

Incumbency Global Guidelines

Effective from January 5, 2023



The Sophos Incumbency Renewal Offering rewards partners who help maintain ongoing customer relationships by providing an incremental discount on qualified renewal opportunities.

Qualification

- "Renewal" is defined as renewing the same Core Product to the same customer.
- Incumbency discounts are applied on a renewal opportunity when the reseller is listed as the partner of record on both the original order and the new order for the same Core Product.
- Core Products can be found in the [Sophos price book](#) and can be modified or expanded at Sophos' sole discretion at any time without further notice.

Requirements

- The opportunity must include a minimum of one mid-market/ enterprise core SKU.
- Incumbency discounts can be requested at anytime prior to the expiration of the renewal.
- Incumbency discounts are valid 12 months past the renewal expiration date.
- Incumbency cannot be requested after the renewal has expired.
- Incumbency discount is not available for product downgrades.
- If a renewal opportunity qualifies for incumbency and meets all of the program requirements, approval will be automatically applied when requested by the Incumbent Partner.
- The incumbency discount is applied to the applicable renewal line items on the quote.
- Sophos reserves the right to terminate/ revoke an existing incumbency discount if a partner is not working to proactively renew the opportunity.
- The Incumbent Renewal Offering is currently not available in the following markets: Latin America. This list of ineligible markets may be updated from time-to-time in Sophos's sole discretion.
- The Incumbency Discount is only available to the Incumbent Partner on a renewal.
- The Incumbency Renewal Offering is available for Sophos resellers only.
- Regional differences in the program may vary. Refer to the [Sophos Partner Program guide](#) and [Sophos Core Product Categories](#) for eligible SKUs, discounts, and rules specific for your region.
- Sophos reserves the right, in its sole discretion, to modify, suspend, or terminate the Incumbent Renewal Program at any time. All decisions by Sophos regarding partner or discount eligibility are made in Sophos's sole discretion and are final.

For more instructions on how to request incumbency, please consult the [Incumbency Submission Guide](#) on the Sophos Partner Portal.

Need help?

Open a support case via www.sophos.com/support if you need help requesting incumbency.

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