Xero Asia co-op marketing funding guide



Welcome

Our aim is to help you grow your business by attracting new Xero clients, and providing more value for your existing clients along the way. We may be able to help cover some of the costs of promoting Xero to future clients from our partner marketing fund. This document outlines the steps you'll need to take to gain access to the fund, eligibility criteria, the kind of things we may fund, and how to apply.

Using the Xero brand

When you use the Xero brand on promotional material it reflects on our business as well as yours. Please follow the **Xero partner brand guidelines** when choosing the size, clear space and colour of logos, badges and ribbons; and seek our approval of any use of the Xero logo, partner badge or certification ribbons before you go ahead with the marketing activities. **If you're working with an external vendor for designs, kindly share the partner brand guidelines with them.**

Getting support

This document outlines the eligibility criteria, the kind of things we may fund, and how to apply. However, there are nuances to each claim and we acknowledge each partner has unique needs and ideas to share. Before you proceed with any activity, please reach out to **asia.partner@xero.com** to discuss your activities with us so we can walk you through the process and ensure a smooth claims process.



Steps to access the partner marketing fund

1 Are you a silver, gold or platinum partner interested in applying for the partner marketing fund?

Our partner marketing fund is only applicable for silver and above partners. **Read the guidelines** outlined in this document, as well as our **partner brand guidelines**. It will make getting your application approved much easier.

2 Apply for funding

Once you've planned out your activity, use our **online funding form** to request review and approval of your activity for funding **before you incur any costs and before your campaign goes out to market.**

3 Look out for our email

We'll be in touch within three to five working days to find out more details about your activity before assessing the validity of your application. Then, we will inform you if your application is approved or declined.

4 Complete your activity

The invoicing and fund reimbursement process will only start **after your activity is fully complete.** To verify this, we will ask for you to share relevant materials from your activity as proof of completion.

5 Show us how your activity went!

After your activity has ended, we'll review the relevant materials to verify that it's complete. Once everything is in order, we'll then provide invoicing details for you to prepare and send your invoice to us. **Kindly do not send us an invoice until we have verified that your activity is complete** and shared the invoicing details with you.

6 Get reimbursed

After reimbursement has been processed, **payment can take up to 30 days,** depending on whether or not your company is already set up in our payments system. If your company is not in our payments system, we'll share the relevant onboarding details with you.

Your entitlements to co-marketing as a Xero partner

	PARTNER	BRONZE PARTNER	SILVER PARTNER	GOLD PARTNER	PLATINUM PARTNER
Client events	**Starter**	**Bronze**	**Silver**	**Gold**	**Platinum**
Account manager support Invite your local Xero Account manager to speak at your Xero-focused client events on behalf of your practice.	Invite your local Xero account manager to speak at your Xero-focused client events on behalf of your practice (subject to the availability of your Xero account manager).				
Quarterly event fund Enjoy a contribution from the quarterly event fund to cover the cost of running your own Xero-focused client events such as venue hire and catering.	–	–	Up to US $200 a quarter*		
Other marketing activities					
Co-op marketing fund Apply for dollar-for-dollar marketing fund contribution for Xero-focused marketing activity. **Xero can reimburse 50% of your incurred costs,** up to your fund balance across each financial year.	–	–	Up to US $500 a year^	Up to US $5,000 a year^	Up to US $10,000 a year

Note: The co-op fund cycle follows Xero's financial year, beginning in April of each year and ending in March the following year. Refer to page 5 for further information on end-of-financial-year deadlines.

*Quarterly event funds must be utilised for approved activities happening within the quarter of claim. All unutilised funds will lapse at the end of the quarter and cannot be carried over across quarters.
^Co-op funds must be utilised for approved activities happening within the yearly fund cycle. All unutilised funds will lapse at the end of each fund cycle and cannot be carried over into the next financial year.

End-of-financial-year information

The co-op fund cycle runs according to Xero's financial year from 1 April to 31 March of the following year.

In March of each year, we prepare to close the books on our financial year. Therefore, we require all partners to submit their final invoices early, so that we can process all approved claims in advance of our end-of-financial-year deadlines.

To avoid a rush to meet end-of-financial-year deadlines, we strongly encourage all partners to plan out their marketing activity across each year, and not to claim funds only in March, because **we only process invoices for reimbursement after full activity completion.**

We understand that you have a busy schedule, and we'll try to be flexible where we can. **Getting us involved in your co-op marketing activity as much in advance as possible** also ensures that we can support you in completing your claim on time.

Please use the table to the right as a guideline for our end-of-financial-year claim deadlines.

Feb or earlier	Start involving us in your claim requests as soon as possible, so that you can complete your activity before we start the fund reimbursement processes.
March Week 1	If you are a new Xero partner, or you have not raised a claim with us in some time, your final invoicing deadline for the current fund cycle will be around this period, as we will need time to onboard you to our payments system. **That means your activity needs to be reviewed, approved, and completed by then.** If you are unable to meet this timeline, worry not! We can still process your activity under the next fund cycle.
March Week 2	
March Week 3	The final invoicing deadline for partners who are already onboarded in our payments system will fall around this period. **If you are unsure, contact us early to find out.**
March Week 4/5	Processing period for end of financial year claims. **Any new or outstanding claim requests will be deferred to be included in the next fund cycle.**

What activities are eligible for the partner marketing fund?

Marketing activities covered under the partner marketing fund

The co-op marketing covers approved marketing activities including but not limited to:

- Digital and social, such as Facebook, LinkedIn ads
- Articles created for industry publications, such as newsletters and magazines
- Mass media advertising, such as radio and TV
- Xero partner marketing collateral, such as brochures or Xero partner tee-shirt
- Online website design, limited only to a **Xero-focused landing page** that sits within your corporate website
- Physical events

To qualify for the co-op marketing fund, your marketing activity must:

- Include a Xero partner badge,
- Promote the benefits of Xero, and
- Where possible, include a call to action to visit **www.xero.com**.

Examples of activities we CAN help fund:



Booth backdrop at an event to feature your Xero partner logo



Facebook campaign to promote the use of Xero



Booth design and/or setup at an event that promotes your status as a Xero-certified partner



Exterior office signage that highlights your Xero partner status

REMINDER: Please submit your funding request first and share the details of your upcoming marketing activity for review and approval before you proceed with your activity and before any costs are incurred.

What activities are not eligible for the partner marketing fund?

Marketing activities that will NOT be funded by the partner marketing fund

- Any activity that has not gone through the stipulated co-op fund process as outlined on page 3 of this document
- Any activity that is not targeted at the development of Asian clients
- Search engine optimisation (SEO) and search engine marketing (SEM/Google AdWords) campaigns
- Generic branding or advertising that doesn't specifically reference Xero
- Any activity (including but not limited to advertising, marketing collaterals, exhibition booth) that offers services not specifically from Xero
- Conferences that Xero is already sponsoring
- Anything that mentions or promotes other accounting software providers
- Business-as-usual items like business cards, stationery and work uniforms
- Drinks with colleagues and office parties
- Telemarketing or the purchase of prospect lists
- Online business directory listings, including yellow or white pages business listings
- Accommodation and travel to and from events
- Sports branding, such as race cars, yachts, and uniforms
- Sponsorship of local sports teams, athletes and events
- Sponsorship of charity initiatives or events

If in doubt, you can feel free to check in with your Xero account manager or email us at **asia.partner@xero.com**

FAQ

- **Who is eligible for partner marketing funds?**
  Xero silver, gold and platinum partners **in Asia**, and are **intending to use the fund for activities targeting Asian clients** are eligible for the partner marketing fund. Learn more about the Xero partner programme and its benefits on www.xero.com/partner-programme.
- **What am I entitled to if I meet the eligibility criteria?**
  Xero silver partners can claim up to US$500 per annum for approved marketing activities plus US $200 per quarter for approved events only.

  Xero gold partners can claim up to US$5,000 per annum for approved marketing activities plus US $200 per quarter for approved events only.

  Xero platinum partners can claim up to US$10,000 per annum for approved marketing activities plus US$200 per quarter for approved events only.
- **What is the difference between the quarterly event fund and the annual marketing fund?**
  The event fund covers only the costs incurred in relation to an approved event activity. 50% of your total incurred costs are first calculated for your claim under the co-op fund. Any remaining balance not covered by the co-op fund can then be claimed, up to the event fund limit of US$200 per quarter.
- **How do I apply for the partner marketing fund?**
  Simply **fill in the application form here** and someone from our team will be in touch within three to five business days to assess the validity of your claim.
- **What happens if I've already completed my activity and I did not know or forgot about submitting my claim for approval?**
  We'll review your claim on a case-by-case basis, and may grant a one-time exception to process the claim, but note that if the proper processes and guidelines are repeatedly ignored, we reserve the right to decline your claim request.
- **How much involvement will Xero have in activities that are eligible for the partner marketing fund?**
  Our role in co-op marketing consists of providing approvals, advice, funding, and/or sharing information that we can easily access. The partner marketing fund serves to enable partner-led activities, and each partner should take full responsibility to plan, execute and complete all activities utilising the fund. Specific to events, we are happy to consider your request for a Xero representative to be present, subject to availability.

Get in touch

If you can't find the answers you need here,please contact your Xero account manager or email **asia.partner@xero.com**

The legal stuff

Staying within the law

All advertisements must comply with applicable laws and it is the partner's responsibility to ensure that all activities comply with these laws. Advertisements must not breach another person's copyright or other intellectual property rights.

Promoting Xero

Any marketing activity that promotes Xero, or is funded in part or whole by Xero, needs to be Xero-specific and cannot mention other accounting software products. Your Xero partner badge must appear in all activities and needs to follow our **partner brand guidelines.**

Your legal liability

Approval of an activity by Xero does not imply acknowledgment of legal compliance. If Xero is liable because of any unlawful partner marketing activities, the partner must indemnify Xero for all costs.

Your responsibilities

You must ensure that any activities:

- do not bring Xero into disrepute
- are not misleading or deceptive in any way

Funding subject to review

The partner marketing fund is subject to review by Xero and may be withdrawn or amended at any time without notice.


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