New Partner Onboarding Services

OBJECTIVE

To identify Services available to introduce new Partners to Delta Controls product and systems.

Objective

To identify onboarding options for new partners.

Note: this document outlines the SERVICES available to new Partners. Services that the new Partner wishes to include as part of their start-up must be added to the Schedule C (first order) included in the Partner Agreement.

Product selection will be determined in discussions between the RSM and the new Partner and must also be added to the Schedule C.

A Schedule C form is included at the end of this document.

Services

The following table is a list of Services that are available for the new Partner.
This can be discussed between the Partner and Delta Sales (RSM and Inside Sales). Once the services are selected they must be added to the Schedule C of the Partner Agreement, as part of the Partners first order.

Table 1: List of Services

Item #	Services	Description	List Price ($US)
	INSIDE Sales		
100	Welcome to Delta – (GoToMeeting)		included
101	DCBI Membership	$15,000.00 value, for one membership	$15,000 / person
	TECHNICAL ONBOARDING SERVICES		
200	Training – Free for first year	At Delta HQ, or one of our regional training centers. Not including costs of travel. Limit 2 seats per class.	included
201	First Project Consulting	Consulting on first Delta project.	included
202	Cloud Engineering	Access to a web based controller database programming tool. Includes 5 running sites, 100 virtual devices each. Additional sites can be ordered in multiples of 5.	$660.00 / mth
203	Intro to Delta on Location	2 day introduction to Delta software, hardware, and networking.	$12,500.00
204	1st Project On Site Review/Consulting	Includes 2 Days on site, assisting with outstanding issues, reviewing install and consulting on workflow and best practices.	$12,500
+		Each additional hour (blocks of 8hrs). Up to 40 hrs max.	$375.00 / hr
	CONTROL DESIGN/PROGRAMMING SERVICES	Discounted for 1st project.	
300	Control System Design on 1st Project	25% Discount	See PAS for Quote
301	Controller Programming on 1st Project	25% Discount	
302	Additional Site Commissioning on 1st Project	Additional hours over and above Item 204. $15,000 for one week. + expenses (travel, meals and accommodations)	

All prices are List Price, shown in $US List unless otherwise noted.

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Description of Services

Insides Sales

Item 101: Welcome and Intro to Delta Controls

Table 2: Topics

Inside Sales – Virtual GoToMeeting Sessions		Owner
Admin		
Passport	Admin, Users, Icons/Links	
Help Desk		
George Support		
George University		
Delta Tech Forum		
Classroom Training Schedule and target audiences		
Training Flow (GU)	Course flow, recommended docs, KBAs, and How To's.	

Delta Controls' Inside Sales team will coordinate Virtual meeting session(s) with the Partner (GoToMeeting, Webex, Conference call).

- Must be scheduled within 30 days of when the Partner becomes officially signed.
- May be one or multiple sessions on a remote Video session.
- Discuss services that are offered.
- Identify support resources and how to contact us.
- Discuss training options, schedules, and registration.
- Overview of Delta System (hardware, software, architecture)

Must be attended by ALL of Partners technical team and sales team.

Item 102: DCBI – Delta Controls Business Institute

DCBI is designed to help our Partners be more successful and avoid common growing pains. It provides specialized industry training. Membership includes;
- access to webinars
- online training resources
- an online forum to discuss topics and share with other DCBI members
- Live seminars and training events throughout the year.

Technical Services

Inside Sales hands off to Delta Technical Services once the Welcome / Intro is completed.

Item 200: Training

- Any employee of the new Partner is entitled to attend training courses at no charge, within the first year, starting on the date of official Partnership.
- Limit of 2 seats per class.
- Pre-Requisites must be met for each course if applicable
- Includes courses at Delta HQ, and any of our approved Delta training centers.
- Does not include travel or accommodations.
- Must follow standard registration procedures.
  - Dependent on course availability
  - Depends on pre-requisites
  - Must be registered previous to class limit (must be a vacant seat upon registration).

Item 201: First Project Consulting

- Assist in engineering / consulting on first project.
  - Partner handles engineering with Delta acting as consultant.
  - Guidance on product selection
  - Guidance on Architecture
  - Review of engineering / design while in progress.
  - Engineering workflow / best practices
  - Performed from remote – (via GoToMeeting sessions, Webex, or conference calls)

Item 202: Cloud Engineering

- Access to a cloud based controller database programming tool.
- Build your application programming for your projects on a network of virtual devices.
  - Removes the need for physical product and network to engineer controller programming for projects.
- Billed monthly.

Item 203: Intro to Delta on Location

- 2 days, on location at Partners office.
- Overview of Delta system (software, hardware, architecture)
- Based on fundamental training agenda, but can be an open discussion to include:
  - Discussion on specific needs of customer
  - Common application types (VAV, FCU, or HP? AHU or RTU?
  - Markets (commercial, educational, retail, etc?)
  - Advise on best product and architectures to suit their standard application(s) and market(s).
  - Etc
- Must be attended by ALL of Partners technical team and the sales team.
- This should not be considered to be official Delta product/system technical training. Partner are still required to fulfill their training commitments by sending person(s) to an official Delta training course, as per the Partner agreement.

Item 204: 1st Project On Site Review/Consulting

An onsite project review to:
- Review installation practices
- Review commissioning work flow and best practices.
- Advise on best practices
- Assist in resolving outstanding issues

On site project review is not intended to be a full point by point end to end check, but to show guidelines to help new Partners complete commissioning on projects.

- $12,500 includes;
  - 2 days (16 hours) commissioning
  - Travel / hotel included
- $375.00 List / hr for each additional hour after 16 hours, up to 40 hours total.
  - 25% break on service rate
- This may include:
  - Assistance near end of project to tie up loose ends, assist with completing the project.
  - Assistance midway through install to ensure system is being installed correctly and assist with troubleshooting and issues.
  - Must be used in same trip, not multiple 2 day trips.
- Extra time for site assistance can be purchased at a discount on first Delta project. See Item 302 for pricing

Control Design/Programming Services

Delta's Partner Application Services group (PAS) will handle control system design and database programming services, at a reduced rate.

Item 302: Control System Design on 1st Project

Includes:

Item	Description	Delta Department
Discount labor rate	Does not include parts. Approx. 25% less than normal rate.	PAS
Quote on Control Design and application programming work, which includes:		
Controller Selection	Recommend controller hardware for project	PAS
Control Wiring schematics	Controller IO, power and networking connections	PAS
Control System layout	System architecture and network layout/riser	PAS
Provide source files to Partner	Control Design files turned over to Partner for future use	PAS
Quotes on hardware pricing		Inside Sales
Quote on applicable peripherals		Inside Sales

Not included:
- Complete project Estimating / submittals for project Bids

This service is intended to assist new Partners in Delta controller selection, network/system architectures and control wiring schematics.
- PAS can offer quotes on control design and programming.
- Inside Sales can quote on hardware and software product and peripherals pricing.
- The Partner can use these quotes in submitting project bids, but it is the Partners responsibility to do a complete takeoff and project estimate.

Scheduling

Target Delivery on quotes : 5 days
Target Delivery on Control Design projects: tbd

PAS will make every effort to accommodate delivery dates, but the more lead time the better. Lead time will depend on current PAS projects, size of the project, complexity of the project, and the clarity of the project specifications provided.

Item 301: Controller Database Programming for 1st project

- PAS can provide Controller Database services at a discount for the first Delta project.
- Approx. 25% less than normal rate.

Item 302: Additional On Site Project Review/Consulting on 1ˢᵗ Project

- Over and above the Item 204 above.
- 25% discount off List price. See PAS for quotes.
- + expenses

SCHEDULE C

New Partner – Minimum Order

Qty	Products	Description	List Price ($US)	Net Cost ($US)
	MARKETING			
	102105	MKTG-Product Catalog 2017 [25/pkg]	included	
	102042	MKTG-enteliBUS Brochure [25/pkg]	included	
	102045	MKTG-enteliWEB Brochure [25/pkg]	included	
	102072	MKTG-Ethernet Networking Brochure [25/pkg]	included	
	INSIDE SALES			
	Welcome to Delta – (GoToMeeting)		included	
	DCBI Membership	$15,000.00 value, for one membership	$15,000 / person	
	TECHNICAL ONBOARDING SERVICES			
	Training – Free for first year	At Delta HQ, or one of our regional training centers. Not including costs of travel.	included	
	First Project Consulting	Consulting on first Delta project.	included	
	Cloud Engineering	Access to a web based controller database programming tool. (Billed Monthly)	$660.00 / mth	
	Intro to Delta on Location	2 day introduction to Delta software, hardware, and networking.	$12,500.00	
	1st Project Commissioning	Includes minimum 2 Days on site commissioning,	$12,500	
		Each additional hour (blocks of 8hrs). Up to 40 hrs max.	$375.00 / hr	
	CONTROL DESIGN/PROGRAMMING SERVICES	Discounted for 1st project.		
	Control System Design on 1st Project	25% Discount		See PAS for Quotes
	Controller Programming on 1st Project	25% Discount		See PAS for Quotes
	Additional Site Commissioning on 1st Project	Additional hours over and above Item 35. $15,000 for one week. + expenses (travel, meals and accommodations)		See PAS for Quotes
			TOTAL	