

# Services Track Benefits and Requirements

## Tableau Services Track Benefits Overview

There are four key focus areas that drive the framework of the benefits: Commitment, Capacity, Capability, and Customer Success. The table below outlines the key program benefits for each focus area by Program Level and Country Cluster. Detailed definitions of terms and conditions are available in the sections immediately following the table.

Benefits	Services Track		
	Bronze	Silver	Gold
<b>Capacity</b>			
Access to Partner Portal	✓	✓	✓
Joint Business Plan		Annual	Quarterly
Strategic Partner Marketing Funds		Eligible	Eligible
Access to Partner Demand Center	✓	✓	✓
<b>Capability</b>			
Joint Solution Briefs			Eligible
Use of Tableau Partner logos	✓	✓	✓
NFR - Demo Licenses	10 Creators	25 Creators	35 Creators
Online sales & product training on Partner LMS	✓	✓	✓
Partner Bootcamp	✓	✓✓	✓✓✓
Discount on Select Certification Exams	40%	40%	40%
eLearning (for internal use)	5 access codes	10 access codes, >10 get 10% off	25 access codes, >25 get 15% off
Public Training (for partner employee)	5 vouchers	10 vouchers, >10 get 10% off	25 vouchers, >25 get 15% off
Private Training (for partner employees)	Available	10% off	15% off
<b>Commitment</b>			
Partner Management	Eligible	Eligible	Assigned
Partner Marketing Manager			By Invitation
Partner Finder Listing	✓	✓✓	✓✓✓
Partner Communications (e.g. Newsletter)	✓	✓	✓
Press Release Opportunities		Eligible	Eligible
Tableau Partner Exec Kick-Off		By Invitation	✓
Global Partner Summit	✓	✓	✓
Tableau event sponsorship opportunities	✓	✓	✓
<b>Customer Success</b>			
Joint Success Stories			Eligible
Access to Prescriptive Services Guide	✓	✓	✓
Tableau Services Subcontracting Program (TSSP)		By Invitation	By Invitation
Tableau Blueprint	✓	✓	✓
Co-branded Campaigns (Renewals, Customer Adoption Assets)	✓	✓	✓
<b>Financial Benefits</b>			
Assist (for LMS SKUs)	7%	7%	7%

## Commitment

### Partner Management

Partner Development Managers are Tableau employees dedicated to helping partners succeed. They serve as a partner's primary point of contact at Tableau. Gold level Services Partners will be assigned a dedicated Partner Development Manager ("PDM") who will serve as the point of contact with Tableau. Silver and Bronze level Services Partners are eligible to be assigned a PDM. Eligibility is based on Tableau resource availability, prior year performance, and other criteria determined by regional leadership. Those partners who do not have a dedicated PDM will still have access to a number of self-service and Tableau supported resources, specifically developed to help ensure all Tableau partners have the necessary tools to succeed.

### Partner Marketing Manager

Partner Marketing Managers are Tableau employees with marketing expertise, who assist Services Partners with developing joint marketing plans and campaigns. Gold level Services Partners may be invited to engage with a member of our Partner Marketing team for joint planning. Eligible Services Partners must be nominated by their Partner Development Manager based on a demonstrated need for specific planning activities and will be selected based on Tableau resource availability and alignment with current Tableau marketing priorities.

### Partner Finder Listing

All Tableau Partners are listed in the Partner Finder on the Tableau website in alphabetical order based on their Program Level, with Gold partners appearing first, followed by Silver and Bronze. Services Partners can maintain their profile information in the Partner Portal via the Manage your Profile page.

### Partner Communications

Services Partners have the opportunity to receive regular communications from the Tableau Partner Team to stay up to date on the latest happenings at Tableau. Services Partners can review and adjust their email preferences in the Tableau email subscription center.

### Press Release Opportunities

Silver and Gold level Services Partners are eligible to produce press releases related to new partnerships and Tableau offerings, among other things. Tableau can support press releases with executive quotations on a case-by-case basis. All press releases must be approved by Tableau and Services Partner as set forth in the Partner Master Terms. Services Partner should submit the draft of their press release to the [Tableau Partner Network Team for review](#). Once the Partner Marketing team has reviewed, it will be forwarded to the Tableau PR and Legal teams for a full review and approval.

### Tableau Partner Executive Kick-Off

The Partner Executive Kick-Off series is an invite-only program that serves as the fiscal year kick-off for the sales and business leaders of our top partners. Gold level Services Partners will have the opportunity to participate in their regional Partner Executive Kick-Off in Q1 each year. Silver level Services Partners may also be invited to attend as space allows, based on performance from the previous year. Participation is limited to a select number of individuals per partner organization.

## Global Partner Summit

All Tableau partners have the opportunity to attend Global Partner Summit, an annual event that coincides with Tableau Conference. Global Partner Summit is a free event for all Tableau Partners with a Tableau Conference ticket.

## Event Sponsorship

All Tableau partners have access to sponsor select Tableau-hosted events to drive awareness, generate leads, and connect with prospects and customers.

## Capability

### Joint Solution Briefs

A joint solution brief is a published description of a Services Partner's joint solution offering or technical integration and the value it brings to customers that Tableau produces and publishes on the Tableau website.

### Use of Tableau Partner logos

All partners will have access to a Tableau Partner logo which can be used in marketing materials, to showcase their status as a Tableau Partner. Partners should continue to use the existing logos until they receive their new Program Level designation and corresponding logo in February 2021. As stated in Section 2 (Trademarks) of the Partner Master Terms, Use of such logo is subject to Tableau's then-current [Tableau Usage and Messaging Guidelines](#) or other guidelines provided in writing by Tableau, which may be updated by Tableau from time to time.

### Not For Resale Licensed Software ("NFR Licenses Software")

Services Partners will be granted NFR Licensed Software, which includes access to a Tableau Online site which may be used solely for the purposes of internal training, demonstration to potential End Users, and internal development and testing reasonably necessary to deliver Services to End Users as set forth in Section 3.1 (NFR Licensed Software and Evaluation Versions) of the Partner Master Terms and Section 4.1 (NFR Licensed Software and Evaluation Versions) of the Services Track Addendum. NFR Licenses will be provided for each twelve (12) month period of the Services Track Addendum Term. Each product key allows for the specific number of activations for each Program Level as listed in the table above.

NFR Licensed Software is configured as follows:

- Tableau Creator offering for (10, 25, or 35) Authorized Users (as applicable based on Program Level) consisting of:
  - (10, 25, or 35) activations of Tableau Desktop and Tableau Prep Builder
  - 1 copy of User Based Server for (10, 25, or 35) Authorized Users at the Creator user level with Data Management and Server Management enablement
  - 1 Tableau Online site for (10, 25, or 35) Authorized Users at the Creator user level

Please note, the Server key configuration with Data Management and Server Management enablement is unique to your NFR Licensed Software and is not something an End User should expect when purchasing the same Products. NFR Licensed Software is provided for use solely by the total number of Authorized Users specified above, and only these Authorized Users may be provisioned access to any component of

the Creator Software package, including Tableau Desktop, Prep Builder, Tableau Server and/or Tableau Online (i.e. Bronze level Services Partner is entitled to 10 total Authorized Users and those users must be the same for across all NFR Licensed Software). “Authorized User” has the meaning set forth in the End User Agreement.

NFR licenses are not to be provided to End Users or prospective End Users. You, the Services Partner, are responsible for managing your NFR Licensed Software including deactivating the license if you are retiring a computer which has the Software installed.

License keys are visible in the Partnership Benefits dropdown of the My Keys section in the Partner Portal. Here you can view the amount of Authorized Users provisioned for your licenses as well as how many users have been activated.

### **Partner LMS**

Partner enablement is a top priority of the Tableau Partner Network. To better reach the needs of our Services Partners, we offer a partner facing Learning Management System (LMS) which provides self-paced online trainings related to Tableau products, our sales methodologies, and foundational demo capabilities. The Partner LMS is also where Services Partners can access the required Tableau Partner Network accreditations and training (Sales Accreditation, Customer Success Accreditation, Marketing 101). Access to the LMS is provided through the Partner Portal.

### **Partner Bootcamp**

Partner Bootcamps are two-day events, provided in-person and virtually, in a classroom-like setting. At these bootcamps, Tableau partners will gain a deeper understanding of how to articulate Tableau’s positioning, from both a sales messaging and product platform perspective. This hands-on, interactive experience requires you to demo and role play with peers and Tableau employees, ensuring a solid Tableau foundation. Gold and Silver level Partners will be given priority to register for these Partner Bootcamps, but Bronze level partners are still able to attend. More information about available boot camps, virtual foundations content, and the current schedule for each theater is available on [Sales Insight for Partners](#).

### **Discount on Select Certification Exams**

Services Partner can take advantage of a 40% discount on certain Tableau certification exams. This discount is off of the list price of the exam and is valid for Desktop Associate, Server Associate, Desktop Professional, Associate Consultant and Associate Architect exams.

### **e-Learning, Public and Private Training**

Services Partner will receive access codes or vouchers for the specific number of eLearning licenses or individual Public training courses for the Program Level as defined in the table above. Each public training voucher is good for one employee taking a single course. Gold and Silver level Services Partners can purchase additional training vouchers, eLearning licenses, or private trainings at a discount as described above. Services Partner's purchase and use of eLearning, Public or Private Training or any other Tableau Products otherwise made available for Services Partner’s purchase as a Program Benefit are subject to the terms of the applicable End User Agreement.

## Capacity

### Partner Portal

The Tableau Partner Portal provides materials and information necessary for Services Partners to effectively manage their Tableau business. It is a centralized location for Services Partners to register deals, access their opportunities, obtain Not-For-Resale (NFR) Licensed Software, find Tableau Partner Network information and more. The Partner Portal also provides Services Partners access to the partner dashboard where they can track their progress toward program requirements.

### Joint Business Plan

Using the business plan tool available in the Partner Portal, Services Partners will create a joint business plan, in collaboration with Tableau. The planning process includes defining clear objectives for revenue, marketing initiatives, and enablement activities. The plan should be reviewed regularly.

### Strategic Partner Marketing Funds

Strategic marketing funds are awarded as part of the Tableau Partner Network Partner Marketing Fund (PMF) Program. Gold and Silver Program Level Services Partners are eligible to participate in the PMF Program as noted in the table above. Partner Marketing Funds are allocated to support demand generation activities that can scale and amplify customer reach and engagement, and leverage partner solutions and customer relationships to reach and engage the enterprise segment. Eligible activities are outlined in the PMF Handbook [here](#). In order to receive funds, an eligible Services Partner needs to be pre-approved. Services Partners should work with their Partner Development Manager on a joint marketing plan in which they request funds that will be approved by the Partner Marketing team.

### Partner Demand Center

All Services Partner employees with access to the Tableau Partner Portal also have access to the Partner Demand Center, a self-service marketing platform that enables Services Partners to execute digital marketing campaigns and events, find support in the services marketplace, manage leads and track the success of demand generation programs.

## Customer Success

### Joint Success Stories

A joint success story is a public story which describes a customer's challenge and a solution delivered by a partner and Tableau, resulting in 2-3 tangible business impact benefits for the customer. These may be produced by Tableau with eligible Services Partners as case studies, webinars, articles, blogs, or other media, and will be hosted on the Tableau website.

The Tableau team will select stories submitted by eligible Services Partners using the [Global Partner Customer Evidence Nomination form](#) to further develop into joint success stories based on resource availability and alignment with current Tableau marketing objectives. More information about the submission process and selection criteria can be found in on the [Partner-Led Customer Case Studies page](#) on Sales Insight for Partners.

### **Prescriptive Services Guide**

The Prescriptive Services Guide is a spreadsheet-based tool that recommends training and consulting services based on the details of a customer deployment or transaction. It is available on [Tableau Public](#).

### **Tableau Services Subcontracting Program (TSSP)**

The Services Subcontracting program is a program through which Tableau subcontracts professional services delivery for Tableau End Users to third parties. Tableau has an agreement with the End User on Tableau paper, and a separate agreement directly with the Services Partner. Eligible Gold and Silver Level Services Partners need to be fully vetted by Tableau before being invited to this program.

The Tableau Services Subcontracting Program (TSSP) provides an opportunity for partners in the Tableau Services Track to participate in the delivery of Tableau-contracted professional services engagements. Participation in the TSSP is by invitation only and is limited to partners that meet the capacity and capability needs of the Tableau Services business. Participation requires partner to agree to the separate agreement for participation in the TSSP.

### **Tableau Blueprint**

Tableau Blueprint is a methodology for building the capabilities customers need to create a successful, data-driven organization. Services Partners are provided blueprint guides, videos and other resources to deliver to customers using Tableau blueprint. These materials are available on [Sales Insight for Partners](#).

### **Co-Branded Campaigns**

Tableau provides marketing materials to Services Partner to use for customer driving customer adoption. These materials are available on Sales Insight for Partners and the Partner Demand Center.

## **Financial Benefits**

### **Assist**

Services Partners participating in the Gold, Silver and Bronze Program Levels are eligible to receive Assist Commissions as set forth in the Tableau Partner Network “Partner Assist” Program Addendum. Services Partner may decline to receive Assist Commissions by opting out of the right to receive these fees as set forth in the Tableau Partner Network “Partner Assist” Program Addendum and Schedule 1 to the Program Guide.

## Tableau Services Track Requirements Overview

There are four key focus areas that drive the framework of the requirements: Commitment, Capacity, Capability, and Customer Success. The table below outlines the key Services Track requirements for each focus area by Program Level and Country Cluster. Detailed definitions of terms and conditions are available in the sections immediately following the table.

Requirements	Services Track		
	Bronze	Silver	Gold
<b>Commitment</b>			
Partner Program Application & Profile	✓	✓	✓
Tableau Partner Network Master Terms and Track Addendum	✓	✓	✓
Program Fee	\$250	\$750	\$1,500
Executive Sponsor	✓	✓	✓
Named Primary Contact	✓	✓	✓
Named Marketing Contact	✓	✓	✓
ACV - Assist LMS			Group A = \$200K Group B = \$150K Group C = \$100K
<b>Capacity</b>			
Joint Business Plan		Annual	Quarterly
<b>Capability</b>			
Accredited Sales Professional		2	3
Marketing 101	1	1	2
Accredited Customer Success Professional		1	2
Tableau Certified Associate Consultant or Tableau Certified Associate Architect		3	4
<b>Customer Success</b>			
Public Customer Case Study			1/year

### Commitment

#### Executive Sponsor

Services Partner must provide the name of its internal executive sponsor, email and phone number.

#### Named Primary Contact

Services Partner must provide the name of its internal primary contact for partnership, email and phone number.

#### Named Marketing Contact

Services Partner must provide the name of its internal primary marketing contact, email and phone number.

## Annual Contract Value (ACV) Commitment

Gold and Silver Services Partners must meet ACV commitments for each Country Cluster to maintain their Services Program Level designation. Performance for this requirement is measured using the twelve-month performance period of February 1 through January 31.

ACV attainment is calculated using closed approved Assist Opportunity sales transactions for the following products:

- Initial purchase of term Software licenses (subscription)
- Perpetual Software licenses and first year maintenance
- Add-On Software licenses

For sales transactions where the End User has existing licenses to Tableau products or related maintenance which are terminated or recontracted as a result of the approved Assist Opportunity (“Pre-Existing Licenses”), ACV attainment excludes any amount of license fees which are deemed by Tableau, in its sole discretion, to be replacement license fees that are otherwise assumed to be renewed and/or paid to Tableau if the Pre-Existing Licenses had not been terminated.

In the case of a multi-year subscription or maintenance contract, ACV attainment in the current program year is based on the annualized amount for the contract value in year one. The value of all subsequent years will not count toward ACV requirements in future periods.

ACV attainment related to approved Assist Opportunities is subject to adjustment based on Assist Commissions payable to the partner.

## Capacity

### Joint Business Plan

Gold and Silver Services Partners are required to collaborate with Tableau to create a joint business plan that includes revenue goals, marketing activities, and enablement activities. The plan should also include the area of focus within the Services Partners defined Country Cluster, either by specific Country or Vertical market. The plan will be submitted using the Partner Portal at the frequency set forth in the table above.

## Capability

### Accredited Sales Professional

Our Partner Sales Professional Training focuses on the skills needed to help sales and presales resources demo effectively, understand Tableau sales strategy, and get familiar with Tableau’s Products. All Partner Portal users have access to the Learning Management System (LMS) for partner training. For each Country Cluster and Program Track, the required number of Services Partner employees need to complete the Sales Professional training and pass the accreditation exam. Each individual may only be counted once and cannot be counted for multiple Program Tracks or Country Clusters. The individuals counted toward attainment of this requirement may not also be counted towards any other accreditation or certification. Accreditations are valid for two years.

### **Marketing 101**

For each Country Cluster and Program Track, the required number of Services Partner employees must complete the Marketing 101 training in the Partner Learning Management System (LMS). Each individual may only be counted once and cannot be counted for multiple Program Tracks or Country Clusters. The individuals counted toward attainment of this requirement may not also be counted towards any other accreditation or certification. Completion of training is valid for two years.

### **Accredited Customer Success Professional**

For each Country Cluster and Program Track, the required number of Services Partner employees must complete the Customer Success Professional training and certification exam. Each individual may only be counted once and cannot be counted for multiple Program Tracks or Country Clusters. The individuals counted toward attainment of this requirement may not also be counted towards any other accreditation or certification. Accreditations are valid for two years.

### **Certified Associate Consultant or Associate Architect**

These certifications are examinations that help position our Services Partners as product experts in the field and trusted advisors to our customers. For each Country Cluster and Program Track, the required number of Services Partner employees must complete the Certified Associate Consultant or Associate Architect certification exam. Each individual may only be counted once and cannot be counted for multiple Program Tracks or Country Clusters. The individuals counted toward attainment of this requirement may not also be counted towards any other accreditation or certification. Certifications are valid for two years.

## **Customer Success**

### **Public Customer Case Study**

A case study is a public story which describes a customer's challenge and a solution delivered by a Services Partner and Tableau, resulting in 2-3 tangible benefits for the customer. Case studies can be produced as a landing page, blog post, pdf, or video, and should be hosted on the Services Partner's website. Services Partners are responsible for receiving approval from the customer to publish the case study. Each case study may only count once toward an individual Program Track and Country Cluster and cannot count across multiple Program Tracks or Country Clusters). Case studies should be submitted using the [Partner-Led Customer Case Studies form](#). Tableau's partner marketing and customer evidence teams will review submitted case studies for approval. Case studies must be submitted no later than December 31 and are valid for one year.