

# KnowBe4 Partner Program



Partnering with the leader and  
fastest-growing vendor in the security  
awareness training market

## Table of Contents

<b>Open the Door to New Opportunities</b>	2
<b>Why Partner With KnowBe4</b>	4
<b>Program Benefits</b>	5
<b>Program Requirements</b>	5
<b>Description of Margin Benefits</b>	6
Net New (Deal Registration)	6
Engaged	6
Passthroughs	6
<b>Description of Program Requirements</b>	6
Annual Net-New Revenue	6
Annual Renewal Percentage	6
Sales Certifications	7
Core Support	7
<b>Deal Registration</b>	7
Overview	7
Eligibility	7
Criteria	8
Approval Status Notifications	9
Summary of Timelines	10
<b>Renewals</b>	10
<b>Program Levels</b>	11
<b>Program Changes, Reservation of Rights and Termination</b>	11

# Why Partner With KnowBe4



## Best-in-Class

Provide your customers with the world's largest library of security awareness training content and fully automated simulated phishing attacks with thousands of templates.



## Easy

Offer products that are easy to sell, understand, install and support—with quick adoption and short ramp-up. We support you at every step of the process.



## Revenue Expansion

Create additional sales by cross-selling, upselling and adding renewals into your existing customer base. Open the door to new opportunities and expand your business.



## Trust-Building

Help to create your customers' human firewall and dramatically reduce their attack surface. Build confidence and become your customers' trusted advisor.

## Greenfield Market with Immense Opportunity



## A Majority

of data breaches are caused by attacks on the human layer



## \$23B

security awareness market globally

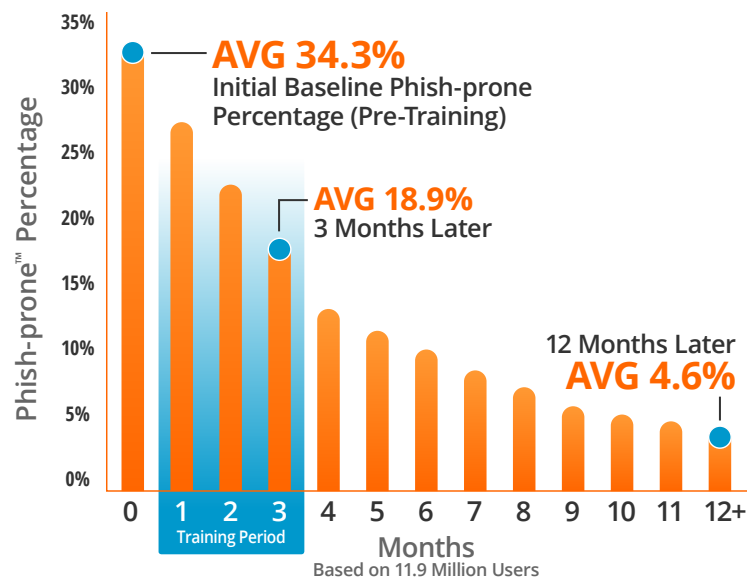


## 65,000+

organizations using KnowBe4 to mobilize their end users as their last line of defense

## The KnowBe4 System Really Works

Immediately reduce your customers' risk and show ROI



Source: 2024 KnowBe4 Phishing by Industry Benchmarking Report\*

**The fact that KnowBe4 can help us convey risk to a client makes ProTech more valuable to our clients.**

**...KnowBe4 is the glue for so much of our clients' security success.**

– Brian Baird, Director of Security Services, ProTech Systems Group, Inc.

\*Note: The initial Phish-prone Percentage is calculated on the basis of all users evaluated. These users had not received any training with the KnowBe4 console prior to the evaluation. Subsequent time periods reflect Phish-prone Percentages for the subset of users who received training with the KnowBe4 console.

## Program Benefits

MARGIN BENEFITS	RESELLERS	VALUE-ADDED RESELLER	
	AUTHORIZED	CERTIFIED	PREMIER
Net New (Deal Registration)	20%	25%	30%
Engaged	10%	10%	10%

KEY BENEFITS	AUTHORIZED	CERTIFIED	PREMIER
Deal Registration	✓	✓	✓
Partner Sales Training	✓	✓	✓
Partner Logo Usage	✓	✓	✓
Partner Portal Access	✓	✓	✓
Sales Enablement Tools	✓	✓	✓
Marketing Resources	✓	✓	✓
Ready-to-Launch Campaigns	✓	✓	✓
Customer Success Manager	✓	✓	✓
Focused Partner Manager		✓	Dedicated
<a href="#">KnowBe4 Partner Directory</a> Listing		✓	✓
Eligible to Apply for Joint Marketing Program Funds		✓	✓
Customized Campaigns			✓

## Program Requirements

REQUIREMENTS	AUTHORIZED	CERTIFIED	PREMIER
Annual Net-New Revenue	Up to \$24,999	\$25,000-\$49,999	\$50,000+
Annual Renewal Percentage	-	82%+	82%+
Sales Certifications	-	5 sales staff	10 sales staff
Core Support	-	Yes	Yes

# Description of Margin Benefits

We believe in rewarding everyone, both internal and external, for putting in the work and getting results. Our partner program does just that—partners who have done the work are rewarded with high margins for closing deals. The following provides more information on the different types of deals and margins associated with each.

## Net New (Deal Registration)

Partners receive their maximum margin based on their program level when they register net-new deals to KnowBe4 and continue to help close the deal. By registering deals, the deal-registered partner receives a competitive edge in pricing, providing the best chance to close the deal to the partner who initiated the deal.

## Engaged

Partners will receive an engaged margin when a deal has already been registered to another entity. The engaged partner will have the opportunity to quote the deal at the engaged margin amount to compete for the deal.

## Passthroughs

Certain partners may be eligible to receive passthrough opportunities from KnowBe4. A passthrough is an opportunity that KnowBe4 has been working with and the end user requests to purchase through a partner. All passthroughs receive a 10% margin.

# Description of Program Requirements

Our goal is to help you succeed, because as partners, we are in this together. When you succeed, we all succeed. And we know what it takes to get you there, which is why we support you with training to enable you, customer success managers to help you onboard your customers, tech support to answer your technical questions, and more. Our program requirements were developed to help you accelerate your KnowBe4 business and ramp up quickly to become a Certified or Premier partner.

## Annual Net-New Revenue

Annual net-new revenue is one of the requirements to achieve certain program levels. Net-new revenue is measured by the total amount of approved registered deals that have been won by the partner. This is calculated on a yearly basis.

## Annual Renewal Percentage

The annual renewal percentage is based on the number of renewals the partner wins each year. The number of renewal opportunities won divided by the total available renewal opportunities will calculate the renewal percentage (*for example, the partner had a total of 10 renewals and 9 were won, the partner's renewal rate is 90%*). The annual renewal percentage is one of the requirements to achieve Certified or Premier level.

## Sales Certifications

Certified and Premier partners are required to have a designated number of sales staff certified as a KnowBe4 Sales Evangelist (Training Series Part 1 & Part 2) and KnowBe4 Sales Specialist. If your organization does not employ the designated number of sales staff required, KnowBe4 will work with you to certify other staff in your organization. The KnowBe4 Sales Evangelist and Sales Specialist trainings are available in the partner portal.

## Core Support

Partners at the Certified or Premier level in the KnowBe4 Partner Program are required to provide core support to their customers for KnowBe4 products. Core support includes answering technical questions about subscription services, assisting customers with setup and configuration, and utilizing KnowBe4 documentation to provide accurate and timely information to customers. When additional support is needed, partners can submit a ticket to KnowBe4 Support or their KnowBe4 Customer Success Manager.

## Deal Registration

### Overview

At KnowBe4, we appreciate our partners and take pride in building a relationship with you based on trust and transparency, just as we do with our own employees. We believe in rewarding everyone, both internal and external, for putting in the work and getting results. Our new deal registration program strives to ensure transparency and is intended to reward those who do the work.

With deal registration, partners are rewarded for generating net-new opportunities and for the value partners bring in closing the deal, providing financial benefits to afford partners to have a meaningful, competitive edge. To do this, partners must meet the guidelines and timelines outlined in the following to receive and maintain approval on deal registration, ensuring total transparency while working collaboratively with your KnowBe4 partner manager to delight your customers.

Partners with an approved deal registration that continue to meet the requirements will receive their maximum margin based on their program level. If a deal is not registered, partners will receive a 10% engaged margin. Any additional partners quoting on an approved deal registration will receive a 10% engaged margin. This is designed to ensure everyone can engage with all prospects and provide a fair market and customer choice, while enabling the partner who put in the majority of the effort to receive the best margin.

### Eligibility

We want to reward all reseller partners for their efforts. That's why Authorized, Certified and Premier reseller partners are all eligible for deal registration. Deals that are eligible for registration include:

- Those who are not already engaged with another entity
- Deals registered prior to a Request for Information (RFI) / Request for Proposal (RFP) / Request for Quote (RFQ) going public

All deals must be submitted through the KnowBe4 Partner Portal to qualify for deal registration. Access the new, easy-to-use partner portal at [www.knowbe4.com/partner-portal](http://www.knowbe4.com/partner-portal).



## Criteria

At KnowBe4, we know what it takes to succeed in closing deals, and we've outlined the criteria below to make it easier for you and to provide you with our recommended best practices to help you win the deal quickly.

Deal registration is valid for 90 days from the time that the deal registration is approved. In order to receive and maintain approval on deal registration, specific criteria must be provided at the time the deal registration is submitted, following through the close of the deal.

- **At time of deal registration submission:** The following information is required at the time the deal is registered:
  - All end-user details as noted in the deal registration form
  - The minimum number of users per product is:
    - KnowBe4 Security Awareness Training: 25
    - PhishER: 101
    - SecurityCoach: 101
    - Compliance Plus: 101
  - The product(s) for the deal registration
  - At least 3 of the following 5 Opportunity Details when registering the deal:
    - Is budget approved for this deal?
    - What is the expected close date?
    - Who are the key decision makers/stakeholders involved with the end user?
    - What is the reason/need for the product?
    - Has a demo been scheduled or can it be scheduled within the next 14 days?
- **Within 14 days of deal registration conditionally approved status:** Partners have 14 days to get the demo scheduled once the deal has been conditionally approved. Once the demo scheduled date has been confirmed, the partner must update the deal registration in the portal with the demo scheduled date and any other updates applicable. The demo must be conducted within 30 days to keep the deal registration moving forward and the quote sent to the end user.
- **Within 30 days of deal registration approved status:**
  - All 5 Opportunity Details must be completed with valid information. Valid information includes:
    - Confirmation that budget has been approved
    - Expected close date within the 90-day deal registration time frame
    - Names and titles of the key decision makers/stakeholders
    - The reason for the product
    - Demo completed date
  - Provide updates and forward movement on procurement, legal, and/or approval process. These updates must be provided through the Partner Tasks in the deal registration in the partner portal.

- **Within 60 days of deal registration approved status:**
  - Provide updates and forward movement on procurement, legal, and/or approval process. These updates must be provided through the Partner Tasks in the deal registration in the partner portal.
- **Extending beyond deal registration 90-day approval:**
  - If the partner is requesting to extend beyond the 90-day approved deal registration, the following criteria must be provided:
    - To extend beyond 90 days (30-day extension):
      - Confirm that the deal is going to RFI/RFP/RFQ
      - Confirm that the deal is stuck in legal and/or approval process
    - To extend beyond 120 days (an additional 30 days):
      - Confirm that the deal continues through the RFI/RFP/RFQ process, OR
      - Provide updates on where the deal is within the legal and/or approval process
- Partners must provide the above points in the appropriate amount of time to keep deal registration approval. If the partner does not meet these timelines, the partner may lose the deal registration.
- Deals registered prior to a Request for Information (RFI) / Request for Proposal (RFP) / Request for Quote (RFQ): Partners must register deals prior to an RFI/RFP/RFQ being made public. If a deal registration is submitted after an RFP/RFQ/RFI has gone public, the deal may be denied.
- Partners may be required to provide certification of or evidence of the above.

## Approval Status Notifications

We want to make sure you are informed at every step of the approval process, and we aim to confirm the deal within 1-2 business days. Partners may receive the following notifications based on the status of their deal registration:

- **Conditionally Approved:** *Conditionally Approved* status is the beginning of the approval process for deal registration. Deals will be conditionally approved if the deal is not already engaged with another entity AND all end-user information has been provided, including the product registered, plus at least 3 out of the 5 Opportunity Details provided with valid information. From the conditionally approved date, the partner will have 14 days to get the demo scheduled. The demo must be conducted within 30 days. *Please note: If the partner receives conditionally approved status but has not yet provided 3 out of the 5 Opportunity Details in the deal registration, the partner will have 24 hours to enter this information through the portal. At the end of 24 hours, if 3 out of 5 Opportunity Details have not been provided, the deal registration will be denied.*
- **Approved:** Deals will be *approved* once the demo has been conducted and the end user quote is sent. The partner must have provided all end user details, product registered, plus 3 out of the 5 Opportunity Details as noted in the above requirements. To keep the deal registration approval, partners must continue working the deal as designated by the timelines noted below.
- **Denied:** Deals will be *denied* when not enough information has been provided as per the requirements above or the deal is already engaged with another entity. The partner manager will be in touch to help guide the partner through why it was denied. Deals may be denied for other legitimate reasons, such as legal, financial, business, or compliance reasons. Clearly, this is not something that we take lightly, and we hate being the bearer of bad news.



## Summary of Timelines

At KnowBe4, our average sales cycles are short, and we want to help you close the deal quickly. That's why we've implemented the specific timelines outlined below for deal registration.

- Deal registration is valid for 90 days from the **approved** date.
- For deals that have been **conditionally approved**, the partner will have 14 days from the initial conditionally approved date to schedule a demo, and conduct the demo within 30 days. Once the deal registration is confirmed with final **approved** status, the following timelines will go into effect:
  - **Within 30 days:**
    - The quote sent to the end user
    - All 5 Opportunity Details must be completed with valid information
    - Provide updates and forward movement on procurement, legal, and/or approval process
  - **Within 60 days:**
    - Provide updates and forward movement on procurement, legal, and/or approval process
  - **To extend beyond 90 days (30-day extension):**
    - Provide updates that the deal is going to RFI/RFP/RFQ
    - Provide updates that the deal is stuck in legal and/or approval process
  - **To extend beyond 120 days (an additional 30 days):**
    - Provide updates that the deal is in the RFI/RFP/RFQ process
    - Provide updates that the deal is stuck in legal and/or approval process
- Partners must provide the above points in the appropriate amount of time to keep deal registration approval. If the partner does not meet these timelines, the partner may lose the deal registration.

## Renewals

We consistently see high renewal rates, and expect to see this from our partners. We provide generous margins when you renew your customers. We provide first-class support from a dedicated channel customer success manager (CSM), your go-to contact for onboarding and working with you and your customers to set them up for continued success with the KnowBe4 platform. When you stay engaged with your CSM and your customers, your customers will be happy campers and will hopefully continue to renew. Below are guidelines and our recommended best practices to keep your customers renewing.

**Renewal Margin:** The renewal margin is the same margin that was received on the original purchase order when the price is the same or higher than the original purchase and a partner holds the Preferred Partner Status as defined below (Example: If a partner wins a \$10,000 deal at 25%, they will also receive 25% on the renewal if the deal renews at \$10,000 or more and they hold Preferred Partner Status). If the renewal price is lower, the partner will take a reduced margin to share the decrease. If Preferred Partner Status is not held, the renewal margin is 10%.

**Renewal of Existing KnowBe4 Customers:** If a partner is quoting an existing KnowBe4 customer, the opportunity will be considered a passthrough at a 10% margin to the partner.

**Preferred Partner Status:** Partners are given preferred partner status when they meet the following requirements:

- Maintain an 82%+ annual renewal rate
- Actively communicates with their CSM on status of renewal opportunities
- Have a history of supporting their customers by helping to:
  - Onboard customers (50% of users imported and one campaign launched)
  - Ensure customers have been *fully active* for 3 consecutive months (Fully active means a monthly phishing and training campaign as well as a monthly admin login)
  - Ensure customers are actively communicating with their CSM a minimum of once a month

## Program Levels

KnowBe4 partner program levels are evaluated on a quarterly basis. If all requirements of a higher level are met prior to the review process, partners may be eligible to advance to that level immediately. The partner should contact their partner manager to determine if they are eligible to advance. Additionally, KnowBe4 may accelerate any partners that may not have achieved all the requirements, but have demonstrated a level of commitment and success that justifies their advancement within the program.

Partners may be moved to a lower level in the program if they have not been able to maintain the requirements of their current program level or have not demonstrated a level of commitment and success that justifies their advancement within the program.

As partners move up or down in the program, any changes in partner margin will be effective on net-new deal registrations following the partner level change date.

## Program Changes, Reservation of Rights and Termination

KnowBe4 reserves the right to alter or discontinue the KnowBe4 Partner Program at any time, including this Program Guide, and without limitation any conditions, requirements or benefits contained herein. All such changes shall be effective immediately. Any notice provided by KnowBe4 about changes to the Partner Program will be furnished via the Partner Portal. We encourage you to review these terms from time to time in order to stay up-to-date on any changes. If you disagree with any change or modification, you may terminate your participation in the program.

Additionally, KnowBe4 reserves the right to suspend or terminate a partner's status or participation in the program if the partner does not maintain their good standing in the program, or fails to comply with KnowBe4 policies, including the [Partner Code of Conduct](#). Each partner is required to have a valid agreement in place with KnowBe4, Inc. and/or one of its affiliates, in order to participate in the partner program.

# Thank you for your partnership!



## About KnowBe4

KnowBe4 is the world's largest integrated Security Awareness Training and Simulated Phishing platform. Realizing that the human element of security was being seriously neglected, KnowBe4 was created to help organizations manage the problem of social engineering through a comprehensive new-school awareness training approach.

This method integrates baseline testing using real-world mock attacks, engaging interactive training, continuous assessment through simulated phishing, and vishing attacks and enterprise-strength reporting, to build a more resilient organization with security top of mind.

Tens of thousands of organizations worldwide use KnowBe4's platform across all industries, including highly regulated fields such as finance, healthcare, energy, government and insurance to mobilize their end users as a last line of defense and enable them to make better security decisions.

**For more info, please visit**  
**[www.KnowBe4.com/Partners](http://www.KnowBe4.com/Partners)**