

One Team, One Dream (OTOD) - All Hands on Deck!

Demand Generation Referral Program: FAQs & Terms

About One Team, One Dream Referral Program

We're cruising fast to our collective next milestone of # \$100million ARR. As we race towards the finish line to achieve our numbers in FY22, it's time to have all hands on deck to acquire new customers.

CleverTap is giving every CT'zen the opportunity to contribute to acquiring new customers by participating in the One Team, One Dream referral program. As a token of our appreciation, all qualified leads that convert into opportunities will receive gift vouchers. What's more, every opportunity that converts into revenue by 30th June 2023 will be eligible for additional incentives (Vouchers and incentive details are described in the subsequent sections).

Here's How It Works:

1. Speak to your professional network about CleverTap and the offerings/value we create for our customers. (Marketing team will help you with draft email / or WhatsApp messages for the same.)
2. Refer companies and contacts from your network that match our target audience. You can go through Sunil's note to understand CleverTap's ideal customer profile (ICP) [here](#).
3. Brief description of our ICP - Digital-Native, Business-to-Consumer (B2C) businesses with a mobile app and/or website as its main GTM channels.
4. Ideally, your contact should be at least an influencer within the company, if not the decision maker. If the contact person referred is from leadership positions (e.g., Founder/Co-Founder, Promoter, Chairman, MD, CEO, CXO, Sr. Vice President, Vice President, Sr. Director, Director etc.), we consider them to be decision makers/influencers.
5. Referrals that belong to our ICP but are not in leadership positions will be nurtured by the Inbound Marketing team. Our team will try to set up a demo with decision-makers through the help of the referral contact provided by the CTzen.
6. If your contact is demo-ready and willing to speak to sales, visit this page and fill out the form on behalf of your contact. Please ensure you enter your CleverTap email address correctly in the form in order to help us keep a track of your referrals and the progress of the leads referred by you.
7. Post submission of the lead, you will receive an intimation email on whether your lead has cleared the first round of screening.

8. You may then connect with the respective CleverTap account executive (who will be copied on the email you received) and your contact in the prospect organization to schedule a demo call. The CleverTap account executive will take over the process thereafter and progress the lead.
9. Post-demo, the CleverTap account executive will either qualify the lead as an opportunity or reject the lead if he/she does not see a potential closure in the account for the next 12 months.
10. If your lead is qualified as an opportunity by 31 December 2022, you will win a \$50 Amazon Gift Voucher.
11. If the opportunity turns into revenue (we win the deal) by 31 June 2023, you win a revenue incentive as outlined in the Rewards section.
12. The assigned CleverTap account executive will keep you posted on the progress of the lead and will reach out to you if need be.
13. You can keep a track of your own and your team rank on the One Team One Dream leadership board. Keep referring and help your team reach its goal. For all lead-related queries, you can reach out to Tanmay Yagnik . For all OTOD program-related queries, please reach out to Jayant Kshirsagar.

Eligibility

1. Leads only from new prospects (excludes churn / debooking in the past 12 months) are eligible for the contest. Upsell and Cross Sale Leads from existing customers are not eligible.
2. Offerings - All offerings, including C4S, are included in the program
3. All CleverTap employees, including contract employees and interns, are eligible to participate
4. Company Leadership members are not eligible for any referral incentives (vouchers/revenue incentives)
5. The sales organization is only eligible for referral vouchers for opportunities. They are not eligible for revenue-related incentives under the OTOD program. Their ongoing VCP and SPIFF will prevail.

Terms and conditions

1. Only leads entered through the employee referral form will be considered valid entries into the contest. Other forms of lead communication, including emails/phone calls, etc., won't be considered.
2. Existing leads/deals within our CRMs (Hubspot and SFDC) will not qualify for the contest.
3. If the referred contact has attended a CleverTap event/webinar/exhibition/trade show in FY22 prior to receiving the lead under the OTOD program, it will be considered an invalid lead.
4. If an employee referral subsequently participates in marketing activities after the employee submits the lead form, it will be considered a valid lead.
5. Leads from separate legal entities that are not existing CleverTap customers within a group of companies will be considered valid leads, provided they fulfill other lead criteria.
6. All incentives, including vouchers, are subject to income tax and/or any other tax deductions at the source of the respective country.
7. We expect CTzens to submit their own leads. Please do not pass on your leads to anyone, nor should you submit someone else's leads in the contest. We value integrity and request everyone hold themselves to the highest standards of professional behavior. In case anyone passes on someone else's lead, not only will such leads be disqualified, but in appropriate cases, disciplinary actions may be taken.

Rewards

- For every lead converted into an opportunity by Sales - a \$50 gift voucher
- Per \$25K revenue closed - \$2.5K for all deals closed by June 30, 2023. The company should have recognized revenue by 31st Dec. and not just received the order.
- No upper cap

FAQs

1. Define Qualified lead and opportunity for the OTOD program? What's the difference?
 - Qualified Lead - Contact details shared by an employee. The organization is our ICP, and the contact person is from a leadership position.
 - Opportunity - An opportunity is a lead that is qualified by the respective account executive post demo.
2. What should be the designation level of the contact shared?
Please refer to point no. 3 in the 'How it works section above
3. What is ACV?
Annual contract value in USD
4. What will be the incentive if the customer signs a multi-year contract?

Revenue incentive will be calculated only based on first-year ACV recognized by CleverTap by 31 December 2022

5. What if two people provide the same referral?

There are two possibilities in this case.

- Two or more employees refer to the same organization and same contact person: Core team will check which employee has filled up the contact form first. Only the first entry will be qualified as a lead. All other entries will be disqualified
- Two or more employees refer different contacts within the same organization: Chief Growth Officer Mr. Vikrant Chowdhary will decide which contact is higher on the decision-making scale. We will retain the lead, which has a higher possibility of closure. There is a possibility that he may consider involving two or more contacts in the demo. In this case, we will consider all contacts involved in the demo as valid leads. However, revenue incentives will be split equally amongst all eligible employees who referred resp. Contacts. The decision by CGO will be final in this case.

6. What if the referral I have given is an existing lead within Hubspot or Salesforce?

Existing opportunities and SQLs within Hubspot and SFDC will not qualify for the contest.

7. Can I accept \$50 cash instead of a voucher? If yes, Can I get this \$50 added to my monthly salary?

No, this option is not available.

8. Which company/brand does this \$50 gift voucher belong to? (will they be given the choice to choose the voucher)

Amazon Gift Vouchers, unless there is an unforeseen challenge in issuing the same in the future.

9. Do I get a \$50 gift voucher for the lead reference or opportunity?

You will only get the voucher once the opportunity is created in Salesforce.

10. When will I get the \$50 voucher?

You will only receive the voucher once the referred lead is converted into an opportunity in the system. For all leads that get converted into opportunities by 31 December 2022 in SFDC, we will issue gift vouchers in the second week of January 2023. Any lead converted into an opportunity closed after 31 December 2022 will not be eligible for any incentive under this plan

11. Am I restricted to any verticals, or can the reference be from any industry?

Your lead reference can be from any industry as long as the nature of business is as described in ICP (Section 'How it works?', point no. 2 at the beginning of this program guide).

12. How can I track the status of my referral?

For every next step, you will receive an auto-generated email alert. Your name and the number of opportunities you contributed can be seen on the main dashboard on the OTOD program microsite. For any queries related to your leads, please reach out to Tanmay Yadnik at tanmay@clevertap.com

13. What if my lead turns into an opportunity but does not convert into revenue? Do I still get the \$50 gift voucher?

Yes, you are eligible for the gift voucher as long as the referred lead converts into an opportunity. It's fine if it does not convert into an order/revenue by 31 December, 2022

14. What happens if my lead converts into an order in 2023 or thereafter? You will not earn any revenue incentives for leads converting into orders post-December 31, 2022.

15. Is there any process that I have to follow after I have given the referral?

Post lead submission and email confirmation, please reach out to your contact and schedule a demo session at a date and time that is convenient to your contact, you and the respective account owner. Post-demo, the respective account owner will take charge of the follow-up with the prospect.

16. Who do I contact for any queries related to the OTOD program?

Please contact Jayant Kshirsagar, our Sr. Vice President, Marketing for any queries related to this program. He is reachable at Jayant.Kshirsagar@clevertap.com and +919769433522