



# opentext | Elite™

Customer and partner loyalty program

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## Present day heroes, digital innovators of the future

*The pinnacle of our success is created by champions who go the distance and set themselves apart from the competition. That's why we created the OpenText Elite™ customer and partner loyalty program. We want to celebrate YOU – the modern day digital innovators whose dedication is at the center of all we do. OpenText wants to reward your loyalty and the time and effort you've committed to our mutual achievements.*

## What is OpenText Elite?

### **Loyalty is rewarded with loyalty.**

The Elite program recognizes customers and partners who participate in program activities that help us tell the OpenText story. Customers are rewarded for offering their time and support by participating in activities such as press releases, success stories, or speaking to prospective customers or analysts about their success with OpenText software. Partners are rewarded for investing in joint go-to-market activities, helping to drive digital transformation and promoting their partnership with OpenText. The Elite program gives back to our customer and partner communities in the form of Elite points, a token of appreciation for their continued support. Elite points can then be redeemed for several awards.

## Why Elite?

When you give feedback, we listen. When you tell your story, OpenText wants to share it with the world! OpenText appreciates all that you do and is committed to continuously rewarding you, our customers and partners, for your loyalty, passion and investment.

Here's why you should join:

- Get recognized as an EIM advocate by sharing how your OpenText solutions have transformed your organization
- Raise your profile as a leader within your organization and industry
- Earn points for participating in reference activities that can be redeemed towards great rewards
- Network with like-minded peers in exclusive Elite-only activities to share your successes and best practices
- Help us help you: influence our product roadmap to create solutions that allow you to work better

## Redemption options for customers and partners

The Elite program offers you the opportunity to redeem your points towards an Enterprise World Pass, Professional or Learning Services. Please see options in the chart below.

Reward	Description	Points
<b>Enterprise World Pass*</b>	Attendee Pass for Enterprise World	3790 per attendee
<b>Professional Services Full Day Session</b>	An OpenText Professional Services Consultant Level Two will come to your site for an eight-hour session	3360 per session
<b>Learning Services Training*</b>	An OpenText Training Consultant will provide online or onsite training for your team. Minimum two and Max 12 attendees	1790 per attendee, per day
<b>Learning Services – eLearning*</b>	eLearning is designed to be available to your user community from their desktop anytime in a software simulation format with audio/video components.	800 per attendee/per course for one year of hosted access

*\*Partial redemption available, see terms and conditions for details.*

## I am a customer

### Elite membership benefits

The Elite program, a global members-only community, allows you to celebrate and share your successes. It offers opportunities to meet, network, and share your stories with your peers through a variety of channels including user groups and conferences. Becoming an Elite member enables you to earn points for your reference activity participation that can be redeemed towards special awards!

As an Elite member, some of the benefits are:

Elite membership benefits	Description
<b>Earn Points</b>	Collect Elite points based on completed reference activity
<b>Elite Points redemption</b>	Redeem points for Enterprise World Passes, Professional Services and Learning Services (on-site and online training)
<b>LinkedIn OpenText Group</b>	A members-only community for OpenText Elite members offering immediate access to OpenText product experts and first looks at new customer stories and OpenText white papers
<b>Exclusive Event Access</b>	Lead or participate in peer meet-ups at OpenText conferences around the world
<b>Webinar series</b>	Exclusive product roadmap previews and Q&A sessions with senior R&D teams
<b>Front of the line access</b>	Priority access to OpenText executives and product experts, including priority nomination to participate on exclusive advisory councils to provide feedback on products and services
<b>Recognition</b>	Participate in the Elite Awards hosted at the OpenText Enterprise World annual user conference to celebrate your digital innovations

*\*Points will only be awarded based on OpenText approvals and once activity has been fully completed.*

## Elite Points

Earn points from a variety of program activities that align with your goals and interests and redeem them towards:

- Enterprise World passes
- Professional Services
- Learning Services (on-site and online)

### How do I check my Elite points balance?

An update is emailed once per quarter in the Elite newsletter. You can also send a request for your balance at any time to [elite@opentext.com](mailto:elite@opentext.com).

## Enrollment

You can become an official member of the Elite program by filling out the Elite membership form online at: [opentext.com/join-elite](https://opentext.com/join-elite)

Select the activities on the Elite sign-up form that interest you and we will contact you to discuss the activities in more detail.

### Initiating an Activity Request

If you are interested in earning points and wish to initiate a new activity with us, please send a request to [elite@opentext.com](mailto:elite@opentext.com) and include your name, company, OpenText solution and the activity that interests you.

Customer activity	Points	Description
<b>Customer logo</b>	50	Permission to display logo on OpenText website, presentations, marketing, and/or promotional activities
<b>Social media promotion</b>	50	Permission to promote your success with an OpenText solution on Twitter, Facebook, LinkedIn and Instagram to reach a larger population of followers
<b>Customer quote</b>	100	Provide a quote that can be displayed on the OpenText website and included in annual reports or online/print articles
<b>User experience design package</b>	100	Participate in <b>any one</b> of the following user activities such as a monthly design call for user feedback, one hour session of remote usability testing via phone and desktop sharing, participate at the Innovation Lab at Enterprise World in a usability test or host OpenText staff as they spend time at your site conducting 1:1 interviews, testing and design reviews. Note: Onsite visit points will be rewarded per participant
<b>Host a Virtual User Group</b>	150	Host a virtual User Group Meeting via phone and/or webinar to connect with other OpenText customers and share your experiences and best practice
<b>Investor reference</b>	200	Approval to use company name, logo and statement in an Investor Relations PowerPoint® Presentation and on the OpenText Investor Relations website
<b>Social media blog</b>	400	Be featured in an OpenText Executive blog or submit a blog to be posted on OpenText channels. Subject to OpenText approvals
<b>Product Advisory Council</b>	400	Join a Product Advisory Council to share your insights and feedback, directly influence the strategic direction of OpenText products you use today, and co-innovate new solutions to solve industry problems. PACs occur a minimum of twice per year - 1 in person event at Enterprise World and 1 virtual event
<b>Beta testing</b>	500	Be in the driver's seat by installing and testing an OpenText solution in your own environment. Your feedback will be used both to influence the direction and design of our released solution and within reference materials such as a customer quote.
<b>Prospect reference call</b>	500	Share your insights over the phone with OpenText prospects evaluating our solutions
<b>Authored white paper/article</b>	600	Allow OpenText to share your success story in a white paper or article format
<b>Customer vignette</b>	600	Promote your success story in a business profile that will include the journey through your digitization vision, business needs, solution description, and benefits from using OpenText. Your story may be included in an upcoming OpenText book
<b>Analyst reference call</b>	800	Discuss your OpenText technology initiatives with research analysts for industry and consulting reports and surveys
<b>Host a Local User Group</b>	800	Host a face-to-face User Group Meeting on site at your office or other location to connect with other OpenText customers and share your experiences and best practices
<b>Onsite visit</b>	800	Host a prospect visit onsite at your organization to share your experiences and demonstrate your OpenText solution
<b>Podcast</b>	800	Share your insight and best practices in an audio presentation format
<b>Press release</b>	1000	Participate in a joint press release with OpenText
<b>Speaking at User Group/ Reference Roundtable</b>	1000	Share your best practices at an approved OpenText User Group Meeting or Customer Reference Roundtable
<b>Success story</b>	1000	Promote your success story in a business profile that will include your business needs, solution description, and benefits
<b>Webinar</b>	1000	Present your OpenText solution in a live online presentation
<b>Video testimonial</b>	1200	Share your success with OpenText technology in a video testimonial
<b>Media interview</b>	1500	Share your company's successful deployment of OpenText products and services with the media
<b>Speaking opportunity</b>	1500	Participate in speaking opportunities at various OpenText events or OpenText sponsored conferences

## I am a partner

### Elite membership benefits

Differentiate yourself with the Elite loyalty program! Earn special recognition and valuable points for participating in specific partner activities. Redeem points for skill development and networking opportunities with OpenText experts and grow your business.

Some of the benefits are:

Elite membership benefits	Description
<b>Earn points based on program activities</b>	Collect Elite points based on completed partner activities
<b>Elite points redemption</b>	Redeem points for Enterprise World passes, Professional Services and Learning Services (on-site and online training)
<b>Exclusive Elite event access</b>	Participate in exclusive peer meet-ups at Innovation Tour stops around the world
<b>Annual Partner Award</b>	Our annual Partner Awards and Recognition Program is designed to highlight partners around the world who are leading the way in the EIM marketplace while helping to promote the OpenText brand

*\*Points will only be awarded based on OpenText approvals and once activity has been fully completed.*

## Elite Points

We understand that our partners dedicate a significant amount of time to gain knowledge about OpenText solutions, and participate in activities that evangelize our brand. For all the great things you do, OpenText wants to reward you with the opportunity to earn points in our OpenText Elite program. As a partner, you are required to earn a minimum number of points based on your Global Partner Program (GPP) enrollment. You can earn points from a variety of OpenText Elite loyalty program activities that align with your goals and interests! Once you have achieved your GPP point requirement, you are eligible to earn additional points that can be redeemed under the Elite loyalty program towards passes to attend the annual Enterprise World user conference, training or professional services.

### Partner Program Activities

OpenText Elite is designed to reward partners who go above and beyond their GPP requirements. Earn points by completing activities as outlined in the chart on page 7. Only the points accumulated above your GPP partner loyalty points threshold in the applicable 12-month period will be redeemable under the Elite program.

**Points will only be awarded based on OpenText approvals and once activity has been fully completed.**

## Enrollment

As a member of the Global Partner Program, you are automatically enrolled in the Elite partner loyalty program.

### Initiating an Activity Request

Some of the activities listed in the chart on page 7 must be pre-approved. Please use the [Program Activity Submission Form](#) to request approval or submit your program activities. The Global Partner Program team will contact you to discuss your activity if needed. Your participation in OpenText-sponsored events will be monitored and points will automatically be added to your Elite account.

## Frequently Asked Questions

**How do I check my Elite points balance?** An update is emailed once per quarter in the Elite newsletter. You can also send a request for your balance at any time to [partnermarketing@opentext.com](mailto:partnermarketing@opentext.com).

**When can I start redeeming my points?** As an official member of the Global Partner Program, you can start redeeming points as soon as you have earned enough points.

**Visit [opentext.com](http://opentext.com) for more information about OpenText solutions.**

Partner activity	Points	Description
<b>Registered deals</b>	50	Earn credit for your sources deals. Points awarded when registration has been approved *
<b>Attend Partner Webinar Series</b>	50	Attend a Partner Webinar Series to get timely updates and information about the Global Partner Program and new resources and materials as they become available*
<b>Approved OpenText marketing campaigns</b>	100	Execute an approved marketing campaign in support of OpenText solutions
<b>OpenText promotion activities</b>	100	In addition to campaign execution, earn points for promoting OpenText via social media, at industry events and other OpenText-approved partner-led marketing activities
<b>Elite program advocate</b>	100	Drive your customer into the Elite program to be an OpenText reference for various activities
<b>Solutions catalog listing</b>	100	Be included in our Partner Solution Catalog, a searchable directory of solutions that allows users to find partner solutions that meet their needs and requirements. Points awarded for each solution listed
<b>User experience design package</b>	100	Participate in <b>any one</b> * of the following user activities: a monthly design call for user feedback, a one-hour session of remote usability testing via phone and desktop sharing, or participate at the Innovation Lab at Enterprise World in a usability test
<b>Attend Innovation Tour</b>	250	Attend our regional Innovation Tour Experience customer focused events*
<b>Attend Partner Workshops</b>	250	Join OpenText at one of its Partner Workshops within different markets and regions around the world*
<b>Elearning – complete featured Learn Track</b>	250	Extend your OpenText knowledge and expertise by completing the yearly Partner: Featured LearnTrack through the online learning management system. This is in addition to required training for your program tier*
<b>Host OpenText-led Partner Workshop</b>	250	Host an OpenText-Led Partner Workshop
<b>Partner directory listing</b>	250	Complete your Partner Profile with the necessary information for customers and prospects searching for a partner to engage with you via the Partner Directory. Update your directory listing annually to earn points
<b>Market development funds</b>	500	Complete OpenText Business Plan outlining campaigns, lead generation initiatives and goals for fiscal year to apply for MDF. Points will be awarded for approved plans when proof of performance and lead metrics have been submitted to Partner Marketing.
<b>Attend Enterprise World</b>	500	Attend our annual, global user and partner conference*
<b>Attend Partner Summit</b>	500	Attend Partner Summit at Enterprise World*
<b>Beta testing</b>	500	Be in the driver's seat by installing and testing an OpenText solution in your own environment. Your feedback will be used both to influence the direction and design of our released solution and within reference materials such as a customer quote*
<b>Current OpenText brand on partner website</b>	500	Promote your partnership with OpenText on your website by posting OpenText and GPP logos, marketing collateral, and solution information. Site reviewed annually for updates and new go-to-market initiatives.
<b>Joint collaboration towards an OpenText story</b>	500	Nominate your customer for a success story, press release or video testimonial**
<b>Sponsor an OpenText event</b>	500	Sponsor a program or activity at any OpenText event*
<b>Partner Summit Award winner</b>	800	Part of the FY17 Partner Awards and Recognition Program, these awards are the Global Partner of the Year awards given annually to our top partners in each of the following categories: Enterprise, Business Networks, System Integrator, Technology, Analytics, and Digital SI

\* Points will be awarded per company participation, not per partner attendee, and will automatically be added to your Elite account

\*\* Customer must be net new to the OpenText reference database

## Terms and conditions

1. Only OpenText customers can register for and participate in the Elite program.
2. Current Partners are automatically enrolled into the Elite loyalty program as part of the Global Partner Program and are eligible to receive points after they completed their GPP points threshold per partner status. Partners must activate their membership prior to collecting Elite loyalty points; retroactive points will not be permitted unless otherwise approved by GPP. The Elite loyalty program is separate and distinct from the OpenText Partner Support Elite and Flex programs.
3. In order to start earning points, any new OpenText customer must officially register by completing and submitting an Elite sign-up form.
4. It is the sole responsibility of the customer or partner to notify OpenText of activities to redeem Elite points.
5. The membership belongs to the company, not the individual. Earned points are collected under the company account and may be transferred at the member's request to another individual within the same company.
6. Unused points will expire 18 months from the date earned.
7. Points are surrendered at the time of redemption.
8. Points accrued in the Elite program cannot be redeemed for cash or its equivalent, and any unused portion cannot be returned as cash.
9. You acknowledge and agree that OpenText may determine completion of reference activities and awarding of points is at the sole discretion of OpenText. OpenText reserves the right to update, modify or terminate the Elite program at any time.
10. Open Text Corporation, its affiliates, subsidiaries and their respective employees, officers, directors, representatives and agents ("Released Parties") disclaim all express, implied and statutory warranties and all liability whatsoever arising out of the Elite program or any related materials. In no event shall Released Parties be liable for direct, indirect, special, consequential, punitive or incidental damages arising out of the Elite program.
11. The following additional terms and exclusions apply to the Redemption Options: (i) Enterprise World pass includes the cost of the Enterprise World pass only and does not include travel costs, accommodations or any other costs associated with attending Enterprise World, (ii) Professional Services and Learning Services are (a) valued based on local currency, (b) do not include travel and expenses, and (c) are subject to local resource availability, (iii) Partial Redemption for Enterprise World Pass means 1,895 points may be redeemed against half the cost of the Enterprise World Pass, (iv) Partial Redemption for Learning Services Training means 895 points may be redeemed against half the cost of the Learning Services Training per attendee; (v) Partial Redemption for Learning Services – E-Learning means 400 points may be redeemed against half the cost of the Learning Services – E-Learning per session.

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