Utilising Microsoft Marketing Co-Op with TD SYNNEX

This is your guide to the process with TD SYNNEX and how you claim back with Microsoft

What is this guide for?

For eligible Microsoft CSP partners, you can earn Microsoft Marketing Co-op funds. There is a section within this guide that explains the incentive rates for FY23 and how you would earn these.

Unlike the rebates that are paid directly into your account, Co-op requires you to complete the approved activities and then claim back the money from Microsoft. Any Co-op not claimed within the set period is unfortunately lost.

This is where TD SYNNEX comes in to support you with utilising these funds in the best way for your business and goals you have set.

If you have read the Microsoft Co-op guidelines you will know it is a art to know exactly what you can and cannot deliver and what is needed for proof of execution (POE), we have added some POE check lists into this guide to support you with this task.

Look out for the useful gold star comments!

Contents of this guide

❏ Updates on Microsoft Cloud Partner Program and Incentives for Microsoft FY23

❏ How to use the Microsoft Partner Incentives Co-op guidebook

❏ Holly Bayliss, TD SYNNEX UK Microsoft Marketing Manager gives her tips and POE Checklists for claiming back from Microsoft Partner Centre

❏ Introduction to TD SYNNEX UK activity packages including Technical Skilling, Sales, Adoption and Events, and Marketing-as-a-Service including SOE, LinkedIn Campaigns, Content creation and more.

❏ TD SYNNEX Invoice Set up Process

❏ Partner Centre Claiming walk though

❏ Microsoft Marketing Tools available from our SureStep Messaging

❏ Next Steps and contact details

❏ Don't forget you also have access to…

Updates on Microsoft Cloud Partner Program and Incentives for Microsoft FY23

Updates on Microsoft Cloud Partner Program and Incentives for Microsoft FY23

Microsoft have recently changed their partner program and released **Microsoft Cloud Partner Program**. This means the end of Silver and Gold competencies and the introduction of Solution Designations. Some of the incentives require certain Solution Designation to be achieved in order to qualify for any payment. For more information on these program changes and what you need to do please see our sway: The NEW Microsoft Cloud Partner Programme Explained

In the next few slides, we are only covering the main Microsoft CSP Indirect Reseller incentives, for more information on all incentives that you could be eligible for please download the relevant content from: Microsoft Commerce Incentive Resources.

Microsoft FY23 incentives run from 1st October 2022 – 30th September 2023, as mentioned some incentives do require certain Solution Designations to be achieved and you need to ensure you are enrolled for MCI incentives within Partner Centre.

In the next slides look out for eligibility and any revenue thresholds.

Microsoft added the 60/40% rebate/Co-op spilt into the Commerce incentive as of 1st November 2022. ;..

Microsoft 365 new commerce CSP Incentive

Engagement summary

Incentive rewards for partners who drive customer adoption of Modern Work & Security products and services through the new commerce experience.

Engagement term

1st Oct 2022

⟶ 30th Sept 2023

Partner Association

Transacting Partner of Record

Earnings Type

60% Rebate/40% Co-op
(started 1st November 2022)

Maximum earning opportunity

Based upon purchasing motion

Product eligibility

See product addendum

Measure & Reward

Incentives are based on billed revenue and calculated in accordance to billing cadence.

Core incentives

Modern Work & Security billed revenue **4%**

Strategic Accelerators

Global Strategic Product Accelerator – Tier 1 **5%**
Global Calling and Conference PTSN accelerator **20%**

Partner eligibility

Partner Agreement

Microsoft Cloud Partner Program Agreement

Partner Authorisation

Microsoft CSP Indirect Reseller channel Authorisation
OR Microsoft CSP direct Bill Partner Channel Authorisation

Program Enrolment

Microsoft Commerce Incentives

Eligibility

One of six solutions Partner designations
OR Active Gold or Silver competency for one of nine competencies (or purchased legacy benefits package with eligible competencies)

Revenue Requirements

$25K USD 12-month revenue threshold for CSP Indirect Resellers

Microsoft 365 customer add new commerce CSP Incentive

Engagement summary

Incentive rewards for partners who drive customer adoption of Modern Work & Security products and services through the new commerce experience.

Engagement term

1st Oct 2022

⟶ 30th Sept 2023

Partner Association

Transacting Partner of Record

Earnings Type

60% Rebate/40% Co-op
(started 1st November 2022)

Maximum earning opportunity

Based upon purchasing motion

Product eligibility

See product addendum

Measure & Reward

Incentives are calculated based on Modern Work billed revenue from new commerce CSP experience. Earnings are available for 12-months from customer tenant create date.

Strategic Accelerators

Customer add – Modern Work & Security build revenue   **15%**

Partner eligibility

Partner Agreement

Microsoft Cloud Partner Program Agreement

Partner Authorisation

Microsoft CSP Indirect Reseller channel Authorisation
OR Microsoft CSP direct Bill Partner Channel Authorisation

Program Enrolment

Microsoft Commerce Incentives

Eligibility

One of six solutions Partner designations OR Active Gold or Silver competency for one of nine competencies (or purchased legacy benefits package with eligible competencies)

Revenue Requirements

$25K USD 12-month revenue threshold for CSP Indirect Resellers

Azure CSP motion Incentive

Engagement summary

Incentive rewards for partners who provide billing & support as part of a partner-managed Azure experience for customers who provide Azure services under the new Azure offer (offer plan)

Engagement term

1st Oct 2022

⟶ 30th Sept 2023

Partner Association

Transacting Partner of Record

Earnings Type

60% Rebate/40% Co-op
(started 1st November 2022)

Licensing Agreement

Microsoft Customer Agreement

Product eligibility

See product addendum

Measure & Reward

Incentives are calculated as a percentage of Azure consumption revenue.

All max earning opportunities at per engagement term, per partner, per subscription level

Incentive structure	Incentive reward %	Max earning opportunity
Azure consumption CSP motion	4%	$75k USD
Azure Reservation Incentive	10%	$75k USD
Azure Workload Accelerator (Data & App Innovation and Analytics + AI	2%	$25k USD

Partner eligibility

Partner Agreement
Microsoft Cloud Partner Program Agreement

Partner Authorisation
Microsoft CSP Indirect Reseller channel Authorisation OR Microsoft CSP direct Bill Partner Channel Authorisation

Program Enrolment
Microsoft Commerce Incentives

Eligibility
Solutions partner for Infrastructure (Azure) OR Active Gold or Silver competency for Cloud Platform

Revenue Requirements
$25K USD 12-month revenue threshold for CSP Indirect Resellers

Dynamics 365 new commerce CSP Incentive

Engagement summary

Incentive rewards for partners who drive customer adoption of Business Applications products and services through the new commerce experience.

Engagement term

1st Oct 2022

30th Sept 2023

Partner Association

Transacting Partner of Record

Earnings Type

60% Rebate/40% Co-op
(started 1st November 2022)

Maximum earning opportunity

Based upon purchasing motion

Product eligibility

See product addendum

Measure & Reward

Incentives are based on billed revenue and calculated in accordance to billing cadence.

Core incentives

Business Applications billed revenue — **4.75%**

Strategic Accelerators

Global Strategic Product Accelerator – Tier 1 — **5%**
Global Calling Product Accelerator – Tier 2 — **10%**

Partner eligibility

Partner Agreement

Microsoft Cloud Partner Program Agreement

Partner Authorisation

Microsoft CSP Indirect Reseller channel Authorisation
OR Microsoft CSP direct Bill Partner Channel Authorisation

Program Enrolment

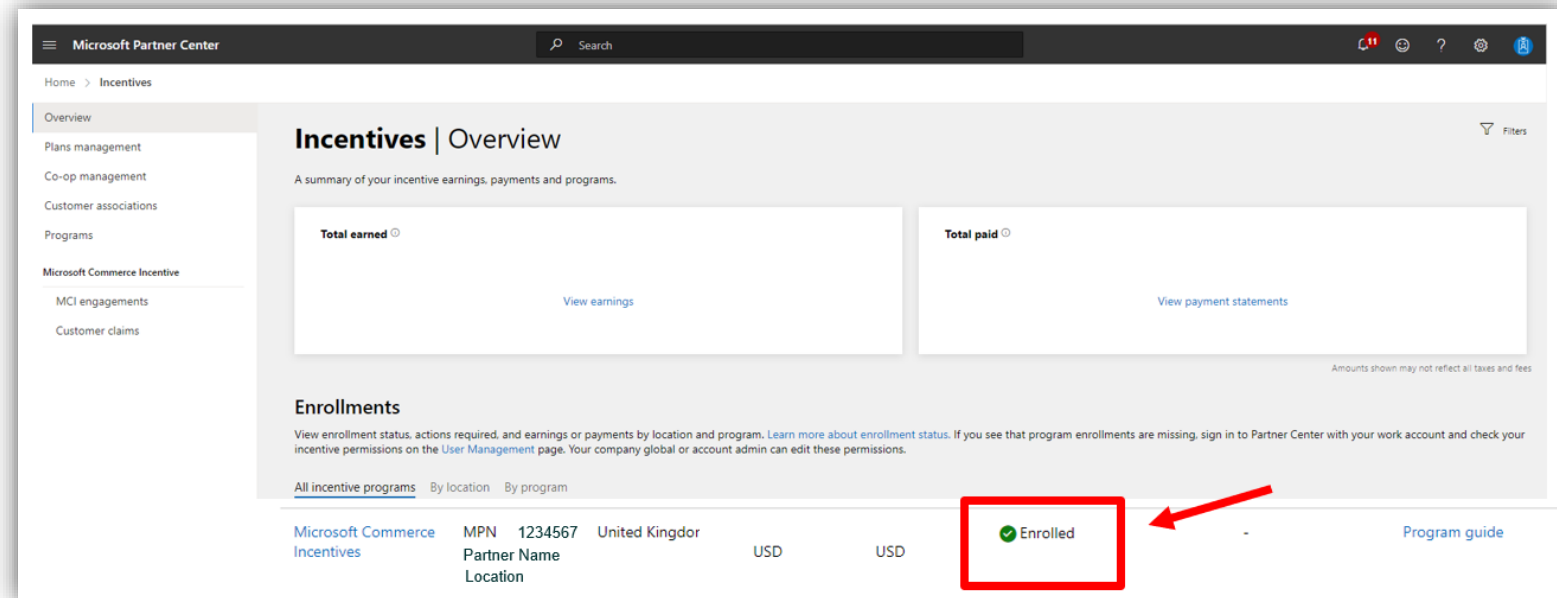Microsoft Commerce Incentives

Eligibility

One of six solutions Partner designations
OR Active Gold or Silver competency for one of nine competencies (or purchased legacy benefits package with eligible competencies)

Revenue Requirements

$25K USD 12-month revenue threshold for CSP Indirect Resellers

Dynamics 365 customer add new commerce CSP Incentive

Engagement summary

Incentive rewards for partners who drive the sale of Business Applications products and services through the legacy CSP experience and the new commerce experience.

Engagement term

1st Oct 2022

⟶ 30th Sept 2023

Partner Association

Transacting Partner of Record

Earnings Type

60% Rebate/40% Co-op
(started 1st November 2022)

Maximum earning opportunity

Based upon purchasing motion

Product eligibility

See product addendum

Measure & Reward

Incentives are calculated based on Modern Work billed revenue from legacy CSP or new commerce CSP experience. Earnings are available for 12-months from customer tenant create date.

Strategic Accelerators

Customer add – Business Applications billed revenue   **20%**

Partner eligibility

Partner Agreement

Microsoft Cloud Partner Program Agreement

Partner Authorisation

Microsoft CSP Indirect Reseller channel Authorisation
OR Microsoft CSP direct Bill Partner Channel Authorisation

Program Enrolment

Microsoft Commerce Incentives

Eligibility

One of six solutions Partner designations
OR Active Gold or Silver competency for one of nine competencies (or purchased legacy benefits package with eligible competencies)

Revenue Requirements

$25K USD 12-month revenue threshold for CSP Indirect Resellers

Ensure you are enrolled in Microsoft Commerce Incentives

You will only earn once enrolled and this cannot be backdated

How to use the Microsoft Partner Incentives Co-op guidebook

Microsoft release a Partner incentives Co-op guidebook each year to support your planning, proof of execution requirements and claiming.

This is a 73-page document and includes more than just the eligible activity types. Make sure you check out the recommendations and Co-op planning slides to inspire you.

Number 1 rule for using Microsoft Co-op is that you MUST be promoting Microsoft content, sounds simple but if you are pushing your own services and Microsoft is not mentioned your claim will not be accepted.

Co-op Funds Resources (microsoft.com)

You also need to have your company details included on content, landing pages, social etc as well as the correct Microsoft logos. Remember you cannot use the silver or gold partner logo anymore. You need to be using your new solution designation logos when you have achieved this.
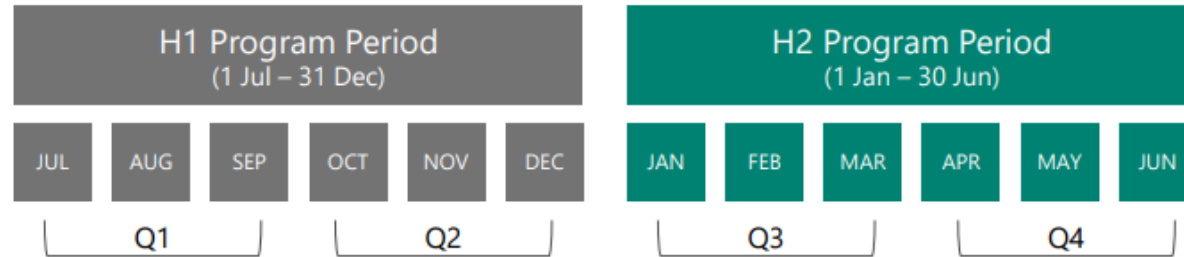
How do Microsoft Co-Op funding cycles work?

Co-op programs run on a 6-month program period.
Accrued funds are calculated based on eligible revenue from previous fiscal half and are calculated per the rates and terms of the program agreement.

Earn

Per program calculation against eligible revenue

Rebate + Co-op

H1 Program Period (1 Jul – 31 Dec)						H2 Program Period (1 Jan – 30 Jun)					
JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
	Q1			Q2			Q3			Q4	

August 15

Funds Available = Rebate Payment and Co-op available for previous Fiscal Year's H2 earnings

February 15

Funds Available = Rebate Payment and Co-op available for previous Fiscal Half earnings

Extends to next fiscal year H1 program period
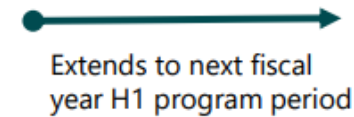
Partner is eligible to earn rebates and co-op funds through sales of eligible licenses and products during the **earning** period (6-month)

When partner meets all requirements, rebate and co-op funds are then **awarded** for payment and usage. Rebates are paid automatically, co-op funds are paid against eligible activities

Partner claims earned co-op funds after an eligible market development, demand generation, or readiness activity is performed during the 6-month **usage** period

Co-op Category Summaries & activities

	Definition	**Qualifying activities**	
Demand Generation	Traditional advertising with broad reach that furthers the marketing and promotion of Microsoft offerings. Results and audience size are measurable.	• Print advertising • Migration Services • Best Practice Development • Solution Building with Third Parties • Digital advertising	• Direct mail/email/mobile SMS • Partner website and SEO • Microsoft syndicated content • Multi-touch digital campaign • Social media marketing	Pages 18-28 in Partner incentives Co-op guidebook
Market Development	Marketing activities designed for a specific customer audience that support the sale of Microsoft software licenses.	• Telemarketing • Customer seminars and bootcamps • Tradeshows and expositions • Customer offers • Internal incentives and SPIFFs	• On-site champs • Proof of concept • Employee purchase web set-up for customers	Pages 29-37 in Partner incentives Co-op guidebook
Partner Readiness	Expenses related to Microsoft training, technical certification, and program fees for internal partner personnel that promote the development of Microsoft technology expertise.	• MPN participation • Microsoft exams and tuition • Internal training and floor days • On Demand Training • Microsoft hosted conferences	• Product seeding and demo units	Pages 38 - 44 in Partner incentives Co-op guidebook

Tips and POE Checklists from our Microsoft Marketing Manager

Microsoft Solutions partner
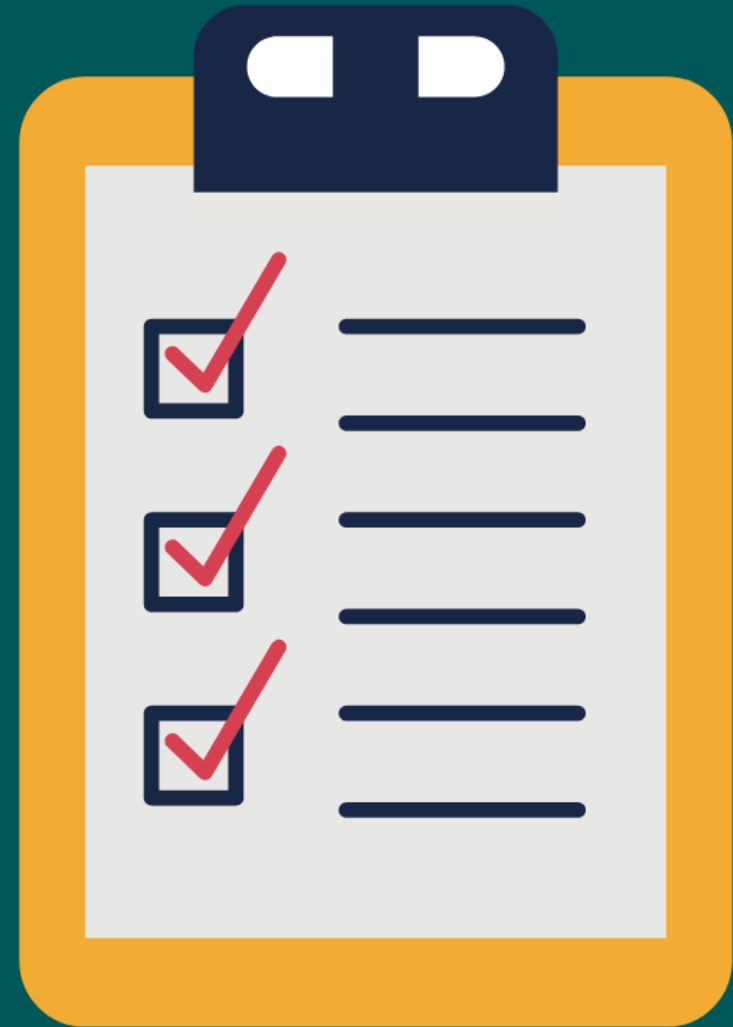
TD SYNNEX

Holly Bayliss, TD SYNNEX UK Microsoft Manager Tips for POE & Claiming

Don't forget to put both Microsoft logo (new one) and your logo on everything you do. Plus you need to talk about Microsoft products/solutions on your content/marketing

Don't leave claiming to the last minute, you can claim as you go!

Collect POE as you execute campaigns as it will be difficult to locate everything needed months later

Title your claims well

Plan how you are going to spend your funding and keep reviewing. Things change, always keep your plan up to date. Remember to remove things that are not going to happen before the end of the current half.

TOP TIPS

On the next pages I have put together my Best Practice POE Checklists I use for TD SYNNEX and with my team to ensure we can collect the correct POE required to claim. Please note these are not the only activities you can claim.

General POE Principles

You will need to provide proof of the following:

- That the activity was completed within the claim period. The date must be visible in any POE images.

- You must mention Microsoft and Microsoft products or solutions.

- That the relevant Microsoft logo has been used. This should be visible in any POE images.

- That the activity happened – i.e., photos of an event, screenshots of a live activity.

POE Check list
In-Person/Virtual Events, workshops and training (this could be internal or customer)

❑ Presentation decks require a title page with date, agenda page, contact details page

❑ Your photos need to capture the same as the deck requirements above.

❑ Attendee list – remember you don't provide PII so just the company names and number of attendees from each customer is enough

❑ Copy of the deck is always good practice in case they ask for it. Remember the number 1 rule is it must state and cover Microsoft products and solutions

❑ Logos – you need to make sure you are using the correct Microsoft logo, this is now the Solution partner one.

❑ Event invite – this can be a calendar invite or an email invite. Again must show what you are covering and date. Recommend you screenshot into a pdf.

❑ Social recruitment - Screenshots are enough but you need to make sure the date is included and its within the correct time period. If your post goes a landing page I recommend you take a screenshot of them side by side to show this. Microsoft will want the full web address visible.

POE Check list
Call out days

❑ Kick off deck for the day – this should include your topic/focus for the day, including a title page with date, agenda page, contact details page at the end (I know this could be internal but it is to tick a box).

❑ You will need to some photos to prove the day went ahead, get some angles to show the people, but also we would recommend you take photos of the kick off deck being presented, similar to the event criteria I would say cover the title page, agenda and contact page as minimum.

❑ Email to your sales team – this email needs to have Microsoft Logo, wording and topic you are covering for the day

❑ Calendar invite – a copy of the calendar invite copied into PDF format is best, similar to the above make sure it has the Microsoft logo, wording and people included visible.

❑ Attendee list – I know this tends to be internal people but you need to put a list together of who was involved in the call out day

❑ Sales Data – Unlike a hardware callout which you can show sales from the day, Microsoft CSP is a longer sales cycle. Therefore I recommend you attach the sales out data for the month your call out day falls into.

❑ Prizes – When you claim in Partner Centre for Call out days you will have to complete the SPIFF Attestation, this this requires you to note number of people involved in the day, the actual prize value awarded, and the date. It's good practice to have evidence they have been handed out, such as an email confirming they have taken receipt of the goods, this might not be a requirement for Microsoft but it might be a requirement for your HR team

POE Check list
Social Media

❑ Screenshot of the social post live. The screenshot should include the date and time in the bottom-right corner, as well as a live link of the social post within the social platform being used (i.e., Twitter, Facebook, LinkedIn, etc.)

❑ If the post links elsewhere then you will need to also screenshot that page making sure to include the date and time in the bottom-right corner

❑ You should provide stats around how the post(s) performed – i.e., impressions, clicks, clickthrough rate, video views (if applicable).

❑ The correct Microsoft logo must be present within the image used. This must be visible in the screenshot.

POE Check list
Email Marketing

❑ You will need to provide a screenshot of the email. The screenshot should include the date and time in subject line or in the bottom-right corner. The date and time must be within the claim period.

❑ You will need to provide proof of distribution. The best way to do this is to provide a screenshot of the email send results, including no. sent to, no. of opens, no. of clicks, and so on. If you can do this within your CRM tool, even better.

❑ The correct Microsoft logo must be present within the email. This must be visible in the screenshot.

POE Check list
Microsoft Exam Fees

❑ Copy of the confirmation booking email (normally Pearson Vue), remember this needs to be within the correct usage period

❑ Copy of proof the exam was taken (again normally Pearson Vue), it can be a pass or fail, but you need an email confirmation to show it was taken

Microsoft
Solutions partner

TD SYNNEX

Three examples of activity packages you can utilise through TD SYNNEX…

Technical Skilling

TD SYNNEX Academy is a certified training provider, we are able to assist with all Microsoft technical skilling. We have 3 main methods of delivery:

Instructor-Led Microsoft Certified Technical Training
- Instructor-led training delivered virtually
- Delivered consecutively across 3-5 days

FastTrack Microsoft Certified Technical Training
- Self-paced and Lab (1-2 days)
- Instructor led session/s (1-2 days depending on course)
- Practice Test
- Includes Exam Voucher

Self-paced Microsoft Certified Technical Training
- Access to on-demand content for 180 days
- Access to associated hands on labs
- Option to add Exam voucher

https://academy.tdsynnex.com/uk/vendor/microsoft/training/

Sales, Adoption and Events

ILLUMINATE LEARNING

Delivering quality sessions that keep people engaged is key to the success of the training or event you are driving! This is why we work closely with Illuminate Learning on the following areas:

One size doesn't fit all! We can adapt and add to our sessions to suit yours and your end user requirements. All of these can be partner or end user facing!

Sales Training
Including:
- Microsoft 365
- Microsoft Teams & Teams Voice
- Microsoft Security
- Microsoft Azure Virtual Desktop
- Microsoft Windows 365
- Azure – Sales Fundamentals

End user adoption Training
Including:
- SharePoint
- Microsoft Teams
- Microsoft Team Phone
- Power BI
- Dynamics 365
- Power Platform

Event Speaker slots
We can support with events, workshops and also sales coaching on Microsoft's solutions areas.

With regards to pricing we would set up a call to discuss requirements, location and dates followed by a proposal.

Marketing-as-a-Service

Marketing-as-a-Service covers a broad spectrum of what we can offer our partners to help with their GTM.

With our industry knowledge, we can support creating plans that work for you and your goal from our scoping discovery calls.

Strategy	• Growth strategy • Sales strategy • Branding and messaging	• Campaign design • Lead generation • Customer acquisition
Digital marketing	• SEO • PPC & paid social media advertising • Marketing automation	• Organic social media • Web / landing page development • Email marketing
PR, media relations & stakeholder engagement	• PR strategy • Media relations • Thought leadership • Sponsorship and speaking opportunities	• Reputation management • Public affairs • Placemaking • Events
Content creation	• Reports & eBooks • Videos & animation • Social assets	• Infographics & checklists • Sales enablement

With regards to pricing we can work within a set budget or scope out the work discussed on a call, followed by a proposal.

Marketing-as-a-Service Funnel Content Examples

Microsoft Solutions partner

TD SYNNEX

Nurture programme

Top of the funnel
(ToFu)

Middle of the funnel
(MoFu)

Bottom of the funnel
(BoFu)

Awareness
Passive but open to engaging with hero content

→ Research reports | Editorial content
Whitepapers | Social media
eBooks | Videos
Blogs | Infographics

Consideration
Actively researching and considering different solutions

→ Expert guides / eBooks | Webinars
Tip sheets | Chat conversations
Blogs | FAQs
Checklists | Case studies
How-to videos | Demo videos
Toolkits

Decision
Solution is right for their problem and ready to buy

→ Case studies | Battlecards
Hyper-personalized blogs | Free trials
Customer testimonials | Personalized live demos
FAQs | Coupons
Product comparisons | Discount codes

Marketing-as-a-Service Example Modular Approach

Discovery

- Interactive discovery workshop with team to understand business, structure, products, market and data

- Content audit to understand what content already exists that can be re-nosed / reused

- Opportunity to gain insights quickly whilst getting buy-in and alignment with team

- Identification of synergies and gaps across different teams / departments

- Provides clarity resulting in supporting roadmap and workshop schedule

Personas

- Interactive workshops facilitated by AP team

- Review of ideal customer profiles and top 10 clients / hit list

- Identification of goals, pain points, challenges and communication preferences

- Surveys and interviews with existing clients and personas to validate assumptions

- Persona profiles written up in branded deck

Value Proposition

- Workshop facilitated by AP team driven by interactive exercises and tasks

- Outputs from the workshop to be scoped based on the requirement

- Toolkit may include, brand positioning statement, value proposition, values and tone of voice

- Proposition outputs will be tested with target audience

Messaging

- Utilisation of AP's messaging house model

- Development of key themes to support proposition

- Creation of supporting messages for each theme

- Scoping of stats, proof points and spokespeople required to support messaging

- Messaging toolkit may also include: persona messaging, solution / product messaging, sector messaging and campaign messaging

Campaign blueprint

- Co-creation workshop with team to identify core campaign themes

- Development of flexible campaign framework which can be scaled

- Full funnel campaign design and plan using our integrated campaign model

- Launch campaign toolkit with content and assets

90-day plan

- Introduction of 90-day planning cycle with team

- Quarterly planning workshops facilitated by AP to agreed objectives, milestones and priority campaigns

- Workshop agenda to include 90-day retro, campaign performance and 90-day forward planning

- Best practice planning and reporting toolkit including, 30-day sprint template, status report template and monthly meeting agenda

Reporting

- Co-creation of KPI dashboard

- Automated real-time dashboard set up in data studio

- Reporting aligned to existing reporting routines and board meetings

TD SYNNEX Invoice Set up Process

If you would like to take advantage of a Marketing Service from TD SYNNEX we have a simple form to complete to allow us to set your company up as a marketing account to allow us to invoice you.
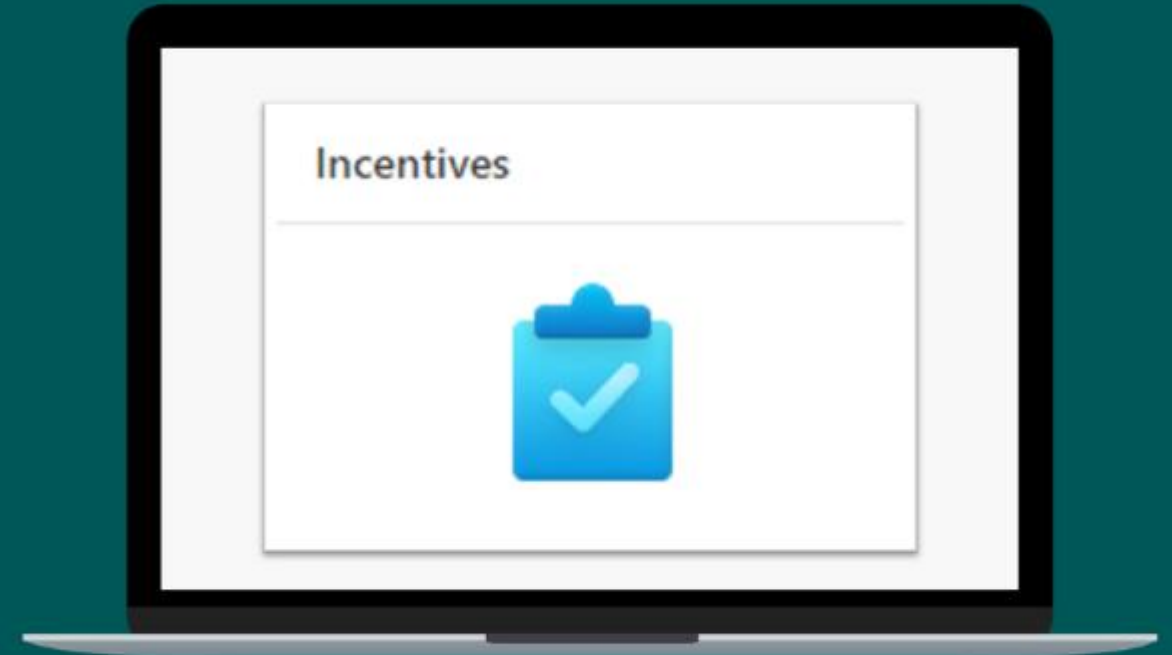
What info is needed for the form?
- Company Name
- Address
- VAT Number
- Contact name, email and phone number for the invoice

TD SYNNEX UK Marketing Account Creation Form

How to claim Co-Op within Microsoft Partner Centre

What do you need to make a claim in Partner Centre?

As mentioned at the start of this guide, you need to make sure:

1. There are two key periods to consider when it comes to Co-op – the **Earning period** and the **Usage Period**, as seen on page 15. If we use FY23 H2 as an example: the earning period is July 2022-December 2022, the co-op earnt over these 6 months give you the amount you will then have to spend on activity for FY23 H2. The usage period is then January 2023-June 2023, you will then plan and execute activities to put your claims into Microsoft before 15th August 2023.

2. You have all the POE that you need to put into this claim – remember to go back to the check lists we have put together if you are unsure.

3. You are claiming within the correct window and before the deadline. Any claims from FY23 H1, which was activity within July-December 2022, must be claimed before 15th February 2023. If you miss this claiming window you forfeit the funding and will be unable to claim. You can start putting in claims for FY23 H2 after 15th February 2023 for any completed activities from January 2023 onwards. Remember you cannot claim something for the future as you need the relevant POE to submit.

4. Whoever is going to process the claim will need the right access within Partner Centre. If they do not, the admin will be able to grant this via the user management. They will need to be an 'incentive admin' to allow them to process a claim.

5. If you check your Co-Op value and you don't have any funds available this could be due to not hitting the required threshold. If this happens you will be paid that money as a rebate instead of going through the claiming process - Co-op threshold - Partner Center | Microsoft Learn

How to navigate Partner Centre
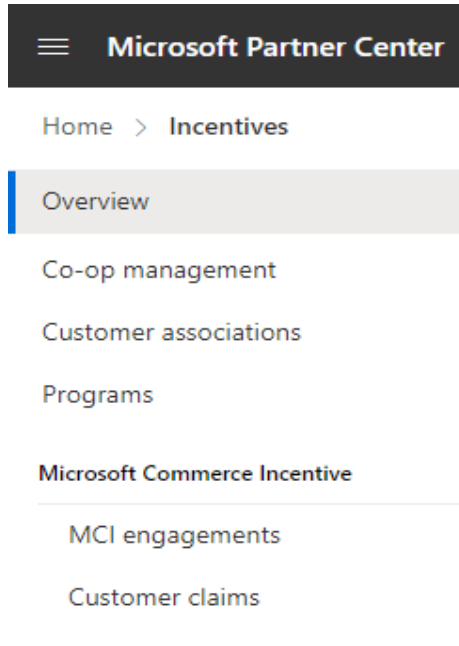
Within the Incentives tab you have the following areas

- **Overview** – this will give you an overview of your earnings and the programs you are enrolled within. Should any state action required please address these, might be a missing tax code or bank details – if could affect your funding.
- **Co-op management-** this is where you will submit your claims – we will focus on this tab on the next page
- **Customer associations** – With the changes to the Microsoft Cloud Partner Program this tab will become more important. This is where you would submit your evidence for CPOR (Claim Partner of Record). If you are trying to achieve the Security Partner Designation you will need to submit these on a regular basis as CSP is not a contributing program, but outside of this any professional service or management services you complete for a customer that you did not sell the licensing to you can get recognised for this via this method. For more details check out this sway: Understanding CPOR, PAL, DPOR and TPOR!
- **Programs** – this breakdowns your incentives into the different programs you have earnt against
- **MCI Engagements** – Within this tab you will find the different workshops you have access to, the funding related to them, POE that is required. You need to add the customer details into this part of Partner Centre to get approved before execution.
- **Customer claims** – this gives you a summary of your CPOR's from customer associations, this allows you to easily track the status and action anything that is required.

Co-op Management within Partner Centre
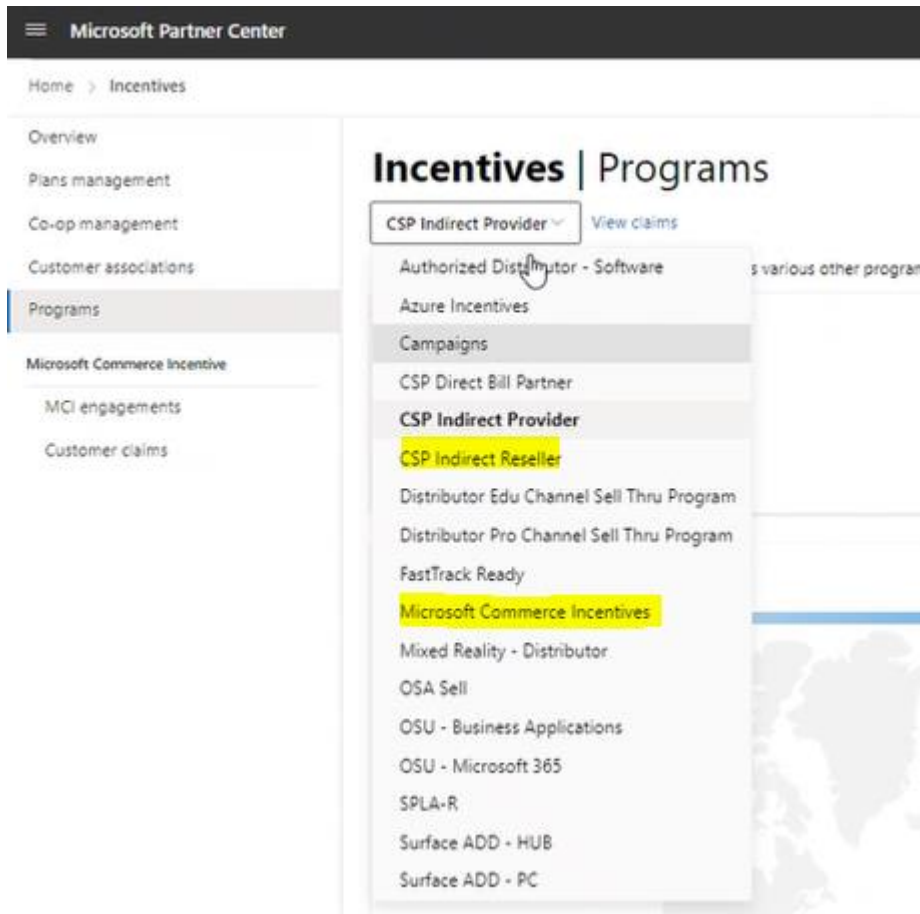
To work out how much co-op you have earnt you go into Incentives > Programs. From here you choose the relevant incentives you earn as an Indirect Reseller and on the top right you adjust the 'custom' filters.

To work out how much you have to spend in FY23 H2 (**usage period** Jan 2023 – June 2023) you filter by the **earning period**, this would have been July 2022 – December 2022. Then filter by COOP to give you the amount in dollars. You can also check your rebate and claims this way as well.

Co-op Management within Partner Centre

Incentives earned this period ⓘ

$

View earnings
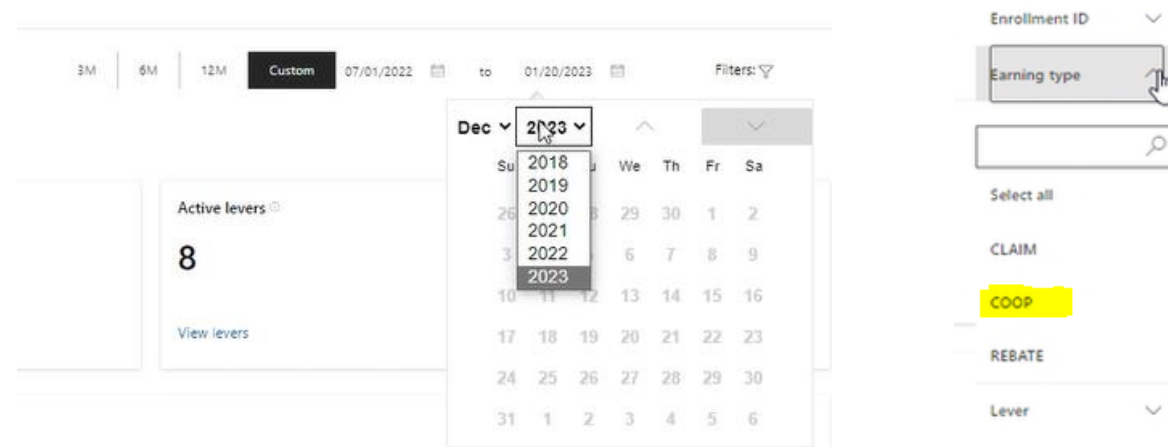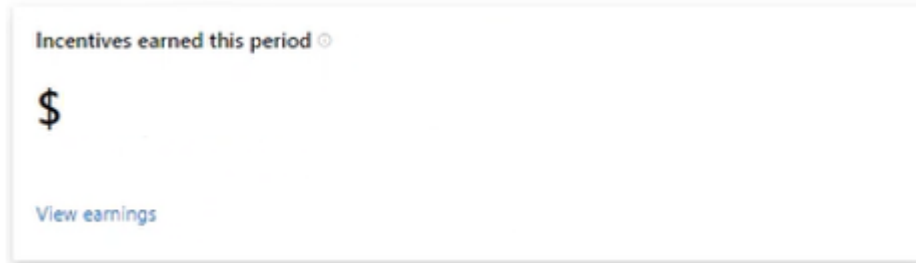
Continuing from the previous page, once you have added these filters on the left side it will show you in dollars what your earning amount is for the set period you have used.

If you need to know the GBP value for this we recommend you start a test claim after the 15th February or 15th August to see the GBP conversation amount.

When you start claiming when you start each claim you will have this wheel that will show how much Coop you have remaining and when the usage fund expire.

Claimed co-op for activity

Claiming: 0 GBP
Remaining co-op:
Usage funds will expire on Wed Feb 15 2023
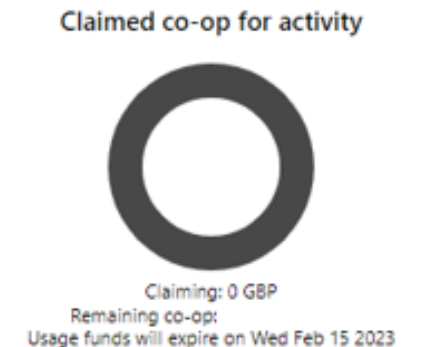
How to start a claim within Partner Centre

Incentives | Co-op management

Create a claim and view your claim history. Learn more

+ Create a claim

Create a claim

Review and fill in any required information to create a claim. Learn more

Select a program*

Select a program ▾

Select a location*   Select a usage period*

Select a location ▾   Select a usage period ▾

Continue   Cancel

Home > Incentives > Co-op management >

TEST

To create a claim you start in the 'Co-op management' tab and 'create a claim. You will be able to select the program, your MPN location (you could have multiple) and then the usage period. You will only be presented with the options that are valued based on the date you are accessing this.

You only have a set period to put in claims, if you miss this window you will forfeit the value earnt.

As mentioned on the previous page you will be able to see the amount of Coop you have left to claim within GBP within the claim.

Claim details	Edit claim details
Program	CSP Indirect Provider
Location	Tech Data Limited,
Usage period	July 2022 - December 2022
Category	Demand Generation
Activity	Multi-Touch Digital Campaign
Activity date range	August 16, 2022 - August 16, 2022
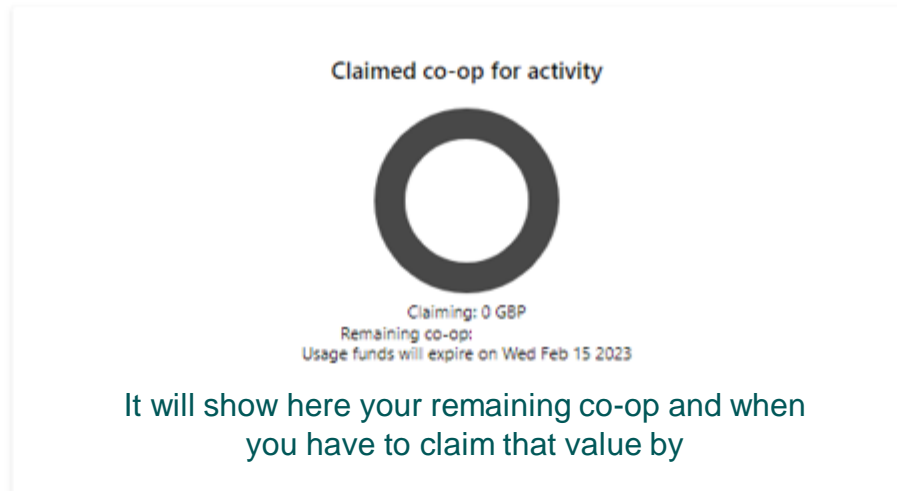
Claimed co-op for activity

Claiming: 0 GBP
Remaining co-op:
Usage funds will expire on Wed Feb 15 2023

It will show here your remaining co-op and when you have to claim that value by

Claim status

● Editing
  ✓ Upload an invoice or CSR form
  ✓ Upload a communication document
  ✓ Upload a metrics document
  ✓ Submit by February 15, 2023 at 11:59 PM UTC

○ Review

○ Approval

○ Payment

Continuing your Claim within Partner Centre

Create a claim

Review and fill in any required information to create a claim. Learn more ⧉
Claims made in Partner Center require submission of POE for validation and to assess compliance, unless noted otherwise by the tool during the claim creation process. Please note, If POE submission is not required, once claim is created it can no longer be edited.

Select an activity*
Market Development - Customer Seminars and Bootcamps

Activity start date*
12/01/2022

Activity end date*
12/01/2022

Select the currency of this activity*
GBP

Give your claim a name*
M365 Workshop

Claim Amount*
2000

Create a claim   Cancel   Back

Select an activity*
Select an activity
Select an activity
Demand Generation - Best Practice Development
Demand Generation - Digital Advertising
Demand Generation - Direct Mail, Email & Mobile SMS
Demand Generation - Microsoft Syndicated Content
Demand Generation - Migration Services
Demand Generation - Multi-Touch Digital Campaign
Demand Generation - Partner Website and Search Engine Optimization
Demand Generation - Print Advertising
Demand Generation - Social Media Marketing
Demand Generation - Solution Building with Third Parties
Market Development - Customer Offers
Market Development - Customer Seminars and Bootcamps
Market Development - Internal Incentives/ SPIFFs
Market Development - On Site Champ
Market Development - Proof of Concept
Market Development - Telemarketing
Market Development - Tradeshows and Expositions
Partner Readiness - Internal Training and Floor Days
Partner Readiness - MPN Participation

Once you have entered the program, location and usage period you will then come to this screen (on the left). The currency you choose in this screen will be the one reflect in the claim, so ensure you choose GBP.

This is where we recommend you have the Microsoft Co-op guidebook to hand to make sure you are picking the right activity type (refer to page 16).

As you can see it asks you for the date of the activity, in the example I have put this as a M365 workshop, and therefore it was 1 day. If this was a campaign spanning days, weeks, months – you would make sure it had the correct dates. These dates must line up with the POE you have collected for this claim.

You need to add the value of your claim, note you cannot add any symbols into this box.
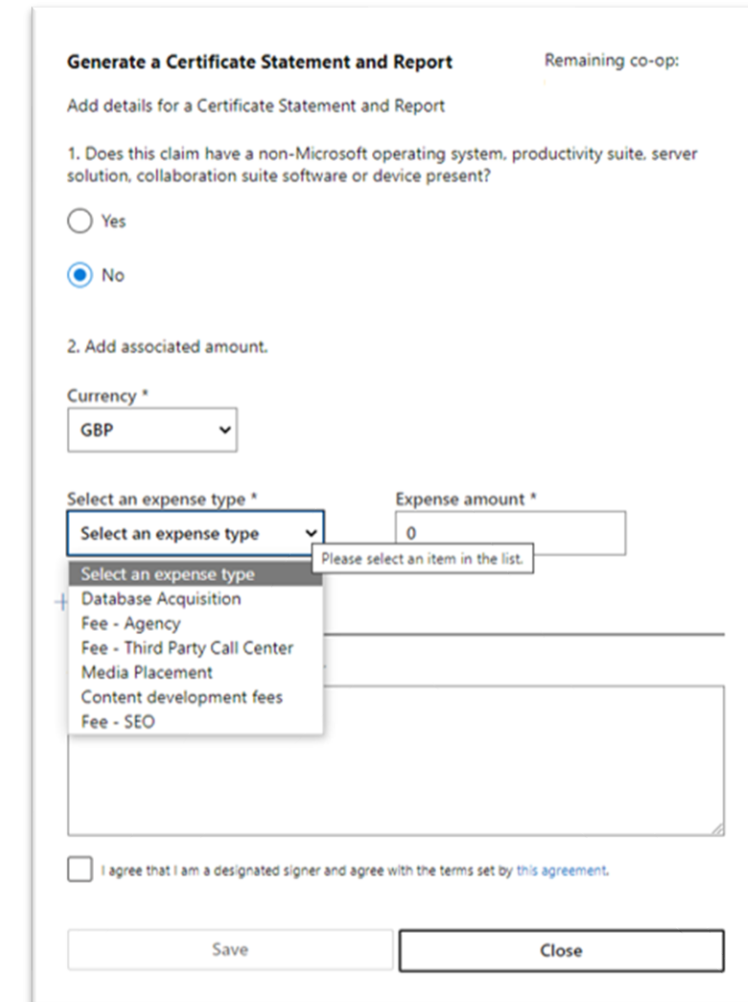
Continuing your claim

Once you have chosen the activity type you will then get to upload the POE you have collected. Reminder of the Core requirements based on the activity are here: Incentives core requirements - Partner Center | Microsoft Learn

You have sections to upload:
Invoice and expense information
- Certification Statement and Report (CSR) – copy of form is on the right
- Proof Documents – Communication Material
- Proof Documents – Metrics
- Optional Comments

If you are taking advance of one of the TD SYNNEX Marketing packages, we will explain and provide all the POE needed for your claim!

Tracking your Claim status and payment

Claim status

- Editing
  - ✓ Upload an invoice or CSR form
  - ✓ Upload a communication document
  - ✓ Upload a metrics document
  - ✓ Submit by February 15, 2023 at 11:59 PM UTC
- Review
- Approval
- Payment
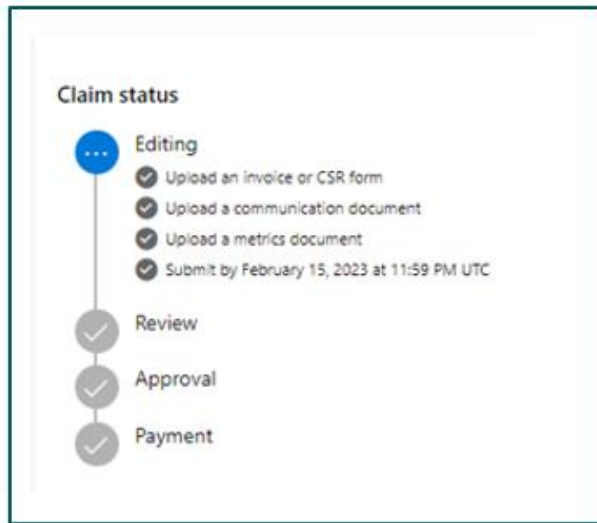
As we saw a couple of pages back, when you start a claim you get the below heading that will show the claim status on the right hand side of each claim. Once you have submitted, it will go to Microsoft to approve.

On the main Co-Op Management tab page it will list all your claims and show you the status, if Microsoft have any queries for you on your claim, it will list as 'Action Required'. You are then able to go into your claim and add a comment or additional information based on their request. Once approved by Microsoft, this will be submitted for payment. Payments will be made within 45 business days of the approval date.

Incentives | Co-op management

Create a claim and view your claim history. Learn more ⬚

| + Create a claim | | 30D | 3M | **6M** | 12M | Custom | ⛉ Filters |

Claim number	Claim name	Program name	Location	Amount claimed	Last activity	Due date	Status

Microsoft Marketing Tools

We have a Microsoft Partner Enablement Program called SureStep, within this program will take our partners through all the areas of their Microsoft partnership, Ensuring they are aware and utilising all the resources, tools, content and funding. Within this section we have added in the Microsoft Marketing tools that are available for legacy Silver, Gold and new achieved Solution Designation partners. For more details on these and the other areas of SureStep please reach out to your BDM, CSM or CSP.UK@TDSYNNEX.COM

TD SYNNEX

Microsoft
Solutions Partner

Go-To-Market toolbox

Partners who want to bring their solutions to market faster and connect with more customers can find the support they need to effectively co-market with Microsoft in Partner Go-To-Market Toolbox.

✓ Co-brand for impact

✓ Market smarter and faster

✓ Generate more sales leads

VIEW
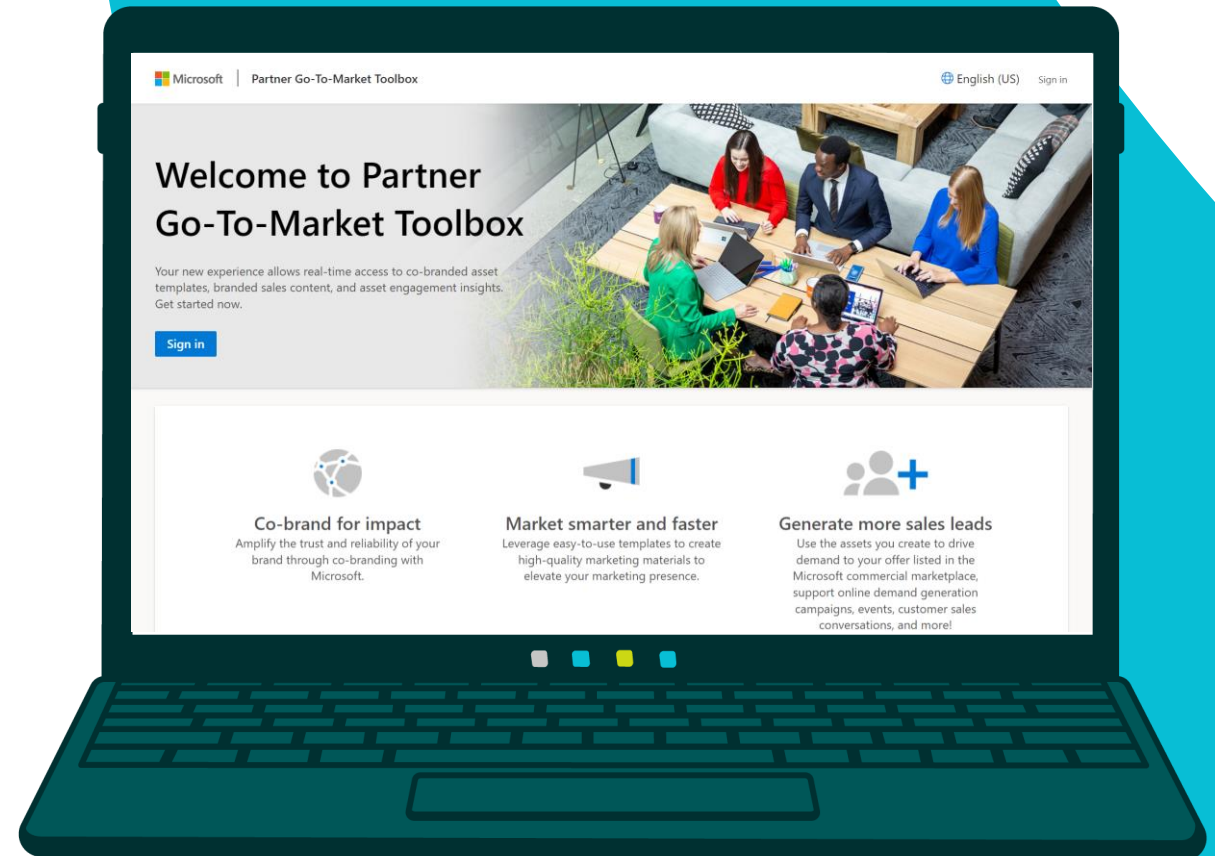
Bring your solutions to market faster and connect with more customers

You don't need design skills to make compelling assets. Take productivity to the next level by creating solution-specific co-branded marketing materials through our innovative marketing technology.

Microsoft Solutions partner

TD SYNNEX

Easy sign-in via Azure AD

No complicated sign-up process. Get started today with just one click.

Self-service

Leverage our innovative marketing technology to create your co-branded marketing materials.

Create assets in 10 languages

English, Spanish, French, Portuguese, Italian, German, Dutch, Korean, Japanese, and Chinese.

Robust photo library

Select images from our robust photo library to use in your co-branded assets.

Drive demand

Use the assets you create to drive demand and to support campaigns, events, customer sales conversations, and more!

Professionally designed templates

Messaging is already aligned with Microsoft solution areas.

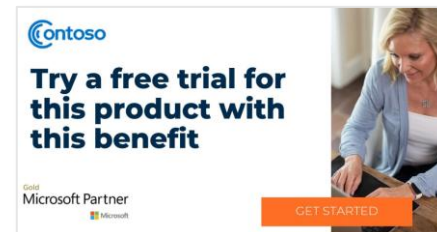# Fully customisable co-branded templates aligned with solution areas
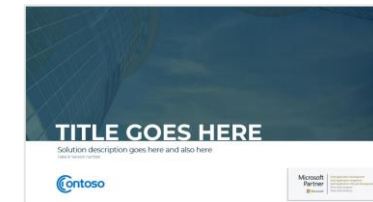
One-pagers
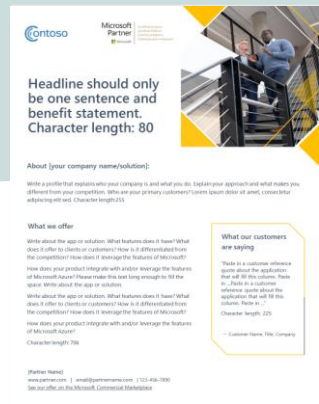
Customer stories

Co-branded social marketing
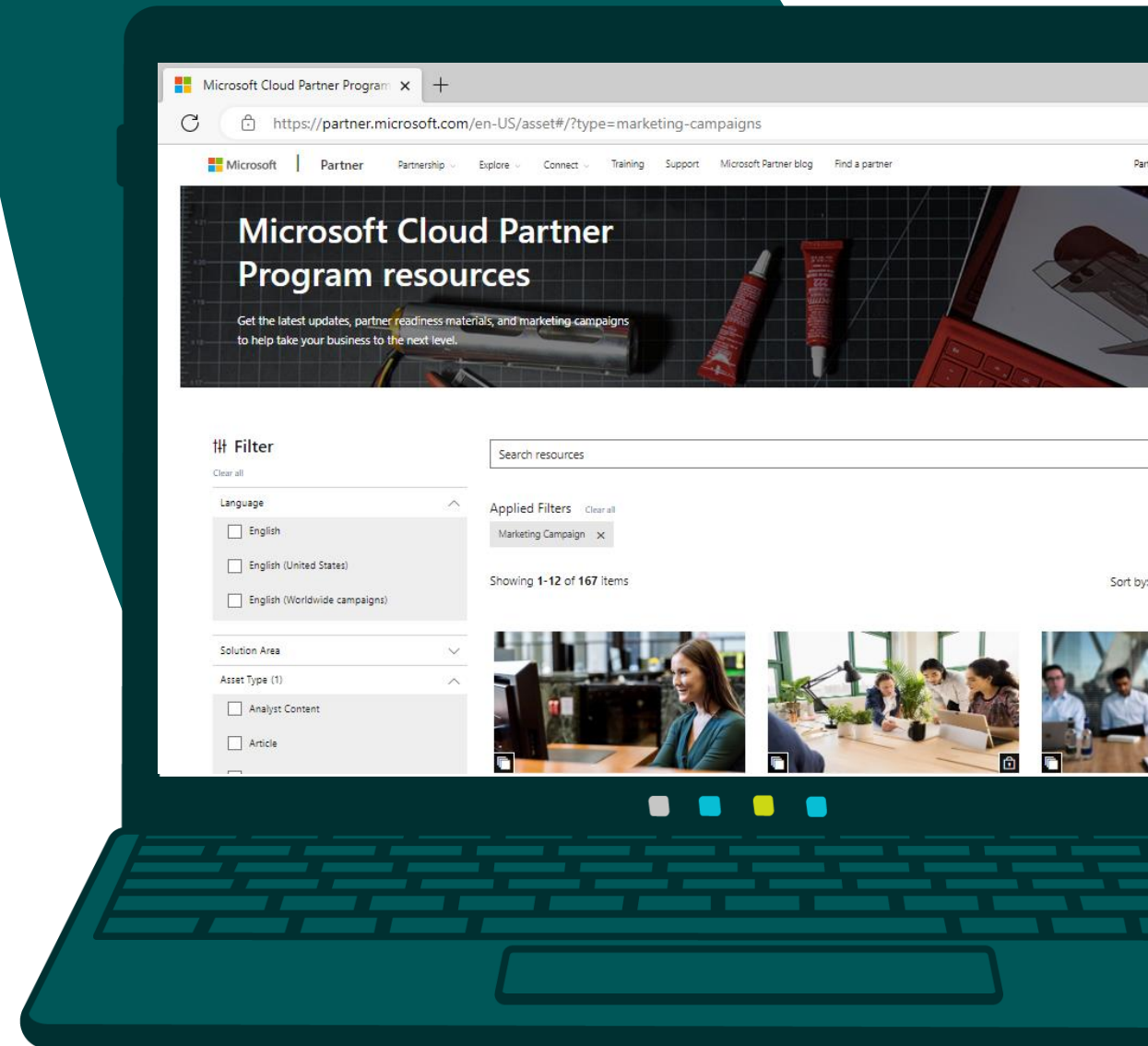
Customer presentations

Microsoft Resource Centre

Within this platform you have access to not only marketing content but pulling content and campaigns by solutions areas, product and industry.

Example assets

# Microsoft Digital Marketing Content OnDemand

What is Digital Marketing Content OnDemand?

This simple, easy-to-use tool provides partners with comprehensive marketing materials and sales resources in a highly prescriptive format.

Suggested tweets, LinkedIn posts, Facebook statuses, mini-blog posts, and emails are provided (yet fully customisable), and with intelligent technology—partners' logos and company names are automatically inserted to customize the content.

Benefits

- ✓ Build and optimise digital marketing campaigns
- ✓ Increase demand generation
- ✓ Capture and close leads through gated content
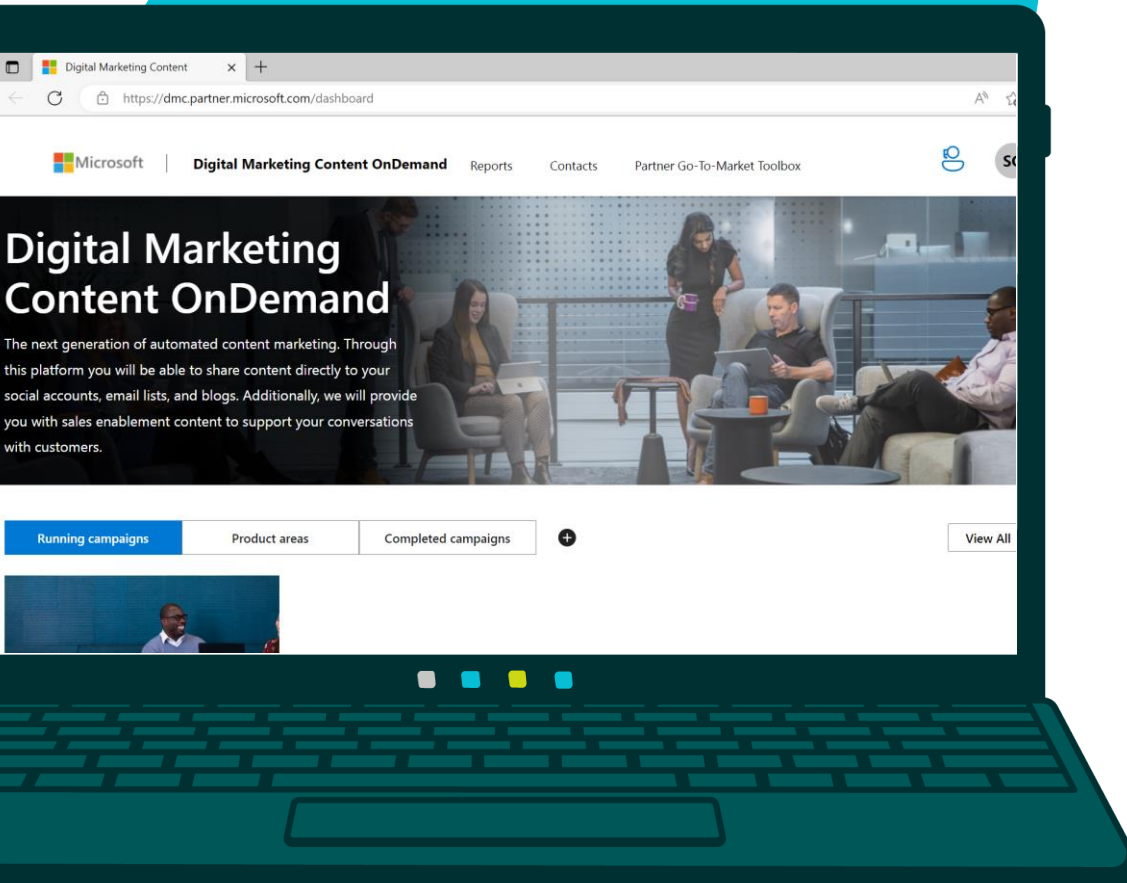
ACCESS CONTENT

Partner Marketing Key Concerns

| Locating the right Microsoft content	Pulling together cohesive campaigns	Managing multiple social media accounts	Tracking ROI on social media
Partners report spending 3-8 hours/week on average looking for content	Finding the right content and creating a campaign requires more time or resources than partners report having	Consistency is the key to social media and partners report not having time to keep their blogs or social accounts active	Partners have no way to track customer interactions with content or content ROI

"[Digital Marketing Content OnDemand] makes my job so much easier to have everything automated. It increases website traffic, shows our legitimacy as a company, and provides more awareness for my sales team to talk about Microsoft solutions. My sales reps can now speak to customers about multiple solutions at the same time and feel confident in their knowledge."

"I am very grateful for the [Digital Marketing Content OnDemand] content each week! Thank you! It saves me time and marketing dollars, and it is high quality."

Next generation automated content marketing!

- Build and optimize your digital marketing strategy and approach with automated marketing

- Share comprehensive digital campaigns complete with to-customer content complete with prewritten tweets, LinkedIn posts, Facebook statuses, mini-blog posts, and emails—all of which are fully customizable

- Easily access sales enablement and training assets complete with prescriptive guidance

- Post to social media accounts and launch email campaigns from directly within the platform

- Maintain a consistent social marketing presence, regardless of time to spend on marketing, by using the auto-update feature
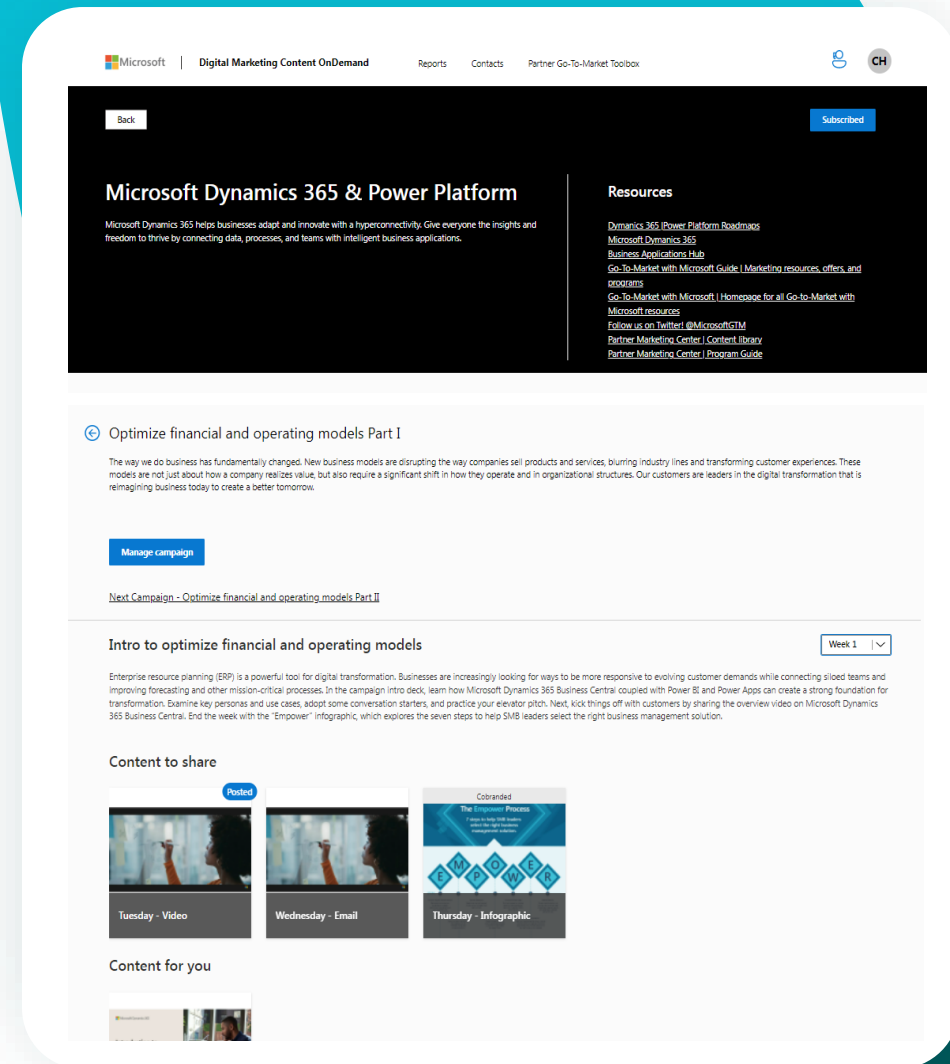
Campaign in a box – Modern Work

Do more with Less (SMB & Enterprise)

What it includes: infographics, pitch decks, thought leadership articles, customer stories, gated social images and eBooks.
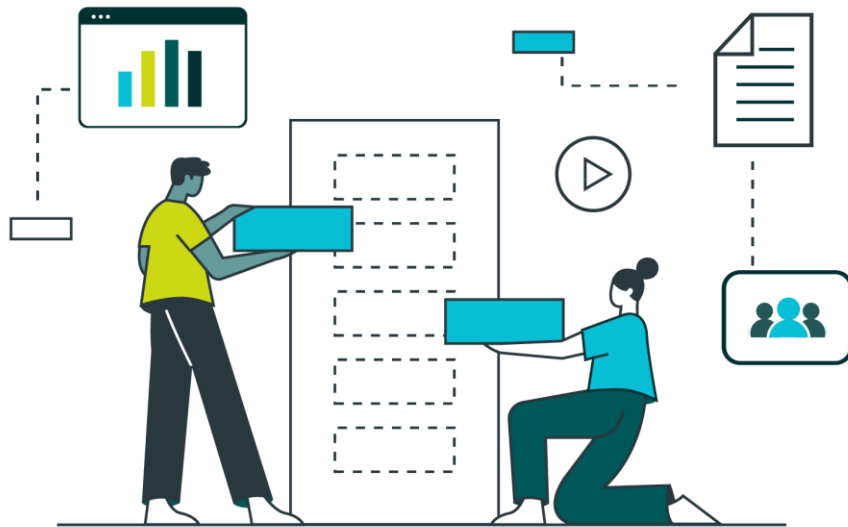
Campaign objective (SMB)

With the SMB New Customer and Upsell Promo, partners can grow revenue by acquiring new customers and upgrading existing customers to more premium products. Now is the time to work with your customers, understand their needs, and show them how to get more out of their technology investments while saving money with Microsoft 365.

Campaign objective (Enterprise)

Highlight the value of Microsoft 365 E3 and E5 for Enterprise customers so you can help your customers do more with less by eliminating redundant solutions, simplifying IT management, and protecting digital workers.
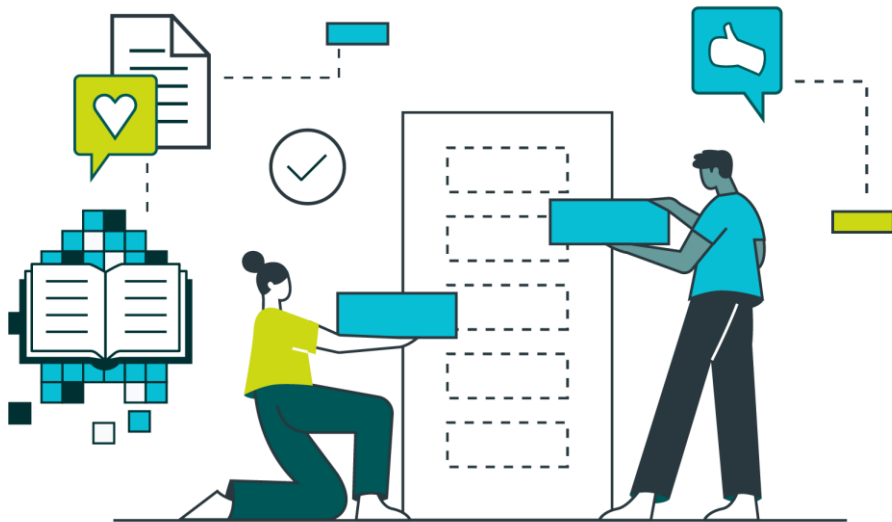
What it includes

What it includes: infographics, pitch decks, thought leadership articles, customer stories, gated social images and eBooks.

After November 21st, all partners will be able to log into Digital Marketing Content (DMC) OnDemand and launch this campaign.

Campaign in a box - Azure

Migrate & Modernize Windows Server/SQL to Azure

Campaign objective

Accelerate Windows Server and SQL Server migration in target accounts through a co-branded semi-customizable campaign in a box driving to an Azure Migration Modernization Program (AMMP) partner-led nomination.

Two campaign kits

Together, both kits provide partners with assets designed to generate new top-of the funnel leads (new account customer contacts within your target list) to enable new Windows Server and SQL Server migration opportunities.
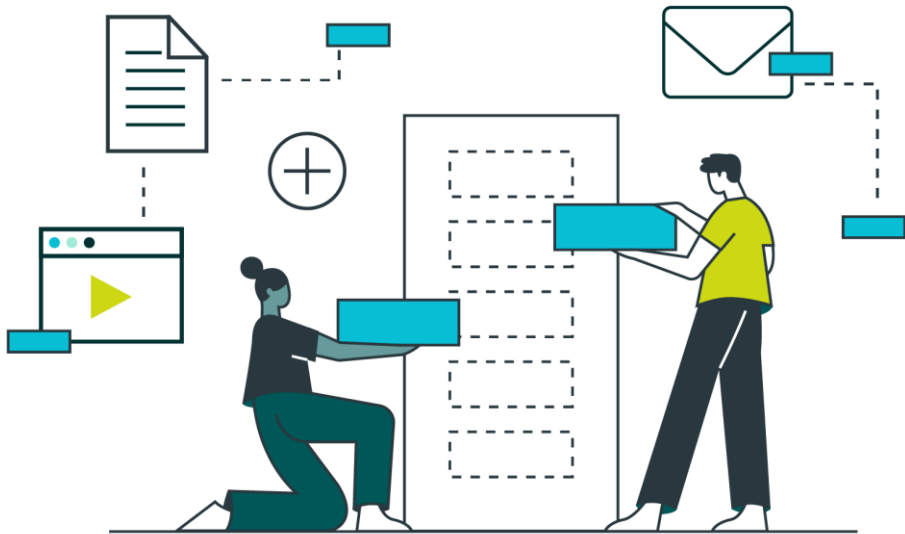
What it includes

What it includes: infographics, pitch decks, thought leadership articles, customer stories, gated social images and eBooks.

After November 21st, all partners will be able to log into Digital Marketing Content (DMC) OnDemand and launch this campaign.

Campaign in a box – Dynamics 365

Optimise Financial and Operating models

Campaign objective

Microsoft Dynamics 365 helps businesses adapt and innovate with a hyperconnectivity. Give everyone the insights and freedom to thrive by connecting data, processes, and teams with intelligent business applications.

Two campaign kits

Together, kits provide partners with assets designed to generate new top-of the funnel leads (new account customer contacts within your target list) to enable new and upsell Dynamics 365 opportunities.

What it includes

What it includes: infographics, pitch decks, thought leadership articles, customer stories, gated social images and eBooks.

Don't forget our SureStep Enablement is more than these 3 marketing tools! We are here to support you to understand and navigate your Microsoft Partnership and all the resources and tools available to you, from sales, technical, funding and more - reach out for more info

Next Steps

- Ensure you are enrolled for Microsoft Commerce Incentive (MCI) – if you are not enrolled you will not be earning!
- Ensure that whoever is responsible for the Co-op admin has the correct user access within Microsoft Partner Centre
- Review how much Co-op budget you have to spend this half – based on your previous 6 months
- Create a business plan for this half and what objective you want to achieve. From this you can create a marketing plan with the budget you have for Co-op (and more if you can allocate it). Download the Microsoft Co-op guide look to what activities are eligible
- Review the top tops and POE check list to support your planning and POE collection
- Are you using the Microsoft Marketing Tools? Is there any content, inspiration or usage of those tools you could work into your marketing team?
- Interested in using TD SYNNEX for your Co-op with one of the suggested activities? How can we help you? Get in touch if you would like a call to discuss anything in this guide further!

The 3 packages we have referenced on pages 25-30 are not the only things TD SYNNEX can provide, these are just the top 3 our partners ask for! If you are stuck, have Coop you are not using, talk to us and we can support you with this and recommend activities that align to your business plans and goals.

Don't forget you also have access to...

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✉ CSP.UK@TDSYNNEX.COM

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