>Channel Operations Team confirms successful request and issues MDF control number</p>	<p>Partner completes activity that was submitted and scheduled for MDF</p> <p>Proof of Performance (POP) is required for all MDF reimbursements Examples are 1) Receipts 2) ROI or Return on Investment 3) Lead results</p> <p>All Claim requests must be submitted within 45 days of the <u>completion date</u></p>	<p>Partner completes and submits claim quoting the MDF control number Attach two documents of Proof of Performance (POP)</p> <p>Channel Operations Team reviews and approves payment or requests partner for more information</p> <p>Channel Operations Team informs partner when payment will be made</p>	<p>NCR uses Channel Pay Manager to deliver MDF funds. An e-mail notice is sent to the partner with claim status via a secure central portal for payment status and tracking. Payments are available monthly by end of 3rd week.</p> <p>Partner should provide an ROI report to their CAM 90 days after the activity date.</p>

MDF Program Process Steps

For MDF requests and submissions, the NCR Interact MDF Program follows a five step process:

- Step 1** Partner MDF plans align with Business Plan objectives
- Step 2** MDF Pre-Approval, initial submission through on-line web site
- Step 3** Partner completes plan and executes MDF activity
- Step 4** MDF Claim, apply for funds through on-line web site
- Step 5** MDF payments processed through NCR Channel Pay

MDF Submission Sequence and Approximate Timelines



Step 1

Partner Business Planning for MDF Requests

Partners should prepare an annual business plan with their CAM and agree to MDF requests for each quarter of the year. An MDF request may span more than one quarter, based on the business/sales and marketing plan. Table 1, reflects a process for planning and MDF engagement within your annual process. A business planning tool can be downloaded in PartnerCentral [here](#):

The business plan should include:

- 1) Description of activities
- 2) Objectives of activities
- 3) Target audience
- 4) Dates of activities
- 5) Cost of activities (NCR MDF required and partner co-funding where applicable)
- 6) ROI/Metrics

Step 2

MDF Program Pre-Approval Procedure

MDF Pre-approval Web Site Form located [here](#) is used for all MDF Pre-Approval (submission) requests. Partners should complete the questions on this page with as much detail as possible. Where the detail can not be included or requires additional documentation to support the MDF request, there is an option on the bottom of the page to attach or upload files to complete the submission with the applicable documentation. This documentation could be rate cards from publications, advertisements, outbound or telemarketing firms. Please see MDF Activity and Requirements Matrix, section 7 for additional details and explanations on the pre-approval documentation. Key dates in this process are the following:

- Submission Date - the date you submit the request, system generated
- Start Date of the activity - partner entry - must be after the Submission Date
- End Date of the activity - partner entry - no more then 30 days from Start Date
- All submissions should be entered at least 30 days before first activity date
- All submission dates must precede the activity date, otherwise submissions will not be approved

Pre-Approval is always required in advance of any MDF activity seeking NCR funds. Once the request is processed through the Pre-Approval step, the partner will receive a notice of submission. If Pre-Approved the partner will receive a notice of pre-approval with a pre-approved amount and a control number for the submitted activity. Control number format is FR-nnnnnn-nnnn, please retain this number for your claim in Step 2.

NCR may reimburse, at it's sole discretion and amount, shared costs incurred by a partner for a pre-approved activity

- Claim amount cannot exceed the amount approved by NCR
- Any unapproved, denied or unacceptable activity will be the responsibility of the Solution Provider or Distributor.
- The amount on the original request should include an estimate for shipping, handling and/or reasonable increase due to additional attendees.

Step 3

MDF activity is executed and completed

Step 3 is where the channel partner executes and completes their marketing activity. The focus for the marketing activities and campaigns should be to enable potential buyers of the the benefits of your company and of NCR's products and solution offers.

- Marketing should direct prospects to your company with specific "calls to action".
- Determine your message focus (i.e., tie in with NCR corporate initiatives like Interactive Teller or SelfCheckout).
- Use a multi layered approach (combine print, web, telemarketing, e-marketing over a specific time period).
- Spend 3+ months executing, this includes focused sales follow-up.

Step 4 MDF Program Claim Procedure

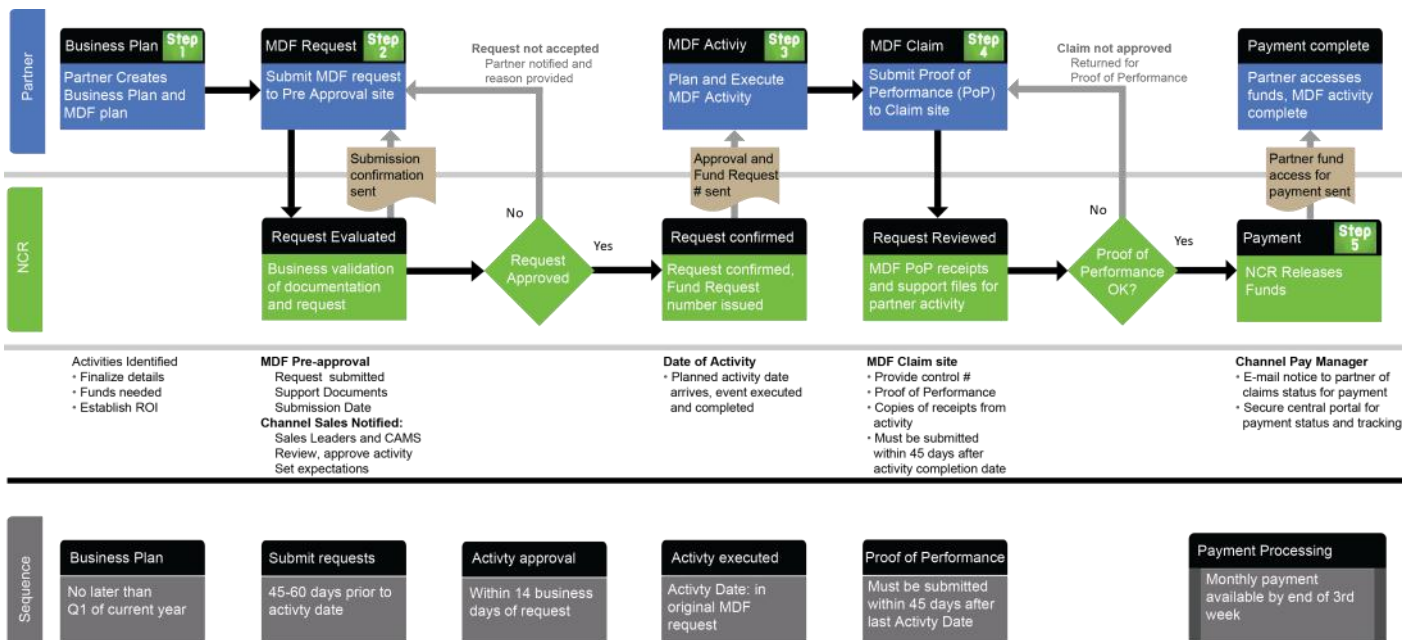
MDF Claim Web Site Form located [here](#) : is where all partners should go when their MDF activity is complete, go to the MDF claim form site and the fill out the form completely within 45 days of Activity End Date. Remember to upload all of your required Proof of Performance (PoP) documents, see Section 7, MDF Activity Requirements Matrix, before you submit information within the claim form. Remember, copies of receipts are always required as part of the Proof of Performance. Remember, incomplete Proof of Performance submissions will cause delays in the process and a delay with release of your funds. The program is not configured to expedite payments.

If you are having difficulty or are not able to upload your Proof of Performance documents, please contact channels.team@ncr.com to make other arrangements for submitting the MDF claim form.

Step 5 MDF Payment Process

MDF Payment Process. After a claim has been approved, Global Channel Operations submits a payment request through our Channel Pay process. Once this is done, the original person who made submission (email that was provided in Step 1, will receive a notification e-mail that the funds are ready to claim. The email will contain a user name and password which is required to access the funds. Typically, payment requests are entered at the end of the first full week of the month. Notifications will commence 10 days after requests are completed for that cycle.

MDF Program Process Flow



7 MDF Activity Requirements Matrix

Step 1 Partner Business Plan alignment to MDF Program. MDF activity planning to identify applicable expenses for reimbursement		Step 2 PRE-APPROVAL: DOCUMENTATION	Step 4 CLAIM: PROOF OF PERFORMANCE
Eligible Activity	Reimbursable Expense	Prior Approval Requirements	Proof of Performance (PoP) Requirements*
NCR Executive Briefing Centers (EBC) Customer visit	Flights and accommodations for customers, subject to Channel Leader approval, transfers to and from hotel, food and beverages during EBC visit.	EBC pre-booked reservation confirmation, customer/partner profile documents are required. See Partner EBC Visits in the NCR Intranet or Partner Central	Receipts, agenda, list of attendees, including names, company, country. Sales initiatives/projects discussed, and ROI.
Training sessions, NCR or Partner hosted Sales training and End User Customer training.	Course fee, audiovisual rental, food and beverage, room rental. No travel expenses.	Complete and submit pre-approval for course type, agenda, attendee list, company name, contact name, title, phone, address, prior to commitment. Work with your Channel Account Manager	Receipts, final agenda and list of attendees, including names, company, country. Documentation showing course completion and certification provided.
Funded Headcount sales/marketing or product solution specialist. No temporary staff.	Up to 100% of average base salary for six months only for newly hired dedicated NCR solution or sales associate.	NCR CAM should be involved in the selection and recruitment process. Resumé and sales growth plan for candidate must be attached to MDF proposal.	Signed offer letter including job title and description, base salary, start date and contract term. Copy of first payroll statement.
Sales Incentives, Partner internal sales team only.	Sales incentive for achieving defined targets for NCR only products and solutions.	NCR CAM must be involved in defining and setting sales targets. Proposal of what is to be achieved by when, eligible sales staff, products and targets within specific period.	Partner's sales invoices for qualifying products, qualified sales people with dates and delivery dates to end customer. Only closed deals apply, no letters of intent.
Printing, publication, brochures, collateral advertising, product data sheets	Agency fees, concept, design, production printing costs	Complete and submit a proposal for each project prior to commitment for approval. Submit a proof or mock-up of your publication before finalizing and printing to ensure NCR Branding is correct.	Receipts from agency or production house, final copy of collateral. Ads, cost of space and duration of ads, final ad copy, calls to action, number of sales leads as a result of ads and collateral produced.
MicroSite, Landing Pages for demand generation	List acquisition, printing, postage, web space fees, agency fees/list service, Concept, design, production	Complete and submit a proposal for each project prior to commitment for approval. Submit a proof or mock-up of your campaign before finalizing and execution to ensure NCR Branding is correct.	Receipts from agency or production house, final site/web page designs, ROI for campaign, banner, number of hits, response report, closed lead report, open leads and opportunities.
E-Mail Marketing demand generation activity	List acquisition, agency fees/list service, concept, design, proof/production costs	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your campaign before finalizing and execution to ensure NCR Branding is correct.	Receipts from printer, media producer, sample of collateral, video or CD, ROI for campaign, response report, closed lead report, open leads and opportunities.
Telemarketing, demand generation activity	List acquisition, agency fees/list service, concept, design, proof/production costs of any follow up ourbound e-mail	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your goals, script, calls to action before finalizing to ensure NCR is represented correctly.	Receipts, itemized costs, invoice from agency/list service, copy of scripts used, target audience, ROI for campaign, response report, closed lead report, open leads and opportunities.
Trade Shows, Events, Conferences	Booth, shipping, drayage and space charges, electrical, furnishing, cleaning, lead retrieval system fees, brochures	Complete and submit a proposal for each event prior to activity date for NCR approval. Show/Conference name, projected results demographics/attendees from previous event, target industry attending this event	Receipts for booth and trade show expenses, photographs of booth space including the NCR presence, equipment displayed, quantity of leads from event.
Direct Mail activities	List acquisition, printing, postage, agency fees/list service, Concept, design, production printing costs	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your mail piece before finalizing and distributing to ensure NCR is represented correctly.	Receipts from agency or production house for design, printing, list purchase, postage.
Webinars/Webcasts	List acquisition, agency fees/list service, concept, design, proof/production costs of any follow up ourbound e-mail	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your presentation before finalizing event to ensure NCR is represented correctly.	Receipts from agency or production house, final event or presentation designs, ROI for communication campaign, attendee response report.

8 Non-Eligible Business Development, Sales And Marketing Activities

Examples of unacceptable or non approved activities, not eligible for reimbursable MDF:

- Any event where NCR products are NOT being offered, advertised, displayed or demonstrated
- Entertainment
- Alcoholic beverages
- Flights/accommodation (unless agreed as an exceptional circumstance, considered to be essential and resulting in increased revenue) Must be approved by Global Channel Leader prior to MDF pre approval submission
- Charity events
- Partner sales representative incentives/expenses
- Additional discounts or margin enhancements
- Giveaways/gifts

9 Termination

If a partner agreement is terminated for any reason, NCR will take the following actions with respect to the MDF Program benefit:

- NCR will not accept any MDF claims for payment submitted beyond 30 days from the date of termination.
- To receive reimbursement, claims must have been originated and approved prior to the date of termination and all Proof of Performance (POP) documentation must be submitted before the 30-day deadline.
- After the date of termination the partner forfeits any rights and NCR has no obligation for
- any MDF payments for claims submitted after the 30-day deadline.

A Appendix A: FAQs

What is an annual business plan?

An annual business plan is generated through discussions with your Channel Account Manager. Through this discussion a written plan for developing sales in your market are identified and agreed to by both NCR and the partner.

What happens if I do not know or have the full cost of the MDF activity?

When submitting for MDF activities, you are required to provide an estimate of the cost for the MDF you require for the particular activity. Please note that when a business plan and specific marketing activities are agreed upon, it does not mean the estimated costs are approved. Reimbursement will be based on the actual receipt amounts provided and all Proof of Performance (PoP) requirements have been met.

How do I know if I'm eligible to receive MDF dollars?

Contact your Channel Account Manager

Do I submit for MDF Online?

To submit an MDF request application go to the MDF Pre-approval Application Web Site [here](#) to submit all MDF requests. An email notification will be sent to Interact Channel Operations of your submission.

I need to submit an invoice for a seminar we held last month. Whom do I submit my invoice to for reimbursement?

All activities require PRIOR approval from Channel Sales and Channel Operations and must be approved through the MDF online system in accordance with the MDF program guidelines, sorry no exceptions. If already approved, follow the claims process with your Fund Request number for submitting required receipts, (no invoices), Proof of Performance and ROI documentation electronically for timely reimbursement.

Can I submit a claim to NCR Interact MDF before the activity or event has taken place?

No. All MDF activities/events must be COMPLETED prior to submitting the Proof of Performance for reimbursement and must include the ROI/supporting documentation as defined in these guidelines.

Our billing address has changed. Who do I need to notify?

You will need to update your partner profile, contact your NCR Channel Account Manager

Appendix B: Glossary

Market Development Fund:

An NCR Interact marketing program designed to help qualified partners grow their business. The fund provides reimbursement for approved market and business development, demand generation, customer visits and partner readiness activities. Available MDF is based upon a partner's qualifying submission. These funds are available on a competitive basis (business case and ROI) through the course of the year but diminish into Q4 as activities have drawn down the available funds.

Proof of Performance:

To be eligible for reimbursement, Proof of Performance (PoP) documentation must be submitted by the established deadline. Proof of Performance is critical to the reimbursement process.

Accepted documentation submission types are as follows:

- Document File Types - doc, docx, xls, xlsx, csv, ppt, pptx, msg, rtf, mht, htm, html
- Media - bmp, jpeg, jpg, jpe, gif, tiff, png, psd
- Reader - pdf, xps

Demand Generation:

Marketing activities in which performance and the size of the audience can be verified. Examples include print, broadcast and Web advertising, and direct response mailing or emailing. Partners can be reimbursed for the cost of qualifying Demand Generation activities.

Market Development:

Marketing activities for which performance and the size of the audience cannot be verified, such as customer events, sponsorships, tradeshows, point-of-purchase sales materials, telemarketing, offers and incentives that support the sale of NCR products and solutions.

Marketing Services Costs:

Costs associated with the creation or design of the marketing piece by a third-party.

Media Rate Card

A document containing prices and descriptions for the various ad placement options available from a media outlet.

Media Placement Costs:

Costs associated with purchasing measured media space from a third-party.

NCR Channel Account Manager:

NCR channel sales personnel who are assigned to individual NCR Interact partners to manage partner relationship, marketing and other business development activities.

Partner Readiness:

NCR recommended, promoted or other qualified sales training conducted by Interact Solution Providers that promote the sale of NCR products, software and solutions.

Third-party Vendors:

A business or service provider that is not affiliated with NCR Corporation or the partner company receiving NCR Interact MDF.

WHY NCR?

With over 125 years of global experience and knowledge, 13,000 consultants and technical support experts and a network of customer care centers, NCR provides best-in-class services and support across multiple industries. We

help our clients around the world improve their customer interactions, implement change quickly and proactively, and transform their businesses to become leaders and change agents.



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MARKET DEVELOPMENT FUND PROGRAM



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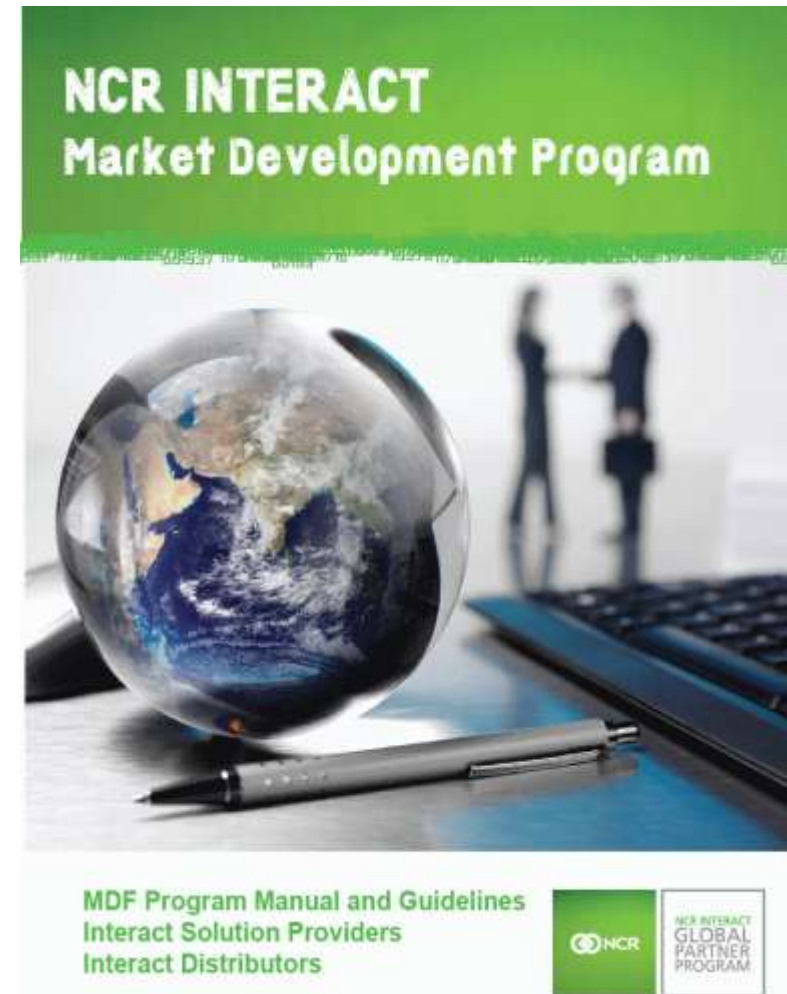
NCR INTERACT
**GLOBAL
PARTNER
PROGRAM**

NCR Interact Market Development Fund Program

What it is, Who can use it, and Guidelines for use

What is NCR's MDF program

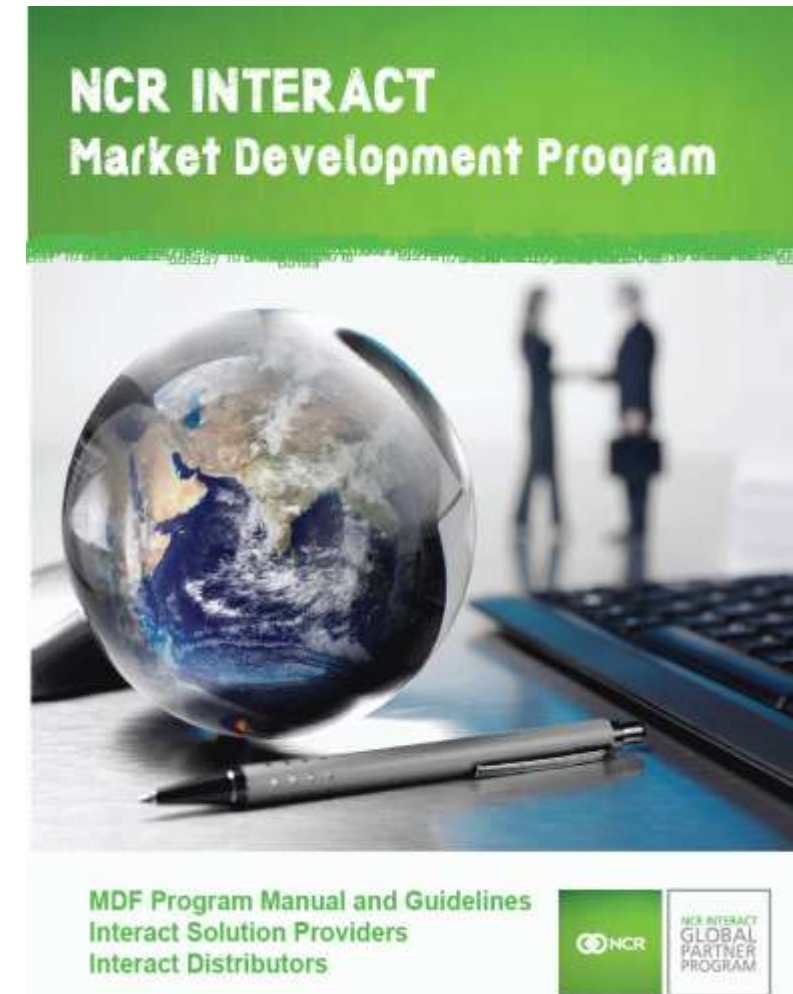
- **Discretionary** investment by NCR
- **Global Fund** focused on regional execution
- Drive incremental **Partner growth**
- Annual **business planning** process



NCR Interact MDF Program

Interact MDF Program - Business financial growth benefits

- Designed to encourage sales enablement
- In concert with annual business planning
- Partners are enabled for Sales & Marketing activities
- Our shared goals are to:
 - Grow or acquire market share with NCR Software-driven, Services-led, Hardware-enabled Solutions
 - Develop new business in Partners' markets with incremental revenue growth beyond committed target and forecast
 - Better serve Customers through our Partners



MDF Eligibility

Who is eligible to use MDF

- Premier and Advanced level Solution Providers
- NCR Distributors

Guidelines for accounting categorization:

- Payment covers a service by the partner that offers a clear benefit to NCR
- Benefit use requires a ROI assessment by Solution Provider
- The benefit is clearly separable from the sale of the product
 - (activity around brand recognition)
- The benefit could have been purchased by NCR from a source other than the partner
- NCR obtained proof of performance to reasonably estimate true costs

NCR BRANDING

Branding use and guidelines

- The NCR Brand Block



- This is to be used by partners EXCLUSIVELY in combination with approved NCR Partner Blocks.



- We encourage you to highlight your association with NCR by using the signature for that applies.

- Co-branded examples:



- Download NCR Partner Branding Guidelines : [Partner Branding Guidelines](#)

MDF Program Process Steps

For MDF requests and submissions, the NCR Interact MDF Program follows a five step process:

**Step
1**

Partner MDF plans align with Business Plan objectives

**Step
2**

MDF Pre-Approval, initial submission through on-line web site

**Step
3**

Partner completes plan and executes MDF activity

**Step
4**

MDF Claim, apply for funds through on-line web site

**Step
5**

MDF payments processed through NCR Channel Pay

NCR Interact Global Partner Program

Business Planning and Funnel Management

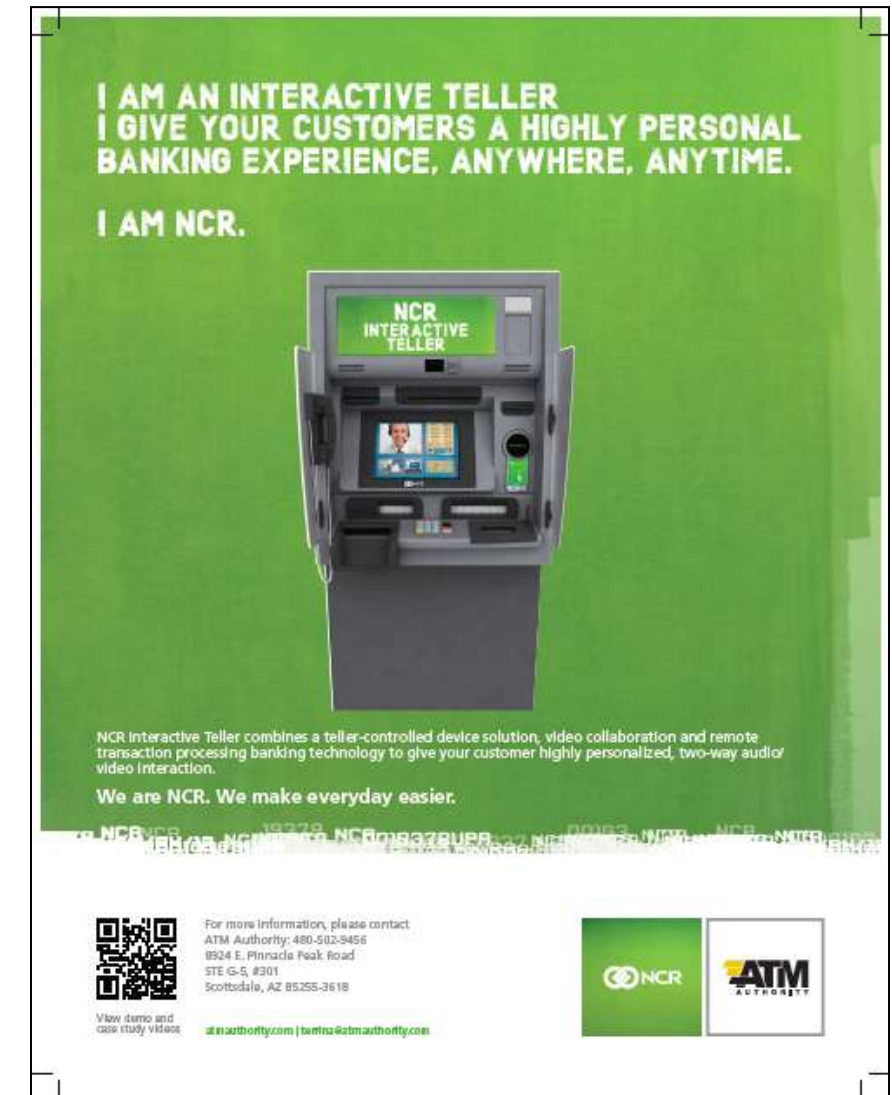


- The business plan is
 - the pen-to-paper "rallying cry" of any business.
 - acts as the operations manual for the coming year
 - internal metric to measure success
- Developing the plan forces capacity and capability self analysis
- An effective business plan should:
 - Help focus ideas about opportunities and turn them into a realistic action plans.
 - Create a track for management to follow resource use against success.
 - Set milestones & benchmarks to measure progress.
 - Be concise, interesting, and sufficiently solid enough to support investment
 - Be flexible enough to handle contingencies and unexpected events.

Marketing Activity Planning


- Marketing aligned with Business Planning
 - Marketing activities and campaigns should focus on identifying/qualifying potential buyers
 - Current customers, net new customers
 - Activities should direct prospects to your company with specific “calls to action”
 - Messaging focus, tie in with NCR corporate initiatives e.g., Interactive Teller or SelfServ Checkout
 - Use a multi layered approach (combine print, web, telemarketing, e-marketing over a specific time period).
 - Spend 3+ months executing, this includes focused sales follow-up

Step
1



I AM AN INTERACTIVE TELLER
I GIVE YOUR CUSTOMERS A HIGHLY PERSONAL
BANKING EXPERIENCE, ANYWHERE, ANYTIME.

I AM NCR.





NCR Interactive Teller combines a teller-controlled device solution, video collaboration and remote transaction processing banking technology to give your customer highly personalized, two-way audio/ video interaction.

We are NCR. We make everyday easier.

For more information, please contact
ATM Authority: 480-502-9455
8924 E. Pinnacle Peak Road
STE G-5, #301
Scottsdale, AZ 85255-3618

View demo and case study videos atmauthority.com | tanina@atmauthority.com



Leverage NCR assets

Activities and Requirements

Key areas covered by MDF



Partner Business Plan alignment to MDF Program. MDF activity planning to identify applicable expenses for reimbursement					
Eligible Activity	Reimbursable Expense	Eligible Activity	Reimbursable Expense	Eligible Activity	Reimbursable Expense
NCR Executive Briefing Centers (EBC) Customer visit	Flights and accommodations for customers, subject to Channel Leader approval, transfers to and from hotel, food and beverages during EBC visit.	Printing, publication, brochures, collateral advertising, product data sheets	Agency fees, concept, design, production printing costs	Trade Shows, Events, Conferences	Booth, shipping, drayage and space charges, electrical, furnishing, cleaning, lead retrieval system fees, brochures
Training sessions, NCR or Partner hosted Sales training and End User Customer training.	Course fee, audiovisual rental, food and beverage, room rental. No travel expenses.	MicroSite, Landing Pages for demand generation	List acquisition, printing, postage, web space fees, agency fees/list service, Concept, design, production	Direct Mail activities	List acquisition, printing, postage, agency fees/list service, Concept, design, production printing costs
Funded Headcount sales/marketing or product solution specialist. No temporary staff.	Up to 100% of average base salary for six months only for newly hired dedicated NCR solution or sales associate.	E-Mail Marketing demand generation activity	List acquisition, agency fees/list service, concept, design, proof/production costs	Webinars/Webcasts	List acquisition, agency fees/list service, concept, design, proof/production costs of any follow up ourbound e-mail
Sales Incentives, Partner internal sales team only.	Sales incentive for achieving defined targets for NCR only products and solutions.	Telemarketing, demand generation activity	List acquisition, agency fees/list service, concept, design, proof/production costs of any follow up ourbound e-mail		

Always ask or request a review if an activity can qualify but is not mentioned

MDF Pre Approval activity planning



What are the objectives?

Pre-Event Planning	Questions
Potential Audience Estimator – whom, level or position, e.g. Buyers, CIO, CFO, etc.	Should we exhibit? What are our realistic numbers for a target audience? “Show Population” What will be the number of attendees interested on our solutions? “Our Market Population”
Exhibit Staff Estimator	How many staff are needed to engage our Market Population?
Exhibit Space Estimator	How much space is required to attract and accommodate our Market Population?
Post-Event Measurement	Questions
Reach	How many of our Market Population did we reach?
Staff Performance	How active were our staff in reaching our Market Population?
Potential ROI Estimator	What is the ROI from inquiries and qualified leads obtained? What is the follow up plan?

Pre-Approval: Documentation

MDF application support documentation



Step 2 PRE-APPROVAL: DOCUMENTATION					
Eligible Activity	Prior Approval Requirements	Eligible Activity	Prior Approval Requirements	Eligible Activity	Prior Approval Requirements
NCR Executive Briefing Centers (EBC) Customer visit	EBC pre-booked reservation confirmation, customer/partner profile documents are required. See Partner EBC Visits in the NCR Intranet or Partner Central	MicroSite, Landing Pages for demand generation	Complete and submit a proposal for each project prior to commitment for approval. Submit a proof or mock-up of your campaign before finalizing and execution to ensure NCR Branding is correct.	Trade Shows, Events, Conferences	Complete and submit a proposal for each event prior to activity date for NCR approval. Show/Conference name, projected results demographics/attendees from previous event, target industry attending this event
Training sessions, NCR or Partner hosted Sales training and End User Customer training.	Complete and submit pre-approval for course type, agenda, attendee list, company name, contact name, title, phone, address, prior to commitment. Work with your Channel Account Manager	E-Mail Marketing demand generation activity	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your campaign before finalizing and execution to ensure NCR Branding is correct.	Direct Mail activities	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your mail piece before finalizing and distributing to ensure NCR is represented correctly.
Funded Headcount sales/marketing or product solution specialist. No temporary staff.	NCR CAM should be involved in the selection and recruitment process. Resumé and sales growth plan for candidate must be attached to MDF proposal.	Telemarketing, demand generation activity	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your goals, script, calls to action before finalizing to ensure NCR is represented correctly.	Webinars/Webcasts	Complete and submit a proposal for each activity prior to commitment for approval. Submit a proof or mock-up of your presentation before finalizing event to ensure NCR is represented correctly.
Sales Incentives, Partner internal sales team only.	NCR CAM must be involved in defining and setting sales targets. Proposal of what is to be achieved by when, eligible sales staff, products and targets within specific period.	Printing, publication, brochures, collateral advertising, product data sheets	Complete and submit a proposal for each project prior to commitment for approval. Submit a proof or mock-up of your publication before finalizing and printing to ensure NCR Branding is correct.		

NCR Interact Global Partner Program

Step
2

Business financial growth benefits - Interact MDF Program

- NCR Interact Market Development Fund program
 - reimburse an appropriate share of a partner's marketing and demand generation activity cost
- *Follow the step process for claims from partners*
- *MDF proposal requests are submitted for pre-approval to the site: [Pre-Approval](#)*

- Note: - You will receive an acknowledgement of the submission, not an approval for the activity.



MDF Pre-Approval Form

All NCR Channel Marketing Development Fund pre-approval requests must be proposed before the activity has started.

Partners must submit their requests/proposals, with their CAM's support, using this web-based pre-approval form. Pre-approval must be obtained in advance of all MDF activities. It is suggested each MDF proposal should be linked to an identified component of the annual business plan.

NOTE: Until you receive a "Pre-Approval Control Number" your activity has not been approved.

In certain circumstances unplanned last minute proposals, backed by the Theater Sales VP, can be submitted however, as funds are limited there is no guarantee they will be approved. Please refer to the NCR Interact 2013 MDF Guidelines located on PartnerCentral or your Channel Account Manager for assistance.

Partner Information

Company Name *

Contact Name *

First Last

Job Title *

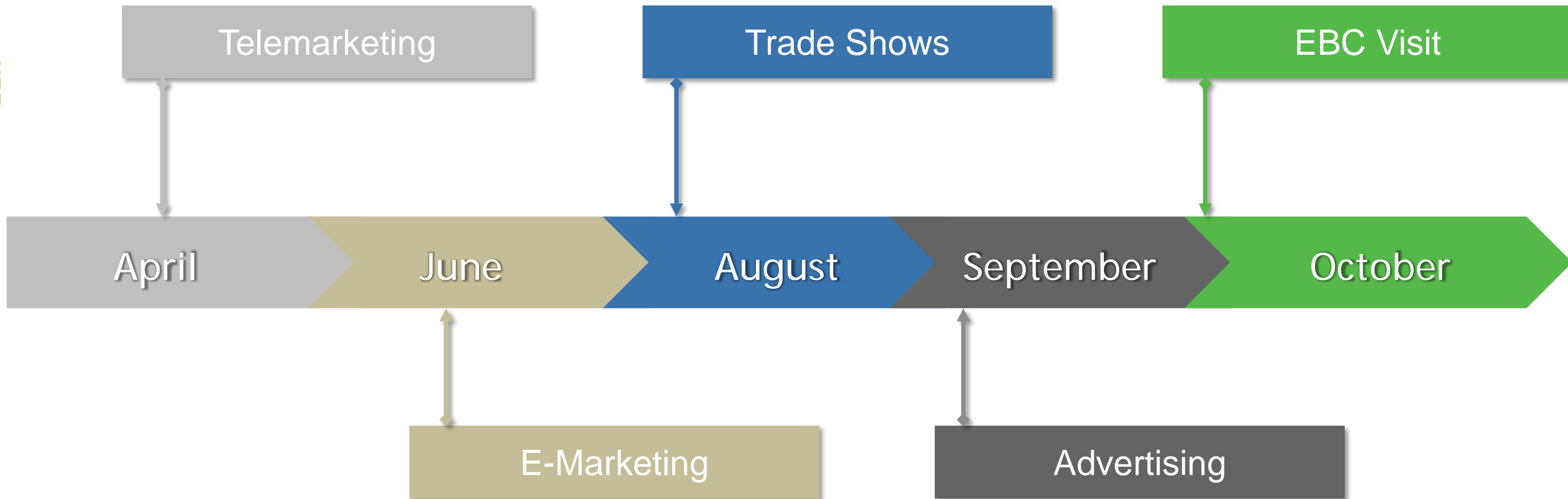
Phone Number *

Email *

Activity Execution

Step 3

Channel partner executes and completes their MDF activity



MDF Claims – Proof of Performance



<div style="display: flex; align-items: center;"> <div style="background-color: #4CAF50; color: white; padding: 5px; margin-right: 10px;">Step 4</div> <div style="background-color: #4CAF50; color: white; padding: 5px;">CLAIM: PROOF OF PERFORMANCE</div> </div>					
Eligible Activity	Proof of Performance (PoP) Requirements	Eligible Activity	Proof of Performance (PoP) Requirements	Eligible Activity	Proof of Performance (PoP) Requirements
NCR Executive Briefing Centers (EBC) Customer visit	Receipts, agenda, list of attendees, including names, company, country. Sales initiatives/projects discussed, and ROI.	Printing, publication, brochures, collateral advertising, product data sheets	Receipts from agency or production house, final copy of collateral. Ads, cost of space and duration of ads, final ad copy, calls to action, number of sales leads as a result of ads and collateral produced.	Trade Shows, Events, Conferences	Receipts for booth and trade show expenses, photographs of booth space including the NCR presence, equipment displayed, quantity of leads from event.
Training sessions, NCR or Partner hosted Sales training and End User Customer training.	Receipts, final agenda and list of attendees, including names, company, country. Documentation showing course completion and certification provided.	MicroSite, Landing Pages for demand generation	Receipts from agency or production house, final site/web page designs, ROI for campaign, banner, number of hits, response report, closed lead report, open leads and opportunities.	Direct Mail activities	Receipts from agency or production house for design, printing, list purchase, postage.
Funded Headcount sales/marketing or product solution specialist. No temporary staff.	Signed offer letter including job title and description, base salary, start date and contract term. Copy of first payroll statement.	E-Mail Marketing demand generation activity	Receipts from printer, media producer, sample of collateral, video or CD, ROI for campaign, response report, closed lead report, open leads and opportunities.	Webinars/Webcasts	Receipts from agency or production house, final event or presentation designs, ROI for communication campaign, attendee response report.
Sales Incentives, Partner internal sales team only.	Partner's sales invoices for qualifying products, qualified sales people with dates and delivery dates to end customer. Only closed deals apply, no letters of intent.	Telemarketing, demand generation activity	Receipts, itemized costs, invoice from agency/list service, copy of scripts used, target audience, ROI for campaign, response report, closed lead report, open leads and opportunities.		

NCR Interact Global Partner Program



Business financial growth benefits - Interact MDF Program

After completion of the activity partner submits all proof of performance documents to the claim site: [Claim Site](#)

- Note: - Pre-approval is only confirmed when the partner receives a “Fund Request” number for the submitted activity
- The “Fund Request” number is required for submission with the final claim

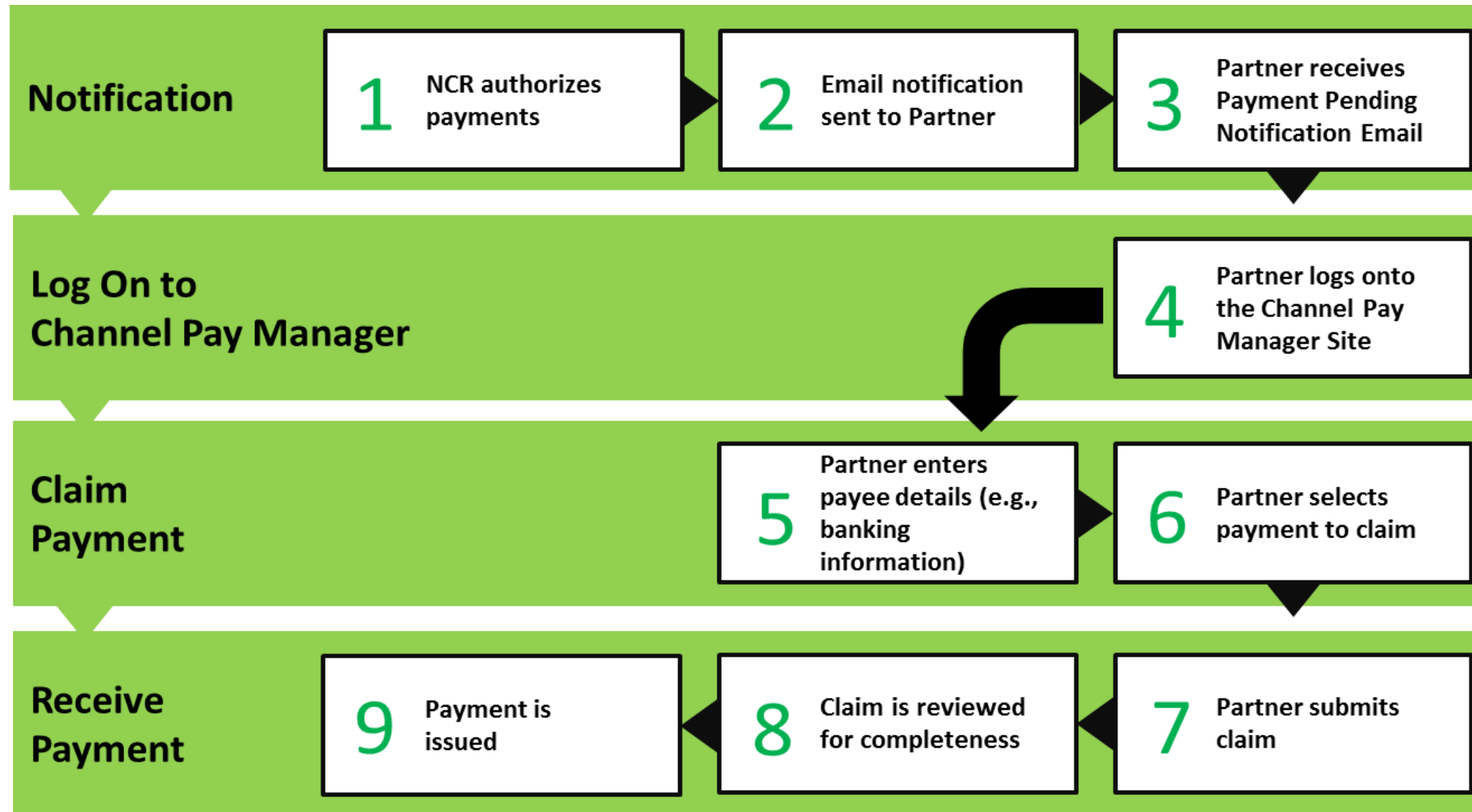
FR-000000-0000

The screenshot shows the 'MDF Claim Form' page. At the top left, there are logos for NCR and the NCR Interact Global Partner Program. The title 'MDF Claim Form' is displayed in green. Below the title, the text reads: 'Please submit all claims as follows:'. This is followed by a section titled 'Once the activity has been approved and executed, submitter collects:' with a bulleted list: 'Pre-approval control number', 'All supporting documentation', 'Proof of performance', and 'Complete MDF Claim form information'. A 'Recommendations' section states: 'Claims should always contain Proof of Performance and a minimum of two examples of supporting documentation that includes an ROI assessment. This should be sent within 45 days of the end of the activity.' Below this, it says: 'Please refer to the NCR Interact MDF Guidelines located in PartnerCentral or your Channel Account Manager for assistance.' A breadcrumb trail reads: 'Home » PartnerCentral » Marketing and Selling » Market Development Fund (MDF)'. The form fields include: 'Fund Request #' with a yellow input box; 'Partner Information' section with 'Company Name *' and 'Contact Name *' (split into 'First' and 'Last') with yellow input boxes; and 'Phone Number' with a yellow input box.

NCR Interact MDF Program

Channel Pay Manager – payment process

Step
5

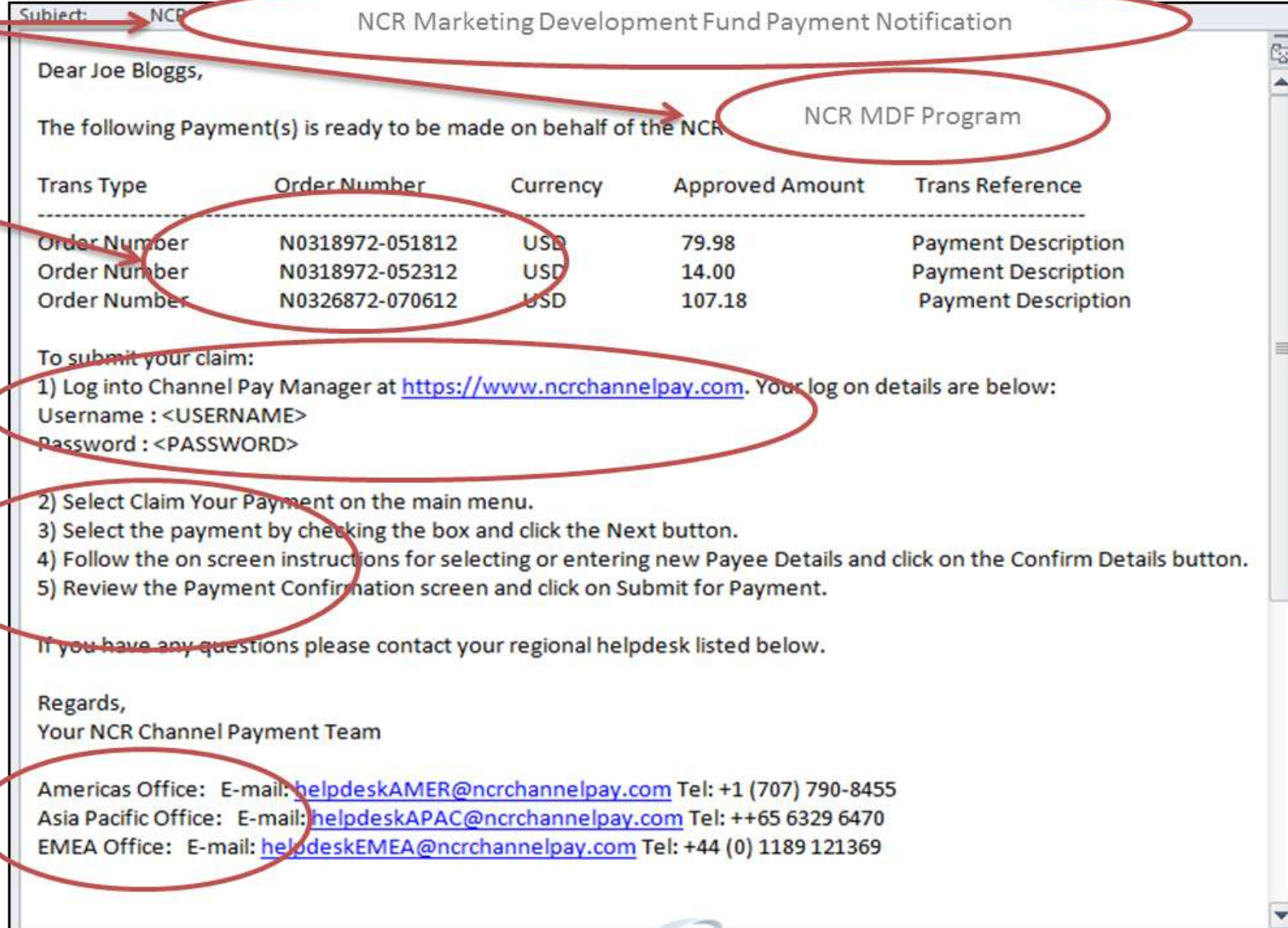


NCR Interact MDF Program

Step
5

NCR Channel Pay Manager- Payment notification Email

Program Identification



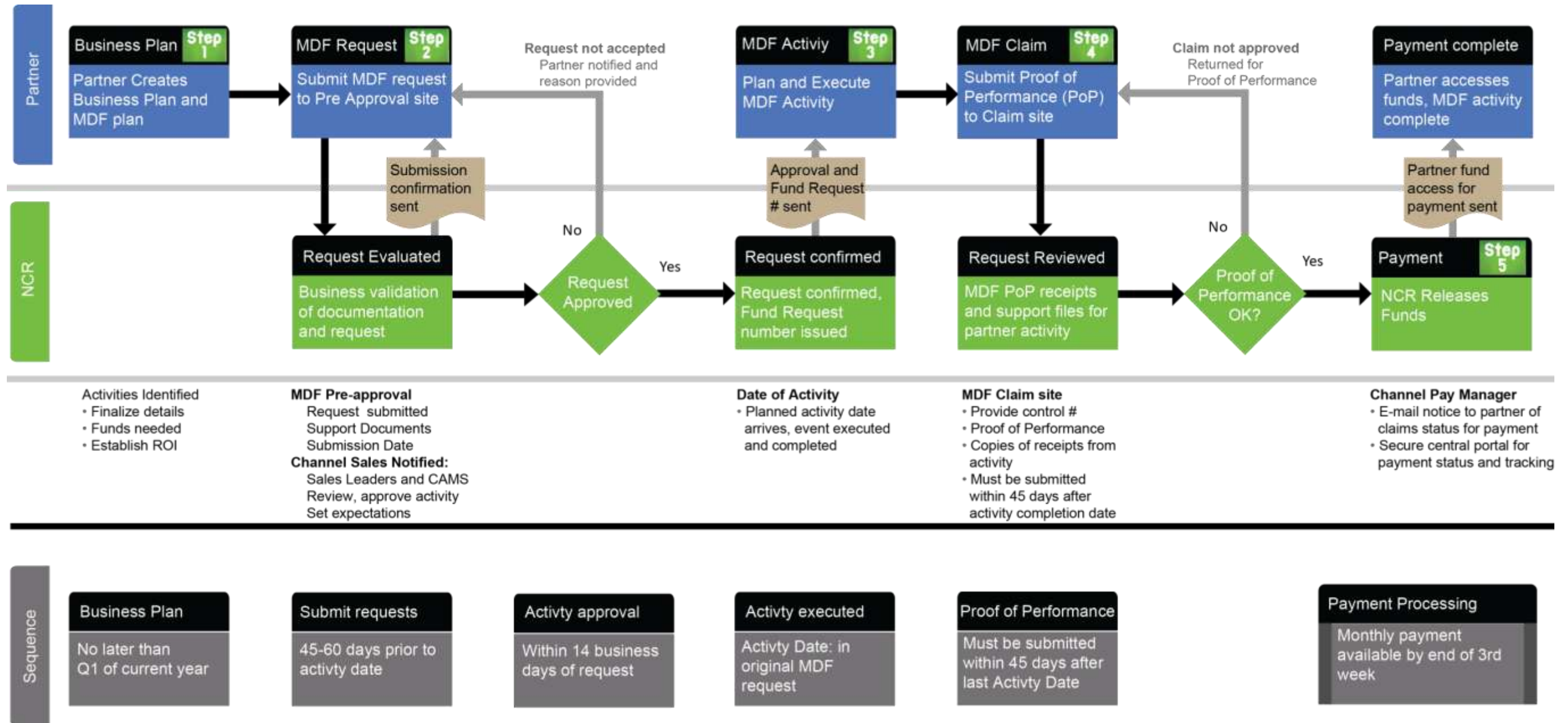
List of payment ready to be claimed

Web address of the Channel Pay Manager site and log on credentials

Instructions on how to claim the payment(s)

Helpdesk contact details.

NCR Interact MDF Program Process



NCR Interact MDF Program

Eligible and Non-Eligible Activities

ELIGIBLE ACTIVITIES:

- Customer visits to Executive Briefing Centers
- Partner Sales Team Selling Incentives (Spiffs)
- Partner hosted Sales/Training Events
- Funded Sales/Marketing Associate
- Advertising (print and on-line)
- Collateral: Brochures, Datasheets, Displays, Translations
- Demand Generation: Direct Mail, Newsletters, Telesales activities
- Tradeshow/Events
- Seminar/Webinar/Roadshow

NON ELIGIBLE ACTIVITIES:

- Any event where NCR products are NOT being offered, advertised, displayed or demonstrated
- Entertainment (as standalone, not associated with a program)
- Trips, golf outings, sports events
- Alcoholic Beverages
- Flights/Accommodation (unless agreed by Theater VP as an exception, considered to be essential and resulting in increased revenue)
- Charity Events
- Additional discounts or margin enhancements
- Giveaways/Gifts

MDF Use and Guidelines

What tools are available to utilize Interact MDF?

- Submission and Claim Web sites
- Campaigns in a Box (under reconstruction)
- Interact MDF Manual and Guidelines
- Activity details for eligibility consideration
- Training
- Contact Information

NCR's Interact MDF program is a co-investment between NCR and its partners -- intended to drive incremental revenue.

FAQs

My partner is going to a tradeshow and will have other vendors in their booth, can they apply for MDF?

- Yes, for the portion that applies to NCR products, we can support with the appropriate shared costs.

NCR is holding a partner event like the Partner Conference, can partners use MDF to recover their travel costs?

- No, this is not an allowed cost within MDF. MDF is directed toward driving sales and enablement.

NCR changed their branding and logos, can I update my booth graphics with MDF?

- Yes, for your next trade show, include this booth graphics cost in your overall event submission.

I need to submit an invoice for a seminar held last month. Whom do I submit my invoice to for reimbursement?

- All activities require PRIOR approval from Channel Sales and Channel Operations and must be approved in advance in accordance with the MDF program guidelines, sorry no exceptions. If already approved, follow the claims process with your Fund Request number for submitting required receipts, (no invoices), Proof of Performance and ROI documentation electronically for timely reimbursement.

Can I submit a claim to NCR Interact MDF before the activity or event has taken place?

- No. All MDF activities/events must be COMPLETED prior to submitting the Proof of Performance for reimbursement and must include the ROI/supporting documentation as defined in the guidelines.

In Summary

- MDF is an investment by NCR in our channel partners
- It is a shared investment by both the partner and NCR
- Global Fund focused on regional planning and execution
 - Tied into the annual business planning process
- Objective is to drive incremental growth through the partners



For more than 125 years, NCR has provided innovative products, solutions and services that support B2B and B2C interactions and transactions while improving operational efficiency and increasing customer loyalty.



Any questions regarding
NCR Interact

Please contact me!

David Rochatka

david.rochatka@ncr.com

NCR CUSTOMER CREED

Live their life. Know their needs. Improve their experience.

1

Be known for being the best

- and don't settle for anything less.

2

Listen to the customer, take

every customer interaction **personally** and go

beyond satisfaction to

customer success

3

Present ourselves as

“one company” to our

customers.

4

Be genuine.

Don't put on a show; stay down-to-earth and humble.

5

Earn the right, every day,

to do business with our customers, and **be there** for them.

6

Lead in **keeping customers** and

excel in attracting new ones.

7

Say sorry when

we fall short, and quickly **make it right.**

EVERYDAY

MADE

EASIER.



NCR INTERACT
GLOBAL
PARTNER
PROGRAM