



Partner Incentives Co-op Guidebook

Business Policies for FY22
July 1, 2021





The Partner Incentives Cooperative Marketing Fund (Co-op) provides reimbursements of earned funds to participating partners to help differentiate and build channel awareness and preference for Microsoft® products. Co-op is a critical investment for Microsoft in driving key business priorities with partners. Its purpose is to not only reward the partner, but also to reinvest back into the partner's business with Microsoft to accelerate future results and meet key objectives. This guide is applicable for incentives programs awarded co-op funds, to be used for activities completed during fiscal year 2022 (FY22).

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Summary of FY22 Changes

General

- FY22 Co-op Guidebook format has been adjusted to move activity slides within Appendix section.
- POE requirements simplified to no more than two pieces of POE required to be submitted for most activities.
- Threshold of \$4K has been increased to \$10K for CSP incentives. (See Claims Guidelines for more detail.)
- Radio and TV advertising, Creative cost and printing fees, and "advanced support for partners" expenses are ineligible activities.

Demand Generation

- Print Advertising no longer applies for Mixed Reality (HoloLens).
- Programming/Development was removed as an eligible expense.

Market Development

- Tradeshows and expositions: Digital/virtual events added as eligible activities.

Partner Readiness

- Microsoft exams and tuition: Initial MCT Enrollment cost added as an eligible expense.
- Product seeding/Demo units: Shipping Fees for Surface PC, Surface Hub and Accessories added as an eligible expense.

Appendix

- Guidance added for third-party online platform tool as an example for delivering Microsoft related training content.
- Refreshed GTM Services content.

How to use the Co-op Guidebook

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

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

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

Overview

Co-op has two six-month (fiscal half-year) periods: **FY22 H1:** July 1, 2021 – December 31, 2021 **FY22 H2:** January 1, 2022 – June 30, 2022

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



Submission Steps on Partner Center

- 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 - applicable prior to execution only*)
 - To request preapproval, email commpre@microsoft.com
 - Ensure pre-approved creative materials are not modified in any way.
- Conduct Activity:** Gather all proof of execution materials required for submission.
- Submit Claim and Proof of Execution (POE)***

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

 - Sign into Partner Center, select *Co-op Management* and then *Create a Claim*.
 - Complete claim form and include preapproval codes for creative pieces.
 - Upload proof of execution materials and *Submit claim*.

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

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

Activity Guidelines: Core Requirements

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

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

2. Microsoft Content:

Mixed Reality	Surface	Hosting and CSP
Demand generation and market development activities must include a minimum of 30% content that furthers the marketing and promotion of Microsoft Mixed Reality products and	Demand generation and market development activities must include a minimum of 30% content that furthers the marketing and promotion of Microsoft Surface products and	Content must support the marketing and promotion of Microsoft products. If the services marketed by the partner do not clearly show a Microsoft component, the partner must provide supporting documentation which describes the Microsoft product, service, solution, or platform that the Partner service or solution is based on.
A minimum of 100% Microsoft* focused content for the following activities:		
<ul style="list-style-type: none"> • Partner website & 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 	<ul style="list-style-type: none"> • Partner website & 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 	<ul style="list-style-type: none"> • 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.

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.
- If an activity is performed by a third party, the invoice from that third party should be provided as POE.
- Applicable for Surface PC and Hub Reseller and ADD Only: PCMM or PDM activity plan approval is required prior to claims being submitted and approved.

Inclusion of Non-Microsoft Products

Partners may claim:

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

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.

Ineligible Activities and Expenses

Co-op funds may not be used to reimburse:

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

Claims Guidelines

Claim Submission Requirements

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

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

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

Applicable for Mixed Reality ADD, Mixed Reality ADR & DMP, Surface PC and Surface Hub Authorized Device Distributor (ADD), and Surface PC and Surface Hub Reseller, Hosting:

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

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

At the close of each six (6) month earning period, partners exceeding the minimum co-op earning threshold of \$10,000 USD, Microsoft will deposit the funds into the Partner Center claims tool for use in the upcoming fiscal semester. Partners that do not exceed the \$10,000 USD co-op threshold will not qualify to use funds and will receive the withheld co-op funds as part of their rebate payment in the following payment cycle.

Earning/Accrual Period	Threshold	Usage Period	Claim Period Deadline
January 2021 – June 2021	\$4,000 USD	July 2021 – December 2021	February 15, 2022
July 2021 – December 2021	\$10,000 USD	January 2022 – June 2022	August 15, 2022
January 2022 – June 2022	\$10,000 USD	July 2022 – December 2022	February 15, 2023

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

Claims Guidelines

Proof of Execution (POE)

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

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

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

NOTE: Starting FY22, Microsoft is simplifying the POE requirements. Going forward, no more than two pieces of POE will be required to be submitted for most activities. One of these will be either an invoice or CSR form, the other will be a defined piece of POE that documents the required details for that activity (answers the questions; where, when, what).

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

Claims Guidelines

Currency Exchange Rates

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

Contract Account (CA) Currency

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

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

When an Activity spans multiple Usage Periods

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

Certification Statement and Report

The Certification Statement and Report (CSR) form is available online in Partner Center for all programs. 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).

Sales Performance Incentive Funds Form

The Internal incentives and sales performance incentive funds (SPIFFS) activity requires an attestation form to be populated online in Partner Center for all programs.

Demand Generation

Demand Generation

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

Qualifying Activities

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

Proof of Execution Guidance

- Third party **invoice** or certification statement & report (CSR) PLUS
- **Communication material:** Copy of final communication piece (based on advertising) showing program-specific core requirements

Best Practices

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials
- Confirm your assets appear in publications or channels with an established circulation and/or advertising rate.
- Comply with all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

Did you know

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

Market Development

Market Development

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

Qualifying Activities

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

Proof of Execution Guidance

- Third party **invoice** or certification statement and report (CSR)
- **Communication material:** Copy of script or relevant materials

Best Practices

- Indicate that the marketing content is from your company and not from Microsoft.
- Use the correct trademarked name for software in the materials and include the specific Microsoft product being promoted.
- Focus on communicating the most important message and driving a response.
- Appeal to Customer by meeting a specific need.
- Test multiple offers to determine impact.

Did you know

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

Partner Readiness

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: Review specific guidelines on the Activity Guidelines: Core Requirements slide.
100% Microsoft Content for timeframe of day or event space being claimed

Proof of Execution Guidance

- 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

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.



Appendix



Demand Generation Activity Sheets

Print Advertising

Print Advertising does not apply to Mixed Reality (HoloLens) partners.

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

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

FOR PRINT CATALOGS ONLY: Description of how to claim

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement & report (CSR) **PLUS**
- **Communication material:** Copy of final communication piece (based on advertising) showing program-specific core requirements

Eligible Expenses

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

Reminders

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials.
- Microsoft content must be featured in the advertisement as outlined in the core requirements.

Best Practices

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

Did you know

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

Migration Services

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

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

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

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement & report (CSR) **PLUS**
- **Proof-of-Concept:** Planning document **OR**
- **Support document:** Statement of work (from the partner or third-party vendor) and/or service agreement

Eligible Expenses

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

Caution

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

Reminder

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

Example

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

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

Best Practice Development

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

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

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement & report (CSR) **PLUS**
- **Support document:** Statement of work (from the partner or third-party vendor) and/or service agreement **OR**
- **Proof-of-Concept:** Planning document

Eligible Expenses

- **Printed materials**
- **Research:** White paper, case study development, market research, Customer Immersion Experience
- **Proof of Concept** development expenses
- **Fee – agency:** Marketing services, including agency fees
- **Fee – service:** Labor services provided by partner or third-party vendor in support of the proof of concept
- **Fee – exam:** Microsoft exam fees for certifications and competencies
- **Fee – training / tuition:** Microsoft tuition fees for certifications and competencies, including on-demand training expenses
- **Demo Center** set-up expenses
- **Workshops:** Development/execution costs

Caution

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

Reminders

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

Examples

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

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

Solution Building with Third Parties

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

Activity Guidelines:

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Support document:** Statement of work (from the partner or third-party vendor) and/or service agreement **OR**
- **Proof-of-Concept:** Planning document

Eligible Expenses

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

Caution

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

Reminders

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

Examples

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

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

Digital Advertising

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Communication material:** Screenshot of landing page with **URL** of landing page, showing program-specific core requirements

Eligible Expenses

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

Reminders

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

Best Practices

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

Did you know:

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

Social Media Marketing

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- Screenshot of Social Media landing page with **URL** of landing page, showing program-specific core requirements

Eligible Expenses

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

Reminders

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

Best Practices

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

Did you know

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

Direct mail, email, and mobile SMS

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Communication material:** Copy of final communication piece showing program-specific core requirements, including postmarked envelope or other proof of mailing.

Eligible Expenses

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

Reminders

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

Best Practices

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

Did you know

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

Partner website and search engine optimization

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- Screenshot with URL (if available) and date visible – showing the keyword and results and/org **OR**
- Copy of ad or Screen shot of ad with URL (if available) with dates visible

Eligible Expenses

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

Best Practices

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

Did you know

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

Microsoft syndicated content

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **URL** and/or screenshots of site pages showing URL

Eligible Expenses

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

- **Fee – Agency:** Marketing services, including agency fees
- **Development:** Content development fees
- **Media placement**

Notices

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

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

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

Did you know

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

Multi-touch digital campaign

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

Activity Guidelines

- Complete campaign activity must meet all guidelines and requirements for each individual activity type, as detailed on the applicable activity page in the Co-op Guidebook.
- Multi-touch digital campaigns can be comprised of different combinations of eligible activities. When making the claim, all the proof of execution required in the included activities for the specific campaign must be submitted.
- Provide a marketing plan or other statement of work in the claim, which outlines the eligible activities included as part of the campaign in order to easily claim reimbursement for eligible expenses.

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- 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**
- **Development:** Content development fees
- **Fee – SEO:** Optimization and maintenance fees
- **Fee - Third party call center:** Third party call center charges

Reminders

- Have a strong, clear call to action.
- Ensure contact information is clearly indicated and easily found on your materials.
- Please enter all activities that the campaign is comprised of in the claim submission.

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



Market Development Activity Sheets

Telemarketing

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Communication material:** Copy of script **AND**
- **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**

Reminders

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

Best Practices

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

Did you know

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

Customer seminars and bootcamps

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Communication material:** Event invitation and agenda/program

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.

Did you know

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

Best Practices

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

Did you know

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

Tradeshows and expositions

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

Activity Guidelines

General Event Expenses

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

Event Communication Materials

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Communication material:** Event agenda, program and/or presentation/printed material

Eligible Expenses*

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

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

Reminders:

- To calculate the claim amount of general tradeshow event and registration expenses, divide the total amount of tradeshow booth space dedicated to Microsoft and meeting the Core Requirements by the total tradeshow event cost.
- If a non-Microsoft operating system, productivity suite, server solution, collaboration suite software, or devices are present in the communication material, a maximum of 30% of the activity cost will be reimbursed.

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

Customer offers

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

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

Activity Guidelines

Customer Offers:

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Communication material** showing offer with terms and conditions

Eligible Expenses

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

Reminders:

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

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

Internal incentives and SPIFFs

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

Activity Guidelines

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (**CSR**) **PLUS**
- **Communication material** flyers or notices circulated to Partner Employee informing them of the sales contests including the eligibility criteria and contest details (ex. KPIs, max cap on award, etc.) **AND**
- **SPIFF Attestation Form** confirming the participant awards, see Reminders section for detail

Eligible Expenses

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

* Photo not required for cash giveaways

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

Reminders

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

Best Practices

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

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

On-site Champ

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

Activity Guidelines

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

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Support Document:** On-Site Champ form with project/activity details

Eligible Expenses

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

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

Reminders

- Services associated with administrative or operational tasks, management of co-op and Incentive funds, and general sales services are not eligible for reimbursement.
- Number of hours worked by Champ(s) is required if CSR is used.
- The On-Site Champ form is available on aka.ms/partnerincentives.

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

Proof of concept

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

Activity Guidelines

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

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

1. Microsoft content

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **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
- **Development:** Content Development Fees
- **Fee – agency:** Marketing services, including agency fees
- **Fee – service:** Labor services provided by partner or third-party vendor in support of the proof of concept

Caution

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

Reminders

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

Did you know:

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

Employee purchase web setup for customer

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

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

Activity Guidelines

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

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

1. 100% Microsoft content

Proof of Execution Requirements

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

Eligible Expenses

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



Partner Readiness Activity Sheets

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 after the completion of a training course. Partners must submit invoices for the vouchers and provide a certificate or a completion document that states the dates the course was taken and completed.
- If the invoice does not include the course/exam code and date of completion, be prepared to show an alternative form of course completion, such as a course certificate.

Core Requirements:

1. Course code / exam code on <https://docs.microsoft.com/en-us/learn/>

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.

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)
- **Initial MCT Enrollment** cost is an eligible expense.

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

Internal training and floor days

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

Activity Guidelines

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

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

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

Proof of Execution Requirements

- Third party **invoice** or certification statement and report (CSR) **PLUS**
- **Communication material:** Training Agenda, Event Program or Screenshot of On-Demand Training Module

Eligible Expenses*

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

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

Caution

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

Reminders

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

On-demand training

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

Activity Guidelines

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

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

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

Proof of Execution Requirements

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

Reminders

Training should be 100% Microsoft-focused

Eligible Expenses

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

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

Microsoft Hosted Conferences

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

Activity Guidelines

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

Core Requirements

1. Microsoft-hosted conference

Proof of Execution Requirements

- Third party **invoice PLUS**
- **Support document:** Copy of conference/event invitation or registration confirmation showing evidence that conference is hosted by Microsoft **OR**
- **Support Document:** Transportation itinerary with travel dates (*Travel – airfare expenses only*)

Eligible Expenses

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

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

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

Caution

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

Product seeding / Demo units

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

Activity Guidelines*

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

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 **PLUS**
- **Support document:** Proof of delivery for third party demo units

Eligible Expenses

- **Fee – equipment purchase:** Product demo units
- **Fee - shipping fees** for Surface PC, Surface Hub & Accessories

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

Caution

- Co-op funds do not cover testing environments and other technology
- Accessories are defined as keyboard, docking station, mouse, pen, earbuds, Surface headphones and Surface travel hub.



Additional Resources

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Co-op funds planning 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%	

a Depth partners (>\$20K of Co-op per semester)

- 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 (<\$20K of Co-op per semester)

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

2 Leverage Microsoft GTM Offers

GTM Offer	Cost
Account based marketing – Content syndication	
Intent based marketing – Paid Search	\$4K - \$23K each, based on campaign target size and objectives
Lead generation – Industry LinkedIn Campaign	
Lead generation – Industry or Topic Campaign	

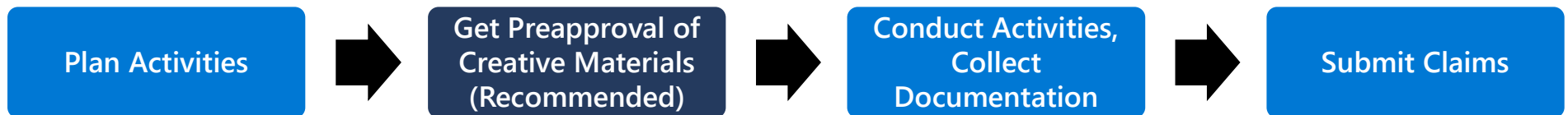
3 Co-op for digital marketing

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

b Demand generation/digital marketing activities

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

Creative materials preapproval



Preapproval Recommendation for Creative Materials

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

Preapproval Best Practices

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

- Include the Co-op Program ID in the preapproval request. The Co-op Program ID can be found on the Partner Center 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.
- Creative Materials Preapproval is applicable prior to execution only.

Giveaway items

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

* Photo is not required as POE for cash.

Event claiming

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

Tradeshows and Expositions

The key difference between these two types of events is:

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

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

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

Customer Seminars and Bootcamps

The key difference between these two types of events is:

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

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

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

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

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



Usage Recommendations by Product Group and Solution Areas

FY22 Co-op Usage Recommendations for Modern Work

Co-op planning recommendations

Partners should work closely with Microsoft PDMs and PMMs in their region to align GTM plans, activities, and spend to drive maximum usage and impact.

All co-marketing in FY22 (July 2021 through June 2022) focused on Modern Work should be used to drive these core priorities:

- Drive New Sockets: SMB, Dark-to-Cloud, Front Line Worker
- Grow Average Revenue Per User: upsell with Teams Meetings & Phone
- Establish New Businesses: Viva, Deschutes, and MMD
- Secure new customer and seat acquisitions with CSP
- Upsell to Microsoft 365 Business Premium (BP) and E5

Co-op Funding Plan (Recommendation only)

Following are suggested co-op activities to plan and execute using available funds that align to the FY22 priorities above.

Demand Generation	Market Development	Readiness
<ul style="list-style-type: none">✓ Best Practice Development for a Teams or Viva solution✓ Social Media Marketing across Modern Work sales plays, especially M365E5 and Business Premium✓ Multi-touch Digital Campaign for Modern Work offers, especially for Teams, Viva, and Premium offers (M365E5 and Business Premium)	<ul style="list-style-type: none">✓ Customer Offer focused on Teams or Business Premium✓ Sales SPIFF focused on Customer Add growth, M365 E5, or Business Premium✓ On-site Champ with sales or marketing campaign management focus on Teams, M365 E5 or Business Premium✓ Proof of Concept for Teams offers (meetings and calling/phones)	<ul style="list-style-type: none">✓ Microsoft Exams and Certifications for Teams (MS-700) and Security (MS-500)✓ Internal Training on Teams offers, Viva, Deschutes, and premium products✓ On-demand Training on Teams offers, Viva, Deschutes, and premium products



FY22 Co-op Usage Recommendations for Security

Co-op planning recommendations

Partners should work closely with Microsoft PDMs and PMMs in their region to align GTM plans, activities, and spend to drive maximum usage and impact.

All co-marketing in FY22 (July 2021 through June 2022) focused on Security, Compliance, and Identity (SCI) should be used to drive these core priorities:

- Leverage co-op to build customer interest for Security, Compliance, and Identity workshops
- Upsell to Microsoft 365 E5 and premium products
- Expand existing revenue opportunity through advanced Security & cross sell Azure security
- Acquire new customers through expansion in new segments (SMB, FLW) and Azure attach

Co-op Funding Plan (Recommendation only)

Following are suggested co-op activities to plan and execute using available funds that align to the FY22 priorities above.

Demand Generation	Market Development	Readiness
<ul style="list-style-type: none">✓ Best Practice Development across Security, Compliance & Identity✓ Social Media Marketing across Security sales plays✓ Multi-touch Digital Campaign across Security sales plays	<ul style="list-style-type: none">✓ Sales SPIFF for Security, Compliance & Identity✓ Customer Offer for managed security agreements focused on Microsoft Security, Compliance, & Identity products✓ On-site Champ focus on Security, Compliance, and Identity sales and marketing projects	<ul style="list-style-type: none">✓ Sponsor employee technical certification on Security, Compliance, and Identity



FY22 Co-op Usage Recommendations for Business Applications

Co-op planning recommendations

Partners should work closely with Microsoft PDMs and PMMs in their region to align GTM plans, activities, and spend to drive maximum usage and impact.

All co-marketing in FY22 (July 2021 through June 2022) focused on Business Applications (Microsoft Dynamics) should be used to drive these core priorities:

- **Land first application** – generate new customers for Business Applications offers
- **Realize application value** – drive application usage and add seats in customer engagements
- **Expand into next applications** – sell additional applications and cross-sell Microsoft solutions

Co-op Funding Plan (Recommendation only)

Following are suggested co-op activities to plan and execute using available funds that align to the FY22 priorities above.

Demand Generation

- ✓ Best Practice Development – use co-op to fund promotion of BizApps focused best practice
- ✓ Solution Building with Third Parties – use co-op to market/promote a BizApps focused solution developed with strategic ISVs
- ✓ Multi-touch Digital Campaign – use co-op to execute demand generation campaign comprised of Digital advertising, SEO, and Telemarketing

Market Development

- ✓ Customer Seminars – use co-op to conduct an on-line seminar on specific BizApps offers
- ✓ Internal Incentives & SPIFFs – use co-op to fund defined sales SPIFFs to support campaigns
- ✓ Proof of Concept – use co-op to fund PoC's for specific customer opportunities
- ✓ On-site Champ – use co-op to fund an On-site champ to manage specific BizApps focused sales and marketing projects

Readiness

- ✓ Microsoft exams and tuition – use co-op for exams required to attain BizApps related MPN Competencies
- ✓ On-demand Training – use co-op to fund customer training on BizApps offers
- ✓ Internal Training – use co-op to fund customer training on BizApps offers



FY22 Co-op Usage Recommendations for Azure

Co-op planning recommendations

Partners should work closely with Microsoft PDMs and PMMs in their region to align GTM plans, activities, and spend to drive maximum usage and impact.

All co-marketing in FY22 (July 2021 through June 2022) focused on Azure (Apps & Infrastructure and Data & AI workloads) should be used to drive these core priorities:

- **Migrate existing applications to Azure & Optimize** – move key applications, both Microsoft on-prem and competitive, to Azure and then optimize the performance of these migrated applications and workloads
- **Innovate with new apps & modernize existing apps** – drive business innovation via new applications on Azure, and modernize existing applications to deliver incremental business impact
- **Enable customers for successful cloud use** – engage customers to realize the most value and secure transformational impact from applications and workloads that they run in Azure

Co-op Funding Plan (Recommendation only)

Following are suggested co-op activities to plan and execute using available funds that align to the FY22 priorities above.

Demand Generation	Market Development	Readiness
<ul style="list-style-type: none">✓ Best Practice Development - use co-op to fund promotion of Azure focused best practice✓ Multi-touch Digital Campaign - use co-op to execute demand generation campaign comprised of Digital advertising, SEO, and Telemarketing✓ Migration Services – use co-op to fund set-up of a technology demo of the proposed solution migration to Azure	<ul style="list-style-type: none">✓ Customer seminars - use co-op to conduct an on-line seminar on specific Azure offers✓ Proof of concept - use co-op to fund PoC's for specific Azure customer opportunities✓ Internal incentives and SPIFFs - use co-op to fund defined sales SPIFFs to support campaigns✓ On-site Champ - use co-op to fund an On-site champ to manage specific Azure focused sales and marketing projects that drive consumption	<ul style="list-style-type: none">✓ Microsoft exams and tuition – use co-op for exams required to attain Azure related MPN Competencies✓ On-demand Training – use co-op to fund customer training on Azure offers✓ Internal Training – use co-op to fund customer training on Azure offers



FY22 Co-op Usage Recommendations for Surface PC & Hub

Co-op planning recommendations

Partners should work closely with Microsoft PCMMs and PDMs in their region to align GTM plans, activities, and spend to drive maximum usage and impact.

All co-marketing in FY22 (July 2021 through June 2022) focused on Surface PC & Surface Hub should be used to drive these core priorities:

- **Priority 1**— Increase presence of Surface in Enterprise. Leverage the new MW Sales Plays to bring the power of Microsoft to life through Surface devices.
- **Priority 2**— Continue to support Small and Medium Size organizations with devices that enable people to work however they work best with flexibility, power and style.
- **Priority 3**—Stand out with Solution Selling by solving customer pain points with solutions deployed on Surface devices.

Co-op Funding Plan (Recommendation only)

Following are suggested co-op activities to plan and execute using available funds that align to the FY22 priorities above.

Demand Generation

- ✓ Digital campaigns leveraging content from Modern Work Sales Plays featuring Surface devices
- ✓ Social media and digital Advertising to amplify product launches
- ✓ Robust Surface landing pages leveraging Microsoft Syndicated Content

Market Development

- ✓ On-Site Surface Champs to develop and drive opportunities
- ✓ Internal SPIFFs and Incentives focused on the priorities above
- ✓ Customer Seminars and bootcamps leveraging the new Sales Play Content for FY22

Readiness

- ✓ Internal training and floor days focused on seller readiness on the Surface portfolio
- ✓ On-demand training Surface training for those partners in a hybrid office
- ✓ Get Surface in the hands of your sellers and customers by purchasing Demo Devices for evaluation programs and training events.

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Claim your co-op right after completing the activity (maximize cash flow) and utilize all your earned co-op so that you don't forfeit funds you have worked hard to earn.

FY22 Co-op Usage Recommendations for Mixed Reality

Co-op planning recommendations

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

All co-marketing in FY22 (July 2021 through June 2022) should be used to drive three core priorities:

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

Co-op Funding Plan (Illustrative only)

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

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

Classified as Microsoft Confidential

ⓘ Claim your co-op right after completing the activity (maximize cash flow) and utilize all your earned co-op so that you don't forfeit funds you have worked hard to earn.



Co-op Planning

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Co-op Plan Example #1

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

Recommendations

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

Co-op Funding Plan Example

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

Demand Generation

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

Sales Spiffs and Offers

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

Program Sponsorship

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

On-site Champs

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

Co-op Plan Example #2

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

Co-op Funding Plan Example

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

Modern Workplace

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

Apps & Infrastructure

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

Business Applications

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

Data & AI

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

Available tools to help drive Microsoft Business

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

Examples

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

Go to www.work365apps.com to learn more

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

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

Pluralsight is an online platform for delivering Microsoft related training content.

Go to <https://www.pluralsight.com/paths/microsoft-365-basic-concepts-and-fundamentals> to learn more

Use co-op for ISV marketing

Does not apply to Surface or Mixed Reality.

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

CSP Indirect Providers

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

CSP Resellers

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

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

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

Digital marketing guidance

Changing buying behaviors is making marketing a mission-critical function

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

Harvard Business Review

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

The cloud buyer and market dynamics

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

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

Digital marketing guidance

Anchor your demand generation in the cloud customer journey



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

Marketing tactics by stage of journey

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 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
- 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.

The screenshot displays the Smart Partner Marketing website. At the top, there is a header with the title "Smart Partner Marketing" and a sub-header "We're here to help you maximize your marketing impact. Use these resources to attract and retain the right customers." Below this is a navigation bar with the heading "Choose your level of marketing experience". The main content area features several sections: "Harness your superpowers" with an illustration of superheroes and a "Get started" button; "Partner Marketing Pros series" with a "Learn about the digital Go-To-Market resources" section and a "Watch the video" link; "Differentiate your solution" with a "Read more" link; and "Marketing with purpose" with a "Read more" link. At the bottom, there is a "Success stories" section with a row of small image thumbnails.

Go-To-Market with Microsoft

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

The Go-To-Market program is designed to enable you to **accelerate your time to market, generate more leads, and grow your cloud business.**

To get started, visit the [Go-To-Market with Microsoft website](#) and explore offers available to you as part of your Microsoft Partner Network membership as well as additional [GTM offers for purchase](#).



Accelerate time to market

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



Generate leads

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



Grow your cloud business

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

Go-To-Market with Microsoft *GTM Offers for Purchase*

Eligible GTM Services	Co-op Activity (for making claims)
Account-based Marketing (ABM) Content Syndication	Multi-touch Digital campaign, Microsoft syndicated content
Intent-based Marketing (Paid Search)	Digital Advertising or Partner website and Search Engine Optimization
Lead Generation – ABM for Industry LinkedIn Campaign	Multi-touch Digital campaign, Social media marketing
Lead Generation – Industry or Topic Display Campaign	Multi-touch Digital campaign

ACCELERATE by Cadence Preferred

Account-based Marketing (ABM) Content Syndication



Objective: Generate awareness, traffic, and leads
Pricing: Various options for different budgets (see below)

Partner audience: All partners
Geographies: Available worldwide
Email:

Deliver **Marketing Qualified Leads (MQLs)** for your sales team (or further nurture campaigns) with a fully managed, co-branded campaign. Targeting options include relevant individuals within specific accounts (**ABM**) provided by you or Microsoft - or a list that the agency generates based on targeting criteria you identify.

Key deliverables and outcomes


- Microsoft + Partner joint value proposition
- Campaign messaging and ad creative
- Gated asset (ebook, webinar, etc.)
- Landing page
- Campaign strategy and targeting
- Campaign execution (media and management/optimization)
- Lead delivery to partner
- Campaign reporting
- Guaranteed leads → 35-150

Note that for smaller campaigns, the partner assumes responsibility for some deliverables to keep costs down—as outlined in the table to the right.

	Large Campaign	Medium Campaign	Small Campaign
Value Proposition	Agency	Agency	Partner (Agency Guided)
Campaign Messaging/Ad Copy	Agency	Agency	Partner (Agency Guided)
Gated Asset (e.g., ebook)	Agency	Partner	Partner
Landing Page (Create)	Agency create, host	Partner create, Agency host	Partner create, Agency host
Campaign Planning, Execution	Agency	Agency	Agency
Guaranteed Leads	150*	60	35
Cost (First month inc. Setup)	\$23,000	\$9,000	\$4,000
Cost Additional Month	\$12,000	\$5,000	\$3,000

*Can scale up the number of leads to any desired number for an incremental cost.

Intent-based Marketing (Paid Search)

 Objective: Generate awareness, traffic, and leads
 Pricing: Various options for different budgets (see below)

Partner audience: All partners
 Geographies: Available worldwide
 Email:

Intent-based marketing campaign through paid search and search retargeting to generate **awareness, traffic, and Marketing Qualified Leads (MQLs)** for your sales team (or further nurture campaigns) with a fully managed, co-branded campaign. Build awareness with individuals who are actively searching for solutions you offer, then generate leads through a gated asset.

Key deliverables and outcomes


- Microsoft + Partner joint value proposition
- Campaign messaging and ad creative
- Gated asset (ebook, webinar, etc.)
- Landing page
- Campaign strategy and keyword targeting
- Campaign execution (media and management/optimization)
- Lead delivery to partner
- Campaign reporting
- Guaranteed landing page visits → 500-3,000

Note that for smaller campaigns, the partner assumes responsibility for some deliverables to keep costs down—as outlined in the table to the right.

	Large Campaign	Medium Campaign	Small Campaign
Value Proposition	Agency	Agency	Partner (Agency Guided)
Campaign Messaging/Ad Copy	Agency	Agency	Partner (Agency Guided)
Gated Asset (e.g., ebook)	Agency	Partner	Partner
Landing Page (Create)	Agency create, host	Partner create, Agency or partner host	Partner create, Agency or partner host
Campaign Planning, Execution	Agency	Agency	Agency
Guaranteed Landing Page Traffic	3,000+*	1,000+	500+
Cost (First month inc. Setup)	\$23,000	\$9,000	\$4,000
Cost Additional Month	\$12,000	\$5,000	\$3,000

*Can scale up for an incremental cost.

Lead Generation – ABM for Industry LinkedIn Campaign

 Objective: Generate awareness, traffic, and leads
Pricing: Various options for different budgets (see below)

Partner audience: All partners
Geographies: Available worldwide
Email:

ABM or Industry-targeted marketing campaign on LinkedIn to generate **awareness, traffic, and Marketing Qualified Leads (MQLs)** for your sales team (or further nurture campaigns) with a fully managed, co-branded campaign. Targeting options include relevant individuals within specific accounts (ABM) provided by you or Microsoft (or a list that the agency generates based on targeting criteria you identify), or companies in targeted industries and verticals.

Key deliverables and outcomes

- Microsoft + Partner joint value proposition
- Campaign messaging and ad creative
- Gated asset (ebook, webinar, etc.)
- Landing page
- Campaign strategy
- Campaign execution (media and management/optimization)
- Lead delivery to partner
- Campaign reporting
- Guaranteed landing page visits → 200-1,000+

Note that for smaller campaigns, the partner assumes responsibility for some deliverables to keep costs down—as outlined in the table to the right.

	Large Campaign	Medium Campaign	Small Campaign
Value Proposition	Agency	Agency	Partner (Agency Guided)
Campaign Messaging/Ad Copy	Agency	Agency	Partner (Agency Guided)
Gated Asset (e.g., ebook)	Agency	Partner	Partner
Landing Page (Create)	Agency create, Agency or Partner host	Partner create, Agency or partner host	Partner create, Agency or partner host
Campaign Planning, Execution	Agency	Agency	Agency
Guaranteed Landing Page Traffic	1,000+*	350+	200+
Cost (First month inc. Setup)	\$23,000	\$9,000	\$4,000
Cost Additional Month	\$12,000	\$5,000	\$3,000

*Can scale up for an incremental cost.

ACCELERATE by Cadence Preferred

Lead Generation – Industry or Topic Display Campaign



Objective: Generate awareness, traffic, and leads
 Pricing: Various options for different budgets (see below)

Partner audience: All partners
 Geographies: Available worldwide
 Email:

Industry or topic-targeted display marketing campaign to generate **awareness, traffic, and Marketing Qualified Leads (MQLs)** for your sales team (or further nurture campaigns) with a fully managed, co-branded campaign. Targeting options include websites frequented by contacts in targeted industries, and/or websites and webpages related to targeted topics and keywords.

Key deliverables and outcomes

- Microsoft + Partner joint value proposition
- Campaign messaging and ad creative
- Gated asset (ebook, webinar, etc.)
- Landing page
- Campaign strategy
- Campaign execution (media and management/optimization)
- Lead delivery to partner
- Campaign reporting
- Guaranteed landing page visits → 1,000-6,000+ (see table to right)

Note that for smaller campaigns, the partner assumes responsibility for some deliverables to keep costs down—as outlined in the table to the right.

	Large Campaign	Medium Campaign	Small Campaign
Value Proposition	Agency	Agency	Partner (Agency Guided)
Campaign Messaging/Ad Copy	Agency	Agency	Partner (Agency Guided)
Gated Asset (e.g., ebook)	Agency	Partner	Partner
Landing Page (Create)	Agency create, Agency or Partner host	Partner create, Agency or partner host	Partner create, Agency or partner host
Campaign Planning, Execution	Agency	Agency	Agency
Guaranteed Landing Page Traffic	6,000+*	2,000+	1,000+
Cost (First month inc. Setup)	\$23,000	\$9,000	\$4,000
Cost Additional Month	\$12,000	\$5,000	\$3,000

*Can scale up for an incremental cost.

Microsoft Advertising

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

Reach more customers with the Microsoft Search Network

- 47 million desktop searches not reached on Google²
- 127 million unique searchers (nearly half the U.S. population)¹
- 6.4 billion monthly searches worldwide¹
- 37% PC market share in the US¹

Partners who are new to Microsoft Advertising or have not advertised in the last 12 months³ are eligible to **receive a complimentary personalized consultation** with a Microsoft Advertising Onboarding Specialist plus a **complimentary ad credit worth USD \$250 when you spend \$50**. See full list of supported markets⁴ and Terms & Conditions [here](#).

The personalized consultation would include:

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

Best practices

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

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

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

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

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?

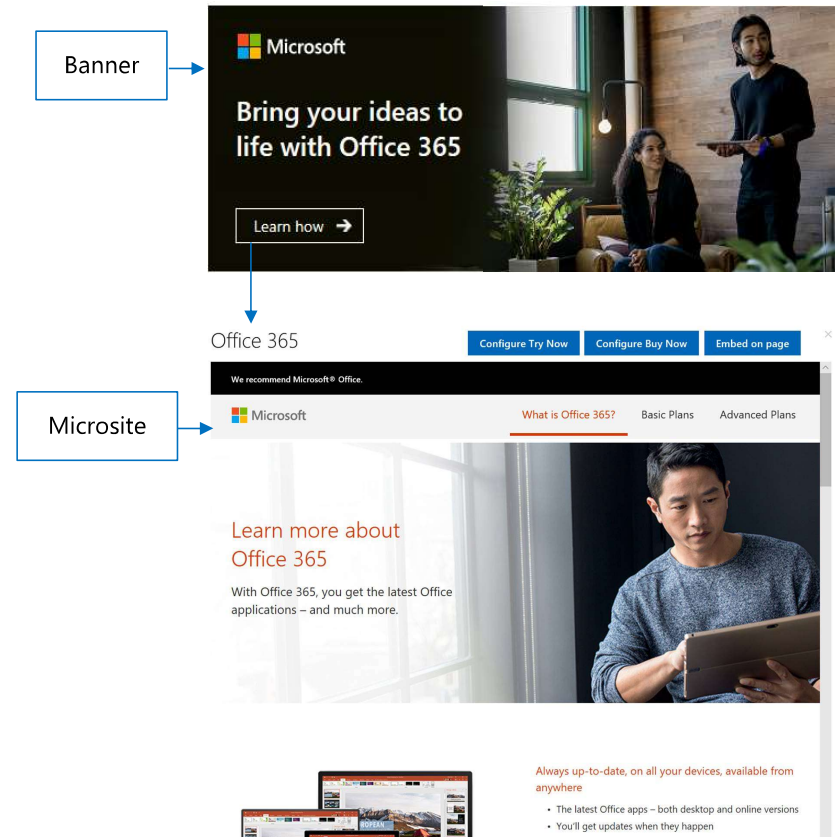
Microsoft provides professionally created banners and help partners embed a code on their own web pages. When the site visitor clicks on the banner, a professionally created microsite (pop-up page within the website) is automatically displayed. The customer is then presented with the option to try or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



Partner Resources

For more information, please review the following resources:

- All co-op assets and Partner Center Guides, are located within the MPN Portal at <https://aka.ms/partnerincentives>.
- The Certification Statement and Report (CSR) form is available online in Partner Center for all programs to request reimbursement to offset costs and/or expenses incurred by the partner solely in connection with the implementation of certain co-op supported marketing activities.
- The Internal incentives and sales performance incentive funds (SPIFFS) activity now requires an attestation form to be populated. This applies to all programs on Partner Center.
- For step-by-step Partner Center co-op claim instructions go here: <https://partner.microsoft.com/en-us/asset/collection/partner-center-incentives-resources#/>

Other program assets are available as follows:

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

Support Channels

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

Glossary

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



Partners make more possible

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