



# Partner Incentives Co-op Guidebook

Business Policies for FY21  
July 1, 2020





The Partner Incentives Cooperative Marketing Fund (Co-op) provides reimbursements of earned funds to participating partners to help differentiate and build channel awareness and preference for Microsoft® products. Co-op is a critical investment for Microsoft in driving key business priorities with partners. Its purpose is to not only reward the partner, but also to reinvest back into the partner's business with Microsoft to accelerate future results and meet key objectives. This guide is applicable for incentives programs awarded co-op funds, to be used for activities completed during fiscal year 2021 (FY21).

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# Summary of FY21 Changes

## General

- FY21 Template updated; including but not limited to Microsoft Branded Template, consolidation of program-specific Activity pages, clarity on Core Requirements language, etc.
- SPIFF Form deployed to Partner Center in June, applicable references added to guidebook
- Activity Guidelines: Core Requirements slide; referenced added that Invoices only need company name
- Claims Guidelines: language added that SPIFFS activity *now requires an attestation form to be populated.*
- Claims Guidelines: Guidance added for Proof of Execution requirements
- Guidance added that partners can now use co-op funds to enhance C3 funds they receive from Microsoft.
- Added additional PoE requirement for Surface ADD and ADR partners.

## Demand Generation

- Added Migration Services as a separate activity
- Added Best Practice Development as a separate activity
- Added Solution Building with Third Parties as a separate activity

## Market Development

- On-Site Champ language updated to reflect improved guidance

## Partner Readiness

- Microsoft Hosted Conferences: Allowance updated for Hosting
- Product seeding/demo units language updated to reflect Microsoft **branded** Surface accessories

## Appendix

- Co-op Plan Examples added for Mixed Reality
- Co-op Plan Examples added for CSP
- Guidance added for allowing partners to claim for using tools from Work 365 and TBSC to drive sales demand
- Refreshed GTM Services content

# How to use the Co-op Guidebook

The Co-op Guidebook is for all programs that receive co-op funds and is published as one guidebook, with program-specific differences highlighted. Activity categories, activity definitions, eligible expenses, and proof of execution requirements are aligned across programs, except where indicated otherwise. This guidebook is applicable for the following programs:

- Managed Reseller
- Commercial Distributor
- Mixed Reality ADD
- Mixed Reality ADR & DMP
- Surface PC and Surface Hub Authorized Device Distributor (ADD)
- Surface PC and Surface Hub Reseller
- Hosting
- Cloud Solution Provider (CSP) Indirect Provider
- Cloud Solution Provider (CSP) Indirect Reseller
- Cloud Solution Provider (CSP) Direct Bill Partner

This Guidebook contains a general “Overview” slide and “Activity guidelines” slides in the “Overview” section. These slides contain detailed information, such as periods, instructions for claim submission, and core requirements. If an activity is not eligible for a specific incentive program, it is noted as not applicable on the “Activity guidelines” slide and the specific Activity slide.

## Activity Guidelines

Managed Reseller, Commercial Distributor, Mixed Reality ADD, Mixed Reality ADR & DMP, Surface PC and Surface Hub Authorized Device Distributor (ADD), Surface PC and Surface Hub Reseller, Hosting and CSP Indirect Provider, Indirect Reseller and Direct Bill Partners: Limited to current Windows systems and Windows peripherals up to the greater of USD3,000 or 10% of total accrued co-op funds per period.

# Overview

Co-op has two six-month (fiscal half-year) periods: **FY21 H1:** July 1, 2020 – December 31, 2020 **FY21 H2:** January 1, 2021 – June 30, 2021

<b>Earning/Accrual Period</b>	<ul style="list-style-type: none"> <li>• Meet eligibility requirements</li> <li>• Sell qualifying products</li> </ul>	<b>Claiming Period Deadlines</b>	Submit reimbursement claims by August 15, 2021 23:59:59 UTC for H1 and February 15, 2022 23:59:59 UTC for H2
<b>Usage Period</b>	<ul style="list-style-type: none"> <li>• View Co-op funds based on Earning Period sales</li> <li>• Conduct eligible activities</li> </ul>	<b>Proof of Execution (POE) Approval Deadlines</b>	Obtain POE approval by September 30, 2021 23:59:59 UTC for H1 and March 31, 2022 23:59:59 UTC for H2



## Submission Steps on Partner Center and CHIP

### 1. Co-op Planning Guidance (optional, recommended)

- Create a co-op plan to enable optimal usage for your organization. This does **not** need to be submitted to Microsoft.

### Creative Materials Preapproval (optional, recommended)

- To request preapproval, email [commpre@microsoft.com](mailto:commpre@microsoft.com)
- Ensure pre-approved creative materials are not modified in any way.

### 2. Conduct Activity: Gather all proof of execution materials required for submission.

### 3. Submit Claim and Proof of Execution (POE)\*

Claims should be made within 45 days of activity completion and must be submitted by the period claim deadline.

- For Commercial Distributor, sign into CHIP and select Submit a Claim. For all other programs, sign into Partner Center, select *Co-op Management* and then *Create a Claim*.
- Complete claim form and include preapproval codes for creative pieces.
- Upload proof of execution materials and *Submit claim*.

\*Actual category names may vary or be displayed in a local language.

- Partners have 45 days after the co-op claiming deadline to close out any claims with a status of "Pending POE," "Request More Proof," or "Action required."
- If any such claims are not closed out, the claim will be moved to a status of "Non-compliant" and payment will not be processed.
- Unsuccessful co-op claims and unused funds will be forfeited at the end of the grace period for claims submission (45 days after the end of the usage period).
- **Note:** Enter your claims in Partner Center as soon as possible in order to maximize cash flow and ensure that you have enough lead time to address any questions that may come up related to the submitted claim.
- If you have any questions regarding what is required, please contact your PDM or the Regional Operations Centers (ROCs) Support Aliases as noted on the Partner Resources slide.

# Eligible Activities

## Demand Generation

Activities include traditional and digital advertising with broad reach that furthers the marketing and promotion of Microsoft offerings. Results and audience size should be measurable.

## Qualifying Activities

- Print advertising *(Does not apply for Office FPP/ESD)*
- Digital advertising
- Social media marketing
- Direct mail, email, and SMS
- Partner website and search engine optimization
- Microsoft syndicated content
- Multi-touch digital campaign
- Migration Services *(Does not apply to Surface or Mixed Reality)*
- Best Practice Development
- Solution Building with Third Parties

## Market Development

Activities include customer recruitment and education, as well as market and business development activities that further the awareness, preference, and sales of Microsoft\* offerings. Typically these marketing activities are designed for a specific customer audience.

## Qualifying Activities

- Telemarketing
- Customer seminars and bootcamps
- Customer Offer *(Does not apply for Managed Reseller, Surface PC/HUB ADR, or Mixed Reality ADR)*
- Tradeshows and expositions
- Internal incentives and SPIFFs
- On-site champ
- Proof of concept *(Does not apply for Office FPP/ESD)*
- Employee purchase web set up for customers *(only for eligible Surface ADR and Mixed Reality ADR)*

## Partner Readiness

Activities for the partner's internal sales and technical personnel and includes specific expenses related to training that helps develop the partner's sales and technical expertise on Microsoft\*.

## Qualifying Activities

- MPN participation
- Microsoft exams and tuition
- Internal training and floor days
- On-demand training
- Microsoft hosted conferences
- Product seeding / Demo units *(Does not apply for Office FPP/ESD)*

# Activity Guidelines: Core Requirements

**Core Requirements:** As part of Partner Incentives Co-op, demand generation and market development activities must include the two core requirements, unless otherwise specified in the activity.

1. **Company/Brand Name and Contact Information:** Company/brand name and contact information must be included in all demand generation and market development activities, including at least one of the following: 1) Your company street address or email address and/or 2) Company website URL or phone number. Invoices only need a company name (not contact information.)

2. **Microsoft Content:**

Managed Reseller and Commercial Distributor	Commercial Distributor activity guidelines Office FPP/ESD only	Mixed Reality	Surface	Hosting and CSP
Demand generation and market development activities must include a minimum of 30% content that furthers the marketing and promotion of Microsoft software and/or Windows devices and/or preinstalled Microsoft products in the system specifications, where specifications are listed <b>and</b>	Demand generation and market development activities should include a minimum of 30% content that must further the marketing and promotion of Microsoft Office software <b>and</b>	Demand generation and market development activities must include a minimum of 30% content that furthers the marketing and promotion of Microsoft Mixed Reality products <b>and</b>	Demand generation and market development activities must include a minimum of 30% content that furthers the marketing and promotion of Microsoft Surface products <b>and</b>	Content must support the marketing and promotion of Microsoft products. If the services marketed by the partner do not clearly show a Microsoft component, the partner must provide supporting documentation which describes the Microsoft product, service, solution, or platform that the Partner service or solution is based on.

A minimum of 100% Microsoft\* focused content for the following activities:

<ul style="list-style-type: none"> <li>• Telemarketing</li> <li>• On-site champ</li> <li>• Proof of concept</li> <li>• Internal training and floor days</li> <li>• On-demand training</li> </ul>	<ul style="list-style-type: none"> <li>• Telemarketing</li> <li>• On-site champ</li> <li>• Internal training and floor days</li> <li>• On-demand training</li> </ul>	<ul style="list-style-type: none"> <li>• Partner website &amp; search engine optimization</li> <li>• Telemarketing</li> <li>• On-site champ</li> <li>• Proof of concept</li> <li>• Internal training and floor days</li> <li>• On-demand training</li> <li>• Employee purchase web set up for customers</li> </ul>	<ul style="list-style-type: none"> <li>• Partner website &amp; search engine optimization</li> <li>• Telemarketing</li> <li>• On-site champ</li> <li>• Proof of concept</li> <li>• Internal training and floor days</li> <li>• On-demand training</li> <li>• Employee purchase web set up for customers</li> </ul>	<ul style="list-style-type: none"> <li>• On-site champ</li> <li>• Internal training and floor days</li> <li>• On-demand training</li> </ul>
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A minimum of 75% Microsoft\* focused content for the following activities: Social media marketing



# General Activity Guidelines

These guidelines apply to all activities. Specific requirements are listed with each activity description. Activities may include components and messaging from complementary vendors.

## Activities must:

- Be focused on eligible Microsoft products that have been officially released as part of general availability (GA) or otherwise notified by the co-op program.
- Only use approved Microsoft assets and logos.
- Be customer focused or targeted.
- Not appear to be conducted by, on behalf of, or sponsored by Microsoft.
- Adhere to all applicable international, national, regional, corporate, and local guidelines, laws and rules, and privacy policies.
- Meet standards of good taste and must not be sexually oriented or otherwise offensive or inappropriate.
- Be placed on media with content adhering to high standards of good taste.

## Inclusion of Non-Microsoft Products

Partners may claim:

- 100% of the cost for qualifying activities that meet the core requirements and promote only Microsoft operating system, productivity suite, server solution, collaboration suite software or devices.
- A maximum of 30% of the cost for qualifying activities that meet the core requirements when any non-Microsoft operating system, productivity suite, server solution, collaboration suite software or device running a non-Microsoft operating system are present.
- The Microsoft-specific portion of the cost of catalogs, tradeshow and expositions, and internal training that meet the core requirements and contain a non-Microsoft operating system, productivity suite, server solution, collaboration suite software, or device.

## Ineligible Activities and Expenses

Co-op funds may not be used to reimburse:

- Microsoft products (except as specified at the activity level).
- Operating expenses and costs associated with the manufacture or distribution of systems, including costs related to bills of materials and costs of goods (packaging, shipping, freight, etc.).
- Giveaway items that include non-Microsoft operating system, productivity suite, server solution, collaboration suite software or device.
- Infrastructure, overhead, depreciable asset expenses (for example, vehicles, capital equipment, etc.), or real property.
- Placement costs associated with advertising on a web site or telephone on-hold message systems owned or operated by Company or Company Subsidiary(ies).
- Costs associated with Microsoft joint agreements or marketing agreements by Microsoft or affiliates that require Company to match or otherwise contribute additional marketing funds. (i.e., Company may not use any co-op funds to satisfy any marketing funds contribution requirement by Microsoft or its affiliates as detailed in said marketing agreement.)
- Multiple claims for a single activity expense. This policy may not apply in the US due to tool differences with global programs.
- Submitting the same expense for reimbursement from multiple Incentives and co-op programs.
- Travel expenses, including flights and hotels (except as specified at the activity level), meals, mileage, and any other travel costs.
- Costs for an activity paid at more than its fair market value.
- Funds redistribution to third parties (excludes marketing agencies contracted by the partner). Co-op is a reimbursement for activities executed by the partner to engage the customer channel.

# Claims Guidelines

## Claim Submission Requirements

Partners may request reimbursement for the cost of qualifying demand generation, market development, and partner readiness activities against their earned funds. Usage of funds involves the completion of co-op eligible activities and submission of reimbursement claims for qualifying activity expenses. To submit a claim, sign on to Partner Center or CHIP and follow the prompts.

Claims may be submitted after the planned activity has been completed. The claim submission and POE documentation must be received no later than the Claim Period deadlines (H1: February 15th 23:59:59 UTC and H2: August 15th 23:59:59 UTC).

Claim amounts are limited by the available funds at the time the claim is submitted. After the funds for that period have been fully utilized, the partner will not be able to submit additional claims. If funds are not claimed by the conclusion of the claiming period, they will be forfeited with no possibility of reinstatement or rollover.

### **Applicable for Mixed Reality ADD, Mixed Reality ADR & DMP, Surface PC and Surface Hub Authorized Device Distributor (ADD), Surface PC and Surface Hub Reseller, Hosting and Cloud Solution Provider (CSP) Indirect Provider:**

If a partner's co-op earnings are below the threshold of \$1,500 USD in a co-op earning period, they will not qualify to use funds and will receive the co-op earnings as rebate at the end of the semester.

### **Cloud Solution Provider (CSP) Indirect Reseller, Cloud Solution Provider (CSP) Direct Bill Partner:**

At the close of each six (6) month earning period, partners exceeding the minimum co-op earning threshold of \$4,000 USD, Microsoft will deposit the funds into the Partner Center claims tool for use in the upcoming fiscal semester. Partners that do not exceed the \$4,000 USD co-op threshold will not qualify to use funds and will receive the withheld co-op funds as part of their rebate payment in the following payment cycle.

A partner's claims will be validated against the activity-specific core requirements listed for that activity. ALL proof of execution (POE) must be provided for claims to be eligible for reimbursement.

# Claims Guidelines

## Proof of Execution (POE)

All claims require submission of POE for validation and to assess compliance. POE includes itemized third-party invoices/receipts and activity materials listed in this guidebook. POE must be provided as part of claim submission and must be uploaded in the claim form. All proof of execution listed on the activity page is required, unless specifically noted otherwise.

The costs associated with submitting POE are not reimbursable through Co-op. Microsoft reserves the right to request original POE documents. You must maintain all original documents for a period of 24 months from the activity date.

POE must originate with the partner and be submitted by the partner for the claim to be reviewed for approval.

NOTE: For many eligible co-op activities, there are multiple POE requirements identified. For each, an invoice or CSR form and at least one other PoE is required for claims approval. POEs that are appropriate to the execution of the activity should be selected and submitted. In some cases the validation team may ask for clarification or additional PoE.

*Microsoft uses proof of execution data to improve and develop our internal tools and processes.*

# Claims Guidelines

## Currency Exchange Rates

The exchange rate used to calculate rebate and co-op payments will be the Microsoft monthly P&L FX Rate which is the London spot close two business days prior to the last business day of the previous month end from Reuters.

## Contract Account (CA) Currency

The CA or 'wallet' currency is the underlying currency used by Partner Center and is set when the first claim of the usage period is created. The currency used is that which was selected when enrolling and creating the bank and tax profiles in Partner Center.

If the partner only has one bank/credit profile setup for this program, the currency of this bank/credit profile is set as the CA currency automatically. If the partner has multiple bank/credit profiles setup for this program in multiple currencies (possible in a multi-pay-from scenario), the partner selects one of those currencies from a dropdown to use as the CA currency for that program and period. Once selected, the CA currency is set for the usage period and will not change for that period even if the bank/credit profile currency is changed, however, the partner will be paid in whatever the bank/credit profile currency is at the time of payment.

## When an Activity spans multiple Usage Periods

If an activity spans multiple usage periods, and there is a milestone delivery date with an invoice in-between those periods, the partner may submit a claim for the portion within the usage period that was invoiced.

## Certification Statement and Report

The Certification Statement and Report (CSR) form is available online in Partner Center for all programs except Commercial Distributor. It must be completed in its entirety and may not be used to claim expenses that are not eligible for reimbursement. It is subject to verification upon request from Microsoft (or Microsoft designated claim validation entity).

For Commercial Distributor only, an offline [CSR Form](#) may be used to request reimbursement to offset costs and/or expenses incurred by the partner solely in connection with the implementation of certain co-op supported marketing activities.

## Sales Performance Incentive Funds Form

The Internal incentives and sales performance incentive funds (SPIFFS) activity *now requires an attestation form to be populated*. This applies to all programs on Partner Center. This is not applicable to the Commercial Distributor program.

# Demand Generation



# Print Advertising

Print advertising includes advertisements that appear in a newspaper, magazine or other publications with established circulation (distribution) rates. Also includes outdoor advertising, catalogs, and print brochures, such as a trifold brochure or one-page reference guides.

**Activity Guidelines:** Complete printed communication must meet the core requirements, except for, catalogs (see below).

*FOR PRINT CATALOGS ONLY: Description of how to claim*

Reimbursement for catalogs is calculated based on the number of pages out of the total that meet the core requirement for Microsoft content. To calculate the claim amount, divide the total number of pages that meets core requirement for Microsoft content by the total number of catalog pages. A proportional amount of the per page cost for each page that meets core requirements for Microsoft content may be claimed, when any non-Microsoft operating system, productivity suite, server solution, collaboration suite software or device running a non-Microsoft operating system are present.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:** Copy of final communication piece (based on advertising) showing program-specific core requirements
- **Metric:** Estimated customer (or partner) reach including activity date
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- Third party **media placement**
- **Printed material**
- **Fee – agency:** Marketing and creative services, including agency fees

## Reminders

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials.

## Best Practices

- Confirm your assets appear in publications or channels with an established circulation and/or advertising rate.
- Comply with all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

## Did you know

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Migration Services

Migration Services does not apply to Surface or Mixed Reality partners.

Certain work performed by the partner to set up a working model of the solution being proposed to the customer to migrate compute workloads, IP solutions, and software to Azure. Also includes Customer Immersion Experience (CIE) and service fees for time incurred in set-up of a technology demo of the proposed migration by the partner.

**Activity Guidelines:** Using a third-party vendor to work on the migration activity is an eligible expense. Labor costs supporting qualifying activities may be claimed for reimbursement.

- Microsoft Customer Immersion Experience (CIE) is an eligible research expense. Eligible service fees include set-up of the technology solution and deployment services, including installation, configuration, data migration, testing, or customer-facing system set-up. Programming/ development expenses can include API system development.
- Costs of Microsoft software, hardware, venue expenses, and other capital expenditures are not reimbursable.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:** Copy of developed materials or market research data. Research data should redact any personal information.
- **Proof-of-Concept:** Planning document
- **Demo Center:** Document itemizing components and Microsoft focus
- **Support document:** Statement of work (from the partner or third-party vendor) and/or service agreement

## Eligible Expenses

- **Printed materials**
- **Proof of Concept** development expenses
- **Research:** White paper, case study development, market research, Customer Immersion Experience
- **Programming / development**
- **Fee – agency:** Marketing services, including agency fees
- **Fee – service:** Labor services provided by partner or third-party vendor in support of the proof of concept
- **Demo Center** set-up expenses
- **Proposal Development** expenses
- **Migration Tools**
- **Assessments and Test Environment Development**

## Caution

- Co-op funds do not cover the cost of the hardware or the venue as it is considered a capital expenditure.
- The cost of the Microsoft software is not reimbursable; license rights should come from internal-use rights benefit.

## Reminder

- Must have a target customer audience
- Include a prominently displayed brand of the Partner
- Respect any .confidentiality obligations to third parties when providing Proof of Execution

## Example

- Customer desires to migrate SQL workloads to Azure
- Partner develops proof of concept and migration plan to present to the customer

**Did you know:** Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Best Practice Development

Certain work performed by the partner to set up a best practice associated with Microsoft technology. This can include sales, marketing, and technical resources required to establish the best practice. Also includes Customer Immersion Experience (CIE) and service fees for time incurred in set-up of a technology demo center.

**Activity Guidelines:** Using a third-party vendor to work on the Best Practice development is an eligible expense. Labor costs supporting qualifying activities may be claimed for reimbursement.

- Microsoft Customer Immersion Experience (CIE) is an eligible research expense.
- Eligible service fees include set-up of a technology demo center and deployment services, including installation, configuration, data migration, testing, or customer-facing system set-up. Programming / development expenses can include API system development. Funds can be used to execute best practice workshops for managed services for specific projects (such as Security, Teams and Voice implementations).
- Costs of Microsoft software, hardware, venue expenses, and other capital expenditures are not reimbursable.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements Eligible Expenses

- Third party **invoice** or certification statement and report (CSR)
  - **Communication material:** Copy of developed materials or market research data. Research data should redact any personal information.
  - **Support document:** Statement of work (from the partner or third-party vendor) and/or service agreement
  - **Proof-of-Concept:** Planning document
  - **Demo Center:** Document itemizing components and Microsoft focus
  - **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval
- **Printed materials**
  - **Research:** White paper, case study development, market research, Customer Immersion Experience
  - **Proof of Concept** development expenses
  - **Programming / development**
  - **Fee – agency:** Marketing services, including agency fees
  - **Fee – service:** Labor services provided by partner or third-party vendor in support of the proof of concept
  - **Fee – exam:** Microsoft exam fees for certifications and competencies
  - **Fee – training / tuition:** Microsoft tuition fees for certifications and competencies, including on-demand training expenses
  - **Demo Center** set-up expenses
  - **Workshops:** Development/execution costs

## Caution

- Co-op funds do not cover the cost of the hardware or the venue as it is considered a capital expenditure.
- The cost of the Microsoft software is not reimbursable; license rights should come from internal-use rights benefit.

## Reminders

- Must have a target customer audience
- Include a prominently displayed brand of Partner
- Respect any .confidentiality obligations to third parties when providing Proof of Execution

## Examples

- Partner decides to develop a best practice and center of excellence for Microsoft Teams
- Partner gets sales and technical resources certified and builds demo-center for customer presentations

**Did you know:** Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Solution Building with Third Parties

Certain work performed by the partner to develop a Microsoft-focused solution with a third-party organization (Tri-branded offer). This work includes technical, infrastructure, and marketing resources required to build and promote the solution. Also includes Customer Immersion Experience (CIE) and service fees for time incurred in set-up of a technology demo center.

## Activity Guidelines:

- Using a third-party vendor to work on the solution building activity is an eligible expense. Labor costs supporting qualifying activities may be claimed for reimbursement.
- Microsoft Customer Immersion Experience (CIE) is an eligible research expense.
- Eligible service fees include set-up of a technology demo center and deployment services, including installation, configuration, data migration, testing, or customer-facing system set-up. Programming / development expenses can include API system development.
- Costs of Microsoft software, hardware, venue expenses, and other capital expenditures are not reimbursable.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:** Copy of developed materials or market research data. Research data should redact any personal information.
- **Support document:** Statement of work (from the partner or third-party vendor) and/or service agreement
- **Proof-of-Concept:** Planning document
- **Demo Center:** Document itemizing components and Microsoft focus
- **Test Case:** Documentation of solution test-case and related expenses
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Printed materials**
- **Research:** White paper, case study development, market research, Customer Immersion Experience
- **Programming / development**
- **Fee – agency:** Marketing services, including agency fees
- **Fee – service:** Labor services provided by partner or third-party vendor in support of the proof of concept
- **Proof of Concept** development expenses
- **Demo Center** set-up expenses
- **Test Case:** Development/execution costs associated with a solution test-case

## Caution

- Co-op funds do not cover the cost of the hardware or the venue as it is considered a capital expenditure.
- The cost of the Microsoft software is not reimbursable; license rights should come from internal-use rights benefit.

## Reminders

- Must have a target customer audience
- Include a prominently displayed brand of Partner
- Respect any .confidentiality obligations to third parties when providing Proof of Execution

## Examples

- System Integrator works with an ISV to develop a healthcare application built on Microsoft Dynamics platform.
- ISV deploys the application for sale on the Microsoft Marketplace.

**Did you know:** Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Digital Advertising

Includes web banners and **online advertising** placed on a third-party website or third-party email and is designed to drive traffic to the Partner's website or offer page. Also includes **search engine marketing** (SEM) and **pay-per-click** (PPC) advertising.

## Activity Guidelines

- Complete digital advertisement, including web banner/advertisement *and* landing page must meet the core requirements. Landing page refers to the website/offer page where customers are directed when they click on the digital advertisement posted on a third-party website.
- Web/online advertisements should be placed on a third-party site with an established advertising rate, of which not more than 10% is partner-owned. Digital content that is hosted on a partner-owned website should be claimed under "Partner Website and Search Engine Optimization" activity.
- **Surface PC only:** May claim web banners and online advertisements placed on a partner-owned website.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party invoice or certification statement and report (CSR)
- **Communication material:**
  - Screenshot of social media advertisement **AND**
  - Screenshot of landing page with **URL** of landing page, showing program-specific core requirements
- Metric: Summary of results (such as click-through report) including activity date
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- Third party **media placement**
- **Fee – agency:** Marketing and creative services, including agency fees

## Reminders

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials.

## Best Practices

- Confirm your assets appear in publications or channels with an established circulation and/or advertising rate.
- Comply with all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

## Did you know:

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.



# Social Media Marketing

Includes **search engine marketing** (SEM), **pay-per-click** (PPC) advertising and paid promotions and advertising through **social media markets**, such as LinkedIn and Facebook.

## Activity Guidelines

- Complete digital advertisement, including web banner/advertisement *and* landing page must meet the core requirements. Landing page refers to the website/offer page where customers are directed when they click on the digital advertisement posted on the social media site.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:**
  - Screenshot of social media advertisement **AND**
  - Screenshot of landing page with **URL** of landing page, showing program-specific core requirements
- **Metric:** Summary of results (such as click-through report) including activity date
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- Third party **media placement**
- **Fee – agency:** Marketing and creative services, including agency fees
- Monthly subscription fee for the **LinkedIn Sales Navigator**

## Reminders

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials.

## Best Practices

- Confirm your assets appear in channels with established advertising rates.
- Comply with all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

## Did you know

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Direct mail, email, and mobile SMS

Communication pieces from the partner that are mailed or delivered electronically to customers.

## Activity Guidelines

- Complete communication piece, including components of the communication must meet core requirements. Individual banners or graphics may not be claimed separately.
- Add the partner organization to the distribution list in order to provide the original communication piece with proof of distribution.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:**
  - Copy of final communication piece showing program-specific core requirements
  - Proof of distribution can include final email distributed to external customers showing dated header or other proof of emailing or photo of phone message (SMS).
- **Metric:** Estimated customer (or partner) reach
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Database acquisition**
- **Printed material**
- **Postage**
- **Fee – agency:** Marketing and creative services, including agency fees

## Reminders

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials.

## Best Practices

- Confirm your assets appear in publications or channels with an established circulation and/or advertising rate.
- Comply with all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

## Did you know

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Partner website and search engine optimization

Creation of a **partner website / microsite** or content hosted on a partner-owned website or a partner's **social media** site. Includes **e-commerce** activities to promote solutions or set up online storefronts to drive sales of Microsoft products and solutions and **mobile e-commerce** efforts such as the development of a mobile-friendly website (web responsive design) or mobile application. **Search engine optimization** (SEO) includes website optimization services to help attract customers, lower customer acquisition costs, and increase content relevancy to a website.

## Activity Guidelines

- The complete activity, including the website or microsite being claimed and any associated web content, must meet the core requirements as a whole.
- Services for search engine optimization may be acquired through Microsoft Pinpoint Marketplace ([www.pinpoint.microsoft.com](http://www.pinpoint.microsoft.com)), DigitalStride ([www.digitalstride.com](http://www.digitalstride.com)), or your local SEO agency,
- Activities must be completed in the period the claim is filed.
- Paid promotion/advertising on a social media site should be claimed under Social media marketing activity.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- Screenshot of landing page with **URL**
- **Metric:** Summary of results (such as click through report) including activity date
- **Support document:** Statement of work or service agreement for SEO project (SEO *activity only*)
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Fee – agency:** Marketing services, including agency fees
- **Programming/development:** Programming and development fees
- **Fee – SEO:** Optimization and maintenance fees

## Best Practices

- Key Product pages help create value by showing additional benefits to products; include an “Add to Cart” or “Buy Now” link to drive sales.
- Place banners on key pages, including the home page, that link to product pages to foster better measurements of results while expanding communication opportunities.
- Create up-sell or cross-sell opportunities by configuring drop-down menus with Microsoft products.
- Do not limit your SEO to just keywords.
- Set measurable goals before execution to gauge effectiveness.

## Did you know

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Microsoft syndicated content

Placement of Microsoft created and maintained content on the partner's website

## Activity Guidelines

- Syndicated web banners and microsites should be prominently placed on the partner's own website, within the top 20% of the page.
- A minimum of two web banners should be syndicated.
- Syndicated content should be placed for 90 days or reach 250 click-throughs. Targets must be achieved in the period in which the claim is filed. Visit the Microsoft Digital Commerce and Campaign Network at [www.msdccn.com](http://www.msdccn.com) or <https://partner.microsoft.com/marketing/campaigns/> to access content.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **URL** and/or screenshots of site pages showing URL
- **Metric:** Summary of Results (such as click through report) including activity date
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

Actual costs up to USD 18,750 per usage period for:

- **Fee – Agency:** Marketing services, including agency fees
- **Programming/development:** Programming and development fees
- **Media placement**

## Notices

How do I participate in content syndication? Please contact your local Partner Development Manager (PDM) for more information and to see if syndication is available in your area.

What is the difference between this and the Partner Website and Search Engine Optimization activity?

- Partner website and search engine optimization is partner-created content on a website or microsite.
- Microsoft syndicated content is Microsoft-created content that is purchased and placed from a provider (typically appears as a web banner or microsite on the partner's webpage)

## Did you know

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Multi-touch digital campaign

Allows Partners to claim expenses for a digital multi-media campaign that may be comprised of several co-op activity components under one eligible activity type, rather than multiple activity types within the tool. Digital marketing activities which can be grouped and claimed under Multi-touch digital campaign include digital advertising, social media marketing, direct email, partner website and search engine optimization, and telemarketing.

## Activity Guidelines

- Complete campaign activity must meet all guidelines and requirements for each individual activity type, as detailed on the applicable activity page in the Co-op Guidebook.
- All proof of execution for each activity type included in the campaign is required.
- Provide a marketing plan or other statement of work in the claim, which outlines the eligible activities included as part of the campaign in order to easily claim reimbursement for eligible expenses.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- All proof of execution as detailed in the applicable activity page is required.
  - [Digital advertising](#)
  - [Social media marketing](#)
  - [Direct email](#)
  - [Partner website and search engine optimization](#)
  - [Telemarketing](#)
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- Third party **media placement**
- **Fee – agency:** Marketing and creative services, including agency fees
- **Database acquisition**
- **Programming/development:** Programming and development fees
- **Fee – SEO:** Optimization and maintenance fees
- **Fee - Third party call center:** Third party call center charges

## Reminders

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials.

## Best Practices

Work with a marketing agency to create successful multi-touch digital campaigns that have an easily identified ROI and build customer pipeline

## Did you know?

- Microsoft's Partner Marketing Center offers resources for partners to easily build multi-touch campaigns. Visit [smartpartnermarketing.microsoft.com](http://smartpartnermarketing.microsoft.com) for more information.
- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.



# Market Development

# Telemarketing

Calling partners/customers or potential customers to promote and sell Microsoft products, services, solutions, or platforms. It can be an effective tool to prospect for leads, communicate directly with customers, and build a sales pipeline.

## Activity Guidelines

- Telemarketing activities must be partner-led and not appear to be from Microsoft. Microsoft products must be properly referenced in the script.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:** Copy of script
- **Metric:** Summary of results (number of calls and number of successful contacts)
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Fee – agency:** Marketing services, including agency fees
- **Fee - Third party call center:** Third party call center charges
- **Database acquisition**

## Reminders

- Indicate that the call is from your company and not from Microsoft.
- Use the correct trademarked name for software in the script and include the specific Microsoft product being promoted.
- Use for special initiatives.

## Best Practices

- Focus on communicating the most important message and driving a response.
- Appeal to Customer by meeting a specific need.
- Use a targeted call list.
- Test multiple offers to determine impact.

## Did you know

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Customer seminars and bootcamps

**Customer seminars** are Microsoft-focused customer and reseller-facing training and recruitment, utilizing content developed by the partner. Digital events such as podcasts, video on demand, simulcasts, hands on lab online, and other virtual seminar events are also eligible. **Microsoft bootcamps** are reseller-facing training events hosted by the partner, utilizing specific Microsoft presentation materials and Microsoft centralized registration.

## Activity Guidelines

- Customer seminars or Microsoft bootcamps must meet the core requirements. No proportional reimbursement is allowed for events that do not meet the core requirements. Events must be partner-led and partner-branded and not appear to be “sponsored by” Microsoft.
- Microsoft business model transformation consultants may be leveraged as external speakers to deliver workshops.
- Giveaway Items and event claiming for customer seminars and bootcamps must adhere to Microsoft guidelines.
- When conducting digital events, an image of the initial welcome screen of the webinar should be submitted in place of the event photos.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Image:** Event photos
- **Communication material:** Event invitation and agenda/program
- **Metric:** Number of registered guests
- **Support document:** Presentation materials, if event invitation and agenda do not meet core requirements
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

- **Fee – agency:** Marketing services, including agency fees
- **Fee - registration**
- **Fee – external** speaker (note: travel and hotel expenses eligible for speaker only)
- **Fee – facility and equipment rental including Surface devices owned and managed by a third party**
- **Catering (excluding alcohol)**

\*US allowances for this activity may vary from the global policy. US partners should check their individual agreements for details.

## Eligible Expenses\*

- **Signage / display / printed materials**
- **Giveaways**

## Did you know

Distributors participating in both the Authorized OEM Distributor incentives and Commercial Distributor co-op programs may claim the appropriate percentage of OEM and/or commercial business-focused event expenses under the respective programs. Proof of execution must designate the percentage of total expenses applied to each program.

## Best Practices

- Customize your strategy based on the unique needs of your business and customers.
- Provide giveaway items to attract attendees, increase participation, and collect customer information.

## Did you know

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Tradeshows and expositions

**Tradeshows** are sales events hosted by a third party, in which the Partner participates as a vendor. **Expositions** are sales events hosted by the partner, which promote multiple vendors. The primary focus of the event is to promote the sale of Microsoft products through demonstration and handouts. Only the Microsoft portion of general event expenses are eligible for reimbursement.

## Activity Guidelines

### General Event Expenses

- Booth or Exposition spaces featuring Microsoft content must meet the requirement for Microsoft content. Only the Microsoft portion of the general event expenses is eligible for reimbursement.
- To calculate the claim amount of general event expenses, divide the total amount of space dedicated to Microsoft and meeting the core requirements by the total event cost.

### Event Communication Materials

- All communication materials used at the Microsoft booth, such as signage, display, and printed materials, must meet the core requirements. No proportional reimbursement is allowed for communication materials that do not meet the core requirements. [Giveaway Items](#) and [event claiming for trade shows and expositions](#) must adhere to Microsoft guidelines.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

### Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Photo** showing event participation (for example, photo of booth, photo of presentation, etc.)
- **Communication material:** Event agenda, program and/or presentation/printed material
- **Metric:** Estimated number of attendees or booth visitors
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

### Eligible Expenses\*

- **Signage / display / printed materials**
- **Giveaways**
- **Fee – agency:** Marketing services, including agency fees
- **Fee – registration**
- **Fee – external speaker**(note: travel and hotel expenses eligible for speaker only)
- **Fee – facility and equipment rental including Surface devices owned and managed by a third party**
- **Catering (excluding alcohol)**

\*US allowances for this activity may vary from the global policy. US partners should check their individual agreements for details.

### Reminders:

- To calculate the claim amount of general tradeshow event and registration expenses, divide the total amount of tradeshow booth space dedicated to Microsoft and meeting the Core Requirements by the total tradeshow event cost.
- If a non-Microsoft operating system, productivity suite, server solution, collaboration suite software, or devices are present in the communication material, a maximum of 30% of the activity cost will be reimbursed.
- Distributors participating in both Authorized OEM Distributor Incentives and Commercial Distributor Co-op may claim the appropriate percentage of OEM and/or commercial business-focused event expenses under the respective programs. Proof of execution must designate the percentage of total expenses applied to each program.

**Did you know:** Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Customer offers

Customer offers not applicable to Managed Reseller, Surface ADR or Mixed Reality ADR partners.

**Customer offers** are customer or thru-partner marketing activities with promotional giveaway items offered to customers/resellers/channel partners to create excitement, generate sales opportunities, and reward outstanding sales performance.

## Activity Guidelines

Customer Offers:

- Should not advertise bundles or include a discount on a bundle which includes software.
- Should not be awarded based on first unit structures.
- Giveaway Items must adhere to Microsoft guidelines.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Image:** Sample giveaway Items or photo of giveaway. Note: Photo not required for cash giveaways
- **Communication material** showing offer with terms and conditions
- **Metric:** Summary of results, including an auditable list of the actual partners or customers that earned the offer and calculation (based on the program definition that the partner executed) in PDF, image (PNG, JPG, BMP or GIF) or Excel format
- Proof that the partners/customers that earned the offer received the payment or offer/reward as an invoice or receipt in PDF or image (PNG, JPG, BMP or GIF) format
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Signage / display / printed materials**
- **Giveaways**
- **Fee – agency:** Marketing services, including agency fees

## Reminders:

- Target your offers to the right audience.
- DO NOT advertise bundles or include a discount on a bundle that includes software.
- What if giveaway items do not comply with the Core Requirements? Giveaway items that cannot physically contain the core requirements must include supporting communication material that demonstrates the core requirements. Examples include advertisement, direct mail, or a brochure.

**Did you know:** Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Internal incentives and SPIFFs

**Internal incentives** and **sales performance incentive funds (SPIFFS)** are activities in which prizes are awarded to partner employees (for example, sales staff) for achieving specific goals or for sales teams for winning sales contests.

## Activity Guidelines

- Must be determined based on overall achievement relative to a peer group. Should not be awarded based on individual minimum commitments, first unit structures, attach rates, year-over-year growth percentage, or volume targets (not applicable for Surface partners).
- Giveaway items must adhere to Microsoft guidelines.
- The SPIFF giveaway expense of a floor day should be claimed under this activity. Other general event expenses for a floor day event should be claimed under "Internal Training and Floor Day".

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (**CSR**)
- **Communication material** flyers or notices circulated to Partner Employee informing them of the sales contests including the eligibility criteria and contest details (ex. KPIs, max cap on award, etc.)
- **Metric:** Summary of results
- **Support Document:** Sample giveaway items or photo of giveaway (*if communication material does not meet core requirements*)
- **SPIFF Attestation Form** confirming the participant awards, see Reminders section for detail
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- Actual costs up to 25% total of earned co-op funds per usage period for:
- **Signage / display / printed materials**
- **Giveaways \***
- **Fee – agency:** Marketing services, including agency fees
- Surface partners may claim up to 100% of earned co-op funds per usage period for eligible activity expenses.

\* Photo not required for cash giveaways

SPIFFs should leverage key performance indicators (KPIs) to structure the payout, require that a minimum eligibility threshold be attained, and place a cap on the award payable. SPIFF cannot be used by the partner to achieve a lower street price as the partner must pay them to partner employees.

## Reminders

- Do not include Microsoft software except as specified.
- Cash/cash equivalent is an acceptable giveaway for SPIFFs.
- The Internal Incentive and SPIFFs activity now requires an attestation form to be populated as part of the claim creation process. This applies to all programs on Partner Center, it is not applicable to the Commercial Distributor program

## Best Practices

- Internal Incentives/SPIFFs are most effective when clear goals and timelines are set and the incentive is related to the goals

**Did you know:** Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# On-site Champ

The On-site Champ activity is an allowance for the use of co-op funds for Microsoft-focused services, such as leading and coordinating marketing or sales campaigns, provided by current or hired, full or part-time partner resource(s) (employees or vendor-contracted) that demonstrate clear business development results such as Microsoft solutions competitive wins and sales uplift. These services should be for specific Microsoft-focused sales and marketing initiatives, or strategic incubation projects that are covered by the eligible co-op funds.

## Activity Guidelines

- Specific marketing activities driven by the On-Site Champ (for example, telemarketing) must be claimed separately under the applicable activity categories and must meet the core requirements.
- On-Site Champ can be a current or hired, full or part-time partner resource(s) (employees or vendor-contracted) to perform Microsoft-focused sales and marketing initiatives, or strategic incubation services.
- In cases where the On-Site Champ is an employee of the partner, a CSR form must be populated as proof of execution. In cases where the On-Site Champ is a vendor-contracted resource, an invoice will be required as proof of execution.
- Can include projects that extend beyond the current fiscal period, and co-op funds that are available to the partner in subsequent fiscal periods can be used to fund services provided by On-Site Champ for these projects within the policy guidelines.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

1. Services that are focused 100% on Microsoft products.

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR); (Number of hours worked by Champ(s) is required if CSR is used)
- **Communication material:** Samples of deliverables (based on what is described in the On-Site Champ form)
- **Support Document:** On-Site Champ form
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- Actual costs up to 100% for Surface and 50% for all other programs of earned co-op funds per usage period for:
- **Fees – services:** Services provided by On-Site Champ resource(s)

\* US allowances for this activity may vary from the global policy. US partners should check their individual agreements for details.

## Reminders

- Services associated with administrative or operational tasks, management of co-op and Incentive funds, and general sales services are not eligible for reimbursement.
- The On-Site Champ form is available on [aka.ms/partnerincentives](https://aka.ms/partnerincentives).

**Did you know:** Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.



# Proof of concept

Work performed by the partner to set up a working model of the solution being proposed to the customer for demonstration and evaluation purposes. Also includes Customer Immersion Experience (CIE) and service fees for time incurred in set-up of a technology demo center in the partner's office.

## Activity Guidelines

- Using a third-party vendor to work on the proof of concept activity is an eligible expense. Labor costs supporting qualifying activities may be claimed for reimbursement.
- Microsoft Customer Immersion Experience (CIE) is an eligible research expense. Eligible service fees can include set-up of a technology demo center and deployment services, including installation, configuration, data migration, testing, or customer-facing system set-up. Programming / development expenses can include API system development.
- Costs of Microsoft software, hardware, venue expenses, and other capital expenditures are not reimbursable.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

1. Microsoft content

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:** Copy of developed materials or market research data
- **Support Document:** Statement of work (from the partner or third-party vendor) and/or service agreement
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Printed materials**
- **Research:** White paper, case study development, market research, Customer Immersion Experience
- **Programming / development**
- **Fee – agency:** Marketing services, including agency fees
- **Fee – service:** Labor services provided by partner or third-party vendor in support of the proof of concept

## Caution

- Co-op funds do not cover the cost of the hardware or the venue as it is considered a capital expenditure.
- The cost of the Microsoft software is not reimbursable; license rights should come from internal-use rights benefit.

## Reminders

- Must have a target customer audience
- Include a prominently displayed brand of Partner.

## Did you know:

- Partners can now use co-op funds can use to enhance C3 funds they receive from Microsoft.

# Employee purchase web setup for customer

Employee purchase web setup for applies ONLY to Surface Reseller and Mixed Reality ADR partners

Setup of web site to allow employees of the customer to purchase Surface and Mixed Reality devices for their own use

## Activity Guidelines

- Partners can claim reimbursement for tech setup, testing, training and development for the web setup.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

1. 100% Microsoft content

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **URL** landing page or screen shot of website pages
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Fee – agency:** Marketing services, including agency fees
- **Programming/development:** Programming and development fees
- **Fee – service:** Labor services provided by partner or third-party vendor in support of the web setup



# Partner Readiness

# MPN participation

Includes Microsoft Partner Network (MPN) annual enrollment fees, MPN membership plaque and first set of DVDs and Additional Benefit Toolkit.

## Activity Guidelines

- Must be submitted within the 6-month usage period. Claims can be filed based on either enrollment date or invoice date.
- Microsoft invoice should indicate payment was made.

## Proof of Execution Requirements

- Original Microsoft **Invoice**
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Fee – Annual enrollment:** MPN annual registration fees
- **Plaque and DVD (first set):** MPN membership plaque and first set of DVDs
- **Additional Benefit Toolkit**

# Microsoft exams and tuition

Official Microsoft exam and tuition fees for certifications and competencies available at [www.microsoft.com/learning](http://www.microsoft.com/learning).

## Activity Guidelines

- Claims should be filed in the period during which the training activity occurred and after the exam / training is completed.
- Training vouchers may only be claimed after the completion of a training course. Partners must submit invoices for the vouchers and provide a certificate or a completion document that states the dates the course was taken and completed.
- If the invoice does not include the course/exam code and date of completion, be prepared to show an alternative form of course completion, such as a course certificate.

## Core Requirements:

1. Course code / exam code on [www.microsoft.com/learning](http://www.microsoft.com/learning)

## Proof of Execution Requirements

- Third party **invoice** with course code and date of completion or invoice with exam code and date of completion. If the invoice does not have the course/exam code and completion date, please provide course/exam code and completion date as a separate POE submission.
- **Metric:** Attendee list and per person cost
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Fee – exam:** Microsoft exam fees for certifications and competencies
- **Fee – training / tuition:** Microsoft tuition fees for certifications and competencies, including on-demand training expenses
- **3rd party ISV solution training** – tuition expenses for training on third-party solutions that can be demonstrated to leverage or reside on Microsoft applications and platforms
- **Fee – MCT renewal:** Microsoft Certified Trainer renewal fee (no metric required)

## Caution

Co-op funds will only cover predefined course materials, as listed on [www.Microsoft.com/learning](http://www.Microsoft.com/learning) in relation to a completed course/exam

## Are training vouchers eligible for Co-op funds?

Training vouchers may only be claimed after the completion of a training course. Partners must submit invoices for the vouchers and provide a certificate or a completion document that states the dates the course was taken and completed.

# Internal training and floor days

In-person partner-led and partner-facing training for internal personnel to help develop partner's sales, marketing, customer relationship management and technical expertise on Microsoft software and solutions; FIT and IAMCP training is eligible. Also includes Microsoft-hosted (or a certified agency) training. **Floor days** and internal **sales kickoff** events are days dedicated for the partner's sales staff to focus on the sale of Microsoft software. Can also include internal vendor fairs.

## Activity Guidelines

- CPLS or Learning Consultant is an eligible expense under **Fee – external speaker**, paid to the CPLS consultant including the Microsoft-related technical training provided by the CPLS consultant.
- Giveaway items must adhere to Microsoft guidelines. Expenses for giveaway items as part of a SPIFF activity during a floor day event should be claimed under the "Internal Incentives and SPIFFs" activity category.
- How to claim proportional reimbursement: Proportional reimbursement is allowed for internal training events when a specific time period of the training is 100% Microsoft-focused. Proportional reimbursement is also allowed for internal vendor fairs. To calculate the claim amount of general event expenses, divide the total amount of time/space dedicated to Microsoft and meeting the core requirements by the total event time/space and multiply by the total event cost.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

1. 100% Microsoft Content for timeframe of day or event space being claimed

## Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:** Training Agenda, Event Program or Screenshot of On-Demand Training Module
- **Communication material:** Microsoft presentation content
- **Metric:** Number of attendees
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses\*

- **Fee – training / tuition / registration / digital training platform or digital training formatting**
- **Signage / display / printed materials**
- **Giveaways**
- **Fee – agency:** marketing services, including agency fees
- **Fee – external speaker** (travel and hotel expenses eligible for speaker only)
- **Fee – facility and equipment rental**
- **Catering (excluding alcohol)**

\*US allowances for this activity may vary from the global policy. US partners should check their individual agreements for details.

## Caution

- Co-op funds do not cover upgrades, alcohol, minibar, laundry, or any other travel cost not explicitly stated in this guide.
- TRAVEL EXPENSES (for partner) ARE NOT ELIGIBLE UNDER TRAINING ACTIVITIES

## Reminders

- Training should be 100% Microsoft-focused.
- Provide giveaway items to boost sales and increase participation.
- Encourage sales staff to follow up with prospects.

# On-demand training

Virtual partner-led and partner-facing training that is delivered on-line in an On-Demand format for internal personnel to help develop partner's sales and technical expertise on Microsoft software and solutions; FIT and IAMCP training is eligible. Also includes Microsoft-hosted (or a certified agency) training.

## Activity Guidelines

- Increasingly, sales and technical training is delivered on-line in an On-Demand format. Typically, a course is offered as a set of consumable modules that are targeted at a specific element of the course and can be digested in a manageable time frame, or as needed. These training offerings can increase employee productivity by delivering the content when and how it is needed.
- How to claim proportional reimbursement: Proportional reimbursement is allowed for training events when a specific modules are consumed in different claim periods and the training is 100% Microsoft-focused. To calculate the claim amount of general event expenses, divide the total amount of time/number of modules meeting the core requirements by the total training time/number of modules and multiply by the total training cost.

**Core Requirements:** Review specific guidelines on the Activity Guidelines: Core Requirements slide.

1. 100% Microsoft Content for the on-line, On Demand training module being claimed.

## Proof of Execution Requirements

- Third party **Invoice or CSR** with course description and date of completion)
- **Metric: Attendee list**
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Reminders

Training should be 100% Microsoft-focused

## Eligible Expenses

- **Fee – agency:** Marketing services and content creation services including agency fees
- **Speaker fees**

\*US allowances for this activity may vary from the global policy. US partners should check their individual agreements for details.



# Microsoft Hosted Conferences

Conference and events hosted by Microsoft, in which the partner participates as an attendee. Includes registration, transportation (airfare or train fare), and hotel for up to 3 attendees per conference.

## Activity Guidelines

- Claims may not be submitted until after the conference activity is complete.
- Partners participating as vendors (with a booth) at a Microsoft-hosted event can claim eligible expenses under “Tradeshows and Expositions” activity category.
- Conferences must be hosted by Microsoft in order to be eligible for reimbursement. If the required proof of execution does not clearly show that the conference was hosted by Microsoft, additional support documentation may be required.
- Conferences should include either a strategic discussion, product roadmap review or training opportunity which can lead to certification.

## Core Requirements

1. Microsoft-hosted conference

## Proof of Execution Requirements

- Third party **invoice**
- **Support document:** Copy of conference/event invitation or registration confirmation showing evidence that conference is hosted by Microsoft
- **Support Document:** Transportation itinerary with travel dates (*Travel – airfare expenses only*)
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Fee – Registration:** for up to **3 attendees (6 attendees for Hosting)** per conference
- **Travel – Airfare/Hotel:** Transportation (airfare or train fare and applicable taxes) and hotel (room rate only and applicable taxes)

**Note:** Travel – Airfare/hotel expenses are capped up to USD5,000 per person per conference, limited to 3 attendees, with a total cap of USD45,000 for airfare/train fare/hotel expenses per period per program.

\* US allowances for this activity may vary from the global policy. US partners should check their individual agreements for details

## Caution

Co-op funds **do not** cover upgrades, alcohol, minibar, laundry, or any other travel cost not explicitly stated in this guide. Hotel room rate will be reimbursed up to the night prior and night after the conference dates.

# Product seeding / Demo units

Demo units are for use by partner employees in customer-facing presentations, showcases, kiosks, and internal training. Product seeding are devices provided to customers on a trial basis for testing and evaluation purposes.

## Activity Guidelines\*

- **Managed Reseller, Commercial Distributor, Hosting and CSP Indirect Provider, Indirect Reseller and Direct Bill Partner Partners:** Limited to current Windows systems, Windows peripherals, and Microsoft HoloLens up to the greater of USD3,000 USD or 10% of total accrued co-op funds per program period.
- **Mixed Reality ADD and DMP Partners:** Limited to Mixed Reality products and accessories for ADD and DMP (no claim limits).
- **Mixed Reality ADR Partners:** Limited to Mixed Reality products and accessories (no claim limits).
- **Surface PC ADD and Reseller Partners:** Limited to Surface and Microsoft branded Surface accessories for ADD and Resellers (no claim limits).
- **Surface Hub ADD and Reseller Partners:** Limited to Surface Hub and Microsoft branded Surface Hub accessories (no claim limits).

Claims should be filed in the period during which the activity was completed (i.e., units have been delivered). Proof of delivery of units can include a packing slip, delivery confirmation, or retail receipt.

## Proof of Execution Requirements

- Third party **invoice** showing demo unit system specs or certification statement and report (CSR) showing the delivery date
- **Communication Material:** Systems specifications for demo units built in-house as well as from third party if TP invoice does not have those details
- **Support document:** Proof of delivery for third party demo units
- **Applicable for Surface PC and Hub Reseller and ADD Only:** PCMM or PDM activity plan approval

## Eligible Expenses

- **Fee – equipment purchase:** Product demo units

*\* Please review guidelines for core requirements under the applicable activity guidelines page including specific guidance for Office FPP/ESD for Commercial Distributors.*

## Caution

- Co-op funds do not cover testing environments and other technology
- Accessories are defined as keyboard, mounts and stands, docking station, mouse, and pen

# Appendix

# FY21 Co-op funds guidance

## 1. Funds guidance per amount of available funds

Category	a Depth partners		b Breadth partners	
	>\$20K Co-op	\$20K-\$5K Co-op	\$20K-\$5K Co-op	<\$5K Co-op
Partner readiness	10%	30%	30%	50%
Demand generation	30%	20%	20%	20%
Market development	60%	50%	50%	30%

### a Depth partners:

- At least 30% towards demand gen/digital marketing activities to generate leads for services (cloud) and devices.
- 60% towards market development activities to close leads.
- 100% co-op claim rate to maximize business impact (ROI).

### b Breadth partners:

- At least 20% towards demand gen/digital marketing activities to generate leads for services (cloud) and devices.
- \$20k to \$5K co-op resellers: strong focus on market development activities to close leads.
- \$5K or less breadth: strong focus on partner readiness to develop partner capabilities to promote, transact and deploy services and devices.

## 2. Co-op recommendation by solution area

Main products	% Co-op
Modern workplace	30%
Business applications	20%
Apps and infrastructure	25%
Data and AI	25%

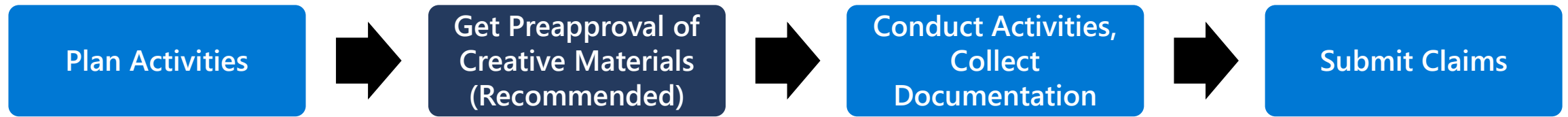
## 3. Co-op for digital marketing

- a **Depth partners:** Target at least 30% of overall funds towards Digital Marketing to generate leads for services (cloud) and devices.
- b **Breadth partners:** Target at least 20% of overall funds towards Digital Marketing to generate leads for services (cloud) and devices.

### Demand generation/digital marketing activities

- Partner website and search engine optimization
- Digital advertising
- Email and SMS
- Microsoft syndicated content

# Creative materials preapproval



## Preapproval Recommendation for Creative Materials

- Preapproval of creative material is available to partners. It is strongly recommended that creative material for Demand Generation and Market Development activities be submitted for preapproval to ensure compliance with the co-op guidelines.
- Creative material may be submitted for preapproval by email before the activity is scheduled to begin. The Preapproval team will review the activities and approve or request changes/corrections within 3 business days.
- Approved activities will be assigned a preapproval code which should be entered into the claim form on Partner Center or CHIP along with proof of execution at the time of claim submission. The activities must be conducted exactly as approved. Any deviation from the approved activities, with the exception of dates and pricing, will result in the activities being re-assessed and the claim may be denied. Activities that run repeatedly should receive a new preapproval number each program period to ensure the activity continues to meet program requirements.

## Preapproval Best Practices

The following suggestions will assist in receiving a quick and accurate preapproval response:

- Include the Co-op Program ID in the preapproval request. The Co-op Program ID can be found on the Partner Center or CHIP homepage following your company name.
- Include the activity type in which the creative material will be used. Including the activity type planned will assist the Preapproval team in accurately evaluating the activity.
- Leave ample lead time in order to make any necessary changes before starting the activity. Recommended lead time is a minimum of 7 business days.

## Submitting Preapproval Requests

- To request preapproval of creative materials, please email the materials to [commpre@Microsoft.com](mailto:commpre@Microsoft.com).
- Each preapproval code is specific to the submitted request and program and cannot be used interchangeably. Assigned preapproval codes are valid for one year from the date of preapproval.

# Giveaway items

- Must be limited to no more than 40% of co-op funds per usage period
- May include up to 20 systems with preinstalled Microsoft software per usage period
- May include cash or cash equivalents, such as gift cards or certificates \*
- Must not include Microsoft software (except as specified above)
- Cannot feature competitors' products or offerings
- Cannot be costs associated with the manufacture or distribution of customer systems, including costs related to bills of material and cost of goods (shipping, packaging, freight).

\* Photo is not required as POE for cash.

# Event claiming

When partners claim using co-op funds for the various events that are eligible activities, subtle differences in the definition and classification of these events often result in claims being made for the wrong type of event or incorrect proof-of-execution (POE) submitted. In these cases, the claims are rejected. This forces the partner to re-work and re-submit the claim. The following guidance will assist partners in successfully claiming for these various events.

## Tradeshows and Expositions

The key difference between these two types of events is:

- A Tradeshow is hosted by a third party, and the partner participates as a vendor/exhibitor (and promotes Microsoft products/offerings at the event).
- An Exposition is a sales event that is hosted by the partner, and can involve multiple vendors, but must promote Microsoft products/offerings among them.

In the case where the partner is promoting the products of multiple vendors at either of these types of events, the partner should only submit an expense amount of the total incurred, eligible expenses that is proportional to the Microsoft amount of space and promotion. This portion can be based on a good faith estimate, but, in the event of an audit, must be backed up with such items as booth photos and copies of any promotional material that was developed to support/promote the event.

Additional clarification, as well as allowable expenses and POE for each event can be found on the activity pages in the co-op guide for these events.

## Customer Seminars and Bootcamps

The key difference between these two types of events is:

- In Customer Seminars, content is used that is developed by the partner.
- In Bootcamps, the content used is originated by Microsoft.

In both types of events, the event must be partner led and partner branded. They can't be sponsored by Microsoft or even appear to be branded by Microsoft.

A Seminar is typically either a selling or product/solution orientation focused event. Either a reseller is conducting an informational meeting with potential customers, or a distributor is conducting a recruiting event with potential partners.

A Bootcamp is an event hosted by a distributor (or CSP Indirect Provider, Indirect Reseller and Direct Bill Partner). Bootcamps are not conducted by resellers. These events are typically used by distributors to both train their partners on specific Microsoft products and offerings and promote specific Microsoft products and offerings. These events typically involve the entire Microsoft-focused sales team at the distributor and last for several hours to an entire day.

Both Seminars and Bootcamps can be conducted in person, or virtually.



# How to use funds for Mixed Reality

## Co-op planning recommendations

Mixed Reality channel partners should work closely with Microsoft PMMs in their region to align GTM plans, activities, and spend to drive maximum impact.

All co-marketing in FY21 (July 2020 through June 2021) should be used to drive three core priorities:

- **Readiness and enablement**—skilling of sales, marketing, and technical teams so they can drive effective solution sales and redeliver readiness to their peers as needed
- **Driving demand**—invest in demand generation activities that fill your pipeline with opportunities in the target industry scenarios and use cases
- **Attaching solutions to HoloLens 2 sales**—attach a Microsoft first-party solution (D365 Remote Assist or Guides) or an ISV solution to HoloLens 2 devices. No naked devices.

## Co-op Funding Plan (Illustrative only)

In this example of a co-op plan, the partner allocates available funds for the next period against the 3 Microsoft priorities (Readiness, Demand Gen, and Attach) as well as on-site champs. These activities are also designed to drive business in partnership with the local Mixed Reality PMM in the region.

Demand Generation	Attach Offers	Readiness	On-site Champs
<ul style="list-style-type: none"><li>✓ MR Roadshow: Mixed Reality for retail success</li><li>✓ Hands-on Workshop: How MR improves frontline worker productivity</li><li>✓ Webinar Series: MR simulation solutions for Healthcare workers</li><li>✓ Digital campaign promoting customer success videos</li></ul>	<ul style="list-style-type: none"><li>✓ Custom financed offers</li><li>✓ 3<sup>rd</sup> party solution offer</li><li>✓ Inside Sales (SPIFF) on attach</li><li>✓ To-customer offer</li><li>✓ Rapid POC offers</li></ul>	<ul style="list-style-type: none"><li>✓ Internal train-the-trainer webinars</li><li>✓ Customer event with ISV to showcase Manufacturing solutions</li><li>✓ Hand on labs</li><li>✓ Role based training guides</li></ul>	<ul style="list-style-type: none"><li>✓ MR champ (PM)</li><li>✓ Additional MR BDM and Presales for driving 3<sup>rd</sup> party solution sales</li><li>✓ Presales &amp; Technical support on MR</li><li>✓ Channel PM to coordinate supply chain, inventory, and fulfillment</li></ul>



# Co-op Plan Example #1

Co-op planning Guidance – effective planning is critical for delivering optimal impact with co-op funds. This page provides an example of a co-op plan defined by activity type

## Recommendations

- Align activities across the 3 categories effectively
- Align activities to Microsoft Solution Areas, priorities and local offers (optimize impact and leverage of Microsoft spending)
- Claim right after completing the activity (maximize cash flow)
- Utilize all your earned co-op (don't forfeit funds you have worked hard to earn)
- Align with local market motions

## Co-op Funding Plan Example

In this example of a co-op plan, the partner allocates available funds for the next period against 4 categories of activities: demand generation, sales spiffs & offers, sponsorships, and on-site champs. These activities are also designed to drive business in alignment with Microsoft solution areas and priorities.

### Demand Generation

- ✓ Cloud Roadshows: Microsoft 365 & Azure
- ✓ Hands-on Workshops: Microsoft 365 & Azure
- ✓ Webinar Series: Microsoft 365 & Azure
- ✓ Webinar: 3 per Quarter
- ✓ Customer event bundling with ISV to focus Azure usage

### Sales Spiffs and Offers

- ✓ Upgrade existing Office 365 Business Premium seats to Microsoft 365 Business
- ✓ Inside Sales (SPIFF)
- ✓ To-customer Offer
- ✓ For every new Azure subscription > \$5000, get a Surface PRO
- ✓ Azure porting support on ISV Campaign

### Program Sponsorship

- ✓ Sponsor Sales Conference
- ✓ Road Show/Hands-on Workshops/Webinar
- ✓ Azure Campaign/building Modern Workplace solutions
- ✓ Promote cloud marketplace to customers
- ✓ Digital marketing to boost offers

### On-site Champs

- ✓ Azure Pre-Sales PM
- ✓ CSP Warrior (Customer recruit Focus)
- ✓ Additional Cloud BDM and Presales for ISV consumption on Azure
- ✓ Presales & Technical support on Azure CSP

# Co-op Plan Example #2

Co-op planning Guidance – effective planning is critical for delivering optimal impact with co-op funds. This page provides an example of a co-op plan defined by Microsoft solution area

## Co-op Funding Plan Example

In this example of a co-op plan, the partner allocates available funds for the next period against 4 categories of activities: demand generation, sales spiffs & offers, sponsorships, and on-site champs. These activities are also designed to drive business in alignment with Microsoft solution areas and priorities.

### Modern Workplace

- Demand Generation
  - Customer recruitment
  - Digital Advertising
  - Post touch nurture email campaigns
  - Lead scoring & onboarding
- Program Sponsorship + Industry Events
  - Cloud, Security + IoT Program
  - SMB Connect Program
- SPIFFs/Offer
  - Inside Sales SPIFF
  - To-Customer E5 Offer

### Apps & Infrastructure

- Demand Generation
  - Customer recruitment
  - Digital Advertising
  - Training recruitment
    - Technical product & profitability training
  - Post touch nurture email campaigns
  - Lead scoring & onboarding
- Program Sponsorship + Industry Events
  - Advisory Council
  - Migration seminar
- SPIFFs/Offer
  - Inside Sales SPIFF
  - To-Customer Migration offer
- On-site Champ
  - Business Dev Coordinator

### Business Applications

- Demand Generation
  - Training recruitment
    - Complimentary vendor trainings
    - ISV trainings
  - Post touch nurture email campaigns
  - Lead scoring & onboarding
- Program Sponsorship + Industry Events
  - CRM Seminar
  - Industry ERP Workshops
- SPIFFs/Offer
  - Inside Sales SPIFF
    - CRM wins
  - To-Customer D365 CRM Offer

### Data & AI

- Demand Generation
  - Azure promotion social media campaign
- Program Sponsorship + Industry Events
  - Azure road show
  - PowerBI Seminars
  - Government Community Show
- SPIFFs/Offer
  - Inside Sales SPIFF
  - To Customer Azure offer

# Available tools to help drive Microsoft Business

Co-op funds can be used and claimed under Demand Generation or Market Development to access third-party tools that help partners connect with a Microsoft solution and drive incremental sales pipeline and cross-sell/up-sell opportunities.

## Examples

**Work 365** is a Customer Experience Platform built on the Microsoft Cloud (Dynamics 365, Azure, Office) that delivers: 1) Billing and invoicing automation, 2) Integration with Microsoft Partner Center; and 3) a Customer Self-Service Portal

Go to [www.work365apps.com](http://www.work365apps.com) to learn more

**TBSC** is a software asset management pioneer that has developed offers you can leverage to help you effectively migrate your customers to the cloud.

Go to <https://businesssoftwarecentre.com/> to learn more

# Use co-op for ISV marketing

Does not apply to Surface or Mixed Reality.

Did you know co-op funds can be used to drive ISV solutions in the market? Co-op funds earned through Partner Incentive programs may be used to engage the ISV partner channel and drive pipeline for ISV applications.

## DISTRIBUTORS

- Assist partners to build Customer Offers that include key ISV applications.
- Develop online marketplaces to distribute ISV applications.
- Conduct Floor Days to train internal sales teams on how best to promote joint reseller-ISV solutions.

## RESELLERS

- Execute Multi-Touch Digital Campaigns that include ISV applications.
- Develop Proof of Concept centers that include ISV applications.
- Build SEO and Telemarketing campaigns that feature solutions built with key ISV applications.

Follow these best practices to claim reimbursement for ISV-focused co-op activities

- **Does your activity prominently display Microsoft solutions?** If the marketing material does not clearly show a Microsoft component, additional proof may be required to ensure the activity meets core requirements. Review specific program guidelines for more details about the Microsoft content requirement.
- **Is the activity's marketing material branded for your company?** Partner company/brand name and contact information is a core requirement for demand generation and market development activities.
- **Does the activity follow general co-op policies and activity guidelines?** Adhere to all co-op activity guidelines as detailed on each activity page.
- **Did you review the necessary proof of execution for activities to be conducted?** Collect all required POE for each ISV-focused activity conducted and submit in the claiming platform.

# Digital marketing guidance

Changing buying behaviors is making marketing a mission-critical function

**“Marketing has become too important to be left just to the marketers.”**

Harvard Business Review

- “57% of B2B purchase evaluation is done without speaking to a human.” – McKinsey & Company
- “88% of business research is done online before purchasing offline.” – McKinsey & Company

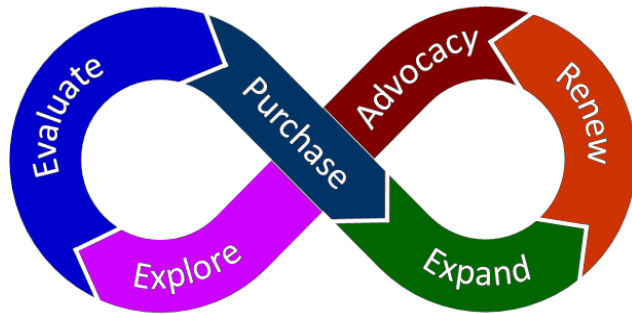
## The cloud buyer and market dynamics

- The customer journey is generally faster with cloud, so it’s important to streamline the process and get to quote fast
- There’s now a need for companies to build and nurture relationships with unknown buyers in varying stages of their journey
- Cloud messages around productivity, economics and pricing are resonating well
- Digital marketing is the bedrock of marketing efforts with content driven websites, SEO, and social media at the core
- Use of specialist marketing agencies is key for many partners to bridge the marketing knowledge and manpower gap

Visit [smart-partner-marketing](#) for digital marketing training and resources.

# Digital marketing guidance

Anchor your demand generation in the cloud customer journey



- IDC defines 6 stages of the customer journey as shown to the left, based on specific goals that must be met.
- Partners should align their demand generation activities to these goals and keep pace as customers progress.
- Cloud customers go through a cognitive process to advance their purchase and use of cloud solutions.
- Each customer may have a unique path to purchase.
- Customers can move forward or backward and even appear to skip steps. But they need to accomplish stage-specific goals before they buy.
- There are differences in importance and the amount of time spent in each stage for different kinds of customers and regional markets, but at the highest level they share the same decision making process.

## Marketing tactics by stage of journey



Website SEO and content	Social media- including blogs	Sales presentations	Website content	Social media	Social media
Social media- including blogs	Email campaigns	ROI tools	Social media- including blogs	Email marketing	Case studies
White papers	Telemarketing	Case studies	Case studies	Telemarketing	Public relations
Web content syndication	Events – online or in person	Offers and incentives	Proof of concepts	Newsletters	Referrals
Social Selling	Videos	Proof of Concepts	ROI tools	Account management	
Educational Videos	Product trials and demos	Account management	Account management		



# Digital marketing tied to customer journey



## How to tell your story (verticals and customer segments considered here), also possibly building personas

A short discussion on the importance of segmenting the database, blending the partner value proposition with the Microsoft Solution, and appealing to the key personas based on the needs of their vertical market.



## Basics of websites (set up, basic content needed, basic measurement)

2-3 short recordings on tools and CMS choices, basic structure, navigation, types of content, calls to action, SEO concept, keywords, etc.



## Basics of blogging

Short recording with tips about how to come up with blog topics, thought leadership style and tone, use of long tail keywords, good blog lengths, where to post and how to amplify postings with social media



## Basics of social media (other than blogs)

Why LinkedIn matters so much, essentials of LinkedIn profiles, tips and tricks of getting connected, other tools you can use, using social for prospecting and lead generation



## SEO

Keywords, keyword research, title tags, page optimization, and search engine submissions. A separate item on Pinpoint.



## PPC/landing pages

The key elements of landing pages that convert, form design and usage, PPC, SEM, Inbound and Outbound techniques defined



## Webinars and online events

Several short sessions on webinar tips and best practices, the advantage two person vs single person webinars, tools to use, scheduling, promoting, driving attendance, managing the registration process, when to send reminders, Q&A including seed questions, calls to action, and post webinar follow ups.



## Video basics

How, why and when to use and essential tools and equipment needed, where to post, how to get started.



## Email marketing

Each topic broken into short recordings: Concepts: Opens vs click through, Subject lines and subject line testing tools, Message body tone and style, Using hyperlinks, Call to action / landing pages, Audience / message segmentation, Simple AB testing, when to send, Avoiding being a spammer.



## Content automation with concept of nurture and lead scoring

Using the right content for the right audience at the right time, triggers, how to create / obtain content with PMC (formerly RTG) and other sources.



## Easy/low cost PR

The format of press releases, how to get ink, gain leverage through influencers, associations, and communities. Tools you can use – Microsoft Community Connections program, Microsoft Stores, and more.



## Basics of CRM – how to measure and adjust and what good ROI is

How to ensure you target market organizations and contacts are represented within your CRM. Basic fields, reports, and segmentation for a typical Microsoft Partner. Ideas on simple segmentation to get started, How to measure campaign and outreach success. Managing campaigns from CRM.



## Evidence and basics of advocacy

How to give back to the community and establish your organization as a regional leader. We will discuss the business impact, employee morale and reputation benefits as well as the resources available to Microsoft Partners.

# Smart partner marketing- advice and training

## What is Smart Partner Marketing?

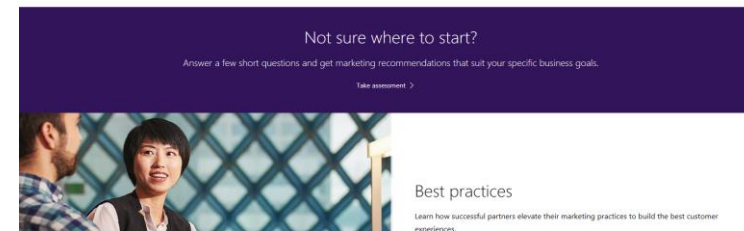
Smart Partner Marketing is dedicated to helping Microsoft partners transform their growth with digital marketing. The site is built for partners by partners – with best practices and recommendations from those companies who are successful and credit some of that success to marketing.

## Benefits:

- Partners can access market insights and research conducted by Microsoft to help guide their strategies and growth
- Guided digital marketing growth path to assess where they are and how they can get to the next level
- Partners can hear advice from other partners and what they did to grow their business through marketing
- Partners can access free digital marketing training to train up their marketing person/team
- Partners can access professionally developed marketing assets to utilize in their campaigns

## Which partners is this resource ideal for?

Available for network level (and above) Microsoft Partners at all marketing sophistication levels at [smart-partner-marketing](https://smart-partner-marketing.com).



# Go-To-Market with Microsoft

Microsoft provides members of the Microsoft Partner Network with marketing resources, offers, and programs to help increase your visibility with, and connection to, customers. And, to meet the wide range of partner needs, resources are **available in more than 174 countries, 12 languages, and supported by six marketing fulfillment centers, worldwide.**

Our [Go-To-Market program](#) is designed to enable you to **accelerate your time to market, generate more leads, and grow your cloud business.**



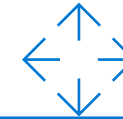
## Accelerate time to market

Quickly build and enrich your marketing foundation and get to market faster. Whether it's learning from our experts, leveraging industry research, or assessing new opportunities, our marketing resources help you do it all, and do it fast.



## Generate leads

Activate new channels and generate demand for your solutions in ways that work best for you. We've made it simple and easy to connect with more customers through multiple channels, like social media and resource tools.



## Grow your cloud business

Create and grow new business channels and extend your business reach. We can help you gain visibility with Microsoft sellers and our partner ecosystem, expand your marketing footprint, and maximize use of every selling channel.

Get started today by visiting the [Go-To-Market with Microsoft website](#)

# Go-To-Market with Microsoft *Signature Offers for Purchase*

Eligible GTM Services	Co-op Activity (for making claims)
Lead Prospecting Campaign	Multi-touch Digital campaign
Lead Engagement Campaign	Multi-touch Digital campaign
CSP Lead Generation Campaign	Multi-touch Digital campaign, Microsoft syndicated content, or Social media marketing
LinkedIn media package	Social media marketing
Add-on media package for virtual events or webinars	Customer seminar
Advertising credits and SEM consultation	Digital Advertising or Partner website and Search Engine Optimization

# Lead Prospecting Campaign

Executed by the Partner Demand Generation Program (PDG) for a single partner solution

Generate high-quality leads at scale.  
Pricing: \$35,000 USD

Partner audience: All partners with Gold & IP Co-sell  
Available worldwide  
Email [gtm@microsoft.com](mailto:gtm@microsoft.com)

Fill the top of your pipeline funnel with a fully managed, co-branded campaign, designed to drive awareness and lead capture. We'll target your most relevant accounts using sophisticated account-based media to capture decision makers and/or influencers in the buying committee.

## Key deliverables and outcomes:

### Strategy

- Custom Microsoft + Partner(s) of joint value proposition
- Campaign messaging and strategic idea

### Content and Assets

- Net new content marketing asset (4-6-page e-book or white paper)
- Static social media lead generation assets (2) for paid media OR your owned social channels (Built to LinkedIn specs)
- Reminder nurture email template to kick off your nurture stream

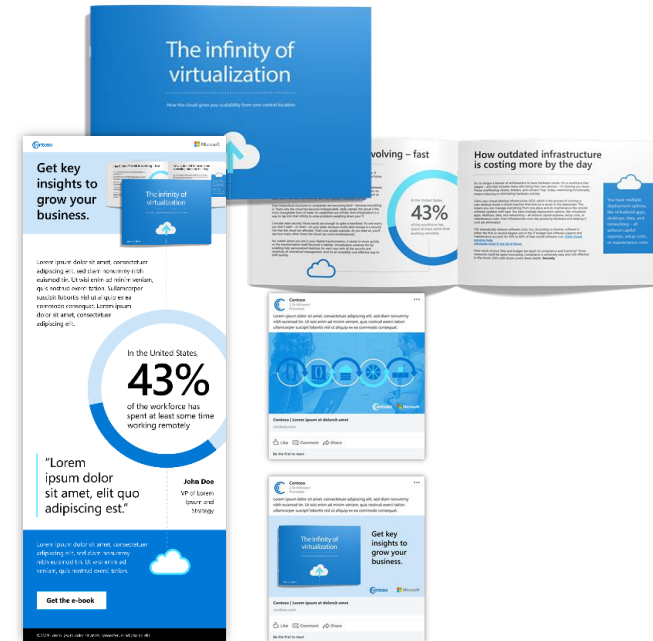
### Media

- Account-based paid media strategy and execution targeting your most ideal accounts/ customers via 1 touch content syndication

### Operations/ Reporting

- Lead flow to OCP GTM and Partner Sales Connect
- Campaign reporting
- Avg 160 - 225 leads per campaign (have had 1 marketing touch prior to hand-off) \*

\* For a single partner solution – (1 Geo, 1 language, & 1 product offering).



*"Microsoft really acted as an extension of our marketing team to create this four-week campaign. We exceeded our target leads by 15%. 100% of those leads were within our parameters. It really helped accelerate our launch to market."*

Shayna Teitelbaum  
Enterprise Partnerships & Alliances, Thomson Reuters





# Lead Engagement Campaign

Executed by the Partner Demand Generation Program (PDG) for a single partner solution



Generate high-quality leads at scale.  
Pricing: \$45,000 USD

Partner audience: All partners with Gold & IP Co-sell  
Available worldwide  
Email [gtm@microsoft.com](mailto:gtm@microsoft.com)

Generate mid-funnel demand with a fully managed, co-branded campaign, designed to drive more engaged leads. We'll target your most relevant accounts using sophisticated account-based media to capture decision makers and/or influencers in the buying committee that have answered qualifying questions.

## Key deliverables and outcomes:

### Strategy

- Custom Microsoft + Partner(s) of joint value proposition
- Campaign messaging and strategic idea

### Content and Assets

- Net new content marketing asset (4-6-page e-book or white paper)
- Partner supplies 2<sup>nd</sup> piece of content
- Static social media lead generation assets (2) for paid media OR owned social channels (Built to LinkedIn specs)
- Reminder nurture email template to kick off your nurture stream

### Media

- Account-based paid media strategy and execution targeting your most ideal accounts/ customers via 2 touch content syndication and custom qualifying questions

### Operations/ Reporting

- Lead flow to OCP GTM and Partner Sales Connect
- Campaign reporting
- Avg 150 – 180 leads per campaign (have had 2 marketing touches prior to hand-off)\*
- Includes 2 qualifying questions as well

\* For a single partner solution – (1 Geo, 1 language, & 1 product offering).



*"The PDG has been great for us. It really has been an extension of our team over the past year. The value that we see out of that is that we are able to target specific Microsoft existing customers about our Adobe story that we have together with Microsoft."*

Mike Weber

Senior Manager, Global Partner Marketing, Adobe

# CSP Lead Generation Campaign

Executed by the Partner Demand Generation Program (PDG) for a single partner solution



Generate high-quality leads at scale.  
Pricing: \$10,000 USD

Partner audience: CSPs and MSPs with Gold & IP Co-sell  
Available worldwide  
Email [gtm@microsoft.com](mailto:gtm@microsoft.com)

Fill the top of your pipeline funnel with Account-Base Marketing campaign and semi-customized co-branded assets. We'll target your most relevant accounts to capture decision makers and/or influencers in the buying committee

## Key deliverables and outcomes:

### Content

- Highlight your added services in 2 to 3 custom pages of a content marketing asset (4-6-page e-book). The ebook is aligned to MSFT strategic messaging.
- Get guidance for effective lead nurture post lead hand-off.

### Media

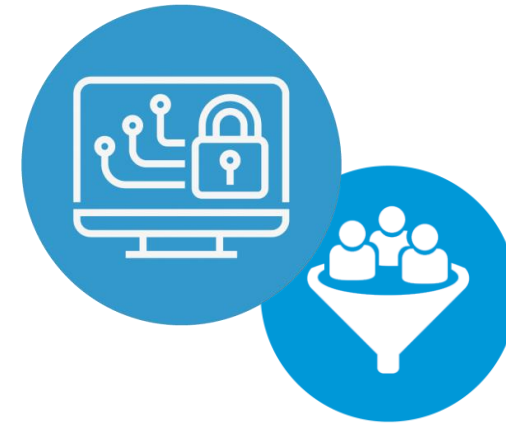
- Account-based paid media execution, targeting within your most relevant accounts via 1 touch content syndication

### Operations/ Reporting

- Lead flow to OCP GTM
- Campaign reporting
- Avg 90 – 120 leads per campaign (have had 1 marketing touch prior to hand-off) \*

**Observation:** This campaign package is eligible for C3 funds

\*For a single partner solution – (1 Geo, 1 language, & 1 product offering).



*"We appreciate the leads and opportunity to work with you on this. Fantastic job!"*

Kelly Chamberlain  
Netwize

**NetWize**

*"The leads have started rolling in from the M365 eBook campaign you guys put together for us. I'm so impressed by the quality! We've participated in these types of programs in the past and the results have been underwhelming – but not this time!"*

Courtney Casey  
Director of Marketing, Accent Computers



# LinkedIn Media Package



Build your brand and generate leads  
Pricing: Starts at \$10K USD

Partner audience: All partners with Gold & IP Co-sell  
Available worldwide  
Email [gtm@microsoft.com](mailto:gtm@microsoft.com)

Precisely reach & engage decision makers at your target accounts, on the world's largest professional network.

## What's included?

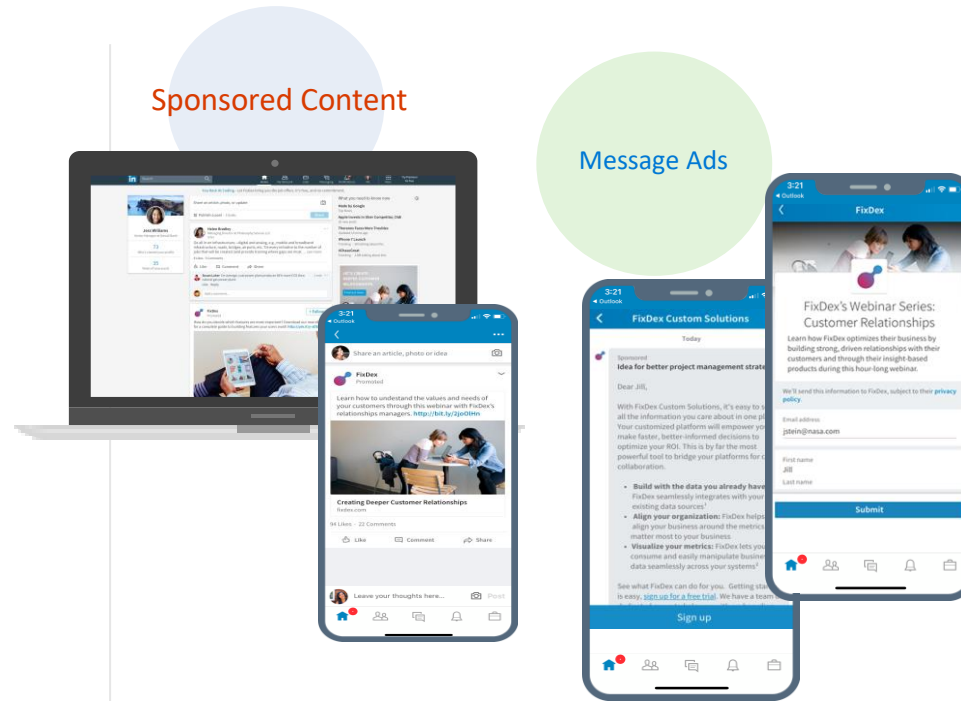
1. Campaign Setup & Best Practices Guide
2. Campaign launch call with LinkedIn
3. Mid-campaign and post campaign reporting emails
4. Dedicated LinkedIn support
5. Invite to webinars, training sessions and Email newsletter

## You provide:

1. Ads: Sponsored Content Lead Gen Form Assets (3-4 variations per campaign)
2. Company Page – Must have LinkedIn Company Page\*
3. Target: .CSV of Account List
4. Billing details

Sponsored Content

Message Ads



*"If someone comes to our landing page from LinkedIn, they typically convert at a high rate," says **Nik Love**, Global Digital Manager, IR*



# Webinar Registration (Media Only)



Generate high-quality leads at scale  
Price: Starting at \$10K USD

Partner audience: All partners with Gold & IP Co-sell  
Available worldwide  
Email [gtm@microsoft.com](mailto:gtm@microsoft.com)

Drive registration for a single webinar with Microsoft! We'll target your most relevant accounts using sophisticated account-based media to capture registration from decision makers and/or influencers in the buying committee.

## Key deliverables and outcomes:

### Content

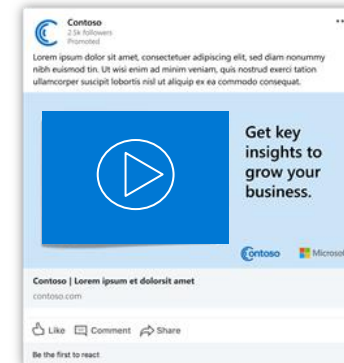
- Creation of demand generation and retargeting assets (e.g. banners, social posts)

### Media

- Account-based paid media plan
- Execution of paid media to drive registration for webinar
- Campaign reporting

\* Includes campaign for a single event, target audience, language, and partner solution

\*\* Registration estimates will vary based on geography, audience and total available market.



# Microsoft Advertising

Get **dedicated support** from a Microsoft Advertising Specialist plus a **complimentary ad credit for \$250 when you spend \$50**. [Sign up](#) for a virtual consultation today.

## Reach more customers with the Microsoft Search Network

- 47 million desktop searches not reached on Google<sup>2</sup>
- 127 million unique searchers (nearly half the U.S. population)<sup>1</sup>
- 6.4 billion monthly searches worldwide<sup>1</sup>
- 37% PC market share in the US<sup>1</sup>

Partners who are new to Microsoft Advertising or have not advertised in the last 12 months<sup>3</sup> are eligible to **receive a complimentary personalized consultation** with a Microsoft Advertising Onboarding Specialist plus a **complimentary ad credit worth USD \$250 when you spend \$50**. See full list of supported markets<sup>4</sup> and Terms & Conditions [here](#).

## The personalized consultation would include:

- Help defining your Microsoft Advertising goals and build a customized plan.
- Support developing a step-by-step overview of the Microsoft Advertising platform, including audience reach and industry or vertical performance.
- Guided campaign setup, keyword selection, feature adoption, and reporting—including importing your most successful Google Ad campaigns.
- Onboarding support to ensure your initial campaigns are performing, with the opportunity to receive ongoing optimization from our customer support team.

## Best practices

- Include Microsoft Advertising as part of your digital marketing strategy.
- Comply with all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

1 comScore qSearch, Explicit Core Search (custom), U.S., December 2019. The Microsoft Search Network includes Microsoft sites, Yahoo sites (searches powered by Bing) and AOL sites in the United States. Data represents desktop traffic only.

2. comScore qSearch, Explicit Core Search (Custom), U.S. December 2019.

3. Partner must be new to Microsoft Advertising or not have advertised within the last 12 months. Any partners with an existing Microsoft Advertising account must not have had a click on their campaigns in the last 12 months to qualify. Offer only available in supported markets. See offer [T&Cs](#) for more details.

# Microsoft Partner Marketing Center

## What is the Partner Marketing Center?

The Microsoft Partner Marketing Center offers partners customizable marketing, sales, and readiness content and materials such as:

- customer pitch decks
- copy blocks for partners to use on their websites or social media
- customizable pre-written emails
- solution training videos, and more

## Benefits

- Promote: Access to customizable marketing material and templates helps partners differentiate their business and stand out from the rest
- Save: Continued investments from Microsoft mean ready-to-use content and services, saving partners time and money of creating it themselves
- Grow: Increase customer leads and close more deals with access to the right marketing tools to help accelerate business to the next level

## Which partners is this resource ideal for?

- Available for network level (and above) Microsoft Partners at <http://aka.ms/pmc>.
- Start at [partner.microsoft.com](http://partner.microsoft.com) and navigate to reach customers > promote your business

Organized by solution area, product, and industry

The screenshot shows the Microsoft Partner Marketing Center interface. At the top, there's a header "Marketing campaigns" with a background image of two people in a meeting. Below the header, there's a navigation menu with options like Language (English (United States)), Target Market Size (All), and a "Select a campaign" dropdown menu. The main content area features a "Featured campaigns" section with three cards: "Microsoft 365 Business", "Cybersecurity and Disaster Recovery", and "General Data Protection Regulation (GDPR)". Below this, there's a section titled "Microsoft 365 Business and Microsoft 365 Enterprise Approved copy blocks for partner use". This section includes a "Short:" summary, a "Medium:" summary, and a list of bullet points for each product. A blue box labeled "Copy blocks" points to this section.

Successfully drive your sales and marketing efforts  
Go to market faster, reach the right customers, and grow your profits with these customizable sales and marketing materials.  
Explore the latest featured campaigns or select one based on the solutions you sell to customers.

Featured campaigns

Select a campaign

- Cloud Platform
- Cross-Product
- Microsoft Dynamics
- Office Solutions
- Server Solutions
- Windows & Devices

Microsoft 365 Business  
Microsoft 365 Business is a new solution designed

Cybersecurity and Disaster Recovery

General Data Protection Regulation (GDPR)

**Microsoft 365 Business and Microsoft 365 Enterprise  
Approved copy blocks for partner use**

**Short:**  
Microsoft 365 is a complete, intelligent solution, including Office 365, Windows 10, and Enterprise Mobility + Security, that empowers everyone to be creative and work together, securely.

**Medium:**  
Microsoft 365 Enterprise is designed for large organizations and integrates Office 365 Enterprise, Windows 10 Enterprise and Enterprise Mobility + Security to empower employees to be creative and work together, securely.  
Microsoft 365 Business: Microsoft 365 Business is designed for small- to medium-sized businesses with up to 300 users and integrates Office 365 Business Premium with tailored security and management features from Windows 10 and Enterprise Mobility + Security. It offers services to empower employees, safeguard the business and simplify IT management.  
Microsoft 365 Business:

- Unlocks creativity by enabling people to work naturally with ink, voice and touch, all backed by tools that utilize AI and machine learning.
- Provides the broadest and deepest set of apps and services with a universal toolkit for teamwork, giving people flexibility and choice in how they connect, share and communicate.
- Simplifies IT by unifying management across users, devices, apps and services.
- Helps safeguard customer data, company data and intellectual property with built-in, intelligent security.

Microsoft 365 Business: Microsoft 365 Business is designed for small- to medium-sized businesses with up to 300 users and integrates Office 365 Business Premium with tailored security and management features from Windows 10 and Enterprise Mobility + Security. It offers services to empower employees, safeguard the business and simplify IT management.  
Microsoft 365 Business:

- Helps companies achieve more together by better connecting employees, customers and suppliers.
- Empowers employees to get work done from anywhere, on any device.
- Protects company data across devices with always-on security.
- Simplifies the set-up and management of employee devices and services with a single IT console.

Copy blocks

# Partner Resources

## For more information, please review the following resources:

- All co-op assets as well as CHIP and Partner Center Guides, are located within the MPN Portal at <https://aka.ms/partnerincentives>.
- The Certification Statement and Report (CSR) form is available online in Partner Center for all programs except Commercial Distributor. For Commercial Distributor only, an offline [CSR Form](#) may be used to request reimbursement to offset costs and/or expenses incurred by the partner solely in connection with the implementation of certain co-op supported marketing activities.
- The Internal incentives and sales performance incentive funds (SPIFFS) activity now requires an attestation form to be populated. This applies to all programs on Partner Center. This is not applicable to the Commercial Distributor program.
- For step-by-step Partner Center co-op claim instructions go here: <https://partner.microsoft.com/en-us/asset/collection/partner-center-incentives-resources#/>

## Other program assets are available as follows:

- Managed Reseller, Commercial Distributor, Hosting, Mixed Reality and CSP Programs: MPN – Partner Incentives: <https://aka.ms/partnerincentives>
- Surface PC and Surface Hub ADR & ADD programs: Operations Readiness: <https://partner.microsoft.com/en-US/resources>

## Support Channels

1. Navigate to [partner.microsoft.com](https://partner.microsoft.com) and sign in.
2. Click on Dashboard in the upper right-hand corner to access your Partner Center dashboard.
3. Click on the Help and support link on the Incentives tile of your Homepage.
4. Click Provide issue details to submit a support ticket.

# Web content syndication

## What is web content syndication?

It is a FREE service for all Microsoft partners that helps deliver compelling customer-facing content on partner websites.

## How does it work?

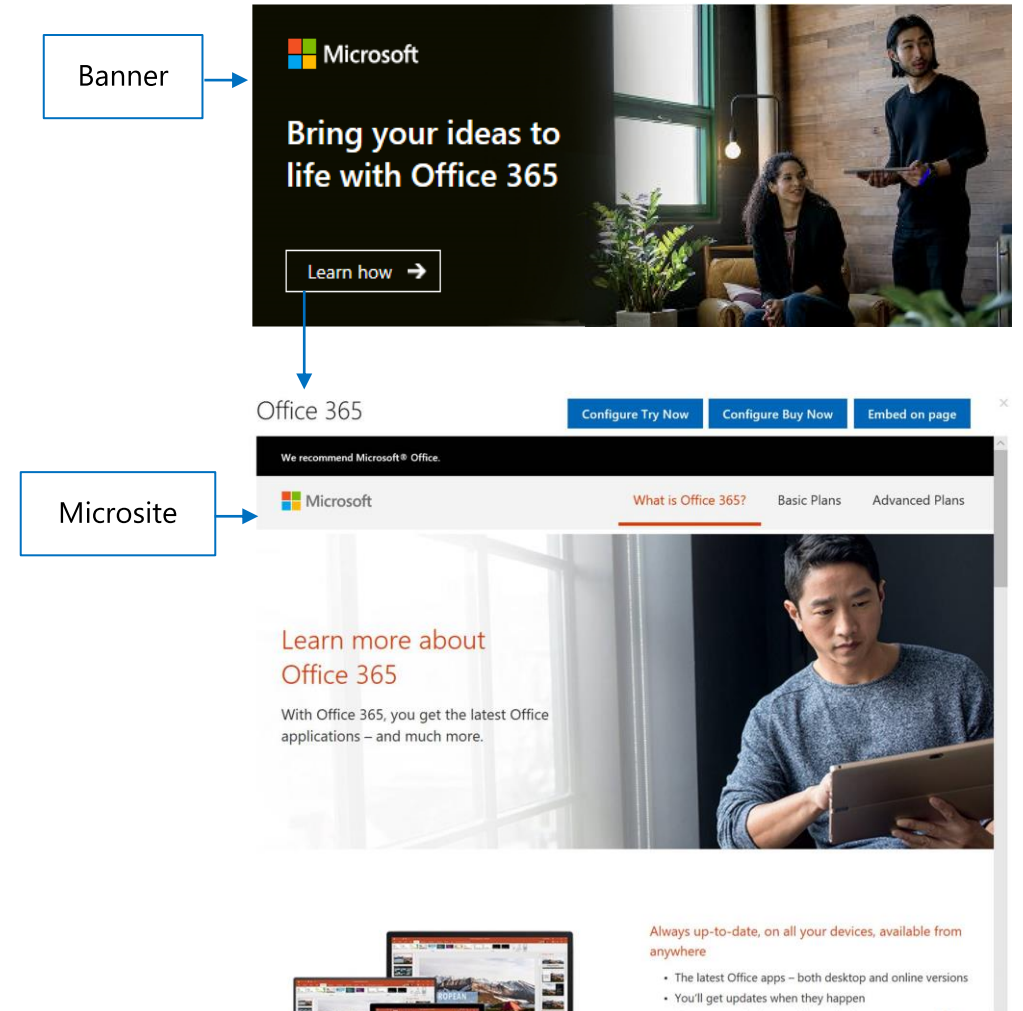
Microsoft provides professionally created banners and help partners embed a code on their own web pages. When the site visitor clicks on the banner, a professionally created microsite (pop-up page within the website) is automatically displayed. The customer is then presented with the option to try or buy.

## Benefits

- Quick and easy initial set up process with no additional action needed from partners. The new and refreshed content flows automatically to their website when updated
- Helps partners save money on professionally created content, while generating valuable leads.
- Builds credibility with customers as partners associate with Microsoft and share consistent messaging across their websites

## Which partners is this resource ideal for?

Available for network level (and above) Microsoft Partners [here](#) within Marketing Center campaigns. Partners may need to create a user name and password for this site.



# Glossary

**Available Funds:** Funds that can be used for claiming and reimbursement in the usage period following the earning period.

**Cash Equivalents:** Item that can be easily converted to cash, such as bank and financial gift cards (for example, prepaid credit cards), certificates or vouchers.

**Co-op Marketing Fund:** A Microsoft marketing program designed to help qualified partners grow their businesses. The fund provides reimbursement for approved demand generation, marketing development, and partner readiness activities. Partner funds accrue based upon qualifying eligible product list purchases.

**Demand Generation:** A marketing activity in which performance and the size of the audience can be verified. Examples include web advertising, and direct response mailing or emailing. Partners can be reimbursed for the cost of qualifying demand generation activities.

**Device:** Any PC (including a desktop, laptop, tablet, all-in-one, or ultra-mobile), mobile internet device (MID) or phone form factor. Also includes wearables, video gaming systems, electronic music players, streaming media devices, televisions, and electronic readers.

**Earned Funds:** The total co-op fund amount that is calculated based on the net sales of eligible Microsoft devices specified in the Partner Incentives Guide.

**Marketing Development:** Marketing activities for which performance and the size of the audience cannot be verified, such as customer events and telemarketing that support the sale of Microsoft devices.

**Media Placement Costs:** Costs associated with purchasing measured media space from a third-party

**Microsoft Channel Development Manager (CDM) or Partner Development Manager (PDM):** Microsoft field personnel who are assigned to individual Microsoft partners to monitor marketing and other business development activities.

**Partner Readiness:** MPN participation, Microsoft exams and training, internal training, and demo units for partner personnel that promote the development of Microsoft technology expertise.

**Peripheral:** Additional components of a demo unit, defined as keyboard, docking station, mouse, and pen.

**Proof of Execution (POE):** To be eligible for reimbursement, proof of execution documentation must be submitted by the established deadline. Proof of execution is critical to the reimbursement process. Accepted file types are:

- ✓ Document: doc, docx, xls, xlsx, csv, ppt, pptx, msg, rtf, mht, htm, html
- ✓ Media: bmp, dib, jpeg, jpg, jpe, jfif, gif, tiff, png, psd, wmv, wma
- ✓ Reader: pdf, xps

**Service Vouchers:** Pre-purchased services vouchers a third party.

**Signage:** Signage includes table top signage, banners, product sheets, sales sheets, promotional materials, event binders, and attendee materials.

**System:** A fully assembled computer system consisting of at least a central processing unit, a motherboard, hard drive, a power supply, and a case.

**Third-Party Vendors:** Businesses or service providers that are not affiliated with Microsoft or the partner company enrolled in the co-op fund.



# Partners make more possible