# 

Building a Partnership Plan

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Introduction

Microsoft understands the unique requirements of ISV partners and their special role in the Microsoft partner ecosystem. We have gathered best of class information from successful ISV partners to help you build an actionable partner plan. This guide provides practical “how-to” guidance on how to build your partnership with Microsoft and how to best leverage the Partner resources Microsoft makes available to ISV partners.

Before you begin, make sure you have a good understanding of your organization’s 3-5 year business plan, in order to align with similar goals and ROI. Having a comprehensive view of the entire firm’s goals will support your asks for needed investments in resources, funding and various other cross functional buy in. This plan will incorporate sales, marketing, legal, finance, product engineering and development, support, and operations, so make sure you have buy-in across your organization of the actions and requirements in this plan.

This worksheet is designed to be a living document that you can develop and extend.

Partner Profile

Your Partner Profile provides a snapshot of the most important information about your company. Complete this information so that Microsoft can quickly understand your business and whom they should contact. This information will also be included on your Quick Reference Card, an example of which is shown below.

## General Information

The following chart provides a summary of key contact information for your organization and your key Microsoft contacts.

## Partner Summary

|  |  |
| --- | --- |
| Partner Name | Partner ID |
| Contact Name |  |
| Contact Email |  |
| Address |  |
| Telephone |  |
| Fax |  |
| Website |  |

## Key Microsoft Contacts

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Title | Email | Phone | Role |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## Key Partner Contacts

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Title | Email | Phone | Role |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## Partner Backgrounder

The Partner Backgrounder provides a short overview of your company as a business— how you’re positioned in the market, how quickly you’re growing, who you’re selling to, and how you can help Microsoft sell key products. This is an executive snapshot and is the core of the Quick Reference Card.

## Targeted Audience

|  |
| --- |
| Industry |
| Vertical: |
| Client Segment: |
| Role (job function of buyer): |
| Elevator Pitch to Buyer: |

## Partner Solution Overview

Provide an overview of the solution this plan addresses.

|  |
| --- |
| Company Overview |
| Solution Name: |
| Solution Description: |
| Benefit 1: |
| Benefit 2: |
| Benefit 3: |
| Deployment Options *(e.g.,*  *on-premise, hosted):* |

## Line of Business (LOB) Pains Addressed

Identify the key pains your solution addresses for the Line of Business executives in the target markets identified above.

|  |
| --- |
| Pain 1: |
| Pain 2: |
| Pain 3: |

## Client Evidence

The best salesperson for your solution is a satisfied client. Having client references is essential to building credibility and is a requirement for reaching Gold partner status. Include 1-3 summaries of client success with your solution below. Ideally, the evidences will be from clients in your target audience. When including benefits, use quantifiable results (e.g., cost savings, performance improvements) wherever possible.

|  |
| --- |
| Client Name: |
| Implementation Summary: |
| Benefit |

|  |
| --- |
| Client Name: |
| Implementation Summary: |
| Benefit |

|  |
| --- |
| Client Name: |
| Implementation Summary: |
| Benefit |

|  |
| --- |
| Client Name: |
| Implementation Summary: |
| Benefit |

## Microsoft Account Executive / Software Sales Professionals Call to Action

Describe the actions you want Microsoft AE/SSPs to take. Examples:

* *Identify target accounts*
* *Create a joint account plan and strategic objectives*
* *Determine how you can replicate successes*
* *Identify what additional resources will be required*

## Value Propositions

You have already summarized the value your solution delivers to your target audience. In this section, you will summarize the joint value your Solution and Microsoft deliver to the market; the value your solution delivers to Microsoft; and the value Microsoft delivers to your organizations and solution.

Each value proposition should be clear about the audience, the pain it alleviates, and why your solution is better than other alternatives. The classic template for a Value Proposition is below:

For (target audience)

Who (statement of pain, need or opportunity)

(solution name) is a (product category) That (statement of benefit).

Unlike (description of competitors or alternative solutions)

(Solution name) (statement of differentiation).

## Joint Value Proposition

Describe the value of the joint offering of your Solution and Microsoft to your target market.

## Partner to Microsoft Value Proposition

Describe the value of your offering to Microsoft. Understand how your target audience is measured and how your solution can help them meet their goals. Make a compelling case for why they should spend precious time and resources with your company.

## Microsoft to Partner Value Proposition

Describe the value of Microsoft to the success of your Solution and Company.

## Sales Commitments

A key part of your relationship with Microsoft is your commitment to revenue. Document your commitment in the table below. An Excel spreadsheet is available to assist you in calculating your commitment.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Sales Commitments | | | | | | | | |
|  | FY15 | | | | FY16 | | | |
| Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 |
| Microsoft Customer Adds |  |  |  |  |  |  |  |  |
| New License (net to MS) |  |  |  |  |  |  |  |  |
| New Software Assurance |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

Goals, Strategy, Metrics

Now that you’ve clearly articulated the value of your solution to the marketplace and to Microsoft and have made your revenue commitment, you will set additional goals and document your strategy for reaching those goals. You’ll also set metrics to measure your success.

## Twelve (12) Month Strategy and Metrics

When determining your strategy it’s important to ensure that it aligns with the overall goals and investments of your company. It’s also important to ensure that you align with Microsoft’s initiatives for the current and coming fiscal years. By aligning with Microsoft’s key initiatives you will be better able to articulate and deliver solutions that will help Microsoft meet its goals—and that Microsoft is more likely to have resources to invest. Here are some sample objectives, goals, and strategies, followed by a blank template.

Keep your goals focused: three is a good target number.

|  |  |
| --- | --- |
| ***EXAMPLE:* Overall Objective: Become the standard BRMS for the Microsoft platform in HHS and Financial services using a solution-focused, partner-driven approach** | |
| Goal 1: Become the standard .NET BRMS for HHS Eligibility solutions, working with key Microsoft partners | |
| Strategies:  - Identify key partners in HHS and develop go-to- market strategies | Objectives/Metrics:   * Partner with ABC SI to bid a solution in 10 states, with 3 wins * Partner with XYZ partner to bid 10 projects, with 3 wins |
| Goal 2: Become the standard .NET BRMS for wealth management, working with key Microsoft partners | |
| Strategies:  - Leverage MSFT and existing partner relationships to identify and build relationships with key partners | Objectives/Metrics   * Leverage deployment at CUSTOMER ABC for awareness and credibility * Run 2 customer seminars with ABC SI for demand generation * Identify 1 opportunities, with 1 win |

|  |  |
| --- | --- |
| **Overall Objective:** | |
| Goal 1: |  |
| Strategies: | Objectives/Metrics: |
| Goal 2: |  |
| Strategies: | Objectives/Metrics: |
| Goal 3: |  |
| Strategies: | Objectives/Metrics: |

Marketing

This section documents the marketing campaigns, including supporting materials that you will deploy as tactics to for the strategies you outlined in the previous section.

## Marketing Campaigns

Provide a description of the campaign, including the intended targets, what the offer or call to action is, and the supporting tactics within the campaign. Include the expected number of responses and wins and when the campaign will be in market. An example is shown below.

Download the MarCom plan guide in the Sales Accelerator kit for additional information. Explore “Spread the Word: Creating Demand for Your Solution” at <http://www.microsoftplatformready.com/AzureGTM/Welcome.aspx>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Campaign Type** | **Targets** | **Calls to Action** | **Tactics** | **Responses** | **Target Wins** | **Dates** |
| Worldwide Partner Conference | P2P | Scheduled Meetings, Breakout Participation | Maximum exposure | 10 Meetings | 4 Meetings | July 13-17, 2014 |
| Webinar Series | HHS | Download | Customer Listing | 100 | 2 | Q1 |

## Marketing Bill of Materials

To support your campaigns and to support the general marketing and sales of your solution—to your target audiences as well as Microsoft and key partners such as Systems Integrators (SI)—you will need a core set of marketing materials. Document your Marketing BOM here.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Marketing Bill of Materials (BOM) Core Set** | | | | |
| Completion Date | Marketing collateral | To Microsoft | To SI | To Customer |
|  | Company overview |  |  |  |
|  | BDM/TDM deck |  |  |  |
|  | Architecture diagram |  |  |  |
|  | Recorded demo |  |  |  |
|  | Client evidence |  |  |  |

Key Milestones and Scorecard

As you execute against your plan, you will want to track your success in attaining your commitments. Based on your company goals, strategies, and commitments, you can create a custom scorecard to help you see what’s working (so you can do more of that) and see what’s not working (so you can readjust plans or invest additional resource). A sample scorecard is shown below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestones** | **Date** | **Owner** | **Status/Notes** |
| Set up Microsoft Partner Network (MPN) Account | | | |
| Execute partner agreements | | | |
| Set up Rhythm of Business   * Monthly pipeline reviews * Quarterly business reviews * Business / marketing connections | | | |
| Partner communications   * External marketing * Publish Win Wire * Pinpoint current and posted | | | |
| Services and Support agreements operationalized | | | |
| Identify Partner Sales, Marketing, Delivery Teams | | | |
| Identify 3 Customer Prospects | | | |
| Complete Business Plan/Solution Profile | | | |
| Complete Marketing Plan | | | |
| Develop and Complete Learning Plan | | | |
| Execute 1st Marketing Campaign | | | |
| Complete Training | | | |
| Achieve Certifications | | | |
| Win 1st Customer | | | |
| Win 2nd Customer | | | |
| Achieve 7 Customer Adds | | | |

Focus, Focus, Focus

As you explore the Microsoft Partner Network, you may notice that the possibilities seem endless. Ideas for potential partners, solutions, go to market campaigns flow as you envision a vibrant relationship with Microsoft to grow revenues.

But every company, even industry leaders like Microsoft, has limited resources. As you go through the planning process, you will continually evaluate the potential and practicality of these many ideas to determine what you can really execute on.

Thomas Edison’s famous quote “Vision without execution is hallucination” reminds us that to see results we have to focus and execute. Focus to ensure that you are placing your time and money on the activities that will yield the most benefit to your company.

## Focus Your Positioning

Make sure your value propositions are focused for each audience—technical or non- technical; Microsoft, Systems Integrator. Make the value prop speak to the specific needs of the audience.

|  |  |
| --- | --- |
| **Generic** | **Specific** |
| We have an application that helps deploy Windows 7/8 for enterprise customers. | We have an application that helps mid- market customers in the public sector in the Nordics migrate from Windows XP to Windows 7/8. |

## Focus Your Strengths

Double-down on what you do best and then tell the world about it.

|  |  |
| --- | --- |
| **Generic** | **Specific** |
| Best marketing application. | Great mid-market marketing automation solution, particularly for small retailers. |

## Focus on What You Want

Keep in mind the proverb “Be careful what you ask for, you just might get it.” Be specific about what you want, particularly from Microsoft.

|  |  |
| --- | --- |
| **Generic** | **Specific** |
| Microsoft to market our product to its customers. | Market differentiation via MPN. Sales and marketing assistance in the financial services industry in the US East Coast region. |

Summary

Leveraging your organization’s 3-5 year business plan and having executive buy-in across sales, marketing, legal, finance, product engineering and development, support, and operations, you can build the foundation for your Microsoft Partnership Plan.

As you execute your plan:

* Ensure that your partnership plan aligns with and supports your company’s business plans and goals
* Check your plan monthly to measure progress and adjust accordingly
* Make sure all three areas are covered: sales and marketing; technology; and support
* Leverage MPN resources