Partner Incentives Co-op Guidebook

Business Policies for FY20 (September 2019 Update)

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Summary of FY20 changes

GENERAL	• Updated fiscal year references and usage/claiming periods throughout document • Simplified program overview with the migration of all programs except Commercial Distributor to Partner Center while maintaining separate program activity pages. Updated tool references as needed and moved program assets to central resource page. Replaced program specific co-op earning, claiming, and submission timelines with program agnostic version. Updated the claim submission and proof of execution deadlines with more specific guidance. • Updated Surface program names throughout the guide • Included Social media marketing and On-demand training as allowable co-op activities under Managed Reseller, Commercial Distributor, Surface, and Hosting/CSP programs, calling out required Microsoft content • Updated claim management process steps for claiming functionality within Partner Center on the Program overview slide • Removed ineligible activities (previously greyed out) from the program specific activity pages • Consolidated claim guidelines onto one slide, including updated guidelines for submission in Partner Center, POE requirements, and CSR Form completion • Provided more specific guidance as to claim submission deadlines on the Claim guideline page • Added wallet currency guidance to Claim guideline page • Added additional guidance related to Office FPP/ESD to the Commercial Distributor pages and adjusted related guidance on activity pages • Added verbiage to Claims Guidelines that *Microsoft uses proof of execution data to improve and develop our internal tools and processes.*
DEMAND GENERATION	• Separated social media marketing from digital advertising into a new activity • Clarified metric wording for print advertising, digital advertising, partner website and search engine optimization, Microsoft syndicated content activities to include activity date • Updated POE for Digital Advertising and Partner website and search engine optimization to add a requirement for a screenshot of the landing page with URL • Updated POE for proof of email distribution for the Direct mail, email, and mobile SMS activity • Under partner website and search engine optimization, noted that paid promotion/advertising on a social media site should be claimed under the new social media marketing' activity • Added social media marketing activity as allowable component in the topline description and POE sections for the multi-touch digital campaign activity • For Social media marketing activity, added monthly subscription fee for the monthly LinkedIn Sales Navigator as an eligible activity

Summary of FY20 changes

MARKET DEVELOPMENT	• For these activities (Customer Seminars and Bootcamps, Tradeshows and Expositions), clarified that travel and hotel expenses are only eligible for the speaker (not attendees) • Updated POE requirements for Customer Offer activities. These changes go into effect with H2 FY20 usage period claims (H1 FY20 earnings)
PARTNER READINESS	• For Internal Training and Floor Days, clarified that reimbursement is only available for the travel and hotel expenses for the speaker (not attendees) • For Internal Training and Floor days, limited to in-person partner-led and partner-facing training as virtual training will now be managed under the new On-demand training activity • Added On-demand training as a separate activity • For Microsoft tuition and exams activity, added to the invoice POE description that if the invoice doesn't have the course code and date of completion details, please add as a separate POE submission. • Microsoft tuition and exams is now an eligible activity for Surface Hub ADD. • Product seeding/ Demo units: For communication material POE, included systems specifications for demo units built in-house or *from third party* • Product seeding/Demo units: for POE for third party invoice, included requirement to show delivery date. • Product seeding/Demo units: Added Microsoft Hololens as eligible product for reimbursement under this activity
APPENDIX	• Summarized FY20 Co-op Guide changes and moved to front of guide for better visibility • Refreshed CSR form for FY20 • Simplified Creative materials preapproval slide with common approach across programs • Added GTM Services content and co-op guidance • Added information on two GTM Services (Qorus and Digital MAGIIC) • Added Microsoft Advertising content on credits and best practices • Updated links on Smart Partner Marketing slide • On Program resource page, consolidated resource information across programs into a single slide, updated program links, and removed retired alias commmpoe@microsoft.com

How to use this guidebook

OVERVIEW

The Partner Incentives Cooperative Marketing Fund (Co-op) program 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 2020 (FY20).

HOW TO USE THIS GUIDEBOOK

The FY20 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
- Surface PC and Surface Hub Authorized Device Distributor (ADD)
- Surface PC and Surface Hub Reseller
- Hosting
- Cloud Solution Provider (CSP) Indirect Provider

This Guidebook contains a general "Program overview" page and program-specific "Activity guidelines" pages in the "Overview" section. These pages contain detailed information, such as program periods, instructions for claim submission, and core requirements.. Each program has been assigned a color, which indicates either:

- A difference in process or requirements or
- Activity eligibility

In instances where there is a difference in process or requirements, the section will be highlighted with program-specific color coding. Throughout this guidebook, a color table at the upper right indicates whether the activity or process is eligible as part of the incentives program. Additionally, if an activity is not eligible for a program, it is noted as not applicable on the "Activity guidelines" page.

ACTIVITY GUIDELINES

Managed Reseller, **Commercial Distributor**, **Hosting and CSP Indirect Provider 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 program period.

| Managed Reseller | Commercial Distributor | Surface | Hosting/CSP |
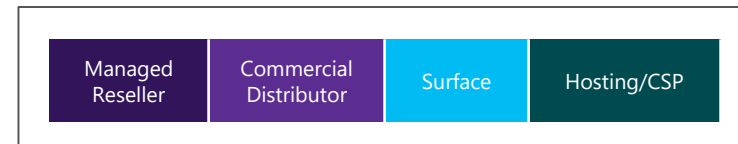
Program overview

PROGRAM SCHEDULE

The co-op program has two six-month (fiscal half-year) program periods, H1 and H2.

- FY20 H1: July 1, 2019 – December 31, 2019
- FY20 H2: January 1, 2020 – June 30, 2020

EARNING PERIOD
- Meet program eligibility requirements
- Sell qualifying products

USAGE PERIOD
- View Co-op funds based on Earning Period sales
- Conduct eligible activities

CLAIMING PERIOD DEADLINES
- Submit reimbursement claims by February 15th 23:59:59 UTC for H1 and August 15th 23:59:59 UTC for H2

PROOF OF EXECUTION (POE) APPROVAL DEADLINES
- Obtain POE approval by March 30th 23:59:59 UTC for H1 and September 30th 23:59:59 UTC for H2

	FY19H2						FY20H1						FY20H2						FY21H1		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Earning	*Earning 2 (FY19)*						*Earning 1 (FY20)*														
Usage							*Usage 2 (FY19)*						*Usage 1 (FY20)*								
Claiming (see text for specific claim deadlines)						*Claiming 2 (FY19)*							*Claiming 1 (FY20)*								

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
     - 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 submitted 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.

Managed Reseller activity guidelines

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
- Digital advertising
- Social media marketing
- Direct mail, email, and SMS
- Partner website and search engine optimization
- Microsoft syndicated content
- Multi-touch digital campaign

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
- Tradeshows and expositions
- Internal incentives and SPIFFs
- On-site champ
- Proof of concept

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

CORE REQUIREMENTS

As part of the Managed Reseller Co-op Program, demand generation and market development activities must include the two core requirements, unless otherwise specified in the activity.

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:
- Your company street address or email address
- Company website URL or phone number

MICROSOFT CONTENT
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 _and_

A minimum of 100% Microsoft focused content for the following activities:
- Telemarketing
- On-site champ
- Proof of concept
- Internal training and floor days
- On-demand training

A minimum of 75% Microsoft focused content for the following activities:
- Social media marketing

Commercial Distributor activity guidelines

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
- Digital advertising
- Social media marketing
- Direct mail, email, and SMS
- Partner website and search engine optimization
- Microsoft syndicated content
- Multi-touch digital campaign

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
- Tradeshows and expositions
- Customer offer
- Internal incentives and spiffs
- On-site champ
- Proof of concept

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

CORE REQUIREMENTS

As part of the Commercial Distributor co-op program, demand generation and market development activities must include the two core requirements, unless otherwise specified in the activity.

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:
- Your company street address or email address
- Company website URL or phone number

MICROSOFT CONTENT
Demand generation and market development activities should include a minimum of 30% content that must further the marketing and promotion of Microsoft software and/or Windows devices and/or preinstalled Microsoft products in the system specifications, where specifications are listed _and_

A minimum of 100% Microsoft focused content for the following activities:
- Telemarketing
- On-site champ
- Proof of concept
- Internal training and floor days
- On-demand training

A minimum of 75% Microsoft content for the following activities:
- Social media marketing

For Office FPP/ESD guidance for Commercial Distributor, please refer to the next page.

Commercial Distributor activity guidelines
Office FPP/ESD only

ELIGIBLE ACTIVITIES

Demand Generation

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

Qualifying activities
- Digital advertising
- Social media marketing
- Direct mail, email, and SMS
- Partner website and search engine optimization
- Microsoft syndicated content
- Multi-touch digital campaign

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 Office offerings. Typically these marketing activities are designed for a specific customer audience.

Qualifying activities
- Telemarketing
- Customer seminars and bootcamps
- Tradeshows and expositions
- Customer offer
- Internal incentives and spiffs
- On-site champ

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 Office.

Qualifying Activities
- MPN participation
- Microsoft exams and tuition
- Internal training and floor days
- On-demand training
- Microsoft hosted conferences

CORE REQUIREMENTS

As part of the Commercial Distributor co-op program, demand generation and market development activities must include the two core requirements, unless otherwise specified in the activity.

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:
- Your company street address or email address
- Company website URL or phone number

MICROSOFT CONTENT

Demand generation and market development activities should include a minimum of 30% content that must further the marketing and promotion of Microsoft Office software *and*

A minimum of 100% Microsoft Office focused content for the following activities:
- Telemarketing
- On-site champ
- Internal training and floor days
- On-demand training

A minimum of 75% Microsoft Office content for the following activities:
- Social media marketing

Surface PC & Surface Hub activity guidelines

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
- Digital advertising
- Social media marketing
- Direct mail, email, and SMS
- Partner website and search engine optimization
- Microsoft syndicated content
- Multi-touch digital campaign

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
- Tradeshows and expositions
- Customer offer (only eligible for Surface PC ADD)
- Internal incentives and SPIFFs
- On-site champ
- Proof of concept
- Employee purchase web set up for customers (only eligible for Surface PC and Hub Reseller)

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

CORE REQUIREMENTS

As part of the Surface co-op program, demand generation and market development activities must include the two core requirements, unless otherwise specified in the activity.

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:
- Your company street address or email address
- Company website URL or phone number

MICROSOFT CONTENT

Demand generation and market development activities must include a minimum of 30% content that furthers the marketing and promotion of Microsoft Surface products *and*

A minimum of 100% Microsoft content for the following activities:
- Partner website and search engine optimization
- Telemarketing
- On-site champ
- Proof of concept
- Internal training and floor days
- On-demand training
- Employee purchase web set up for customers

A minimum of 75% Microsoft content for the following activities
- Social media marketing

Hosting / CSP Indirect Provider activity guidelines

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
- Digital advertising
- Social media marketing
- Direct mail, email, and SMS
- Partner website and search engine optimization
- Microsoft syndicated content
- Multi-touch digital campaign

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
- Tradeshows and expositions
- Customer offer
- Internal incentives and SPIFFs
- On-site champ
- Proof of concept

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

CORE REQUIREMENTS

As part of the Hosting and CSP Indirect Provider programs, demand generation and market development activities must include two core requirements, unless otherwise specified in the activity.

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:
- Your company street address or email address
- Company website URL or phone number

MICROSOFT CONTENT
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:
- On-site champ
- Internal training and floor days
- On-demand training

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.

GENERAL ACTIVITY REQUIREMENTS

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, tradeshows 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

Program 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.

Claim 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.

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

PROOF OF EXECUTION (POE)

All claims require submission of POE for validation and to assess program 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 the Programs. 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.

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

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, a 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.

DEMAND GENERATION

Print advertising
Digital advertising
Social media marketing
Direct mail, email, and SMS
Partner website and search engine optimization
Microsoft syndicated content
Multi-touch digital campaign

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, with the exception of 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*

1. Company brand name and contact information

2. Microsoft content

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

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

ELIGIBLE EXPENSES

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

NOTICES

REMINDER
- ❑ 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.

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*

1. Company brand name and contact information
2. Microsoft content

PROOF OF EXECUTION REQUIREMENTS

- ❑ Third party **invoice** or certification statement and report (CSR)
- ❑ **Communication material**: Screenshot of digital advertisement <u>AND</u> screenshot of landing page with **URL**, showing program-specific core requirements
- ❑ **Metric**: Summary of results (such as click-through report) including activity date

ELIGIBLE EXPENSES

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

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

NOTICES

REMINDER
- ❑ 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.

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*

1. Company brand name and contact information
2. Microsoft content

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

PROOF OF EXECUTION REQUIREMENTS

❑ Third party **invoice** or certification statement and report (CSR)

❑ **Communication material**: Screenshot of social media advertisement <u>AND</u> 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

ELIGIBLE EXPENSES

• Third party media placement

• **Fee – agency:** Marketing and creative services, including agency fees

• Monthly subscription fee for the **LinkedIn Sales Navigator**

NOTICES

REMINDER
❑ 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.

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*

1. Company brand name and contact information
2. Microsoft content

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

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

ELIGIBLE EXPENSES

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

NOTICES

REMINDER
- ❑ 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.

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), DigitalStride (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*

1. Company brand name and contact information
2. Microsoft content

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*)

ELIGIBLE EXPENSES

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

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

NOTICES

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

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 or https://partner.microsoft.com/marketing/campaigns/ to access content.

CORE REQUIREMENTS*

1. Company brand name and contact information
2. Microsoft content

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

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

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).

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*

1. Company brand name and contact information
2. Microsoft content

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

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

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

NOTICES

REMINDER
❑ 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 for more information.

MARKET DEVELOPMENT

Telemarketing
Customer seminars and bootcamps
Tradeshows and expositions
Customer offer
Internal incentives and spiffs
On-site champ
Proof of concept
Employee purchase web set up for customers

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*

1. Company name/brand information must be included in the telesales script

2. Microsoft content

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

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)

ELIGIBLE EXPENSES

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

NOTICES

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.

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.

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*

1. Company brand name and contact information
2. Microsoft content

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

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

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.

NOTICES

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.

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.

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*

1. Company brand name and contact information

2. Microsoft content

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

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

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.

NOTICES

❑ 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 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.

Customer offers

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*

1. Company Brand Name and Contact Information
2. Microsoft Content

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

PROOF OF EXECUTION REQUIREMENTS

- ☐ Third party **invoice** or certification statement and report (CSR)
- ☐ **Image**: Sample giveaway Items or photo of giveaway*
- ☐ **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

ELIGIBLE EXPENSES

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

 * Photo not required for cash giveaways

NOTICES

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 DON'T 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.

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*

1. Company brand name and contact information (internal contest rules will suffice if the company/brand name is included in the communication material.)
2. Microsoft content

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

PROOF OF EXECUTION REQUIREMENTS

❑ Third party **invoice** or certification statement and report (CSR)
❑ **Communication material** showing Internal incentive or SPIFF offer details with terms and conditions
❑ **Metric**: Summary of results
❑ **Support Document**: Sample giveaway items or photo of giveaway (*if communication material does not meet core requirements*)

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

NOTICES

REMINDER
❑ Do not include Microsoft software except as specified.
❑ Cash/cash equivalent is an acceptable giveaway for SPIFFs.

BEST PRACTICES
❑ Internal Incentives/SPIFFs are most effective when clear goals and timelines are set and the incentive is related to the goals.

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.

On-site Champ

The On-site Champ activity is an allowance for the use of program funds for Microsoft-focused services provided by partner resources (employees or vendor-contracted) that demonstrate clear business development results such as Microsoft solutions competitive wins and sales uplift. These services should be for Microsoft-focused sales and marketing initiatives, or strategic incubation projects that are performed within the fiscal period covered by the eligible program 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.

Can include projects that extend beyond the current fiscal period, and program 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.

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.

CORE REQUIREMENTS*

1. Services that are focused 100% on Microsoft products

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

PROOF OF EXECUTION REQUIREMENTS

- ❑ Third party **invoice** or certification statement and report (CSR)
- ❑ **Communication material:** Samples of deliverables (based on what is described in the On-Site Champ form)
- ❑ **Support Document:** On-Site Champ form

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.

NOTICES

REMINDER
- ❑ 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 can be found on the MPN Portal.

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*

1. Microsoft content

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

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

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

NOTICES

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 Partner.

(not eligible for Surface ADD)

Employee purchase web setup for customers

Setup of web site to allow employees of the customer to purchase Surface for their own use

ACTIVITY GUIDELINES

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

CORE REQUIREMENTS*

1. 100% Microsoft content

* Please review program guidelines for core requirements under the applicable activity guidelines page.

PROOF OF EXECUTION REQUIREMENTS

- ❑ Third party **invoice** or certification statement and report (CSR)
- ❑ **URL** landing page or screen shot of website pages

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
Microsoft exams and tuition
Internal training and floor days
On-demand training
Microsoft hosted conferences
Product seeding / Demo units

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**

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.

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 <u>after</u> 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

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

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

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)

NOTICES

CAUTION
❑ Co-op funds will only cover predefined course materials, as listed on 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 <u>after</u> 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*

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

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

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

ELIGIBLE EXPENSES*

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

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

NOTICES

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*

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

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

PROOF OF EXECUTION REQUIREMENTS

❑ Third party **Invoice or CSR** with course description and date of completion)

❑ **Metric: Attendee list**

ELIGIBLE EXPENSES*

1. **Fee – agency**: Marketing services and content creation services including agency fees
2. Speaker fees

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

NOTICES

REMINDERS
❑ Training should be 100% Microsoft-focused.

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

❑ 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)*

ELIGIBLE EXPENSES*

• **Fee – Registration**: for up to 3 attendees 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. *

* Hosting may have different allowances.

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

NOTICES

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 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.

Surface PC ADD and Reseller Partners: Limited to Surface and Surface accessories for ADD and Resellers (no claim limits).

Surface Hub ADD and Reseller Partners: Limited to Surface Hub and 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

ELIGIBLE EXPENSES

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

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

NOTICES

⚠ 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

FY20 Co-op funds guidance
Creative material preapproval
Giveaway items
Event claiming
Use co-op for ISV marketing
Digital marketing guidance
Smart partner marketing
Microsoft Go to Market (GTM)
Services
Funding GTM Services through
available co-op

GTM Service: Qorus Content Hub
GTM Service: Digital MAGIIC
Microsoft Advertising
Microsoft Partner Marketing Center
Web content syndication
Resources
Glossary

FY20 Co-op funds guidance

1 Funds guidance per category

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

2 Co-op solution area recommendation

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

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.
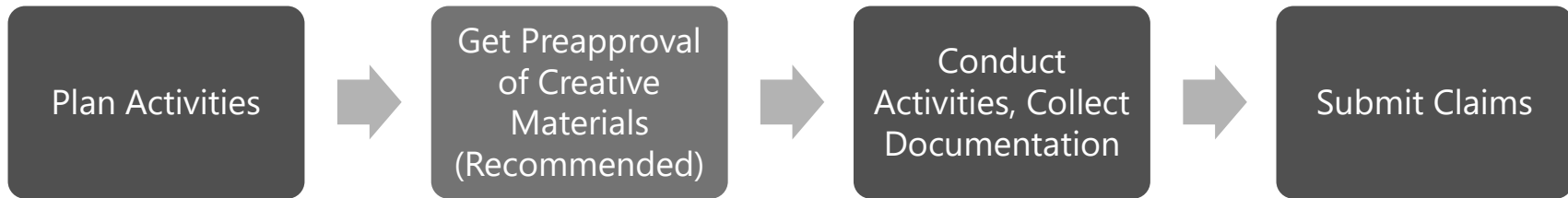
3 Co-op for digital marketing

- 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

| Plan Activities | → | Get Preapproval of Creative Materials (Recommended) | → | Conduct Activities, Collect Documentation | → | Submit Claims |

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 program 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 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.

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

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 <u>Tradeshow</u> is <u>hosted by a third party</u>, and the partner participates as a vendor/exhibitor (and promotes Microsoft products/offerings at the event).
- An <u>Exposition</u> is a sales event that is <u>hosted by the partner</u>, 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.

Event claiming

Customer Seminars and Bootcamps

The key difference between these two types of events is:

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

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). 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.

Use co-op for ISV marketing

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.

<table>
<tr><th>DISTRIBUTORS</th><th>RESELLERS</th></tr>
<tr><td>

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

</td><td>

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

</td></tr>
</table>

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
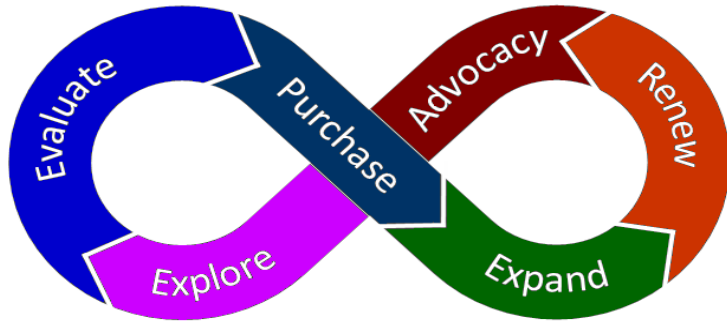
- IDC defines 6 stages of the customer journey as shown to the left, based on specific goals that must be met.
- Partners should align their demand generation activities to these goals and keep pace as customers progress.
- Cloud customers go through a cognitive process to advance their purchase and 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

Explore	Evaluate	Purchase	Expand	Renew	Advocacy
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 guidance

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.

GTM SERVICES
Unlocking New Opportunities for Growth Globally

WHO WE ARE

Go-To-Market (GTM) Services is a portfolio of best-in-class marketing content and programs that help you **accelerate** time to market, **generate demand**, and **expand** your business.

11K+
FY19 GTM Services activated

$50M
FY19 generated revenue from customer wins

WHAT WE DO

o Provide GTM Services included as part of Microsoft Partner Network benefits to further your success in market, and offer incremental services for purchase to take your business growth to the next level.

o Enable you to co-market with Microsoft, leveraging our branding and messaging to maximize your marketing impact on a global scale.

HOW WE SUPPORT YOU GLOBALLY

You get a dedicated Partner Engagement Manager (PEM) to learn about your business goals, and help give draw a roadmap to marketing with Microsoft.

16K+
FY19 Microsoft Qualified Leads (MQLs) delivered

100M
FY19 Microsoft content impressions generated

Canada
Germany
US
UK
France
CEE
WE
APAC
LATAM
MEA
Greater China
India
Australia

Global Go-to-Market Services Desk locations

Visit the GTM Services website and click "Get Started" at the top banner to activate today!

< G E T   S T A R T E D >

LANGUAGES AVAILABLE

1. Portuguese
2. Dutch
3. English
4. French
5. German
6. Italian
7. Japanese
8. Polish
9. Russian
10. Spanish
11. Mandarin
12. Korean.

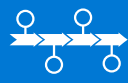# Funding GTM Services through available co-op

Eligible GTM Services	Co-op Activity
Co-sell ready BOM; P2P Premium Marketing BOM	Any Demand Generation or Market Development activity (except Onsite champs)
Qorus Content Hub for Channel Enablement; Qorus Content Hub for Sales Enablement; Quorus content and best practices basic service (Channel or Sales Enablement); Lead generation campaign assets; Lead generation campaign with cobranded ebook or on-demand webinar (1 partner solution); Add-on: 6-week media package lead generation; Multi-quarter lead generation campaign (featuring 1 partner solution) * Lead generation campaign (featuring multiple partner solutions) * Lead generation campaign with media supported microsite (featuring multiple partner solutions) * P2P lead generation campaign (featuring LSP, MSP, SI, Distributor and multiple partner solutions)	Any Demand Generation activity that aligns to a campaign
Mini Commercial; 12-month Marketing Campaign Content - Digital MAGIIC Platform (Customer); 12-month Marketing Campaign Content -Digital MAGIIC Platform (Partner and Customer); Boost Your Business	Digital advertising
Sales Enablement	Multi-touch digital campaign
LinkedIn Account Based Media Package	Social media marketing
Video case study	Social media marketing, digital advertising, or direct mail/email/SMS
Digital MAGIIC-Indirect Provider Option (outside the US); Digital MAGIIC-Indirect Provider Option (US); eBook; Thought leadership	Social media marketing, digital advertising
Add-on: 6-week media package event demand generation; Event demand campaign (featuring 1 partner solution); Event registration assets	Customer seminars and bootcamps
Telephonic lead generation	Telemarketing

* To claim co-op for these GTM Services featuring multiple partner solutions, each partner that is participating in one of these campaigns will receive an invoice from Microsoft that has both the per-partner charge as well as their portion of the total campaign charge. The partner should submit the invoice with the total charges as POE for its claim submission and reimbursement.

GTM Service: Qorus Content Hub
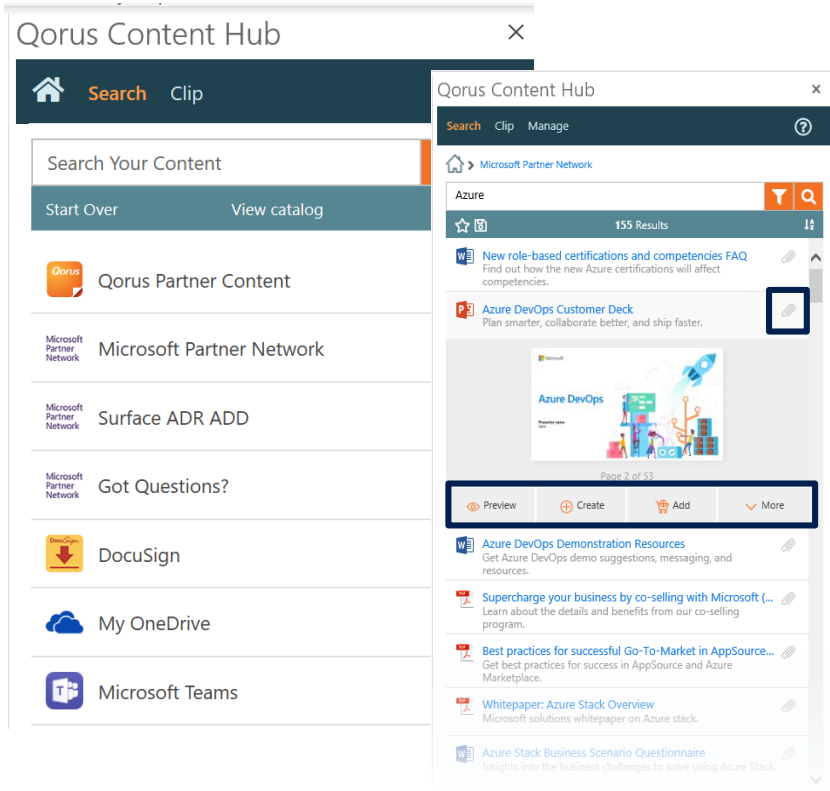
● **DESCRIPTION:** Brings business critical marketing and sales content from the Microsoft Partner website into Office applications allowing partners to spend less time creating content and more time in front of customers selling.

● **PARTNER AUDIENCE:** Available for all partners, focus on Indirect Providers and their channels

● **DELIVERY:** Indirect Provider channels via 3rd party application

● **PARTNER CO-OP CATEGORY:** Any Demand Generation activity that aligns to a campaign

● **HOW IT BENEFITS THE PARTNER LIFECYCLE:** Once a prospect is known and the partners is ready to contact them with more information, use Qorus Content hub for creating customer presentations, RFPs and proposals quickly.

Available worldwide: aka.ms/qoruscontenthub

PRICING:
Varies. Per seat pricing and scale discounts. No Cost to Microsoft partners for Microsoft content source in FY19.

GTM Service: Digital MAGIIC

- **DESCRIPTION:** Digital MAGIIC (Marketing Automation for Global Indirects, ISVs, and Channel partners) enables Indirect Providers to scale Microsoft marketing and sales materials to their partner channel. Resellers can leverage to-customer content on their social media accounts, utilize training assets, update their blog, and launch email campaigns from directly within the tool.

- **PARTNER AUDIENCE:** Indirect Providers

- **DELIVERY:** Indirect Provider channels via 3rd party platform

- **CO-OP CATEGORY:** Digital advertising or Social media marketing as appropriate

- **HOW IT BENEFITS THE PARTNER LIFECYCLE:** Helps partners drive demand, connect and build relationships with prospects, and increase their knowledge about solutions, services, and products through online marketing.

AVAILABILITY: ACTIVE: US, Australia
FY20: UK, WE, LATAM CA

PRICING: Pricing varies. See appendix here.
$2,000-$16,000/month

Microsoft Advertising

Advertising credits and best practices for Partners

Start search engine marketing with Microsoft Advertising.
Sign up today to claim your ad credit at:
**https://about.ads.microsoft.com/MPN**

Transform your digital marketing with the Microsoft Search Network. Our powerful ad platform and intelligent audience targeting capabilities make it easy for our partners to connect with new customers. Thanks to our industry-leading innovations and artificial intelligence, personalized marketing is now a reality.

Reach more customers with the Microsoft Search Network

- 5 billion monthly searches in the U.S [1]
- 122 million unique searchers (nearly half the U.S. population) [1]
- 11 billion monthly searches worldwide [2]
- 63 million desktop searchers not reached on Google [3]

Partners get $250 in search ad credit with Microsoft Advertising

- ☐ Receive an ad credit of $250 when you spend $50
- ☐ Valid only for partners opening a new Microsoft Advertising account
- ☐ Available in regions where Microsoft Advertising is available
- ☐ Limit one promotional offer per Microsoft Advertising customer
- ☐ Any portion of the credit not used with ninety (90) days of credit award will expire.
- ☐ Microsoft Advertising will continue to run and accrue costs after any promotional credit has been exhausted.
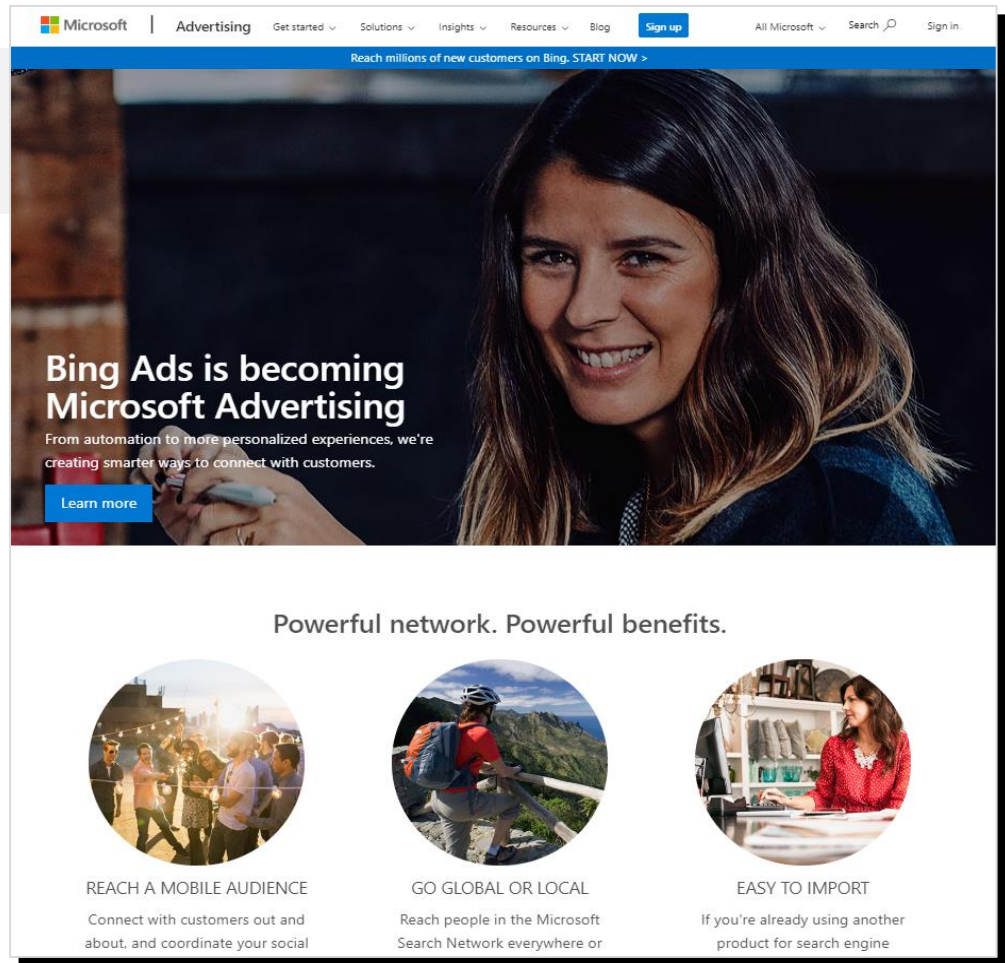
Benefits and resources

1. Free onboarding consultation
2. Keyword Planner
3. Google Import

- ☐ https://about.ads.microsoft.com/en-us
- ☐ Success stories
- ☐ Intelligent search

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., Dec. 2018. The Bing Network includes Microsoft sites, Yahoo sites (searches powered by Bing) and AOL sites (US only).
2. comScore qSearch, Explicit Core Search (custom), worldwide, Dec. 2018. The Bing Network includes Microsoft sites, Yahoo sites (searches powered by Bing) and AOL sites worldwide.
3. comScore qSearch, Explicit Core Search (custom), U.S., Feb. 2019; industry categories based on comScore classifications Note: All data represents desktop traffic only.

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 standout 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 and navigate to reach customers>promote your business

Organized by solution area, product, and industry

Copy blocks

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.

Banner

Microsite
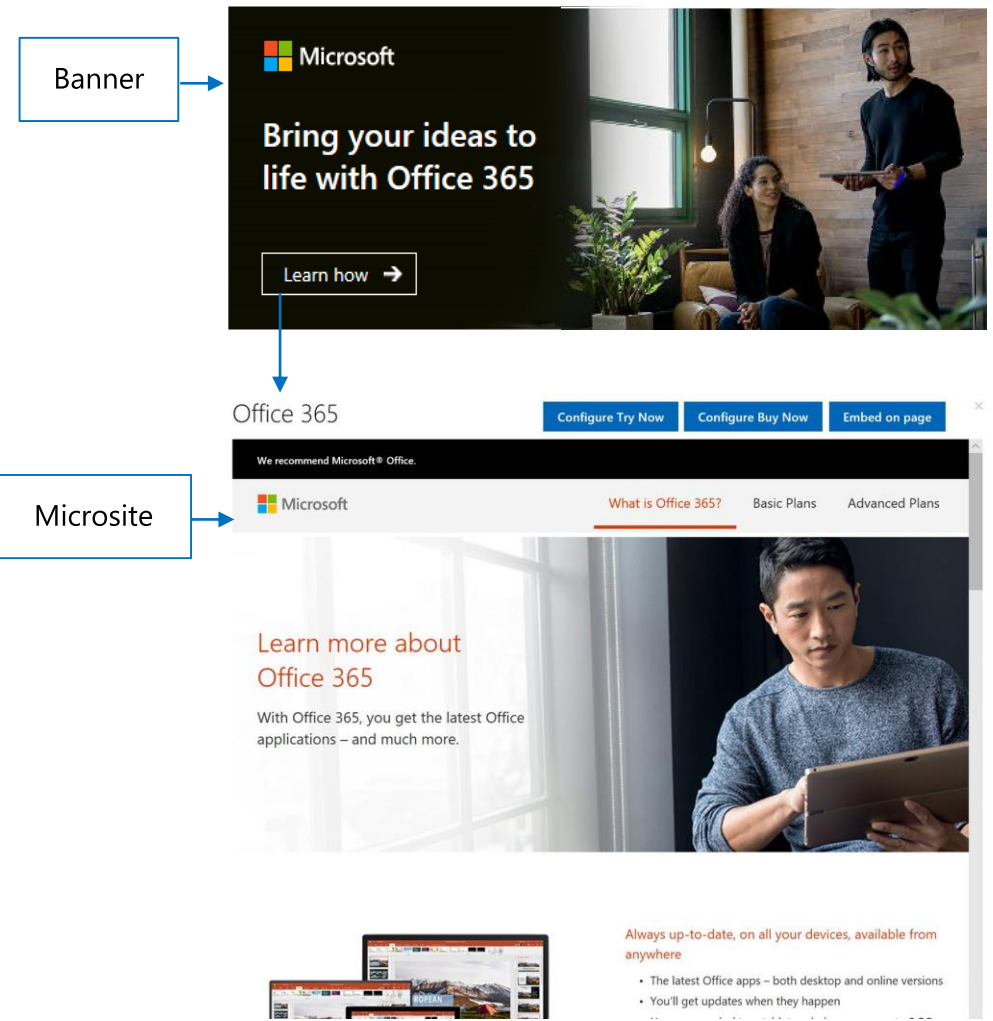
Partner resources

For more information, please review the following resources:
All co-op program assets as well as CHIP and Partner Center Guides, are located within the MPN Portal at
https://aka.ms/partnerincentives.

Other program assets are available as follows:
- Managed Reseller, Commercial Distributor, Hosting, and CSP Programs: MPN – Partner Incentives: https://aka.ms/partnerincentives
- Surface PC and Surface Hub ADR & ADD programs: Microsoft Readiness Online – www.microsoftreadiness.com

MICROSOFT READINESS ONLINE: The Microsoft Readiness site is now also available on any device, anywhere, any time on Microsoft Readiness Online (www.microsoftreadiness.com)

SUPPORT
Support including self-help, live support agents, community support, and support tickets can be accessed through the Microsoft Partner Network. Under the "Support" tab, select "Contact Support." When the portal opens, select "Partner Incentives" as your category. You are then able to choose your topic and issue.

Regional Operations Centers (ROCs) Support Aliases for Commercial Distributor, Managed Reseller, Hosting, and Surface:
- North America - ciquest@microsoft.com
- Latin America - msreb@microsoft.com
- Europe, Middle East and Africa - erebates@microsoft.com
- Japan and Asia Pacific - apocchi@microsoft.com

Regional Operations Centers (ROCs) Support Aliases for CSP
- North America: ocina@microsoft.com
- Latin America: ocilatam@microsoft.com
- Europe: ociemea@microsoft.com
- APOC, Japan: ocijp@microsoft.com
- APOC, APGC: ociapgcq@microsoft.com

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.

MARKET 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, xlxs, 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.