



## IT Nation Evolve Policy Guide (See also ITN Evolve Membership Agreement.)

### Overview

All IT Nation Evolve Members shall operate their companies and themselves in a manner consistent with the vision, purpose, mission, and values of IT Nation Evolve. IT Nation Evolve Members will conduct themselves with a focus on “Business and personal growth driven by execution through accountability.”

<b>Vision</b>	To connect leaders by fostering authentic relationships and opportunities for sharing.  We will become the leading framework for peer interaction, personal growth and professional development as we equip and inspire you to make a difference.
<b>Mission</b>	To Create Experiences that Ignite Customer Success
<b>Values</b>	<ul style="list-style-type: none"><li>• Drive Partner Success</li><li>• Make a Difference</li><li>• Perform as a Team</li><li>• Take Pride in Your Work</li><li>• Own the Outcome</li><li>• Innovate Everywhere</li></ul>

### Member and Solution Partner Participation Norms

Participation. For a peer group to work, you must be present, and you must participate in good faith in the discussions, programs, and activities. Primary Member Attendees (as identified in the Membership Agreement) shall be named and must plan to attend and participate in peer group meetings and other group activities. In the event these individuals are unable to attend, consistent with applicable group plans, an appointed management level representative of the Member shall attend and participate. Additional attendees are welcome to attend and can be determined by topics and needs. Solution Partner representatives are considered members of IT Nation Evolve and are subject to the norms set forth herein.

You are expected to complete the 4 Plans: legacy, life, leadership, and business. You are expected to set and achieve goals aligned with your business, leadership, legacy and life plans. You are encouraged to engage in member-Solution Partner planning activities.

You are expected to intentionally mentor your peers and openly share best practices and accurate financial information.

Timely Response. Members are expected to timely respond to communication within the group and from IT Nation Evolve. It is expected that phone calls and emails will be acknowledged within 24-48 hours. In areas of service or technical support, the response time needs to be same day if possible.



**Confidentiality.** The spirit of sharing in IT Nation Evolve is founded on and protected by a sense of confidentiality within the peer group. Subject to the IT Nation Evolve Membership Agreement, what you and other Members present and divulge in the peer group should remain in the peer group. (View agreement at <https://hub.connectwise.com/communities-list/about/agreements>.)

**Specific Group Plans.** Your peer group may have a Group Plan which contains additional expectations and participation norms beyond the Membership Agreement and this Policy Guide. Your Group Plan is binding on you as a member in good standing. Failure to comply with that Group Plan may cause you to become the subject to a Member Improvement Plan. (View Member Improvement Plan at <https://hub.connectwise.com/communities-list/about/agreements>.)

**Professional Behavior.** IT Nation Evolve Members shall behave in a respectful, professional, and law-abiding manner at all times during their Membership.

**Member Improvement Plan (MIP).** In the event you fail to meet the participation or behavior norms or your specific group plan, you may, at the discretion of IT Nation Evolve or your Facilitator, be subject to a Member Improvement Plan. The Member Improvement Plan will include specific intervention and remediation guidelines for your improvement. Failure to comply with the Member Improvement Plan may lead to your removal from IT Nation Evolve. (View MIP at <https://hub.connectwise.com/communities-list/about/agreements>.)

**Marketing within IT Nation Evolve.** IT Nation Evolve is a peer group supported by IT channel Solution Partners. Relationships and clarity have value and are important for creating a healthy peer community. To avoid confusion and maintain the peer community health, IT Nation Evolve has developed ways for Members to promote their products and services to the other members in a specific group or the Membership-at-large during IT Nation Evolve meetings or through other IT Nation Evolve channels. Only upon obtaining prior written approval of IT Nation Evolve or participating in applicable IT Nation Evolve Solution Partner, sponsor, or consultant programs are you authorized to do so.

**Surveys.** Member shall complete and update the online Member profile survey at least annually. Member shall also participate in periodic surveys as requested by IT Nation Evolve.

**Employee Solicitation.** The targeted, proactive recruiting of employees of other IT Nation Evolve Members outside Member's Peer Group should not occur and is not aligned with the values of IT Nation Evolve

**HUB Online Community Code of Conduct.** There is a Code of Conduct for use of the online community called the IT Nation Evolve HUB. This applies to you. You are expected to comply with it; failure to do so may subject you to a Member Improvement Plan or removal from IT Nation Evolve.

**Payments and Fees** – Payment information by check or ACH may be requested by emailing [evovlemember@connectwise.com](mailto:evovlemember@connectwise.com).

**Non-participation Fees.**

Non-participation fees applicable to Service Leadership Benchmarking Services and SLIQ for Evolve 2 & 3 group members:

1. Service Leadership Benchmarking Index Service and SLIQ. Due to program expenses incurred by IT Nation Evolve, if you fail to participate, you may be billed the applicable non-participation



fee each quarter you fail to participate. This fee is to encourage your participation and to reimburse IT Nation Evolve for its expenses including payment to Service Leadership.

2. **Meeting Attendance.** Active participation is critical for the group to be effective. The applicable non-participation fee will be assessed to companies that do not prepare for or attend the quarterly meetings. This is in addition to the Membership fee which will still apply. The assessment of the non-participation fee is determined by facilitators and may be waived due to personal circumstances.

## **Group Meetings**

**Recruiting.** IT Nation Evolve will use its best efforts to fill each group with the IT Nation Evolve program target number.

IT Nation Evolve publishes a list of prospective members in regularly scheduled communications. Members have 48 hours to provide written feedback on any objections they may have to the prospects under consideration.

**Group Member Placement.** No New Members will be placed in a specific peer group (Evolve1, Evolve2, and Evolve 3) if there is an existing Member with a primary market actively serving that area without the potentially conflicting Members agreeing that no market conflict exists.

Other factors IT Nation Evolve considers in placing member into a group include the pool of applicants, member attributes, peer group culture and fit, specific peer group plans, and input from facilitators.

**Logistics.** Group meeting dates and logistics are set and planned by IT Nation Evolve. You are expected to reserve a guest room in the IT Nation Evolve contracted hotel.

**Removal.** A Member who fails to satisfactorily work through the Membership Improvement Plan can be removed from the group. This can lead to termination of the Member Agreement and complete removal from IT Nation Evolve. Decisions regarding Member removal are made by IT Nation Evolve and are final.

## **Solution Partner Relationships**

Solution Partners are an important part of the IT Nation Evolve community and their sponsorships provide a significant portion of the IT Nation Evolve operating expenses. As such, you are expected to act in good faith in building mutually beneficial business relationships and to participate fully in all Solution Partner presentations and interactions such as:

- Lunch and Learns
- Content Sessions
- Group dinners
- Happy hours and Welcome Receptions
- Community Day activities
- Solution Partner exhibit halls
- Other Solution Partner interactions that build the relationship

It is not acceptable behavior to leave the meetings, focus on distractions such as email, or engage in other things that detract from engaging with the Solution Partners.



Although IT Nation Evolve or individual IT Nation Evolve peer groups may negotiate special IT Nation Evolve pricing from Solution Partners, you have no obligation to make purchases of the Solution Partner products or services. Purchasing will be the responsibility of the Members.