Increasing deal velocity and profitability with offers and incentives

Presented by US partner investments:

- **Ben Circeo** – Partner Investments Readiness Lead
- **Kaushal Mehta** – Senior Partner / Channel Marketing Manager
Today’s agenda

01 Partner Investments Engine Overview

02 MCI and MCAP Updates

03 Resources
Join our next office hours calls

What
Bi-weekly partner call focused on US partner investments

When
Wednesday, 3/2/2022
FY22 Partner Investments Office Hours

How
Register for our calls on the EventBuilder listing page
Partner Investment Engine (PIE) overview
## Investments aligned to partner-customer sales journey

Microsoft investments are a foundational element to accelerate your growth.

### Sales Cycle

<table>
<thead>
<tr>
<th>Build Intent</th>
<th>Transact</th>
<th>Consume</th>
<th>Post-sale utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recruit &amp; Enable</strong>&lt;br&gt;Recruit new customers and build pipeline</td>
<td><strong>Pre-sale activities</strong>&lt;br&gt;Activities to understand how products/services drive business outcomes</td>
<td><strong>Sale</strong>&lt;br&gt;Sale</td>
<td><strong>Post-sale implementation</strong>&lt;br&gt;Activities to implement and execute solutions</td>
</tr>
<tr>
<td><strong>Structural Investments</strong>&lt;br&gt;MARGIN and incentives&lt;br&gt;Always on</td>
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<tr>
<td><strong>Discretionary Investments</strong>&lt;br&gt;Responding to short term market needs and opportunities&lt;br&gt;Time bound campaigns</td>
<td><strong>Partners offers, co-op, &amp; frameworks</strong>&lt;br&gt;Partner offers</td>
<td><strong>Transactional incentives &amp; margin</strong>&lt;br&gt;Transactional Incentives</td>
<td><strong>Partner Offers</strong>&lt;br&gt;Utilization Incentives &amp; Offers</td>
</tr>
<tr>
<td><strong>Non-Monetary</strong>&lt;br&gt;PDM support, GTM support (digital), readiness resources, technical support&lt;br&gt;Always on</td>
<td><strong>Technical enablement, Internal use rights, marketing support &amp; assets, commercial marketplace</strong>&lt;br&gt;Partner-field-integration (PFI) model, deal support and coaching, customer trials</td>
<td><strong>Licensing support, deal support and coaching for field-led and partner-led motions</strong>&lt;br&gt;STU/PTS aligned to workloads</td>
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</tbody>
</table>

**Utilization incentives**
Partner Investment Engine overview

What is the Partner Investment Engine?

• The Partner Investment Engine (PIE) is an online platform that provides partners with access to all US partner offer programs

Who can access PIE?

• PDM-managed partners in the US can access the PIE Portal
• Eligibility requirements vary by offer program

Why should partners use PIE?

• Access all US partner offer programs using a single platform
• Apply for many offer programs using a consistent request process
• Receive real-time status information on all pending requests
• View holistic reporting on program usage in your personalized dashboard
Getting started with PIE

**Onboarding:**
- Read our quick start guide
- Review the PIE How-to guide

**How do I access PIE programs?**
- Log in with your MPN Account at [www.microsoftpartnerinvestments.com](http://www.microsoftpartnerinvestments.com)
- Review the How to access the PIE Portal section of the PIE How-to guide for detailed, step-by-step instructions on how to access PIE and request funding
- Contact our PIE Support Team ([piesupp@microsoft.com](mailto:piesupp@microsoft.com)) with any access or claim-related questions

**Where can I learn more?**
- Attend our partner investments office hours call for program and policy updates and Q&A
- Join the partner investments MPC to access partner resources and announcements
- Read the PIE FAQ guide for more information about PIE programs
## FY22 PIE Offers at-a-glance

<table>
<thead>
<tr>
<th>Description</th>
<th>Payout</th>
<th>ROI</th>
<th>Partner eligibility, competencies and other requirements (US ECIF-approved suppliers)</th>
<th>Customer eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Partner-led Azure Customer Experience (PACE) (Virtual)</strong></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Marketing funds to support 1:many, partner-led, Azure marketing campaigns, designed for developer, IT or business decision maker audience types</td>
<td>$1,500</td>
<td>N/A</td>
<td>US PDM-managed partners with Gold Cloud Platform, Data Platform, or Data Analytics competency, Managed ISVs exempt</td>
<td>All US managed and unmanaged</td>
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<tr>
<td><strong>Azure Everywhere</strong></td>
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<tr>
<td>Funding aligned to the Cloud Adoption Framework (CAF) that helps customers on their cloud adoption journey and drives Azure consumption</td>
<td>$2k - $26.5k</td>
<td>10:1 Managed Customer 5:1 ACA/Fragile Nurture Customer</td>
<td>US PDM-managed partners with Gold Cloud Platform, Data Platform, or Data Analytics competency</td>
<td>US Managed only (excludes SMB and Federal)</td>
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<tr>
<td><strong>Azure Everywhere for Commercial Marketplace</strong></td>
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<tr>
<td>Provides funding to help the customer identify use cases for solutions built on or deployed on Microsoft Azure</td>
<td>$5K – $10K</td>
<td>10:1</td>
<td>US PDM-managed services partners with Gold Cloud Platform or Data Platform competency engaging in an IP Co-sell deal with US PDM managed ISV or Managed ISV</td>
<td>US Managed only (excludes SMB and Federal)</td>
</tr>
<tr>
<td><strong>Microsoft Modern Work and Security Everywhere</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Pre-sales activities to drive Microsoft 365 with US managed customers</td>
<td>$2k - $10k</td>
<td>20:1</td>
<td>US PDM-managed partners with Gold Windows &amp; Devices, Cloud Productivity, Security, or Enterprise Mobility Management competency</td>
<td>US Managed only (excludes SMB, Non-Profit, Federal, &amp; EDU)</td>
</tr>
<tr>
<td><strong>Microsoft Teams Adoption</strong></td>
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<tr>
<td>Post-sales activities that showcase the capabilities and drive adoption of Microsoft Teams</td>
<td>$2k – $25k</td>
<td>$5 per qualified entitlement (QE), QE = Teams net new whitespace</td>
<td>US PDM-managed partners with Gold Communications, Windows &amp; Devices, Collaboration &amp; Content, or Cloud Productivity competency</td>
<td>US Managed only (excludes SMB, Non-Profit, Federal, &amp; EDU)</td>
</tr>
<tr>
<td><strong>Microsoft Security Adoption</strong></td>
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<tr>
<td><strong>Microsoft Dynamics 365 Adoption</strong></td>
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</tr>
<tr>
<td>Post-sales activities to drive Dynamics 365 consumption and usage with US customers. Partners must engage a Microsoft Representative/Sponsor to create a valid request.</td>
<td>$5k - $30k</td>
<td>$40 per qualified entitlement (QE)</td>
<td>US PDM-managed partners with Gold Enterprise Resource Planning, Cloud Business Applications, Cloud Customer Relationship Management, or Data Analytics competency</td>
<td>All US customers (excludes Federal)</td>
</tr>
</tbody>
</table>

Visit [https://aka.ms/partner.investments](https://aka.ms/partner.investments) to learn more.

Partners should plan to begin work between 10 and 17 days after submitting a funding request *PACE is between 7 and 14 days

- Partners must select an activity start date between 10 and 17 days in the future when creating a claim
- The activity end date for each claim will be automatically populated based on the activity start date selected

**Partners cannot execute on offer activities until an approved Purchase Order (PO) is in hand**

- Microsoft sends the communication via email that PO is ready for the relevant claim

**Partners must complete work within 45 days of the Activity Start Date for each claim**

**Partners must submit invoice to MS Invoice before PO Expiration Date (not before work has finished)**

- Claims without invoices will Expire on the PO Expiration Date

**Customers must submit signed Proof of Execution within 30 days after receiving it**
A. Purchasing guidance

B. NCE Azure in CSP

C. NCE for Seat-based Offers

D. Microsoft Commerce Incentives (MCI)

E. Office Standard and Pro Plus & M365 price adjustment

F. Additional NCE Incentives launch

**Timeline FY22/23**

**A. Purchasing guidance**
- Customer adds accelerators (MW/Dynamics) and NCE incentives begin release running through Sept., legacy incentives begin to retire.

**B. NCE Azure in CSP**
- Seat-based offers go GA and promos begin for monthly and annual offers.

**C. NCE for Seat-based Offers**
- New subscriptions in NCE only for Seat-based. Partners can no longer add new on legacy CSP.
- Renewing subscriptions in NCE only for Seat-based, no more renewals on legacy CSP.
- Manual migration of remaining legacy CSP subscriptions to NCE in CSP for Azure.

**D. Microsoft Commerce Incentives (MCI)**
- Microsoft Commerce Incentive (MCI) serves as the incentives platform for all NCE.

**E. Office Standard and Pro Plus & M365 price adjustment**
- Promo for annual Seat-based offers expires.

**F. Additional NCE Incentives launch**
- Price update goes into effect for Microsoft 365 (all channels).

**All dates are subject to change, use for guidance purposes only**
Introduction to MCI Engagements: Build Intent Workshops

Feb 16, 2022
Agenda

Topics

MCI Program Overview
Build Intent Workshops
GTM Integration
Getting Started
Q&A

Slides and Recording will be available in the next week.
Overview: http://aka.ms/MCI/OverviewWebinar
Deep Dive: http://aka.ms/MCI/DeepDiveWebinar
MCI Program Overview
Microsoft Incentives and Investments Journey

We are on a multi-stage, multi-year journey to transform the go-to-market experience, maximize partner earning opportunity, and create new value for partners and our shared customers.
Microsoft Incentives and Investments

Partner earning opportunity across the purchasing lifecycle

Build Intent
Encourage customers to pursue Microsoft solutions and prove Microsoft solution value

Partners have a role in each stage of the customer journey

Consume
Integrate solutions into customer environments and increase consumption

Transact
Facilitate customer purchasing motions

Learn more: Watch Inspire Session “Maximize Microsoft Programs and investments to accelerate the customer journey” (link)
Microsoft Commerce Incentives (MCI)

A new and centralized Partner Center experience for MCI

Enable partners to deliver more value with a streamlined experience & customer focused earning opportunities

- Simplified experience, incentive management + reporting
- Transparency and predictability for earning opportunities
- Clear visibility of partner + customer eligibility across earning opportunities
- Data driven targeting, connects right partners with right customer engagements
MCI Engagements: Build Intent Workshops
As part of our journey to simplify, consolidate, and enhance our engagement programs and incentives, MCI will now support the customer pre-sales journey through Build Intent Workshops.

What are Build Intent Workshops?

Build Intent Workshops are partner-led engagements designed by Microsoft that help partners **demonstrate value, build customer intent**, and **maximize opportunities** for Modern Work and Security.
“We increased our win rate by over 80% by leading each customer engagement with a workshop. Workshops increased opportunity size and helped close deals more quickly vs. those without a workshop.”
A New Digital Experience

Microsoft Commerce Incentives
Review programs by solution

Build Intent Workshops
Overview + solution areas

Workshop Landing Page
Individual workshop pages

http://aka.ms/mci
Navigating MCI Engagements & Eligibility Requirements

Engagements Overview
• Workshops & incentives by solution
• Engagement summary
• Partner eligibility
• Customer qualification
• Workshop requirements

Eligibility Page
Lists all locations enrolled in the MCI program, their eligibility status, and their payee profile status.

✅ A green check mark indicates eligibility to earn on the specific engagement for that location.

Join the next webinar and gain step-by-step guidance to “Accelerate Opportunities with Build Intent Workshops”

Session 1: Feb 15: 9:00am – 10am PST:  https://aka.ms/MCI/BIW-201-Webinar1
Session 2: Feb 15: 6:00pm – 7:00pm PST:  https://aka.ms/MCI/BIW-201-Webinar2
Differentiated incentives (MCI claimed engagements)

<table>
<thead>
<tr>
<th>Workshop</th>
<th>Market A Incentive</th>
<th>Market B Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modern Work</td>
<td></td>
<td></td>
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<tr>
<td>Enable Frontline</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Endpoint management</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Hybrid meetings</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Microsoft Viva</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Microsoft Viva insights</td>
<td>$5000</td>
<td>$3500</td>
</tr>
<tr>
<td>Modernize communications</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Next gen endpoints (new)</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Teams apps &amp; solutions</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Transition to cloud</td>
<td>$3500</td>
<td>$2500</td>
</tr>
<tr>
<td>Azure Sentinel</td>
<td>$5000</td>
<td>$3500</td>
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<tr>
<td>Discover sensitive data</td>
<td>$5000</td>
<td>$3500</td>
</tr>
<tr>
<td>Hybrid cloud security</td>
<td>$5000</td>
<td>$3500</td>
</tr>
<tr>
<td>Manage &amp; investigate risk</td>
<td>$5000</td>
<td>$3500</td>
</tr>
<tr>
<td>Securing identities</td>
<td>$5000</td>
<td>$3500</td>
</tr>
<tr>
<td>Threat protection</td>
<td>$5000</td>
<td>$3500</td>
</tr>
</tbody>
</table>

| Security | | |
|----------| | |
| Threat protection | $5000 | $3500 |
| Discover sensitive data | $5000 | $3500 |
| Hybrid cloud security | $5000 | $3500 |
| Manage & investigate risk | $5000 | $3500 |
| Securing identities | $5000 | $3500 |
| Threat protection | $5000 | $3500 |

Market A MPN ID Countries
- Australia
- Germany
- Norway
- Austria
- Iceland
- Portugal
- Belgium
- Ireland
- Spain
- Canada
- Italy
- Sweden
- Denmark
- Japan
- Switzerland
- Finland
- Luxembourg
- United Kingdom
- France
- Netherlands
- United States

Market B MPN ID Countries
- All other eligible countries

Ineligible Countries
- Afghanistan
- North Korea
- Syria

Each workshop incentives are calculated in USD based on the location of the MPN ID that delivered the workshop and paid out in the currency the partner selected in their Partner Center bank profile.

Workshop eligibility and payout amounts are subject to change.
# Build Intent Workshop Stages

<table>
<thead>
<tr>
<th>Workshop Stage</th>
<th>Stage 1: Add or Claim Customer</th>
<th>Stage 2: Customer Consent</th>
<th>Stage 3: Execution &amp; POE</th>
<th>Stage 4: POE Validation</th>
<th>Stage 5: Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Partner claims or adds customer</td>
<td>Partner requests customer consent</td>
<td>Partner conducts customer workshop</td>
<td>Microsoft reviews POE documentation</td>
<td>Once approved, claim will be processed for payment</td>
</tr>
<tr>
<td></td>
<td>Partner Center verifies workshop eligibility for partner &amp; customer</td>
<td>Partner Center receives customer consent</td>
<td>Partner submits claim with required POE</td>
<td>Microsoft reaches out to partner if additional information is needed.</td>
<td>Microsoft issues payment to partner</td>
</tr>
<tr>
<td></td>
<td>Partner selects workshops from a list for which both partner and customer are eligible for adding/claiming customer</td>
<td>Without customer consent, claim will automatically expire</td>
<td>Workshop claims with incomplete POE will automatically expire</td>
<td>Microsoft approves or declines POE</td>
<td></td>
</tr>
<tr>
<td>Timeline</td>
<td>Timeline: 30-days max from claiming customer</td>
<td>Timeline: 90-days max from receiving customer consent</td>
<td>Timeline: 30-days max</td>
<td>Timeline: 45-days max from claim approval month end</td>
<td></td>
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</tbody>
</table>
MCAP Transition to MCI Guidance

**MCAP nominated workshops continue as normal:**
- All activity started in MCAP must be completed in MCAP
  - Approvals require uploaded “Customer Acknowledgements”
  - Payment require uploaded “Proof of Execution” (POE)
  - May 31st - MCAP "Manage POE" capability will close on
  - June 30th - MCAP Program Dashboard will be decommissioned

**As of February 1st**
- All MCI Enrolled partners may now access MCI to claim customers for Build Intent Workshops
- MCAP will no longer be available for new customer workshop nominations

**MCI Intent Building Workshops new process going forward:**
- New customer workshop claims submitted via aka.ms/MCI/Claim
  - Approvals require “Customer Consent” and uploaded “Workshop Claims” (POE),
  - Payments require MCI bank and tax profile
- MCI Support is managed through the Partner Center “Help + Support” process. For Engagement claim related queries please select 'Incentives' under Workspace and 'Engagement' path in Problem type.
Call to Action

To learn more about program benefits, complete your enrollment, and amplify your GTM strategy with Build Intent Workshops, we encourage you to:

✓ Register for next webinar! Learn how to “Accelerate Opportunities Build Intent Workshops”
  • Session 1: Feb 15: 9:00am – 10am PST: https://aka.ms/MCI/BIW-201-Webinar1
  • Session 2: Feb 15: 6:00pm – 7:00pm PST: https://aka.ms/MCI/BIW-201-Webinar2

✓ Complete your enrollment in MCI. See Incentive Enrollment Guide to participate and earn rewards

✓ Learn about MCI Engagements. Use the MCI Training Guide to quickly get started

✓ Get started today! Visit MCI Engagements to explore workshops, access content, and claim new customers
Resources

MCI Engagements - http://aka.ms/MCI
Engagements Overview - https://aka.ms/MCI/EngagementOverview
Incentives Support - https://aka.ms/MCI/Support
Workshop Feedback - http://aka.ms/MCI/Feedback
Additional Resources
## PIE Resource Directory

### Stay Connected
- **Partner Investments MPC**
  Information, updates, and announcements throughout the year.

### Program Resources
- **PIE Portal**
- **Partner Incentives Information**
- **Partner Incentives Reporting Guide**

### Tier 1 Support
- **PIE support team**

### Office Hours: Increasing Profitability and Deal Velocity with Offers and Incentives
Registration link and recordings of past calls, held bi-weekly from 10:00am to 11:00am Pacific Time.

### PIE Documents
- **PIE office hours deck (in MPC)**
  Most recent decks from PIE office hours, including program updates and programs in market.

- **PIE Office Hours FAQ**
  Frequently asked questions from weekly office hours.

- **PIE How-to Guide**
  Detailed instructions on accessing the PIE Portal, submitting funding requests, and tracking active claims.

- **Partner Investments Guide**
  High-level overview of partner investments with summaries of all offer and incentive programs.

### PIE Program Decks
- **Azure**
  - Demand Gen
  - Partner-led Azure Customer Experience (PACE) Sales
  - Azure Everywhere
  - Azure Everywhere for Commercial Marketplace

- **Modern Work + Security**
  - Pre-Sales
  - Microsoft Modern Work & Security Everywhere
  - Post-Sales
  - Microsoft Teams Adoption
  - Microsoft 365 Security Adoption

- **Dynamics**
  - Post-Sales
  - Dynamics 365 Adoption

- **Global Partner Offers**
  - Microsoft Cloud Accelerators for Microsoft 365
  - Dynamics Pre and Post Sales Offers

Visit [https://aka.ms/partner.investments](https://aka.ms/partner.investments) to learn more.
Thank you