

Welcome to Know Your IBM



## Introduction

**KYI is a global offering designed to reward Business Partner Sales and Technical staff for building skills and selling eligible Hardware and Software products.**

We are delighted to share this interactive PDF to help you navigate the Offering.

### How to use this interactive PDF:

1

Navigate using your mouse and not your keyboard.

2

Use the key below: hover your mouse to reveal more, or click to reveal more.

3

Click on the buttons in the navigation bar at the top of the page to jump to the relevant section.

4

You can navigate through this document using the arrow buttons in the bottom right corner.

5

You can search this document for keywords using the search box on the toolbar at the top, or using the Ctrl + F search function.

6

Interactivity is not available on smart phones or on tablet devices. You must use Adobe Reader for the full functionality to work. To find out more, please [click here](#).

#### KEY



**Hover** your mouse to reveal more



**Click** to reveal more

### KYI consists of two components:

**'Learn and Earn' Rewards** (available in EP, LA & NA)

**'Sales Incentive' Rewards** (available in EP, LA, NA, MEA, AP, Hong Kong & Taiwan)

**'Learn and Earn'** provides the ability for users to earn Learn points by completing KYI eligible education. These are hosted on IBM Skills Gateway and KYI eligible courses & certification are clearly displayed on the Learn Page within KYI. All learn points can only be redeemed via the KYI Rewards Catalogue/Concierge service and users participate at an individual level only.

**'Sales Incentives'** award Incentive points earned via sales claiming for the current IBM Incentives on offer. Your PRC (Primary Relationship Contact) is responsible for choosing how to award the IBM Sales Incentive Points. This can either be at firm level – award is paid via rebate direct to the Company, or at individual level – funds are automatically loaded to an individual's reloadable IBM Rewards card.

Terms & Conditions can be found on your respective country site.

### What would you like to view?

## How to award at Firm level for the Sales Incentives





## How to register into KYI at firm level

- 1 Only the PRC (Primary Relationship Contact) for your firm can choose to be awarded at firm level, all other Business Partner's registering into Know Your IBM will default to individual level.
- 2 Go to Know Your IBM and sign in using your IBM ID.
- 3 Follow the steps and ensure you are eligible to join.



## How to register into KYI at firm level

### Eligibility



## How to register into KYI at firm level

- 4 You will need to accept the latest terms and conditions along with the privacy policy to be able to access the program.
  
- 5 Ensure you accept the 'Privacy Policy' on entry to the site to confirm you have read and understood.
  
- 6 As the PRC for your firm, you can choose how to award your Business Partners, you will be presented with the following screen.
  
- 7 To earn a benefit through this offering you must have completed the IBM Integrity Training within the last two years. The Integrity Training is free of charge and approximately 30 minutes in length. Until such time as this training is fulfilled/ validated, a user cannot redeem any earned KYI points.



## How to register into KYI at firm level

### NOTE:

- Integrity Training is mandatory for ALL users both at firm and at individual level.
- You can designate a different person to claim benefits on behalf of your firm.
- All current and new users will automatically be awarded at an individual level\*.
- If the firm level is chosen then any active individual users will be amended to be rewarded at firm level and all points balance and/or pending incentive points will be transferred to the company account. This does not affect any points earned through Learn & Earn (Learn and Earn is only available in select regions).
- You can revert to individual level provided NO Company points have been earned – this option will be presented on the My Account Statement Page and will only be visible until such time as points are awarded.
- Once Company points have been earned you will remain at firm level for the **entire** program year and will be unable to revert to individual level for the remaining Program year.
- If a firm has chosen to be awarded at firm level then users within that CEID will be unable to view/claim eligible sales.
- Only the PRC/nominated claimant has the authority to view and claim sales transactions.
- Note that if your company elected the firm level payment option all individual representatives who are registered can still earn a benefit for Learn and Earn. Points earned for Learn and Earn may only be redeemed on the KYI Rewards merchandise catalogue. (Learn and Earn is only available in select regions).
- If you choose this option and are participating in KYI for Security both sites will award at firm level.

\* Individuals will retain any funds already earned and loaded to their IBM Rewards card



## Roles and responsibilities of PRC/nominated claimant

We've listed below a list of mutual responsibilities and actions to complete to ensure your firm is able to participate fully in the KYI offering:



## How to claim Incentives at firm level

All eligible sales for your firm are shown on the respective Incentive page.

### Follow these steps to claim your sales

- 1 Choosing the respective month you wish to claim for, click **'View Details'** to see the sales information. Only products that are eligible to receive KYI Points will be displayed.
- 2 Carefully review the details and if everything checks out, click the **'Claim now'** button.
- 3 Your claimed invoice is now viewable under the **'Previously Claimed Invoices'** page with your name(s) attached to the invoice.
- 4 Incentive Points will be paid via rebate direct to your firm on a Quarterly basis.

A photograph of two men in a server room. The man on the left is wearing a light blue shirt and glasses, looking towards the man on the right. The man on the right is wearing a dark blue shirt and glasses, looking back at the first man. They are standing in a narrow aisle between rows of server racks. The lighting is dim and blue-toned.

How are we awarded at firm level



## Firm level Account Statement

Company points earned will be visible on the Account Page and are awarded instantly. There is no 10 day cooling period for the firm option.

There is no cap on the amount of points available to be earned at firm level.



## 2019 Claiming deadlines

2019 Claiming deadlines are subject to change however, we will do our best to load all eligible sales as promptly as possible once IBM validate the data. Sales claiming data will be loaded on a monthly basis and will be available approx 5-6 weeks after the end of the month. We will advise all eligible claims direct to the user via email.

### When can I claim?

**Please note** that these deadlines are subject to change. Please check the KYI site for the up-to-date claiming deadlines.



## Annual Caps and Transaction Caps at Firm level

Users participating in the IBM Sales Incentives 2019 at firm level have no cap – so the sky is the limit on your Company earnings!

However, each Sales incentive and region/countries do have different transaction\* caps and these can be found by navigating to the respective Announcement letter live link found on Know Your IBM Incentive pages.

\* A qualifying transaction is a sale within the same enterprise and to a single end user customer. Multiple orders may be placed for a single transaction resulting in multiple invoices. These are all viewed as a single transaction. If there is more than a single invoice to an end user customer, there must be no more than 10 business days between the first and last invoice.

## How to award at Individual level for the Sales Incentive



A photograph showing the hands of several business professionals shaking hands in a circle, symbolizing agreement or partnership. The background is slightly blurred, showing office buildings.

## How to register into KYI at Individual level

- 1 Go to Know Your IBM and sign in using your IBM ID.
- 2 Follow the steps and ensure you are eligible to join.

A photograph showing the hands of several business professionals shaking hands in a circle, symbolizing agreement or partnership. The background is slightly blurred, showing office buildings.

## How to register into KYI at Individual level

### Eligibility



## How to register into KYI at Individual level

- 3 You will need to accept the latest terms and conditions along with the privacy policy to be able to access the program.
- 4 Ensure you accept the 'Privacy Policy' on entry to the site to confirm you have read and understood.
- 5 To earn a benefit through this offering you must have completed the IBM Integrity Training within the last two years. The Integrity Training is free of charge and approximately 30 minutes in length. Until such time as this training is fulfilled/validated, a user cannot redeem any earned KYI points. Integrity Training is mandatory for ALL users both at firm and at individual level. If you haven't completed the Integrity Training in the last 2 years you will have to request an invite to the training by sending an email to [service@kyirewards.com](mailto:service@kyirewards.com).



## How to claim Incentives at Individual level

All eligible sales for your firm are shown on the respective Incentive page.

### Follow these steps to claim your sales

A photograph showing the hands of several business professionals shaking hands in a circle, symbolizing teamwork and agreement. The background is slightly blurred, showing an office or meeting environment.

How to apply for my IBM Rewards Card



## Individual level Account Statement

Your Incentive Points Statement shows all points earned through the new Incentives, the number of Points earned alongside the number of points loaded to your Mastercard.

There is a processing time of 21 business days once Incentive Points are awarded and when the funds are available on your IBM Rewards Mastercard.

You can view full details of how you earned the points and from which incentive by clicking 'view details' underneath the number of Points earned.

Your points will appear as **'pending'** until after the 10-calendar day pending period for Individual level.

Once the points are out of the 10-calendar day pending period and loaded to the reloadable Mastercard the status will change to **'Loaded to Mastercard'**. There is a **'One-off Business Partner Fee'** which will be deducted at this time (Full details are provided on the Mastercard page as a downloadable PDF).



## 2019 Claiming deadlines

2019 Claiming deadlines are subject to change however, we will do our best to load all eligible sales as promptly as possible once IBM validate the data. Sales claiming data will be loaded on a monthly basis and will be available approx 5-6 weeks after the end of the month. We will advise all eligible claims direct to the user via email.

### When can I claim?

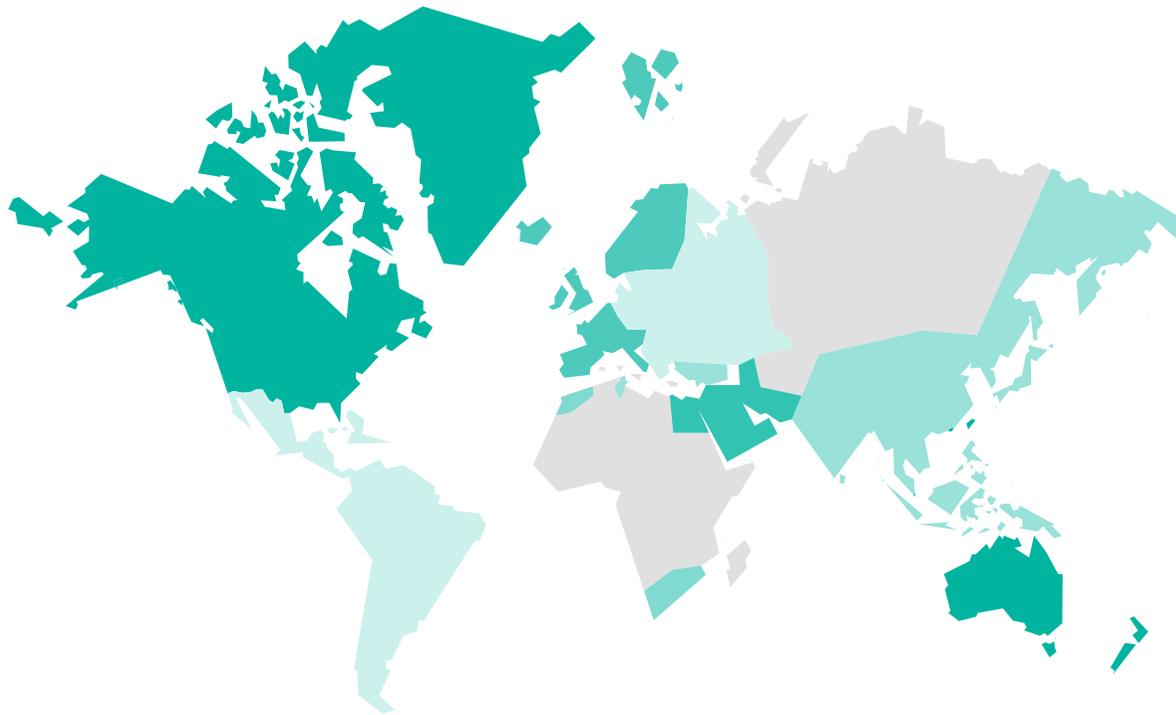
**Please note** that these deadlines are subject to change. Please check the KYI site for the up-to-date claiming deadlines.

# Annual Caps and Transaction Caps at Individual level

## Users participating in the IBM Sales Incentives 2019 have an overall aggregated cap

(Remember this is separate to what you can also earn via the Learn & Earn aspect of the Offering)

Each incentive and region/countries have different transaction\* caps and these can be found by navigating to the respective Announcement letter live link found on Know Your IBM Incentive pages.



\* A qualifying transaction is a sale within the same enterprise and to a single end user customer. Multiple orders may be placed for a single transaction resulting in multiple invoices. These are all viewed as a single transaction. If there is more than a single invoice to an end user customer, there must be no more than 10 business days between the first and last invoice.



## Local Tax Requirements

Users participating at firm level are not required to complete local tax requirements to participate in the Sales Incentives, however if you are participating in the Learn & Earn aspect of the Offering, IBM must collect your personal information to comply with local tax reporting requirements. Details can be shared on the My Profile Page and points cannot be redeemed until it is complete.

This information is only used to complete the required tax return form.

Learn & Earn in Know Your IBM



**Know Your IBM**



## Learn Overview

Learn points can only be redeemed via the KYI Rewards Catalogue/concierge service\* and for 2019 earned points, they are available to redeem until 31 May 2020.

The amount of points earned per question will depend on the tier level of the participant. Points are only awarded for your first attempt of the test questions and you must be registered into Know Your IBM BEFORE you can receive a benefit.

### Certification awards:

#### EP: 250 points

(Must achieve a passing score or greater on the test)

#### LA, NA: 800 points

(Must achieve a passing score or greater on the test)

All regions receive a standard 25 Tier Credits per Certification.

From time to time, IBM also release promotional activities where users can earn Promo points which are redeemable against the KYI catalogue/concierge service.

\* Merchandise Limits: Participants are limited to redeeming a quantity of three (3) for a specific product type. (Example: you can claim 3 x iPads, but you can't claim 3 x iPad 16GB and 3 x iPad 32GB and 3 x iPad 64GB)



## How to participate in Learn

View the list of eligible education on the site.

Click through to Skills Gateway to take the courses within the roadmap. You will then need to take the quiz at the end of the roadmap in order to be awarded KYI points and Tier Credits. Points are only awarded for your first attempt of the test questions and you must be registered into Know Your IBM BEFORE you can receive a benefit.



## How to redeem your Learn points via catalogue/concierge

Simply click the 'Redeem' tab in the KYI website and click on 'Merchandise' to browse the online rewards catalogue. The Merchandise page features descriptions of available merchandise, vouchers which you can use your KYI points to redeem.

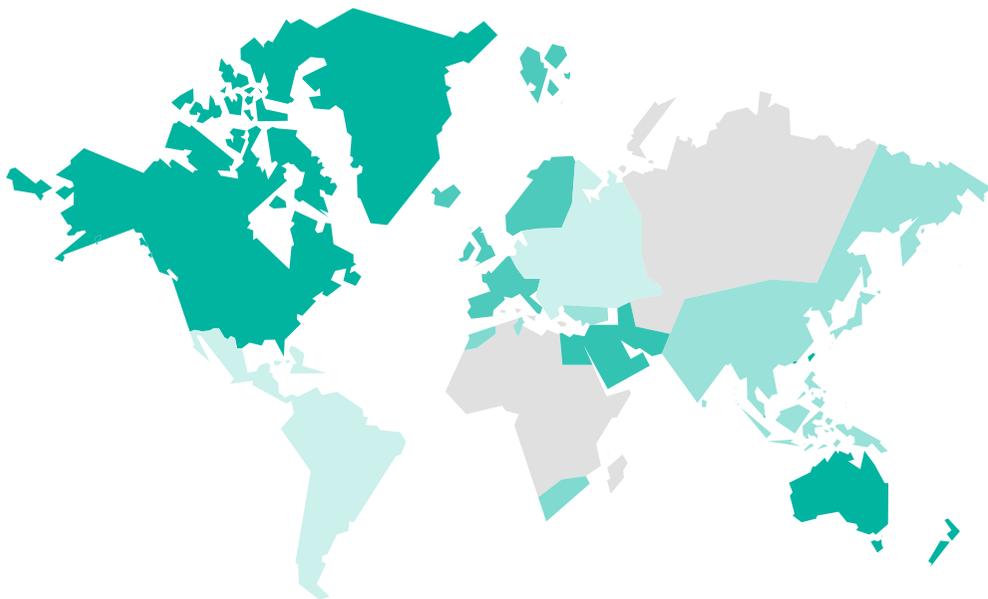
To redeem the reward of your choice, simply add it to your online shopping cart. If you still have other KYI points available to be redeemed, you can add other rewards to your cart too. When you are done, click on 'Checkout'.

You will see on the right hand side how many points you have available to redeem.

## Annual Earnings Caps

The KYI Reward Point Value is worth \$0.25 USD per point. There are limits to how much a user can earn in the Offering for participating in Learn & Earn in the Program year 2019. Remember this is over and above what you can earn in the Sales Incentive aspect of the Offering!

**Users in the below regions participating in Learn & Earn can earn:**



## Local Tax Requirements



If you are participating in the Learn & Earn aspect of the Offering IBM must collect your personal information to comply with local tax reporting requirements. Details can be shared on the My Profile Page and points cannot be redeemed until it is complete.

Thank you for reading this interactive PDF. We hope that you now have a greater understanding of the KYI offering.

If you have any questions about the KYI offering, please email the service team.