8x8

Reseller Guidelines

Partnering for Business Success!

Contents

About This Document

In this document, 8x8 is referred to as 8x8 or "**we**" and the 8x8 partner to which these guidelines apply, such as a reseller, distributor, or VAR, is referred to as the "**Reseller**" or "**you**". In addition, capitalized words not defined in these guidelines have the meaning given to them in your agreement with 8x8.

The purpose of this document is to:

- Strengthen our ability to work together to increase sales of 8x8-offered products and services. Together, we can empower workforces worldwide to connect individuals and teams so they can collaborate faster and work smarter.

- Define who does what and when, ensuring that everyone knows their part in our partnership. This clarity helps us work smoothly and effectively together.

- Share tools and materials that explain processes and functions, making it a breeze to do business with each other. Our aim is to create a seamless experience for our customers and partners alike.

- Emphasize the importance of customer satisfaction and how our collaborative efforts contribute to delivering outstanding customer experiences. Happy customers are more likely to be loyal and refer others to our products and services.

- Highlight the significance of open and transparent communication between us. Effective communication ensures that issues are addressed promptly, feedback is valued, and we can continuously improve our partnership for mutual benefit.

The latest version of this document can always be found at www.8x8.com/legal (our "**Legal Information Hub**"). The Legal Information Hub collects a lot of the relevant information in one central and easy to use online location. The other documents referred to in these guidelines are also available in the Legal Information Hub or in PartnerXchange. Please note that private documents (e.g. confidential documents that are not permitted to be shared publicly, such as price lists) are only available in PartnerXchange, which is accessible to users with credentials. See Section 2 below for more information about PartnerXchange and how to request access if you need it.

1 Overview

1.1 Introduction to the Reseller Program

The 8x8 Reseller Program offers substantial advantages to our program partners, including:

- **Dedicated Support Team:** This includes a Channel Account Manager, Field Marketing Manager, Account Executives (AEs), and Systems Engineers (SEs) who are available to assist with collaborative selling efforts as needed.

- **Effortless Marketing Initiatives**: Access to easy-to-implement marketing campaigns and support for generating leads and pipeline development.

- **Complimentary Training and Certification**: We provide comprehensive sales and technical training, allowing you to attain full certification free of charge.

- **Professional Services Accreditation Program**: Participation in a program that recognizes and accredits your expertise in professional services.

- **PartnerXchange Access**: Your gateway to registering deals, creating quotes, managing customer relationships, and more, all conveniently accessible through PartnerXchange.

- **No Up-Front Financial Commitments**: One of the significant advantages of our program is that there are no initial financial investments required.

1.2 Reseller Business Models

We offer our Resale Partners the flexibility to choose from two distinct transaction options:

- **Direct VAR (DVAR):** Under this option, you are the one purchasing products directly from 8x8 for resale to End Customers. We make this very easy with a single contract allowing you to resell to End Customers directly or through intermediaries.

- **VAR**: Under this option, you purchase products from someone who is an 8x8 Authorized Distributor and you then resell them to the End Customer. Under this model, you do not have a reseller agreement with 8x8.

Each of these pathways serves specific purposes and aligns with different business strategies. For instance, partners may opt for the DVAR option when they have a well-established customer base and a strong in-house sales and support team. This approach allows them to maintain direct control over customer relationships, offer tailored solutions, and exercise greater influence over the entire sales process. It's an ideal choice for partners who have the resources and expertise to manage the entire sales cycle, from prospecting and lead generation to post-sales support.

On the other hand, partners might choose the VAR path and transact via an 8x8 Authorized Distributor when they are looking to expand their market reach without incurring the overhead of managing every aspect of the sales process. Authorized Distributors often have extensive networks and resources for marketing, distribution, and customer support. This approach can be particularly advantageous for partners seeking to enter new markets or regions quickly, as it allows them to leverage the distributor's existing infrastructure and expertise.

For more detailed insights into these transaction options and to determine which one best suits your unique business goals, we encourage you to reach out to your dedicated Channel Account Manager. They are here to provide tailored guidance and assist you in making an informed decision that aligns with your specific needs and strategies.

1.3   Key Contacts & Resources

Function/Name/Resource	Contact information
Find your dedicated CAM	Channel Account Manager details are displayed in the Homepage of the PartnerXchange portal.
DealDesk	Use the "DealDesk" button in PartnerXchange
PartnerXchange	https://8x8.my.site.com/partnerxchange/
Channel Operations	US/ANZ: channeloperations@8x8.com; UK: channeloperations-uk@8x8.com
Legal Information Hub	www.8x8.com/legal

2 PartnerXchange

2.1 Overview

PartnerXchange is a one stop shop for 8x8 resellers which allows users to sell, deploy, and support 8x8 services.

2.2 Specific Functionality

Through PartnerXchange partners are able to:

2.2.1 Submit and manage opportunities

2.2.2 Configure quotes and place orders

2.2.3 Get access to the 8x8 University and other training tools

2.2.4 Get access to the marketing & sales asset library, including campaigns, collateral and pitch decks

2.2.5 Create and manage Support Cases

2.2.6 Access the 8x8 Admin Console for customer deployment

2.2.7 Access the 8x8 Knowledge Base

2.2.7 Manage Subordinate Accounts and User Capabilities

2.3 How to Gain Access

PartnerXchange is available at the following URL: https://8x8.force.com/partnerxchange/s/. After joining the 8x8 ELEVATE Partner Program, the main point of contact of the partnership with 8x8 will receive an automatic email with login credentials.

3 Customer Support

3.1 Tiered Support

We rely on tiered support to provide timely, effective, and efficient help for our customers. This section addresses the allocation of responsibilities between 8x8 and the Reseller regarding Tier 1 and Tier 2+ support. These guidelines aim to ensure clear communication and collaboration between the parties and to provide a framework for efficient customer support.

- **Tier 1:**   **Basic customer inquiries and technical issues**
- **Tier 2+:**   **Escalation support, for complex technical issues and advanced troubleshooting**

Unless otherwise agreed by 8x8, Reseller is required to provide Tier 1 support to the customer and 8x8 is only required to provide Tier 2+ support to the Reseller. 8x8 offers training and certification to enable Resellers to take on the Tier 1 support responsibilities. See Section 6 below for more information on the training and certification process.

3.2 Tier 1 Support

Tier 1 support is the initial level of customer support and is primarily responsible for handling routine inquiries and basic troubleshooting. This includes:

- **Basic Inquiries:** Dealing with general inquiries from customers and end-users. These inquiries often involve requests for information about the product or service, such as pricing, features, and account-related questions.

- **Issue Triage**: Evaluating the nature of incoming issues and inquiries, categorizing and prioritizing them, and providing product-relevant feedback to 8x8 for product-planning purposes.

- **Troubleshooting & Escalations**: Performing troubleshooting including walking customers through step-by-step solutions for issues like connectivity problems or configurations. For more complex technical problems this also involves engaging Tier 2+ support when necessary and coordinating the response to the customer.

- **Account Management**: Managing customer accounts, such as creating and updating user accounts, resetting passwords, and assisting with account setup.

- **User Training**: Providing user training to customers, making sure users understand how to use the product or service's features and functionalities effectively.

- **Usage Guidance**: Help customers to maximize their use of resold products and services by providing guidance on how to integrate the products and services into their day-to-day business operations and processes, including disseminating industry-specific best practices.

- **Responsiveness**: Tier 1 support should aim to provide timely responses to customer inquiries, acknowledging receipt of requests and setting clear expectations for issue resolution timelines.

3.3 Tier 2+ Support

Tier 2+ support is a more advanced level of technical support and is responsible for handling complex issues that typically require specialized expertise. Usually, there are additional tiers that are specifically

defined, such as Tier 2, Tier 3, etc., with each higher tier being more specialized and only engaged if the previous tier is unable to solve the solution. In most cases, Tier 3 provides the response to Tier 2, which relays it to Tier 1, which is in touch with the customer. In some cases, 8x8 may agree to have Tier 2+ support levels deal directly with the customer. Tier 2+ generally performs the following functions:

- **Advanced Technical Troubleshooting:** Tier 2+ support personnel are skilled in diagnosing and resolving complex technical issues. This includes in-depth troubleshooting of network configurations, integration problems, and software-related issues.

- **System & Network Configuration**: This level of support assists with advanced system and network configurations. For example, they might help customers set up complex routing or implement advanced security measures.

- **Software Debugging**: Tier 2+ support has the expertise to identify and address software bugs or anomalies. They work closely with the technology provider's development and engineering teams to resolve software-related issues.

- **Integration Support**: For customers integrating cloud communications services with other systems or third-party applications, Tier 2+ support provides guidance and troubleshooting expertise.

- **Performance Optimization**: Tier 2+ support helps customers optimize the performance of their cloud communication services, ensuring efficient use of resources and addressing performance-related challenges.

- **Escalation Handling & Response**: When a problem cannot be resolved by Tier 1 support, it is escalated to Tier 2+ support. Tier 2+ is responsible for managing escalated cases and ensuring that they are resolved efficiently. Tier 2+ support aims to provide timely responses to escalated issues, acknowledging the urgency and complexity of these cases. They work diligently to resolve problems and minimize service disruptions.

- **Knowledge Transfer**: Tier 2+ support often shares knowledge and expertise with Tier 1 support and resellers, facilitating ongoing learning and improving the overall quality of customer support.

4   Guidelines for Positive Engagement

We're thrilled to have you as a Reseller and look forward to working together for our mutual success. As we strive to achieve our goals and deliver exceptional products and services to our customers, it's essential that we do so with a strong sense of purpose and a commitment to ethical excellence.

At the heart of our business relationship lie our shared values and principles, which guide us in our daily interactions, decision-making, and overall conduct. This section is designed to ensure we maintain a friendly and collaborative relationship and at the same time set the standards for integrity, compliance, and responsible behavior. To that end, we require the following:

4.1   Important Items for You and the End Customer

You must do the following, and also properly inform your End Customers of these items so that they are also informed about these important topics:

- **911 and Emergency Services Notices**: Regulators in the jurisdictions you operate may have specific requirements with regard to VoiP services.   For example, the US Federal Communications Commission regulations and the UK Ofcom General Conditions impose requirements on VoIP providers that are designed to enhance user safety and transparency in telecommunications services. They mandate providers inform customers, in plain language, about potential limitations in accessing emergency services, particularly during power outages or service interruptions. Additionally, providers may be required to include this information in sales processes, terms and conditions, and user guides, ensuring customers are well-informed. Please see the Regional Terms in the Legal Information Hub for these required terms and conditions that apply in those jurisdictions and other important requirements you need to be aware of. In addition, the regulations may impose a requirement of obtaining affirmative acknowledgments from subscribers, which reinforces the importance of this information, contributing to overall safety and customer awareness in the telecommunications industry. You must obtain such acknowledgement if it is required in your jurisdiction.

- **Telemarketing and Electronic Marketing Requirements**: Telemarketing and electronic marketing (e.g. SMS marketing) are subject to federal, state, and international laws and industry guidelines like the Mobile Marketing Association Guidelines, CTIA Messaging Principles and Best Practices, Industry Traceback Group).   Robocalling and nuisance telemarketing are a major focus of regulators in the U.S. and abroad. If Reseller receives notification that one of its customers may be violating the rules for telemarketing or electronic marketing, Reseller must promptly address the issue with its customer. If 8x8 receives notification that one of Reseller's customers may be violating the rules for telemarketing or electronic marketing, Reseller must also cooperate with 8x8 to address the issue. If Reseller has repeated incidents of its customers violating the rules for telemarketing and electronic messaging, 8x8 may take remedial actions up to and including suspending or terminating the resale relationship.

- **Call Recordings**: Many states require two party consent for call recordings. In these states, your customers could violate state call recording law if a call is recorded without notification. 8x8 offers the ability for customers to play a notice that a call is being recorded. You must inform your customers about this functionality.

- **Privacy-related Practices**: You must properly disclose your privacy-related practices and ensure those practices comply with applicable Laws and industry standards. You are also responsible for ensuring that the End Customer at all times has the authority to provide the End Customer Data to 8x8. You will obtain and maintain any necessary or legally required notices, policies, consents or releases from persons whose data is included in the End Customer Data.

- **Acceptable Use Policy**: 8x8's Acceptable Use Policy is available in the Legal Information Hub (www.8x8.com/legal). You must inform customers about this policy and they (and you) must comply with it.

- **Third-party Products & Services**: 8x8 offers Resellers the ability to resell products or services provided by third parties (e.g. Verint). Third-party products are provided as-is by 8x8, but certain third parties have important terms and conditions that apply to you and which you may be required to pass on to the customer. It's important for you to inform the customer of any third-party products and the applicable terms and conditions. You and the customer must comply with all such terms and conditions. The 'Product Schedules' section of the Legal Information Hub has more information about third-party products and services and the applicable terms and conditions.

4.2   Dealing with Regulations & Other Topics

4.2.1   No Money Laundering, Bribery, or Dealing with Prohibited Entities

You must not breach any applicable Law related to money laundering, bribery, corruption or any related matter. You must also maintain adequate procedures designed to prevent your officers, employees, representatives, or agents from offering, promising, paying, giving, or authorizing any financial or other advantage to any person to induce that person to improperly perform a function or activity in connection with a business or organization, a person's employment, or a public function. You must also remain in compliance with all applicable sanctions regimes and not resell the services, directly or indirectly, to any person or entity with whom a U.S. person, 8x8, or you is prohibited by Law from conducting business with. This includes at a minimum complying with the regulations of the Office of Foreign Assets Control (OFAC) of the U.S. Department of Treasury and any statute, executive order, or regulation relating thereto and includes not dealing with anyone listed on the Specially Designated Nationals and Blocked Persons List, Foreign Sanctions Evaders List, or the Sectoral Sanctions Identifications List, which are all maintained by OFAC, or listed on any other similar list maintained by OFAC or other governmental authority.

4.2.2   Regulatory Engagements

8x8 operates in a heavily-regulated and frequently-changing regulatory environment. If there is any engagement with regulators, you will cooperate with 8x8 as to such engagement (including responding to information requests), and notify us immediately of any regulatory engagement you become aware of. In addition, if we reasonably determine any change to our agreement is necessary or appropriate in light of our obligations under any Law, adherence to industry or self-regulatory frameworks, guidelines, or standards, you will work in good faith with us to promptly amend the affected agreements in a manner that reasonably addresses the relevant issues or developments. However, you will never be obligated to agree to any such change that materially reduces your rights or benefits, or materially increases your obligations or liability, under our agreement. This section is merely dealing with changes that are needed to adjust to changes in the Laws.

4.2.3   Proper Data Processing

As part of our commitment to safeguarding privacy and ensuring compliance with data protection regulations, we have an 8x8 Reseller Data Processing Addendum ("**DPA**") available in the Legal Information Hub. The DPA outlines the terms and conditions under which 8x8 will process and protect personal data, in accordance with the requirements set forth by the General Data Protection Regulation (GDPR), the California Privacy Rights Act (CPRA), and other data privacy laws. Our joint dedication to the responsible handling of personal data is of paramount importance, and the DPA is designed to clarify 8x8's and your responsibilities and provide data subjects with assurance regarding the protection and security of their personal information. You and 8x8 are each required to comply with the DPA.

4.2.4   Effective Security Standards

Security and privacy begin with the way data is handled, stored and protected. Rest assured, the 8x8 platform conforms to stringent specifications for securing data, customer privacy and computer networks, which includes keeping up with regulations and verification by third-party certifications. 8x8 believes security is an important and shared responsibility. 8x8 abides by, at a minimum, the security standards listed in the Reseller Security Supplement (available in the Legal Information Hub) to protect data it controls or processes. You must meet or exceed the same security standards when protecting data that you control or process. The Reseller Security Supplement is a part of these guidelines and incorporated here by reference. As defined in the Reseller Security Supplement, Reseller will maintain appropriate security programs and plans that, at a minimum, implement industry-standard practices designed to protect data from accidental or unlawful destruction, loss, alteration, unauthorized disclosure, or access.

4.2.5   Reasonable Credit Controls

Both 8x8 and you are businesses operated for profit. SaaS services such as the ones provided by 8x8 rely on a variety of vendors who must be paid in advance for their services. This is why SaaS services are prepaid services and therefore timely payment of invoiced amounts is of paramount importance. While 8x8 is happy to extend certain payment terms to you as agreed in our agreement, 8x8 reserves the right to establish credit limits from time-to-time. If a credit limit applies to you, you must ensure that your aggregate payment liability to 8x8 (i.e. invoiced amounts not yet paid by you) does not exceed that credit limit. 8x8 will act reasonably with regard to credit limits and will notify you in writing at least 30 days before a new credit limit or reduction in an already effective credit limit takes effect. If your aggregate payment liability exceeds the credit limit and 8x8 has previously informed you that you are approaching your credit limit and not increased your credit limit (acting reasonably, and taking into account your credit history and past performance under your agreement with 8x8), then you will on receipt of a written demand from 8x8 make an immediate payment of the amount requested by 8x8. In addition, 8x8 may request that you pay a deposit in advance (or establish a parent company or other satisfactory guarantee) as security for payment of your invoices if at any time you fail to (or we reasonably believe that you will fail to) pay invoices by their due date.

8x8 also encourages you to establish an effective credit control program with respect to your customers. Timely payment of invoices is one of the best indicators of a healthy customer relationship. Please notify us when you encounter issues with your customers payments so that we can work together to get ahead of any payment issues.

4.2.6   Risk of Use Outside the Territory

8x8 is delivering the services to you in the Territory that you are licensed in and is delivering Equipment to you in the country where title transfers from 8x8 to you or your designee in

accordance with the agreed-upon shipping terms (INCOTERMS). If the Equipment subsequently moves to any other country, you are the exporter or importer for all purposes. The same is true for any use of services outside the Territory. In other words, as between 8x8 and you, you are deemed to be the one doing the exporting, importing, or use, and are solely responsible for the consequences of any export, import, or use, of services outside of the Territory (or the country where title transferred, in the case of Equipment).

4.2.7 Effective Policies and Procedures

Each company's relationship with their customer is of utmost importance. For 8x8, the relationship with you is therefore very important. And we understand that as a Reseller, your relationship with the End Customer is of significant importance. Effective policies and procedures play a crucial role in ensuring that these relationships thrive. You can find the 8x8 policies and procedures in the Legal Information Hub. Please familiarize yourself with those policies and procedures as you are required to follow them. Similarly, we suggest that you establish robust policies and procedures for use with the End Customer. By having robust policies and procedures in place, you can also demonstrate professionalism, reliability, and a commitment to meeting the needs of your valued End Customers. Ultimately, it's through these effective policies and procedures that we can both create a positive experience for your End Customers, ensuring their satisfaction and your success as a trusted Reseller.

5   Order Placement & Logistics

5.1   Ordering Process

Orders for new and existing customers can be placed via the PartnerXchange portal. Through an easy-to-use cart interface, partners are able to configure the quote, select the applicable contract term and place the order. VAR operating under an 8x8 distributor will submit their quote to the distributor for approval.

In the event a manual adjustment is needed, assistance from 8x8 Deal Desk can be requested from within the PartnerXchange portal through the Contact Deal Desk support button (Direct VARs.) VARs will need to contact their distributor, who in turn will discuss options with 8x8.

Once your order has been submitted, whether via PartnerXchange or 8x8 Deal Desk, it will only become effective and legally binding when you receive an 8x8 confirmation email summarizing the services ordered or the Order is fully signed by both parties.

Upon order activation, partners will automatically receive access to the admin portal of their customer account (Admin Console).

5.2   Partner Rules of Engagement

Nobody likes channel conflict, lost opportunities, or the feeling of uncertainty in partnerships. We get it! That's why, at 8x8, we're all about clear skies and smooth sailing in our collaborations. To that end, 8x8 has established certain "Rules of Engagement" and other procedures that apply to you and are designed to ensure that channel conflicts are minimized, and opportunities are maximized.

In PartnerXchange, you will find more comprehensive documentation on our strategies and processes for handling channel conflicts, our deal registration procedures, and other important topics we need to deal with to ensure that our collaborations are as friendly as they are fruitful. Note that these policies and procedures may vary by region, so make sure to look at the correct documents. PartnerXchange is your go-to resource for diving into the details.

Of course, we are continuously refining our processes to continue to find ways to improve the business and maximize opportunities. As such, 8x8 reserves the right to modify the rules of engagement and all other related policies and procedures from time-to-time at 8x8's sole discretion. We will post updated processes and procedures to PartnerXchange and may also notify you by email of those changes.

6   Reseller Training & Certification

6.1   Training

Resellers are able to prepare for success with no cost self-paced training through 8x8 University. Role-based instructor-led training is also provided by 8x8 quarterly for all Resellers to stay informed on the latest 8x8 product releases, best practices, and opportunities. Individualized training is available for Resellers participating in 8x8's Elevate Partner Program.

For information about 8x8 University training offerings, visit www.8x8.com/University.

6.2   Certification

Resellers are also able to prepare for success with no cost self-paced certifications through 8x8 University. Additionally, Resellers with at least two individuals who have completed deployment certifications are eligible to participate in the 8x8 Deployment Accreditation Program at no cost. The accreditation program includes best practices, documentation, tools, and expert shadowing services to ensure Resellers are prepared, capable, and confident to deliver a world class service to their customers.

Additionally, Resellers with at least two individuals who have completed support certifications are eligible for direct line access to Tier 2 technical support.

Requirements:

- Resellers are required to have a minimum of 1 PartnerXchange user who has completed PartnerXchange Administrator training and is designated as the PartnerXchange system administrator. Resellers are also required to have a minimum of 1 sales representative certified.
- Resellers are required to have a minimum of 1 sales engineer (SE) certified, 2 technical engineers certified in Build, 2 technical engineers certified in Deployment, and 2 support engineers certified for providing customer technical support services.
    - The SE can be trained and certified in either unified-communications-as-a-service ("*UCaaS*") or experience-communications-as-a-service ("*XCaaS*"). The same individual can hold both the Sales and Sales Engineer certification to meet requirements for the Reseller.
- For new Resellers, Sales and Sales Engineer Certifications should be completed within the first 30 days while Build, Deployment, and Support certifications should be completed within 60 days.

Training and certification exams are provided by 8x8 online and in virtual sessions through 8x8 University. The learning paths outline the sequence of required courses and exams. A summary of the current training investment is summarized in the below table.

6.3 Training and Certification Investment Summary

Activity	Time	Cost	# Individuals Required
Sales Training/Certification	6 hrs.	Free	1 Individual

SE Training/Certification
               UCaaS Training
               XCaaS Training
 	
(Prerequisite - Sales Training/Certification)
	3.5 hrs.
	7 hrs.
		Free
		Free
			1 Individual

Build Training/Certification UCaaS Training or XCaaS Training	7 hrs.	Free	2 Individuals
Deployment Training/Certification UCaaS Training or XCaaS Training	10 hrs.	Free	2 Individuals
Support Training/Certification UCaaS Training or XCaaS Training	10 hrs.	Free	2 Individuals

7   Technical Information

The following documentation is helpful as you prepare a customer's environment for the 8x8 solution.

8x8 Technical Requirements

- https://support.8x8.com/cloud-phone-service/voice/network-setup-voice/x-series-technical-requirements

Network Utility Tool

Details of how to use this network testing tool including how to download and interpret the results can be found here:

- https://support.8x8.com/equipment-devices/network-devices/how-to-use-the-8x8-network-utility-tool

8x8 Work Application Requirements

The requirements for 8x8 Work for Desktop can be found here:

- https://support.8x8.com/cloud-phone-service/voice/work-desktop/download-8x8-work-for-desktop#Minimum_System_Requirements

The requirements for 8x8 Work for Mobile are here:

- https://support.8x8.com/cloud-phone-service/voice/work-mobile/minimum-mobile-os-requirements-for-using-8x8-virtual-office-mobile

Guidelines for 8x8 Work for Web are found here:

- https://support.8x8.com/cloud-phone-service/voice/work-web/what-is-workw

Video Meeting Basics and FAQs

Guidelines and FAQs for 8x8 Meetings can be found here:

- https://support.8x8.com/cloud-phone-service/meetings

8x8 Contact Center Agent Requirements

The requirements for Contact Center agents can be found here:

- https://docs.8x8.com/8x8WebHelp/VCC/technical-requirements/Default.htm

Quality Management Screen Recording Prerequisites

The requirements and download for 8x8 screen recording can be found here:

- https://support.8x8.com/us/Cloud_Contact_Center/Contact_Center_Intelligence/Quality_Management/Screen_Recording_Client_Prerequisites

Microsoft Teams Network Requirements:

Microsoft's requirements on how to prepare a network for Microsoft Teams can be found here:

- https://docs.microsoft.com/en-us/microsoftteams/prepare-network

Network Planner for Microsoft Teams:

- https://docs.microsoft.com/en-us/microsoftteams/network-planner