Microsoft

Surface Co-op Planning:
Process, Best Practices and Resources

Surface Co-op Marketing Advisors

Planning Best Practices

Marketing activity planning is critical to ensure activities are eligible and meet the POE requirements for the Co-op program. An approved plan required for ALL Surface partner Co-op claims.

Planning Best Practices

- Review current priorities and campaigns, and ensure all activities are in line with global and regional objectives.

- Determine estimated Co-op funds and plan to utilize 100% of earned funds.

- Review activity planning guidance and allocate funds appropriately across categories.

- Review the FY24 Co-op Guidebook and identify specific activities within categories.

- Ensure planned activities are eligible and compliant prior to execution.

Create A Plan

Resellers (ADRs) utilize the Reseller template and Distributors (ADDs) utilize the Distributor template. Complete all required fields in yellow.

In the **Marketing Activity Framework**, find two example line items.

Complete all fields for each activity:

➢ Campaign Name
➢ Category
  • Select one of three Co-op categories from the drop down
➢ Activity Type
  • Activities are updated based on the category selected, select one from the drop down.
  • Eligible Expenses and POE requirements will update automatically. Review these requirements and do not edit.
➢ Activity Description
➢ Start and End Dates
  • Ensure the planned dates fall within the usage period being claimed.
➢ KPIs or estimated reach
➢ Planned Amount and Currency

Utilize the FY24 Co-op Planning Templates to plan campaign activities.

FY24 Surface Reseller Co-op Planning Template

FY24 Surface Distributor Co-op Planning Template

Plan Approval and POE

- ➢ Complete the plan utilizing the appropriate template (Reseller or Distributor) and the instructions provided.
  - ❖ Create a single plan per usage period and utilize all earned Co-op funds.

- ➢ Once complete, submit the plan to Microsoft PDM or contact via email.

- ➢ The PDM will review the plan and provide feedback or approval.

- ➢ Once approved, partners save a screenshot of the approval email and submit it with claims in Partner Center.
  - ❖ Ensure the approval email is submitted with each activity/claim included in the plan.

SAMPLE: Your FY24H2 Co-op Plan is approved!

SC Surface Co-op Marketing Advisors
To ○ Surface Co-op Marketing Advisors

🛡 General

Dear Partner,

Thank you for submitting your FY24H2 Co-op activity plan for review. It is approved!

Please submit a copy of this email approval with your claim in Partner Center as part of the required POE (Proof of Execution).

Thank you,

Your Microsoft PDM

Plan approval is required POE (Proof of Execution) for all Surface claims.

Planning Resources

Surface Reseller Alliance Portal

Partners access to the full range of Surface assets, resources, and programs

Surface News

Stay in the Know

- Product news
- Campaigns
- Briefings
- Trainings
- New assets

Priorities

Drive Core Priorities

- Surface Laptop & Pro
- Surface Hub
- Enterprise & SMB

Marketing

Capture new business

- Devices
- Imagery
- Campaigns
- Industry
- Warranty & Support

Programs

Explore Resources

- SRA Program
- DaaS
- Modernize with Surface
- Co-op
- X-Program

Training

Take Trainings

- Live Briefings
- ExpertZone
- Surface Academy
- Webinars
- Sales Play Immersion
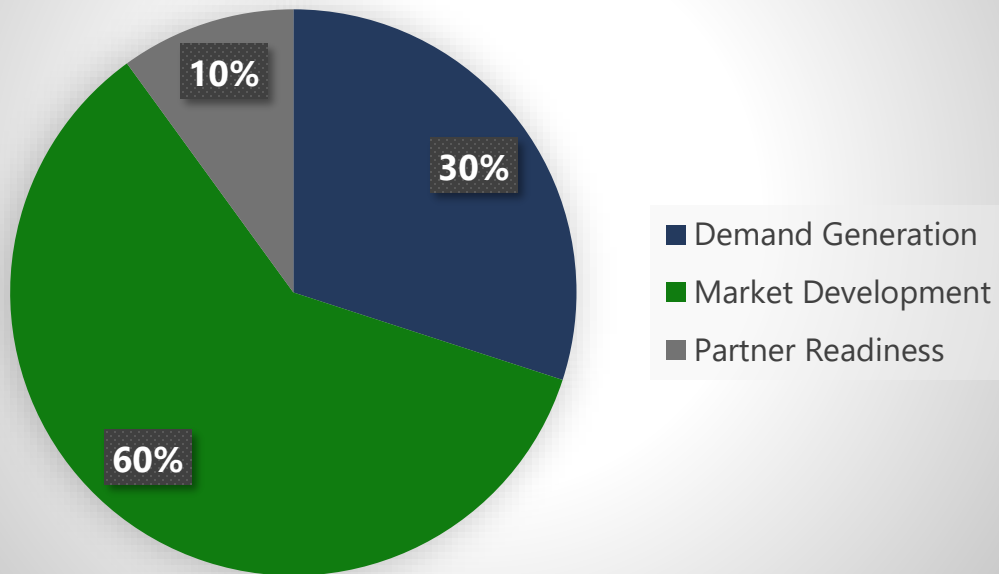
Activity Planning Guidance

Activity Planning Guidance
Depth Partners (>$50K Co-op Funds)

Review the **FY24 Co-op Guidebook** and identify activities to drive core priorities

Depth Partners
(>$50K Co-op Funds)

- Demand Generation
- Market Development
- Partner Readiness

Funds guidance per category

- 60% towards market development activities to close leads
- At least 30% towards demand gen/digital marketing activities to generate leads
- 10% towards partner readiness to develop capabilities to promote, transact, and deploy devices

Category		Recommended Activities
Market Development	60%	• On-Site Champs • Customer Seminars and Bootcamps • Internal Incentives and SPIFFs
Demand Generation	30%	• Partner website and SEO • Digital advertising & social media • Email and SMS
Partner Readiness	10%	• Product Seeding/Demo Devices • Internal Training and Floor Days • Microsoft hosted Surface Training(s)

Activity Planning Guidance
Breadth Partners ($20-50K Co-op Funds)

Review the **FY24 Co-op Guidebook** and identify activities to drive core priorities

Breadth Partners
($20-50K Co-op Funds)

- 20%
- 30%
- 50%

- Demand Generation
- Market Development
- Partner Readiness

Funds guidance per category

- 50% for strong focus on market development activities to close leads
- At least 20% towards demand gen/digital marketing activities to generate leads
- 30% towards partner readiness to develop capabilities to promote, transact, and deploy devices
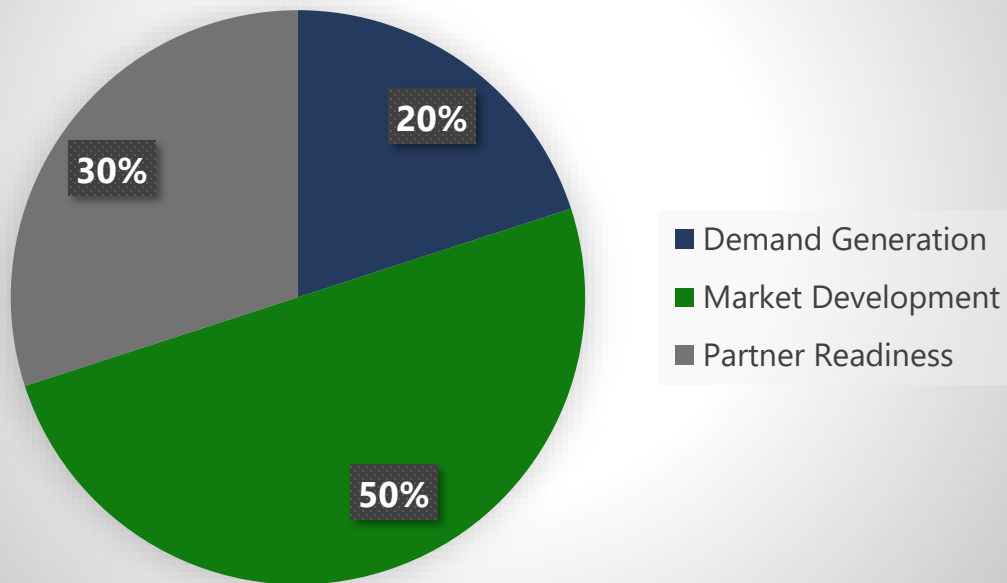
Category		Recommended Activities
Market Development	50%	• On-Site Champs • Internal Incentives and SPIFFs • Customer Seminars and Bootcamps
Demand Generation	20%	• Partner website and SEO • Digital advertising & social media • Email and SMS
Partner Readiness	30%	• Internal Training and Floor Days • Microsoft hosted Surface Training(s) • Product Seeding/Demo Devices

Activity Planning Guidance
Breadth Partners (<$20K Co-op Funds)

Review the **FY24 Co-op Guidebook** and identify activities to drive core priorities

Breadth Partners (<$20K Co-op Funds)

- Demand Generation
- Market Development
- Partner Readiness

Funds guidance per category

- 30% on market development activities to close leads
- At least 20% towards demand gen/digital marketing activities to generate leads
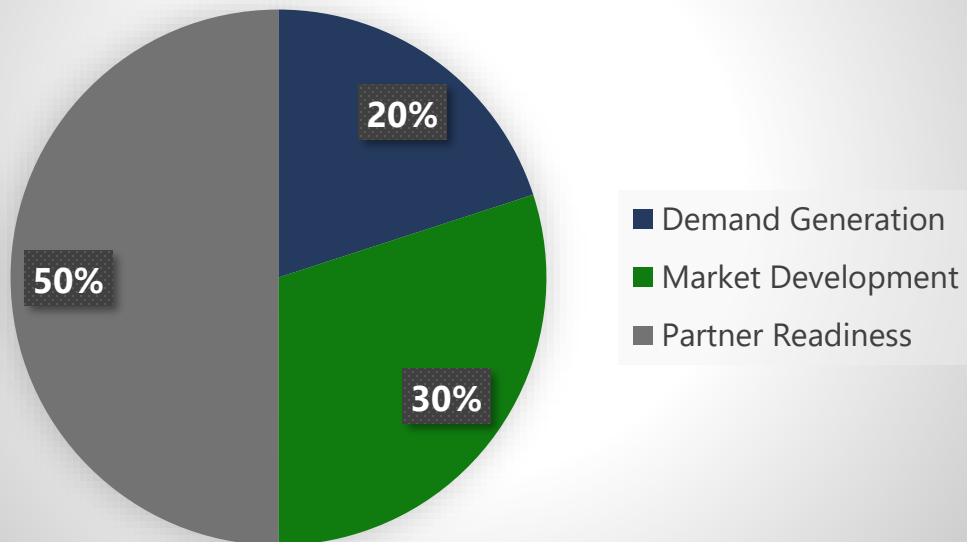- 50% towards partner readiness to develop capabilities to promote, transact, and deploy devices

Category		Recommended Activities
Market Development	30%	• On-Site Champs • Internal Incentives and SPIFFs • Customer Seminars and Bootcamps
Demand Generation	20%	• Partner website and SEO • Digital advertising & social media • Email and SMS
Partner Readiness	50%	• Internal Training and Floor Days • Microsoft hosted Surface Training(s) • Product Seeding/Demo Devices

Demand Generation | Activity Descriptions

- **TV/Radio Advertising (FY24 Co-op Guidebook p.18)** includes advertisements that appear in a TV or Radio spot.
- **Print Advertising (p.19)** 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.
- **Best Practice Development (p.21)** 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.
- **Solution Building with Third Parties (p.22)** 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.
- **Digital Advertising (p.23)** 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.
- **Social Media Marketing (p.24)** includes search engine marketing (SEM), pay-per-click (PPC) advertising and paid promotions and advertising through social media markets, such as LinkedIn and Facebook page.
- **Direct Mail, Email, and Mobile SMS (p.25)** includes communication pieces from the partner that are mailed or delivered electronically to customers
- **Partner Website and Search Engine Optimization (p.26)** 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.
- **Microsoft Syndicated Content (p.27)** Placement of Microsoft created and maintained content on the partner's website.
- **Multi-Touch Digital Campaign (p.28)** 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 with 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.

Market Development | Activity Descriptions

- **Telemarketing (FY24 Co-op Guidebook p.30)** Calling partners/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.

- **Customer Seminars and Bootcamps (p.31)** Customer seminars are Microsoft-focused customer and reseller-facing training and recruitment events, 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.

- **Tradeshows and Expositions (p.32)** 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.

- **Customer Offers* (p.33)** 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 *(*not applicable to Surface ADR partners)*

- **Internal Incentives and Sales Performance Incentive Funds (SPIFFS) (p.34)** 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

- **On-Site Champ (p.35)** 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.

- **Proof of Concept (p.36)** is 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.

- **Employee Purchase Web Setup for Customer* (p.37)**. Setup of web site to allow employees of the customer to purchase Surface and Mixed Reality devices for their own use. *(ONLY applicable to Surface Reseller partners)*

Partner Readiness | Activity Descriptions

- **Microsoft Cloud Partner Program (MCPP) Participation (FY24 Co-op Guidebook p.39)** includes Microsoft Cloud Partner Program annual enrollment fees for benefits package.

- **Microsoft Exams and Tuition (p.40)** Official Microsoft exam and tuition fees for certifications and Solutions Partner Designations available at www.microsoft.com/learning.

- **Internal Training and Floor Days (p.41)** 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.

- **On-Demand Training (p.42)** 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.

- **Microsoft Hosted Conferences (p.43)** 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.

- **Product Seeding/Demo Units (p.44)** 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 prior to a purchase decision.