

4.1

Customer Definitions Policy

Policy Purpose and Scope

The purpose of this policy is to define customer types and the associated benefits.

Roles and Responsibilities

The Marketing Manager is responsible for maintaining and updating this policy and ensuring all information is accurate and the current process is documented. Plus, the Marketing Manager is responsible for working with the Chief Operating Officer to get approval for complimentary memberships, products, and services. The Marketing Manager, with the help of the Marketing Team, is also responsible for tagging appropriate functions to accounts based on customer participation.

The Finance Team is responsible for setting up all complimentary memberships, products, and services. In order for the Finance Team to set up anything complimentary, they must receive an approved complimentary products or services form. For accounts that set up fees are waived, but the customer is paying for their membership fees, a credit card must be obtained from the customer before setting up the account.

The Marketing and Finance Team will meet quarterly to review all accounts receiving complimentary memberships, products, and/or services to ensure they are labeled with the appropriate type, status, and function.

Account Type Definitions and Benefits

PhotoBiz strategically partners with a number of its customers. This includes both those customers who have the capabilities to promote PhotoBiz among their sphere of influence, as well as local organizations in an effort to give back to the community. There are several different classifications of account types that are associated with complimentary products, services, or memberships. These classifications are outlined below:

Account Type: VIP

Account Status: Complimentary

Membership Plan Level: Copper, Bronze, Silver (Gold and higher with special approval)

- Requirements to be considered:
 - Ability to reach large group of people

- Celebrity status, well known in the industry for their skills
- Exhibit superior skill in their craft
- Speaker at large events (e.g., WPPI, PPA, PhotoShop World, Mystic)
- Well rounded business approach
- Existing customer and rapport with PhotoBiz (6+ months)
- We invite them to this level
- What they do for us:
 - Advocate for PhotoBiz brand
 - Refer new customers
 - Promote PhotoBiz through speaking engagements and workshops
 - Provide images and/or content for sample sites
 - Provide video testimonial
 - Host PhotoBiz webinars (optional)
 - Write guest blog posts (optional)
 - Donation of time at tradeshow (optional)
- What we do for them:
 - Assign dedicated Passionate Support agent
 - Recognized on blog as Featured Photographer of the Month (or Featured for their craft)
 - Provide exposure opportunities through blog and social media outlets
 - Provide SWAG for speaking events
 - Provide “PhotoBiz Loves Me” SWAG
 - Provide the following complimentary services:
 - Waive set up fee for new products
 - Up to silver membership fee (\$45) per month
 - Additional accounts or higher membership levels require approval
- Accounting note:
 - When setting up new VIP accounts, client’s credit is card required in account, even if won’t be charged
 - Can use VR/Gift certificate to set up account if waiving set up fees

Account Type: VIP

Account Status: Active

Membership Plan Level: VIPCopper, VIPBronze (higher with special approval)

- Requirements to be considered:
 - Ability to reach large group of people
 - Celebrity status, well known in the industry for their skills
 - Exhibit superior skill in their craft
 - Speaker at large events (e.g., WPPI, PPA, PhotoShop World, Mystic)
 - Well rounded business approach
 - Existing customer and rapport with PhotoBiz (6+ months)
 - We invite them to this level
- What they do for us:
 - Advocate for PhotoBiz brand
 - Promote PhotoBiz through speaking engagements and workshops

- Provide images and/or content for sample sites
- Previously active VIP who is no longer sending significant referrals
- What we do for them:
 - Assign dedicated Passionate Support agent
 - Recognized on blog as Featured Photographer of the Month (or Featured for their craft)
 - Provide exposure opportunities through blog and social media outlets
 - Provide SWAG for speaking events
 - Provide “PhotoBiz Loves Me” SWAG
 - Provide the following complimentary services:
 - Waive set up fee for new products
 - Additional accounts or higher membership levels require approval
- Accounting note:
 - Can use VR/Gift certificate to set up account if waiving set up fees
 - Requires client credit card in account

Account Type: Elite

Account Status: Active

Membership Plan Level: To be paid by customer, sometimes may get special pricing

- Requirements to be considered:
 - Ability to reach large group of people
 - Speaker at medium to large events (e.g., statewide PPA, SYNC)
 - Exhibit excellent caliber of work
 - New customer
 - We invite them to this level, and use status to track them
- What they do for us:
 - Advocate for PhotoBiz brand
 - Promote PhotoBiz through speaking engagements and workshops
 - Provide video testimonial
 - Host PhotoBiz webinars (optional)
 - Write guest blog posts (optional)
 - Donation of time at tradeshow (optional)
- What we do for them:
 - Assign dedicated Passionate Support agent
 - Provide SWAG for speaking events
 - Provide “I Love PhotoBiz” SWAG
 - Provide exposure opportunities through blog and social media outlets
 - Provide the following complimentary services:
 - Waive set up fees for new products, as approved on case-by-case basis
- Accounting note:
 - Client credit card required before set up

Account Type: Employee

Account Status: Demo

Membership Plan Level: Copper

- Every employee receives a demo account to explore all PhotoBiz products
- This account may **not** be assigned a custom domain or used as a live site

Account Type: Employee

Account Status: Active or Complimentary

Membership Plan Level: Dependent on approval

- Requirements to be considered:
 - Employee of PhotoBiz (after at least 6 months of employment)
 - Website can not compete with PhotoBiz business
- What we do for them:
 - Provide the following complimentary services:
 - Waive set up and/or monthly fees, as approved on a case-by-case basis
- Accounting note:
 - Client credit card required before set up, even if won't be charged

Account Type: Sample

Account Status: Demo

Membership Plan Level: Copper (unless higher level approved)

- Used to showcase a template/design, product, or service, and how it works

Account Type: Sponsored

Account Status: Active or Complimentary

Membership Plan Level: Customer dependent

- Requirements to be considered:
 - Family of PhotoBiz employee
 - PhotoBiz business partner outside of local area
- What we do for them:
 - Provide the following complimentary services:
 - Waive set up and/or monthly fees, as approved on a case-by-case basis
- Accounting note:
 - Client credit card required before set up

Account Type: Donated

Account Status: Active or Complimentary

Membership Plan Level: Customer dependent

- Requirements to be considered:
 - Family or friend of PhotoBiz owners

- What we do for them:
 - Provide the following complimentary services:
 - Waive set up and/or monthly fees, as approved on case-by-case basis
- Accounting note:
 - Client credit card required before set up, if monthly fees are to be paid by customer

Account Type: Local

Account Status: Active or Complimentary

Membership Plan Level: Customer dependent

- Requirements to be considered:
 - Local organization that supports kids and/or the arts
- What we do for them:
 - Provide the following complimentary services:
 - Waive set up and/or monthly fees, as approved on case-by-case basis
- Accounting note:
 - Client credit card required before set up, if monthly fees are to be paid by customer

Account Type: Charity

Account Status: Active or Complimentary

Membership Plan Level: Customer dependent, if complimentary membership level no higher than Copper or Bronze

- Requirements to be considered:
 - 501(c)(3) or other non-profit status that supports kids and/or the arts
- What we do for them:
 - Provide the following complimentary services:
 - Waive set up and/or monthly fees (for copper or bronze plan), as approved on case-by-case basis
- Accounting notes:
 - Client credit card required before set up, if monthly fees are to be paid by customer

Account Type: Prize

Account Status: Active

Membership Plan Level: Customer dependent

- Requirements to be considered:
 - Won a raffle or contest
- What we do for them:
 - Provide the following complimentary services:

- Waive set up and/or monthly fees using virtual credits based on the award specified in the contest or raffle
 - Complimentary services given a limited time frame, normally less than one year
- Accounting note:
 - Client credit card required before set up

Operational Function Type Definitions and Benefits

PhotoBiz engages its customers in a variety of functions. We would like to reward our customers for helping us to grow by sharing their insights with our community. These classifications are outlined below:

Account Function: Contributing Blogger

- Requirements to be considered:
 - PhotoBiz client
 - Contributes to industry through blogs
 - Active on Facebook and/or Twitter
 - Good writer
- What they do for us:
 - Write contributing blog post
 - Actively participate through blog comment feature
- What we do for them:
 - Feature blog post on blog.photobiz.com
 - Promote blog post through monthly enewsletter and social media
 - Provide the following complimentary services:
 - Virtual credit for copper membership level for one month (\$15)

Account Function: Sample

- Requirements to be considered:
 - PhotoBiz client
 - Exhibits excellent caliber of work (both images and logo)
- What they do for us:
 - Provide logo (PNG with transparent background) and 50-80 images (JPG) through dropbox, yousendit, or similar ftp type service
 - Images must be unbranded, high resolution, JPGs, at least 3000x1730 pixels
 - 300 word description of photographer highlighted on the “About” page in the template sample
- What we do for them:
 - Recognize on blog post announcing the new design, as well as in social media
 - Provide the following complimentary services:

- Virtual credit for copper or bronze membership level for one month (\$15-\$25)

Account Function: Featured Photographer

- Requirements to be considered:
 - PhotoBiz customer
 - Caliber of work – photographs, logo, and website
 - Publicly advocate for PhotoBiz
 - Complete application or hand selected by PhotoBiz team
 - Application reviewed by team of 3-5, majority vote (website, images, write up of why to be considered)
- What they do for us:
 - Provide the following by the 15th of the previous month
 - Video testimonial
 - Written answers to interview questions
 - 100-200 word bio
 - 5-6 profile images
 - Links to their website, blog, and social media outlets
 - Promote their feature through their own blog and social media
- What we do for them:
 - Recognition through blog post, social media, and monthly enewsletter
 - Provide the following complimentary services:
 - Virtual credit for up to bronze membership level for one month (\$25)

Account Function: Webinar

- Requirements to be considered:
 - PhotoBiz customer
 - Speaker with significant clout to draw a crowd
- What they do for us:
 - Present a 1 hour webinar including live Q&A on a relevant topic for our customers
 - Provide slides for review one week in advance
 - Provide graphic to promote their webinar
 - Provide headshot and bio for introduction
 - Promote the webinar through their social media outlets
- What we do for them:
 - Recognition through blog post, social media, and email promotions
 - Provide the following complimentary services:
 - Virtual credit for silver membership level for one month (\$50)