

Request Information

Today's date (submission date): _____

Product or Service Requested for Endorsement: _____

Indicate the full scope of the request for endorsement including any related branded website, specific web pages, webinars, ancillary tools or customer communications: _____

Reason for Endorsement Request: _____

Endorsement Request Date: _____

PLEASE COMPLETE FORM AND RETURN TO:

Suzi Artzberger

suzia@betterinvesting.org

IMPORTANT:

The endorsement request will be reviewed and processed per the published BetterInvesting Endorsement Policy. The final review and approval of the endorsement team's findings are the sole right and privilege of the BetterInvesting Board of Directors. There is no guarantee of endorsement.

The work of the endorsement team will be scheduled within the scope of other scheduled work. There is no guarantee that the endorsement team will be able to commence and/or complete the review before the next scheduled meeting of the BetterInvesting Board of Directors.

Company Information

Company Name: _____

Company Address, Contact Information: _____

Primary Contact: _____

Company History and Management BIO: _____

Company Financial History (required to evaluate the company viability): _____

Product Information

Provide a description of the product: _____

Current retail price of product: _____

Current product discounts: _____

Describe why you feel that the BetterInvesting membership would be interested in the product: _____

Describe how the product promotes or supports membership in BetterInvesting: _____

Describe how the product supports BetterInvesting's 4 principles: _____

Provide a description of the current fulfillment method for the product: _____

Provide a description of the installation method for the product: _____

Describe the scope of interaction between the product and externally supplied data and/or data feeds (current or future): _____

Customer Service

Customer Service hours of operation: _____

Service Contact Method – Phone: _____

Service Contact Method – Email: _____

Service Contact Turn-around time: _____

Describe the company's process flow for providing customer service: _____

Describe the company's history in providing customer service for this specific problem (number of calls received, time for resolution, etc.): _____

Number of full time customer service representatives: _____

Describe your desired support model for this product should it be endorsed: _____

Product Development & Product Quality

Describe, in general, the company's product development process for this product: _____

Number of equivalent full-time development staff for this product: _____

Describe the product testing and launch process: _____

Describe the bug tracking and bug fix process for this product: _____

Average turn-around time for bug fixes to be resolved in production product: _____

Describe the hardware, operating systems and/or browsers for which this product is compatible and have completed the testing process: _____

BetterInvesting Chapters

Describe the current interaction with BetterInvesting Chapters regarding the product and the current knowledge of BetterInvesting Volunteers about the product. _____

Describe how that knowledge level and/or interaction may change if the product is endorsed: _____

Sales and Marketing

Describe the current marketing efforts for this product: _____

Describe in detail the desired specific activities requested of BetterInvesting in marketing or communicating about this product: _____

Describe the desired marketing agreement/revenue share with BetterInvesting for this product (Per the BetterInvesting Endorsement Policy all endorsed products require a separate marketing agreement): _____
