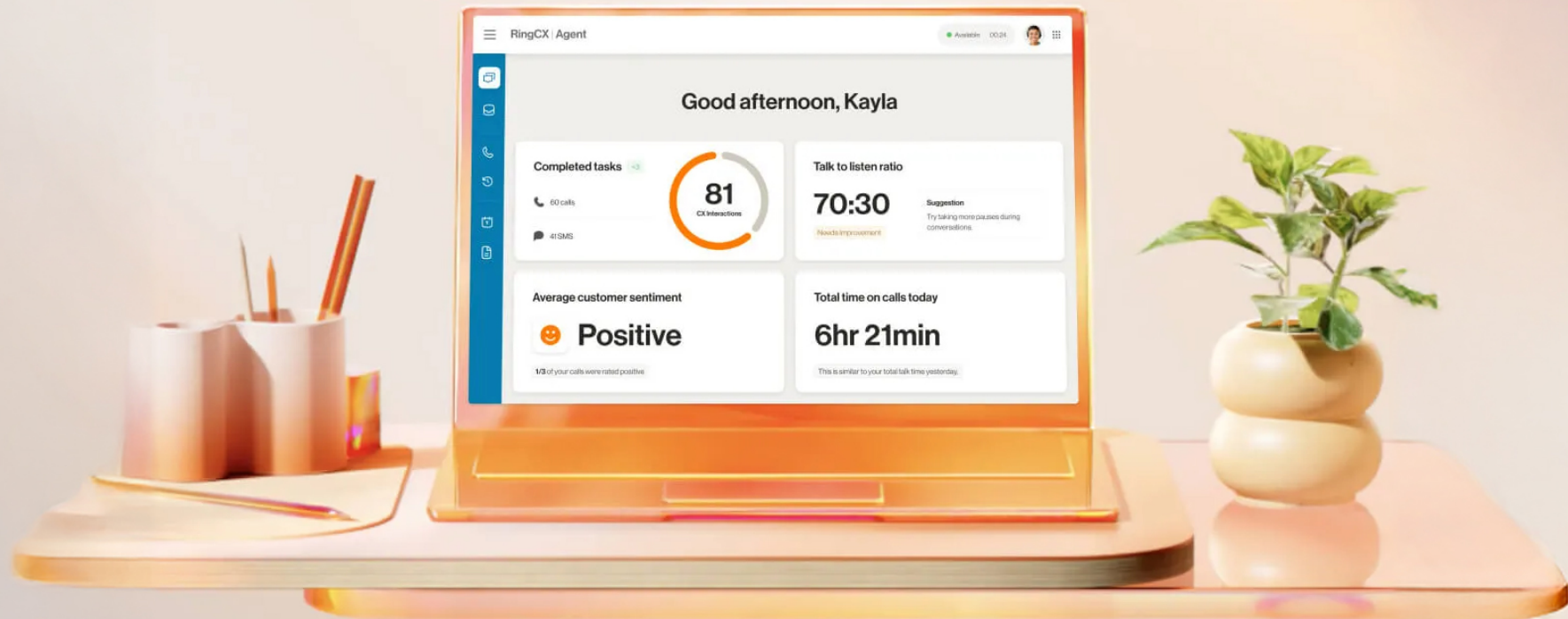
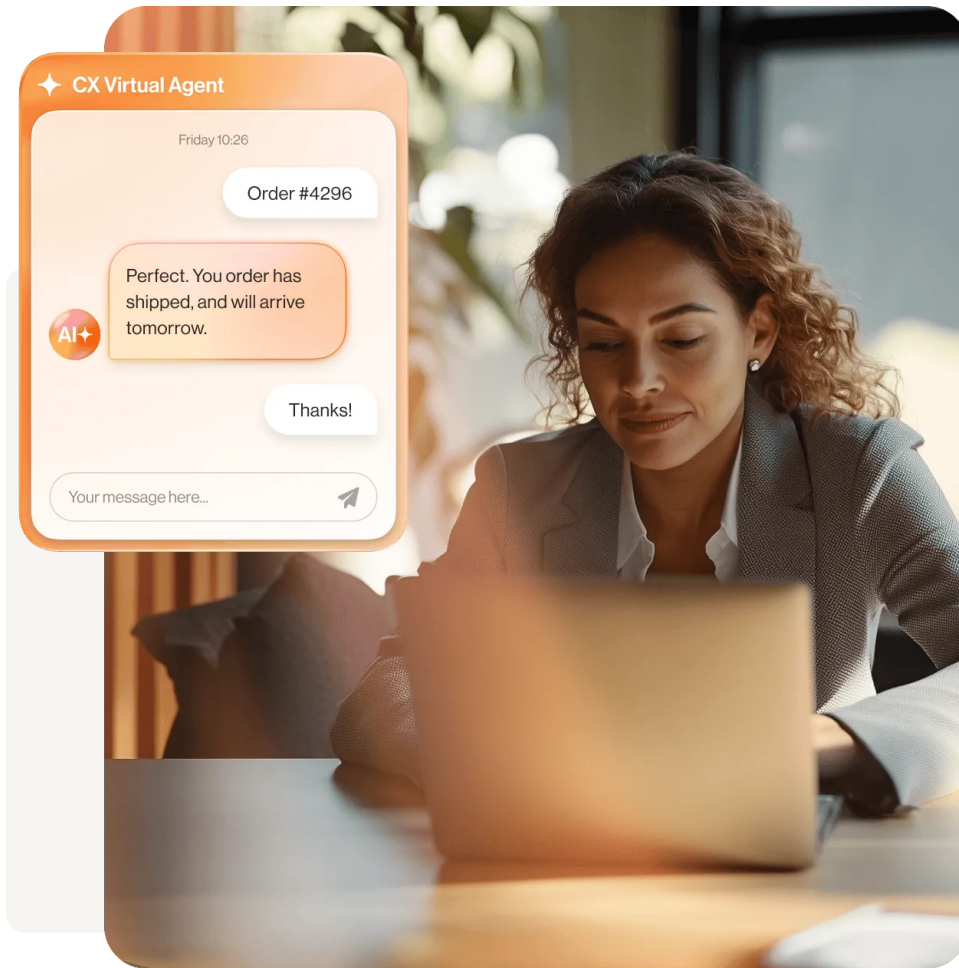


RingCentral Reach™

Partner Playbook



About RingCentral



RingCentral® is the #1 global UCaaS and CCaaS solution for every business size and industry. With the world's leading business cloud phone system, RingCentral simplifies communications so your customers can connect from everywhere.

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RingCentral at a glance



Publicly held company
(NYSE: RNG)



Total ARR of \$2 billion



400,000+ global customers



20+ years of R&D in building
and operating an open
cloud platform



Leader in product, engineering,
and operations within cloud
communications

Reliable

RingCentral is the leader in reliability, delivering on its 99.999% uptime for more than 4 years.

Scalable

No matter how big your customer grows, RingCentral scales with them at the click of a button.

Global

RingCentral is available in 45+ countries and offers a local calling presence with more than 200 area codes to choose from.

Easy to use

No more switching between apps: RingCentral offers message, video, and phone capabilities within a single interface.

Secure

Protect the customers' data at every level with built-in security that encrypts conversations between all endpoints.

Connected

RingCentral connects customers to their favorite apps like Salesforce, Google Workspace, Microsoft 365, and hundreds more via APIs.

Why do partners choose RingCentral?

Partners choose to work with RingCentral for two primary reasons:



We have one of the best UCaaS and CCaaS solutions on the market.



We have one of the top partner programs in the channel.



And third-party sources agree:

RingCentral has been named a leader in cloud communications by:



RingCentral was named a Leader in the 2022 Gartner® Magic Quadrant™ for UCaaS, Worldwide*1 for the eighth consecutive year.

[Read the Report](#)



IDC MarketScape names RingCentral a worldwide UCaaS Leader in both SMB and enterprise segments.

[Read the Report](#)



For the fifth year in a row, Frost & Sullivan identified RingCentral as a Leader in the 2022 Frost Radar™ UCaaS North American Market Report.

[Read the Report](#)



Aragon Research named RingCentral a Leader in the Aragon Research Globe™ for Unified Communications and Collaboration, 2022.

[Read the Report](#)

RingCentral Reach is consistently ranked as one of the top partner programs in the channel, having been awarded a CRN 5-Star Partner Program eight years in a row.



In Q3 of 2022, the channel contributed more than

60%

of RingCentral's
\$1M+ TCV wins

RingCentral Product Information

We offer a comprehensive suite of cloud communications solutions:

Unified Communications



RingCentral MVP® (Message, Video, Phone™)

One communications platform to do your best work, with the world's leading cloud phone system, powerful AI, workflow automation, video, messaging, and more.



RingCentral Video® Pro / Pro+

No downloads or contracts required. Host unlimited meetings, plus team messaging for free with RingCentral Video.



RingCentral Webinar™

Go live with just a few clicks. Host webinars with up to 10,000 participants with this add-on to RingCentral MVP, currently in free beta.



Customer Experience

RingCentral Contact Center™

Resolve customer issues faster with AI-enabled intuitive tools that work from anywhere on any channel. Boost agent satisfaction with an integrated communications platform and enhanced workforce engagement capabilities.



Engage Voice

Run outbound CX campaigns, deliver proactive service and reach customers in their preferred channel.



Engage Digital

Make it easy for customers to reach out in the way that's most convenient for them. Make it simple, intuitive, and easy to connect in their channel of choice.



Check RingCentral's website for the latest pricing, features, and regional variations.

The RingCentral Reach Partner Program

No hassle, big payouts, happy customers.

RingCentral Reach is the channel's easiest Partner Program to work with, prioritizing your goals to make it simple to grow your business. The program's clear structure provides a roadmap to higher revenue, with set benchmarks for rewards. It also represents RingCentral's investment in partner success and commitment to the channel through transparency and mutual benefit.

Within RingCentral Reach, partners have two sales models to choose from, Channel Harmony® and IGNITE!™.



The Channel Harmony Sales Model

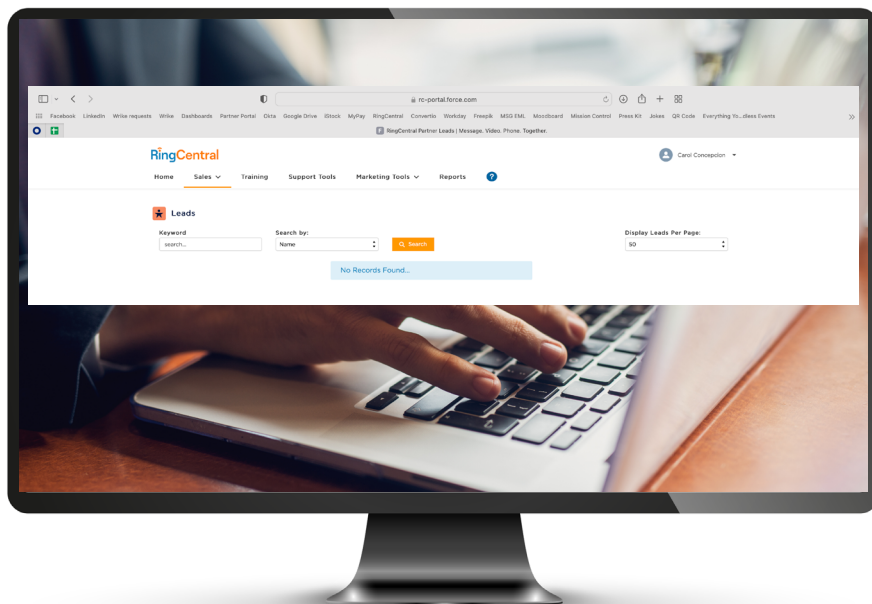
Level of required partner involvement: Minimal

With Channel Harmony, there are only two steps required of partners: submit qualified leads and attend the partner strategy meeting with their RingCentral Partner Manager. We can take care of the rest.

Now, that doesn't mean partners are limited to ONLY delivering qualified leads and attending the strategy meeting.

In fact, many RingCentral partners prefer to take a more hands-on role when working the lead and implementing the solution. This is especially true as the deal size trends toward enterprise. However, it is up to the partner to decide their level of involvement on each deal.





Submit Qualified Leads

If delivering qualified leads is the primary responsibility of the partner with Channel Harmony, it's important to define precisely what a qualified lead is.



Definition of a Qualified Lead:

1. Customer has shown interest in a UCaaS solution
2. Partner has had a conversation with the customer about RingCentral
3. Partner has informed the customer that they will be registered with RingCentral
4. Customer is willing to have a conversation with RingCentral within 30 days
5. Buying decision will occur within the next 12 months
6. Customer does not currently have RingCentral service
7. Customer is not an existing opportunity with RingCentral's Direct Sales

Important: If any of the above requirements have not been met or communicated to the customer, the partner should not register the lead. If, during the course of working the lead, it is discovered that any of the lead requirements haven't been met, RingCentral may downgrade the lead.

Register a Lead



How to Register a Qualified Lead

Once the requirements for a Qualified Lead have been met, the partner should submit the lead through the RingCentral Partner Portal.

From the main page, the partner should click the Sales drop down menu, and then select Lead Registration.

From there, the partner will fill out basic information like the lead's name, title, email, etc.

Important: Partners who are sub-agents will often have multiple RingCentral Partner IDs tied to the various master agents they operate under. It's critical that the partner submits a lead under the correct Partner ID at the time of lead registration. A lead cannot be transferred to another Partner ID after it has been submitted.



Attending the strategy meeting with the RingCentral Partner Manager

After the qualified lead is submitted by the partner and approved by RingCentral, the second requirement of the partner under Channel Harmony is to attend a strategy meeting with the RingCentral Partner Manager.

This meeting is critical for getting the RingCentral Partner Manager up to speed, so that the right RingCentral resources are applied to winning the deal. Strategy meetings are also when the partner decides how large of a role they want to play in working the current lead. For example, is this lead a simple handoff to RingCentral? Or would the partner prefer to take charge and call in RingCentral resources only as needed? The strategy meeting is when everyone gets on the same page.



Partner Post-Sale Responsibilities

With Channel Harmony, the partner is encouraged to be involved in the post-sales and support process as much as the partner wants.

RingCentral has the resources and expertise to get customers set up and running, including the network, cabling, opening ports, etc. It is recommended that the partner is present during this process, but not required.

Customers can choose between no-cost implementations and RingCentral Professional Services, the latter of which is recommended for accounts with more than 50 users.

Channel Harmony

Rules of Engagement



Process and Timeline for Lead Routing

Incoming leads are routed to a RingCentral Subject Matter Expert (SME) based on the customer's size (segment), geography, and vertical. Lead assignment is completed within two business days as per our service-level agreement (SLA).



Lead Protection

Qualified leads submitted by the partner for new RingCentral business and approved by RingCentral will be attributed to the partner for 180 days while still in the lead stage. During this time, the lead will be immune to competition from RingCentral's Direct Sales Team, though still subject to competition from RingCentral partners.





Partner Opportunity Stages

Per RingCentral's Channel Harmony sales model, all partner initiated opportunities require joint engagement between the partner and RingCentral's SMEs. The SME will progress the opportunity through the following sales stages:

1 Qualification

- Confirm contact information and buying authority
- Hypotheses for business issue or problem

2 Problem

- Conduct Discovery
- Uncover Problem
- Verify Decision Making Process
- Propose Next Step
- DEMO

3 Solution

- ROI/TCO Confirmed
- Propose Solution
- Objections addressed
- Present Quote – Solution

4 Proof

- Proof of Concept (POC)/ Trial
- Objections addressed
- Technical Agreement

5 Agreement

- Present Contract
- Objections addressed
- Negotiation
- Legal Redlines

6 Order

- Finalized contract
- Obtain PO if required

7 Closed Won

- Provision/Activate Account
- Implementation



ROE for Partner Compensation on Contact Center Upsell Opportunities

Partners are required to register Contact Center Upsell opportunities in the Partner Portal for Customer Accounts that did not close with Contact Center in the initial sale in order to earn commission on Contact Center MRR. If the Contact Center upsell closes within 60 days of the MVP activation, the Partner will be protected on compensation.



ROE for an Opportunity with Multiple Partners Registering the Deal

When a qualified lead has been submitted by a partner, other partners may still submit qualified leads for the same prospect prior to the opportunity reaching Sales Stage 4 (POC- Proof of Concept).

The RingCentral Account Executive (AE) is required to provide price parity to each partner and pursue every opportunity related to the deal.

On opportunities at or beyond Sales Stage 4, secondary and/or subsequent partner lead registrations are prohibited.

Ultimately, the customer decides on the partner of record prior to activation. The prospective customer must formally communicate the partner of record to RingCentral in writing (not through a partner), before the contract is signed.



RingCentral Direct Sales Team Initiated Opportunities

RingCentral Direct Sales Team Initiated Opportunity Stages 1-3

An active opportunity that originated from RingCentral Direct Sales Team can be shared with a partner for opportunities in Sales Stages 1-3 at the discretion of the RingCentral Account Executive (AE). If the RingCentral AE believes the partner will offer significant value and increase their likelihood of winning the opportunity, the existing opportunity can be shared with a partner. Multiple partners may be engaged with the same opportunity that originated from the RingCentral Direct Sales Team. Prior to Sales Stage 4, RingCentral AEs are expected to create/pursue each opportunity and provide price parity to all partners engaged.

RingCentral Direct Sales Team Initiated Opportunity Stage 4 and Beyond

An opportunity originated from the RingCentral Direct Sales Team at Sales Stage 4 requires advanced RingCentral Segment Leader approval prior to being shared. Ultimately, the prospective customer will decide which partner to work with prior to activation and name the partner of record in writing directly to RingCentral.



RingCentral Direct Sales Team Initiated Opportunities: Compensation Impact

The partner will receive reduced commissions when engaging with an opportunity originated by RingCentral.

- Partners should refer to their partner contract for specific reduction terms.



Partner Engagement on Existing RingCentral Accounts

When certain conditions are met, existing RingCentral customers with minimum growth activity* may be eligible for secondary partner engagement when the new partner has a relationship with the customer that will lead to significant and immediate revenue growth on the account.

A business case must be created by the partner and submitted to their assigned Partner Manager. In order for the proposal to be considered, the following criteria must be met in the following order:

Criteria 1

Customer Account Activity Requirement:

The account must be active for a minimum of 12 months at the time of the request in addition to completing its initial contract commitment for activated services. In the case of accounts that are still pending with step-up additions to service, the request for outside partner engagement on upsell will be denied. Furthermore, the account may not have exceeded minimum account growth activity in the last 12 months.

Criteria 2

Upsell Requirement:

The new opportunity must represent a minimum of 2X growth over the existing MRR on the account (Ex: Current account with \$1,000 in MRR must add a minimum of \$2,000 to be eligible).

The new opportunity must have a defined timeline under which the upsell will be achieved commensurate with the size of the upsell (not to exceed 6 months).

Criteria 3

Submit Business Case for Review and Approval

A business case outlining the previous two requirements must be submitted to and approved by RingCentral before moving on to Criteria 4 Customer Sign Off.

Criteria 4

Customer Sign Off

After receiving RingCentral approval to proceed with changing the Partner of Record, the customer must specifically identify the Partner of Record in writing to RingCentral (not through a partner communication).



Commissions on existing accounts

If there is an existing Partner of Record on the account, that partner will be protected for the life of the customer on existing MRR at the time of transition. If the business case for upsell is approved, the new Partner of Record will be eligible for reduced commissions. The new Partner of Record will be compensated on new revenue only. (Ex: Account with \$1,000 in MRR adds \$3,000, the original partner will be compensated on \$1,000 in MRR while new partner will receive reduced commission on \$3,000 in MRR). All impacted parties will be notified of the change.

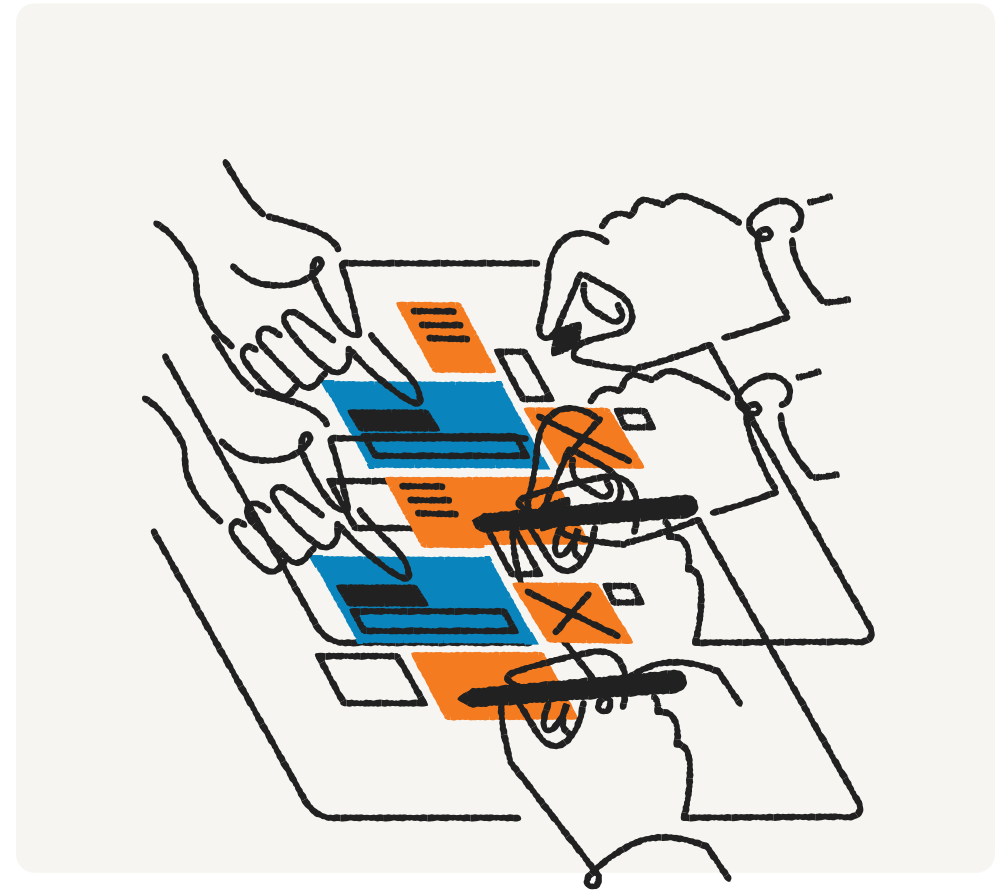
Commissions will only be earned and paid to the new Partner of Record once the upsell submitted in the business case is achieved. If the required upsell is not achieved, no commission will be paid. For clarity, no partners will be double paid on the same revenue.

DISCLAIMER: RingCentral reserves the right, at its sole discretion, to approve or deny any business case submission for any reason. *Minimum account growth activity is defined as less than 10% growth in MRR during the last 9 months.

The IGNITE! Sales Model

Level of required partner involvement: Involved

The IGNITE!™ sales model allows partners to fully own the sales process for RingCentral MVP or Customer Experience deals. Under the IGNITE! model, you can provide budgetary quotes, access a dedicated IGNITE! Partner Assist team and channel sales support, and close deals on your own, all while enjoying increased compensation and exclusive incentives to boost your bottom line.





What's in it for you?

- Access to support resources
- Maintain ownership of customer and operate independently of RingCentral
- Increased compensation and exclusive incentives
- More control over the sales process
- Faster time to close
- Ability to build multiple quotes with different pricing and packages for customer comparison
- Ability to discount up to 15% using the quoting tool without additional approval



Getting Started

To utilize the IGNITE! sales model, we highly recommend that partners:

1. Take the IGNITE! Certification course
 - The IGNITE! Certification course can be found under the [Training section](#) of the RingCentral Reach partner portal
 - The certification is free and should take about 90 minutes to complete
2. Obtain a RingCentral demo account
 - We also highly recommend that partners have a RingCentral demo account to show to customers
 - A free demo license, excluding taxes and fees, can be acquired by submitting a lead in the Partner Portal for one download, entering your business information as the Partner in the lead, and including "Free IGNITE! Demo Line" in the description of the lead

- Partners who use RingCentral internally can use their own account to conduct demos, but risk exposing their personal messages
- For additional information or help, please reach out to your Partner Manager.



Definition of a Qualified IGNITE! Lead

The IGNITE! definition of a qualified lead is the same as Channel Harmony

1. Customer has shown interest in a UCaaS or CCaaS solution
2. Partner has had a conversation with the customer about RingCentral
3. Partner has informed the Customer that they will be registered with RingCentral
4. Customer is willing to have a conversation with RingCentral within 30 days
5. Buying decision will occur within the next 12 months
6. Customer does not currently have RingCentral service
7. Customer is not an existing opportunity with RingCentral's Direct Sales

[Register a Lead](#)



Working an IGNITE! Lead

The partner will work directly with the IGNITE! Partner Assist team to move the opportunity through the sales process.

The IGNITE! Partner Assist team will be responsible for:

- Generating official quotes
- Gaining pricing approvals
- Invoice billing approval
- Engaging legal

The Partner is responsible for:

- Discovery Calls with the customer
- Demoing the MVP product to the customer
- Creating budgetary quotes in the Partner Portal
- Liaisoning with the Partner Manager to ensure successful activation of the Customer Account



IGNITE! Implementation Choices

There are three choices for implementation.

Partners can:

- Have RingCentral do the implementation for them
- Perform the implementation in coordination with RingCentral
- Conduct the implementation on their own (RingCentral Professional Certified Delivery Training recommended)



First 60 Days

- The account will be handled by the IGNITE! Partner Assist rep



Post-60 day hand-off to the Expansion Team

Partners can expect:

- 60 days after implementation, the account will be assigned to an Expansion Account rep
 - The Expansion Account rep will be the point of contact and assist with upsell
- Commission on all MRR services for the life of the account

What a partner can expect after submitting an IGNITE! lead

1 The partner submits an IGNITE! lead through the Partner Portal.

2 The IGNITE! Partner Assist rep. will check the lead for active accounts or existing opportunities in the system. If nothing is found, they will automatically convert the lead and send a confirmation email to the partner indicating that the lead is now an opportunity. You will now find the lead in the Opportunities section in the IGNITE! Portal.

3 For qualifying IGNITE! leads, an introductory email will also be sent connecting the partner to their IGNITE! Partner Assist rep.

4 The partner will generate a budgetary quote using the Quoting Tool on the Partner Portal and submit to the IGNITE! Partner Assist rep.

5 The IGNITE! Partner Assist rep. emails the partner the final quote for the customer to approve.

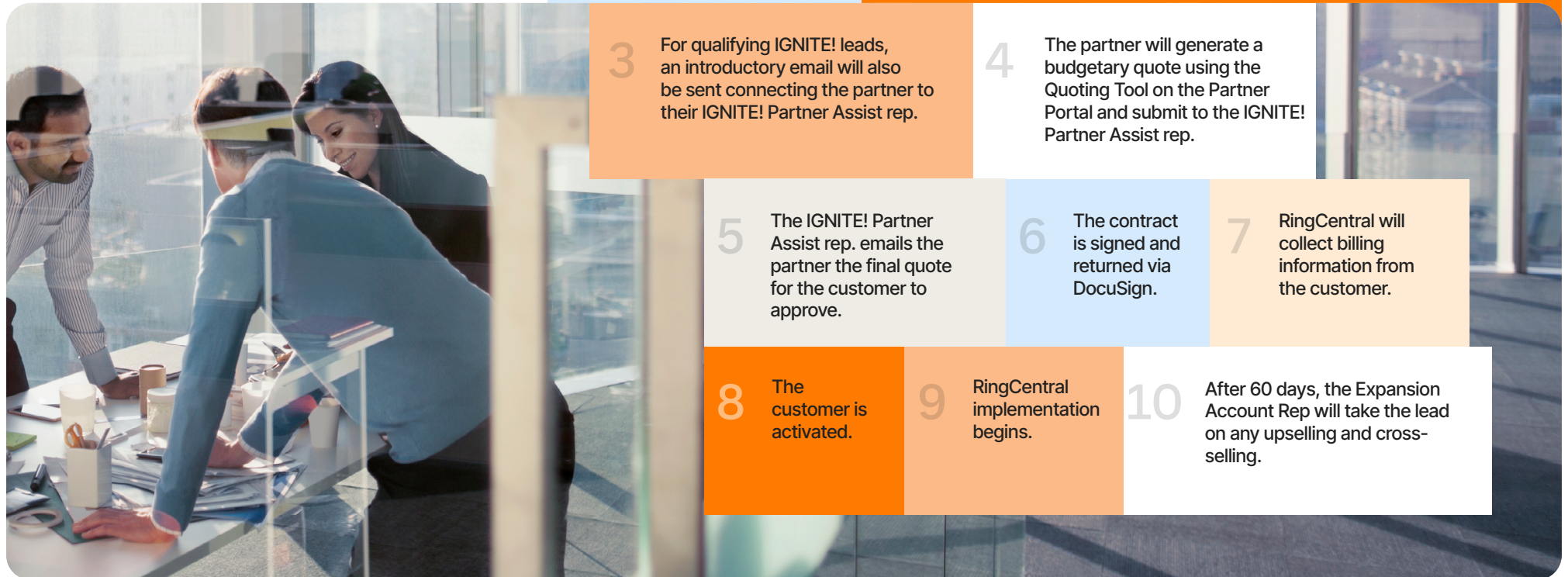
6 The contract is signed and returned via DocuSign.

7 RingCentral will collect billing information from the customer.

8 The customer is activated.

9 RingCentral implementation begins.

10 After 60 days, the Expansion Account Rep will take the lead on any upselling and cross-selling.



RingCentral Reach Resources & Marketing

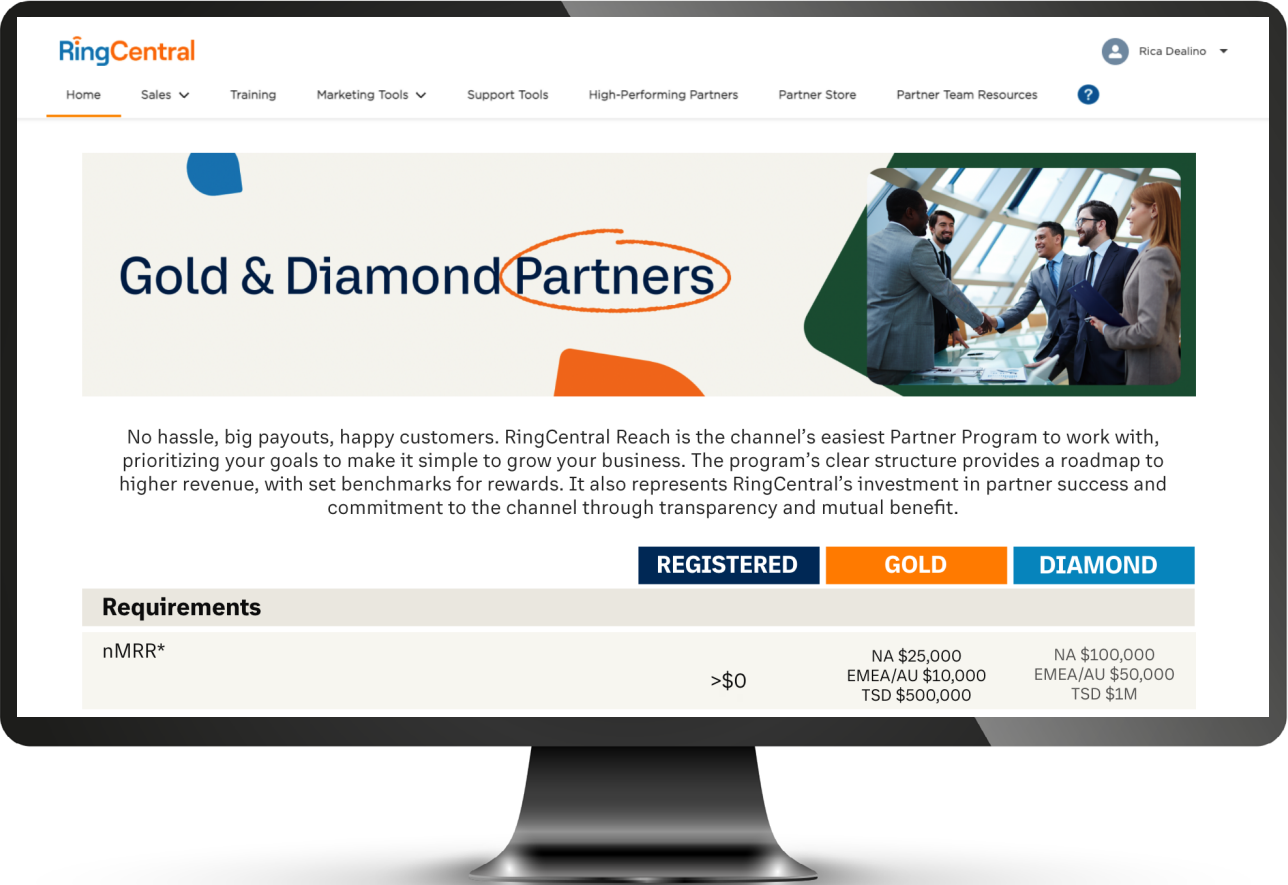
RingCentral is here to support partners throughout the sales process—not only in helping partners close deals, but to find leads as well.

Partners who leverage RingCentral's no-cost marketing consistently find their sales pipeline full and their business growing. To put RingCentral's marketing resources into action, partners simply need to reach out to their Partner Manager or access the RingCentral Reach Partner Portal for content.



RingCentral Reach Partner Portal

The RingCentral Reach Partner Portal is not only the hub for submitting leads and competitive strategy, but also where partners can access the latest marketing content and sales tools. For marketing needs, the portal should be the first stop for partners. To access the portal, please visit: partners.ringcentral.com



RingCentral Reach Benefits

RingCentral Reach puts success at your fingertips, with all the tools and support you need to run and grow your business.

Every partner gets access to our world-class partner portal and a dedicated channel manager, plus lucrative incentives, strategic webinars, certifications, and marketing assets.

But as your partnership with RingCentral grows, so too do the benefits, helping you earn more as you sell more.

Here's what you can get when you #ReachHigher.

	REGISTERED	GOLD	DIAMOND
Sales Benefits			
President's Club			Performance-based
Partner Roundtable/Partner Advisory Council		Performance-based	Performance-based
Discounted RingCentral MVP Service *		●	●
Dedicated Partner Manager	●	●	●
Channel Harmony and IGNITE!	●	●	●
Partner Promotions	●	●	●
Enablement Benefits			
Discounted Certified Delivery Partner (CDP) Certification			●
Custom Partner Training Sessions		●	●
RingCentral Partner Portal Access	●	●	●
Online Partner Learning Access	●	●	●
Marketing Benefits			
Dedicated Channel Marketing Support			●
Marketing Funds (Proposal Based)		●	●
Marketing Acceleration Services	●		
Regional Partner Events and Webinars	●	●	●
Partner Marketing Content and Assets	●	●	●
RingCentral Partner Badge	●	●	●
Support Benefits			
Partner Manager Sales Assist	●	●	●
Partner Support Helpdesk (Post-Sales)	●	●	●

Partner Marketing Content & Assets

RingCentral puts world-class marketing content in the hands of our partners via the RingCentral Reach Partner Portal. These types of content include:

- Campaigns-in-a-Box
- Why RingCentral? Pitch Decks
- Customer Case Studies



Campaigns-in-a-Box

Campaigns in a box are pre-packaged content that partners can use to launch their own email and social campaigns. Partners will find PBX-to-Cloud campaigns, CCaaS campaigns, campaigns for current Mitel or Microsoft Teams customers—content for any type of prospect the partner might want to target.



Why RingCentral? Partner Pitch Deck

RingCentral always keeps its Partner Pitch Deck up to date with the latest messaging and stats available. We've also created slides for every scenario and possibility, allowing partners to customize their pitch to win the deal.



Customer Case Studies

Sometimes it helps to have partner-specific case studies to help partners make their case to customers. RingCentral has partner case studies for every product, situation, and vertical.

Partner Training & Sales Certifications

RingCentral hosts a multitude of partner events and webinars to help partners upgrade their skills, learn more about the product solutions, and how to generate more leads. With partner events, webinars, and certifications, the partner can always count on RingCentral to help them stay on top of their game.



Partner Training: Webinars & Certifications

RingCentral offers multiple live webinars each quarter, where partners can learn more about issues and strategies to own the UCaaS and CCaaS conversation. [See our current schedule here.](#)

In addition, we offer the following technical trainings, which you can [sign up for here.](#)



RingCentral Sales Professional Certification

The RingCentral Sales Professional Certification is an introduction to selling RingCentral, including how the Channel Harmony model works, as well as how to demo and position RingCentral products.



Contact Center Certification

The RingCentral Contact Center Certification is an in-depth look at RingCentral's Contact Center solutions, including RingCentral Engage Digital and RingCentral Engage Voice.



Certified Delivery

For partners looking to lead the implementation process on their own, they can do so by completing RingCentral's Certified Delivery Program. This certification dives deep into the technical aspects of implementing and maintaining RingCentral's solutions. To learn more about Certified Delivery, contact your Partner Manager directly.



RingCentral Admin Certification

The RingCentral Admin Certification teaches partners the technical skills needed to implement and administer RingCentral products.



IGNITE! Certification

Partners are highly encouraged to complete this certification to learn more about the IGNITE! sales process and how to effectively demonstrate RingCentral products. The course takes about 90 minutes.



Partner Sales Engineer Certified Course 101 & 102

Gain specialized technical knowledge of RingCentral's network capabilities and different tools available in the RingCentral Service Web to help analyze customer needs.



Marketing Certification

The Partner Marketing Certification teaches partners how to utilize all of RingCentral's marketing content assets and programs.

Contact Directory

Resource	Email / Webpage	Phone
Partner Support	partners@ringcentral.com	(800) 595-8110
Customer Service	support.ringcentral.com	(888) 528-7464

IGNITE! Partner Assist Desk	Email	Phone	
US/CAN	partners.sales@ringcentral.com	1 (800) 595-8110	Option 7
UK	partners.sales.uk@ringcentral.com	0800 024 6777	Option 6
FR	partners.sales.fr@ringcentral.com	0800 909 006	Option 6
AU	partners.sales.au@ringcentral.com	1800 291 050	Option 6