

2003 EMEA Co-marketing Process - for BPs

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Co-Marketing - 7 Steps to Increase your sales

1. Understand your funding eligibility
2. Plan SMB lead generation activities with IBM
3. Apply
4. Execute the activity
5. Report generated Leads
6. Claim
7. Invoice IBM AND close the business

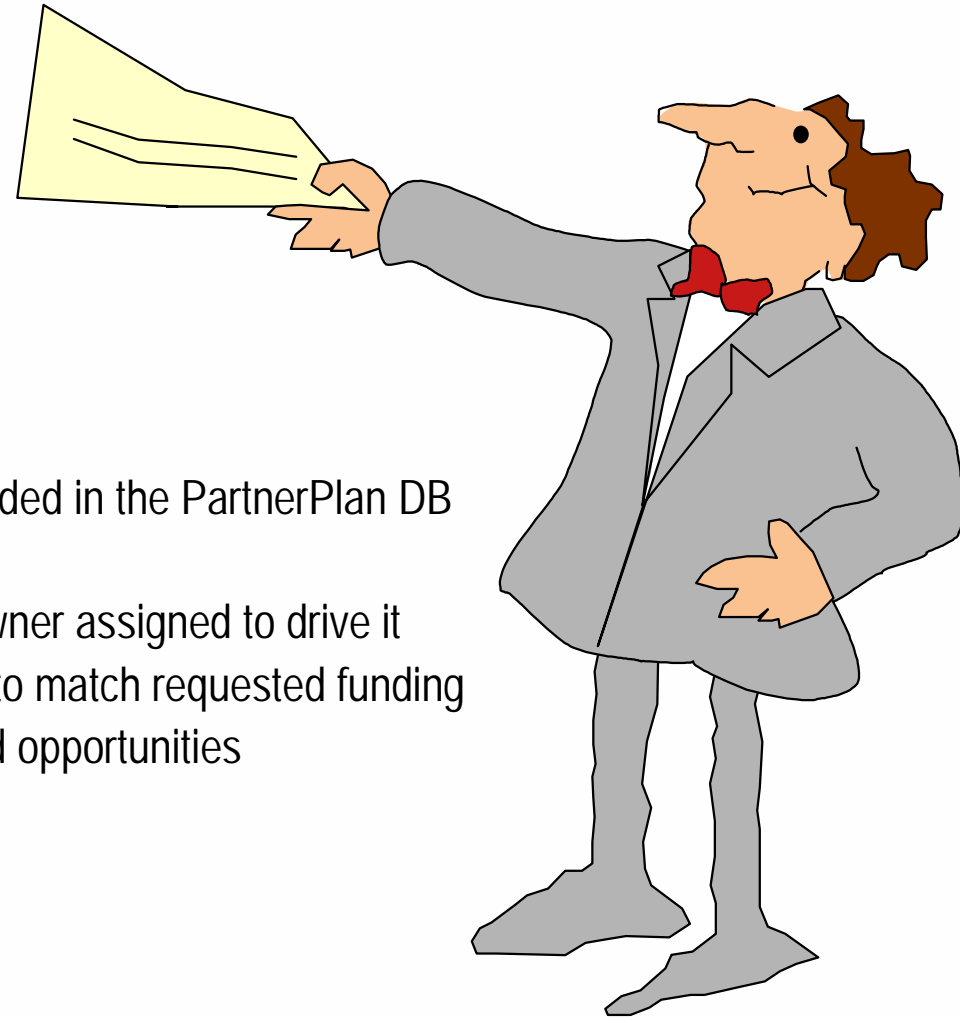
I. Understand Your Funding Eligibility

■ Funding Sources

- ▶ Incentives
- ▶ VAD
- ▶ Brand DCM
- ▶ SMB
- ▶ BP's own marketing funds

■ Requirements

- ▶ Each activity has to drive the SMB revenue
- ▶ Each activity has to be agreed-to and recorded in the PartnerPlan DB
- ▶ Each activity has to be measurable
- ▶ Each activity has to have an appropriate owner assigned to drive it
- ▶ Each BP has to have enough own funding to match requested funding
- ▶ The BP has to be ready to report generated opportunities



II. Plan SMB lead generation activities with IBM

- Help you can find on IBM Web pages

- ▶ Co-Marketing Web for Ideas on how to plan lead generation tactics
<http://www.ibm.com/partnerworld/software/zone>
>Marketing and sales support >Co-marketing program
- ▶ Telemarketing scripts & Seminar materials
<http://www.ibm.com/partnerworld/software/zone>
>Marketing and sales support >Co-marketing program
>Co-marketing program opportunities for Business Partners
>Telemarketing or seminar solutions
- ▶ Campaign Designer messaging and graphics
<http://www.ibm.com/partnerworld>
>Marketing and sales >Campaign Designer

- Agree on your activities with your IBM account manager/Your VAD

- Update your PartnerPlan, or ask your IBM account manager to do so

Updated

Improve your marketing skill by reading the new [PartnerWorld for Software "How-to" Marketing Guides](#) for *Direct Marketing, Seminars and Events* and *Telemarketing*. You'll come away with some great tips including the IBM resources you can leverage to create a successful campaign.

IBM Software Group

Page contents

- ▶ [Program Description](#)
- ▶ [Traditional Seminars](#)
- ▶ [e-seminar](#)
- ▶ [Teleseminars](#)
- ▶ [e-seminar and Teleseminar Downloads](#)
- ▶ [Business Intelligence Standard Seminar Downloads \(English\)](#)
- ▶ [Business Intelligence Standard Seminar Downloads \(Translations\)](#)

III. Apply - Access Your Plan

- Access the Partner Plan - WWW

- ▶ <http://www.ibm.com/partnerworld/software/zone>
 - > Marketing and sales support > Co-marketing program
 - > Co-Marketing program opportunities for business partners
 - > Partner Plan


The screenshot shows the IBM PartnerWorld for Software website. The navigation bar includes links for Home, Products & services, Support & downloads, and My account. The main heading is 'Co-marketing Business Partner Zone'. A left-hand navigation menu lists various support options, with 'View By Products' selected. The main content area is titled 'Welcome, IBM PWSW - EMEA - UK' and is dated 'Updated 25 September 2002'. It provides a general description of co-marketing offerings and lists 'How to participate' steps: 1. Review the eligibility requirements. 2. Read and agree to the General Terms and Conditions. 3. Submit a co-marketing application via 'Partner Plan' (see the news item listed below) or via this web site (by selecting an offering from the table below or from the left hand navigation bar). A blue arrow points from the 'Partner Plan' link in the navigation menu to the 'Partner Plan' link in the third step of the 'How to participate' section.

- ▶ **Please NOTE: You need a Global Partner Info ID, which is different from your PWSW ID!**
 - Problem With ID/Password? + 44 1256 344500 or partnerline@us.ibm.com

III. Apply - Select an Initiative From Your Plan

The screenshot shows the IBM PartnerPlan interface. At the top left is the IBM logo and the text 'PartnerPlan'. To the right, it says 'Welcome Paul Clayton/US'. Below this is a navigation bar with three tabs: 'View Plans', 'About PartnerPlan', and 'Admin View'. The 'View Plans' tab is active. Below the navigation bar are 'Previous' and 'Next' buttons. The main content area displays a list of initiatives for 'Danielburg Data (CH:Curran) ***COPY*** - Overview'. The list includes: 'Initiative - 1 Personnel Hire and Train new people', 'Initiative - 2 e-Service Management', 'Initiative - 3 HR Connect', 'Initiative - 5 eCRM xPERT' (circled in red), 'Executive Review Page', 'Solution and Revenue - e-Service Management', 'Solution and Revenue - eCRM xPERT', 'Solution and Revenue - HR Connect', 'Summary of all Solution and Revenue Pages', 'Personnel and Contacts', and 'Executive Communications'. At the bottom of the page are another 'Previous' and 'Next' button.

III. Apply - Access The Application Form


Welcome Paul Clayton/USM000012 !

PartnerPlan
View Plans
About PartnerPlan
Admin View

Previous
Edit

Note: Click on blue field headings for information about that field. Fields marked with a red * are required.

| | | | | | | |
|---|------------------------------|----------------------------|---------------------------------------|---|---------------------------|------------------|
| Danielburg Data (CH:Curran) *** COPY*** | | | | | Initiative Number* | 5 |
| <u>Initiative Name (Business Partner's Solution)*</u> | | | <u>Measure of Success (Objective)</u> | | | |
| eCRM xPERT | | | 14,000,000 of eCRM Sales | | | |
| <u>Initiative Owner*</u> | <u>Start Date (mm/dd/yy)</u> | <u>End Date (mm/dd/yy)</u> | <u>Total BP and IBM Revenue</u> | <u>E/R Ratio</u> | <u>IBM Revenue</u> | <u>E/R Ratio</u> |
| Anna Naumann | 01/01/2002 | 10/15/2002 | \$13,950,000 | .5% | \$8,327,375 | .4% |
| Average number of months to close a lead => | | 2 | December | <= Last month to close a sale | | |

| Market Segments | Leads | Sales | Revenue | Decision Maker's Job | Business Issues |
|--|-------|-------|------------|---------------------------------|---|
| Financial Services - customer services process | 520 | 130 | 11,700,000 | CIO; VP Sales; VP Marketing | Improved customer responsiveness in line with new Service Level Agreement [SLA] standards |
| Manufacturing - customer services process | 100 | 25 | 2,250,000 | CIO; VP Sales; VP Marketing | Better tracking of Leads and Customer buying habits to improve business conversion rates in commodity markets |
| | 0 | 0 | 0 | | |
| Total Leads Required => | 620 | 155 | 13,950,000 | Prospects Required==> | 3,111 |
| Leads Planned => | 625 | | | | |

SWG Co-Marketing Application

III. Apply - Most of The Available Data Will be Retrieved From Your Plan.

IBM PartnerPlan Welcome Paul Clayton/USM000012 !

[View Plans](#) | [About PartnerPlan](#) | [Admin View](#)

[Previous](#) [Save & Close](#) Danielburg Data (CH:Curran) ***COPY***

Software Group Activity/Event Funding Application - eCRM xPERT

| Date Updated | IBM Client Rep Name * | C/R Phone | C/R Dept. | Region* | Business Area* | Geography * |
|--------------|-----------------------|----------------|-----------|--------------|----------------|-------------|
| 06/25/2002 | Alison Windsor | 44-1582-462266 | ??? | EMEA - Other | IBM Software | EMEA |

| | | | | | |
|-----------------------|---|-------------------------------|------------------------|--------------------|-------------------------|
| Company Name * | Danielburg Data (CH:Curran) ***COPY*** | | | BP Type * | |
| Contact Name | Dieter Schmidt | Phone: 0049 40 5291871 | E-mail: | Solution Provider | |
| | dieter.schmidt@dd.com | | | | |
| Street Address | Elbstrasse 23 | | | Reseller | |
| | City | Province / State | Postal Code/Zip | Country * | PartnerReward ID |
| | Hamburg | | | Netherlands | UK123321S |
| | PWSW ID | PWD ID | BPDB ID | Distributor | |
| | | | | Avnet | |
| | Date PartnerWorld Level Attained | Date for Level Renewal | | | |
| | Premier | 12/31/95 | 12/31/2001 | | |

Enter your correct PWSW ID →

General overview of Business Partner's business and market place

Danielburg sells a Web Based CRM solution in Central Europe.

BP CEO says: The company needs to review and change its strategy; now is

III. Apply - Enter the Rest of Required Data and Submit

| | | | | | | | |
|---|--|--|----------------------|---|--------------------------|-----------------------------|----------------------|
| PartnerPlan | | | | View Plans | About PartnerPlan | Admin View | |
| Application Submitted by: | | | | | | | |
| Name * | | Phone * | | eMail * | | | |
| <input type="text"/> | | <input type="text"/> | | <input type="text"/> | | | |
| Are you applying for the Top Contributor Initiative Start Now Incentive? * <input type="radio"/> Yes <input type="radio"/> No | | | | | | | |
| Funding Information (US Dollars): | | | | | | | |
| Total Expense for Activity/Event * | | *Maximum IBM Reimbursement * | | SW Revenue expected as a result of the activity/event * | | | |
| <input type="text"/> | | <input type="text"/> | | <input type="text"/> | | | |
| Activity/Event Information | | | | | | | |
| Product Name * | | Type of Activity/Event * | | *Location of Activity/Event * | | | |
| <input type="text"/> | | <input type="text"/> | | <input type="text"/> | | | |
| Starting Date * => | | | <input type="text"/> | | Ending Date * => | | <input type="text"/> |
| Language(s) in which the Activity/Event will be performed. * | | Estimated size of Audience or Mailing* | | Estimated number of Responses * | | Estimated number of leads * | |
| <input type="text"/> | | <input type="text"/> | | <input type="text"/> | | <input type="text"/> | |
| Business Case | | | | | | | |
| What is the objective of this Activity/Event? * | | <input type="text"/> | | | | | |
| What will the "call to action be"? * | | <input type="text"/> | | | | | |
| How does this fit into your overall Marketing Plan? * | | <input type="text"/> | | | | | |
| * All fields must be completed in order to save this form. | | | | | | | |
| <input type="button" value="Save & Close"/> | | | | | | | |
| <input type="button" value="Submit"/> | | | | | | | |

III. Apply - You Can See Your Application on WWW

IBM®
PartnerPlan

Welcome Paul Clayton

View Plans | About PartnerPlan | Admin View

Previous Next

Tip:
PartnerPlan on the web is optimized for a 1024 x 768 display setting.

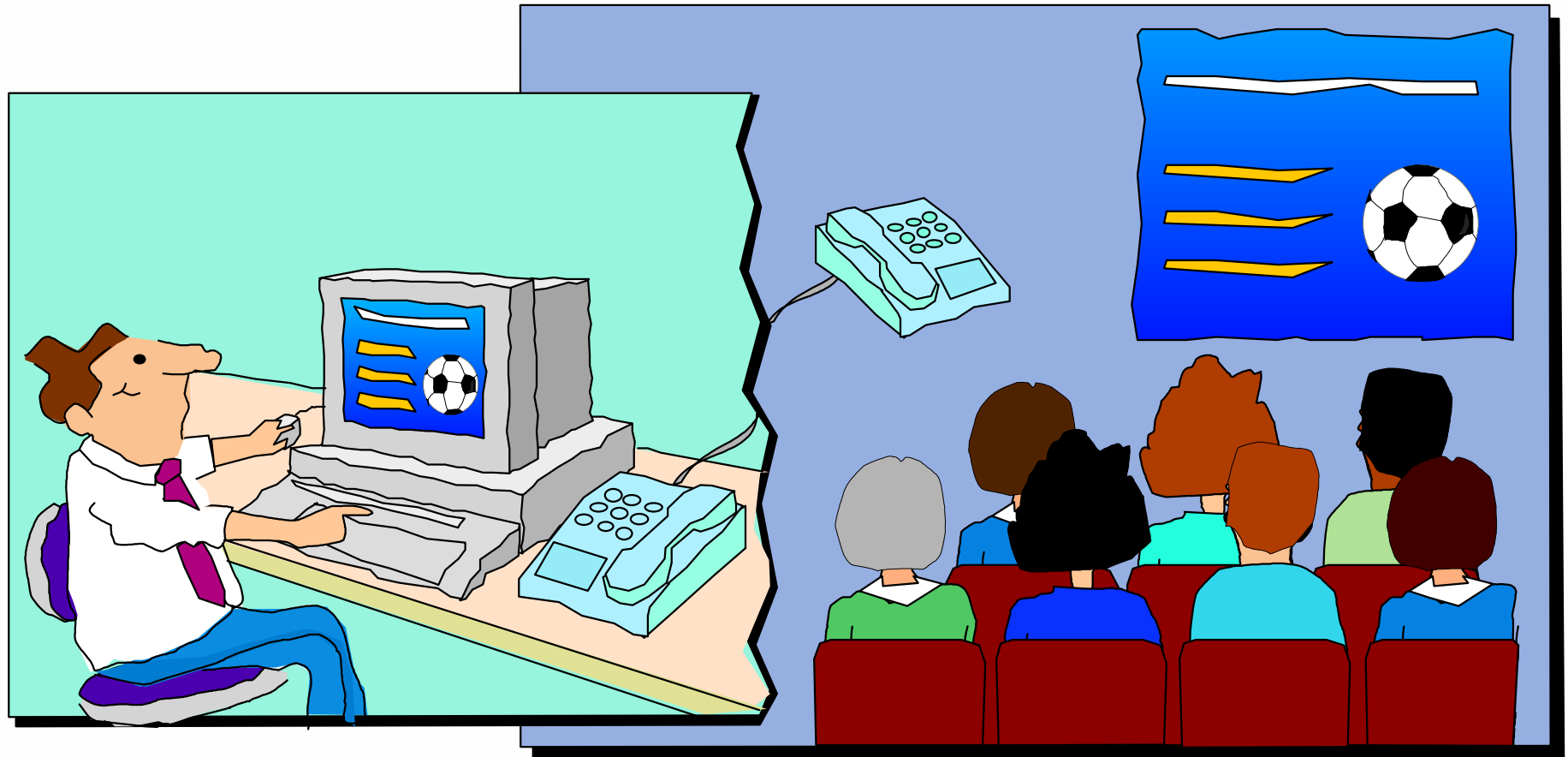
- ▶ **Danielburg Data (CH:Curran) ***COPY*** - 9**
- ▶ [Initiative - 1 Personnel Hire and Train new people](#)
- ▶ [Initiative - 2 e-Service Management](#)
- ▶ [Initiative - 3 HR Connect](#)
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- ▶ [Solution and Revenue - eCRM xPERT](#)
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- ▶ [Summary of all Solution and Revenue Pages](#)
- ▶ [Personnel and Contacts](#)
- ▶ [Executive Communications](#)
- ▶ [SWG Co-Marketing Application - eCRM xPERT](#)

Previous Next

The status of your Application will be updated by IBM. Enter the Application later, to understand the status.



IV. Execute the Activity



V. Report generated Leads

The screenshot shows the IBM Co-marketing Business Partner Zone interface. On the left is a navigation menu with options like 'Select a country', 'Business Partner Zone', 'Switch Location', and various support categories. The main content area is titled 'Co-marketing Business Partner Zone' and contains text about available offerings and requirements. A large red thought bubble is overlaid on the page, containing the text 'You are expected to report generated customer opportunities'. A red arrow points from a box labeled 'Read Terms & Conditions' to the text 'Read and agree to the General Terms and Conditions.' in the requirements list. The text 'customer leads' in the requirements list is also circled in red.

You are expected to report generated customer opportunities

Read Terms & Conditions

Read and agree to the General Terms and Conditions.

customer leads

→ Select a country

← Business Partner Zone

Switch Location

Marketing and sales support

Co-marketing

Custom Marketing Proposal

Direct Marketing

Seminar Solutions

Telemarketing

View By Product

Software

Education and certification

Technical support

Incentives

Financing

Relationship support

Campaigns

Events

Membership centre

Co-marketing

Business Partner Zone

PartnerWorld for Software

Site map Contact us Help

available a number of Co-marketing offerings which IBM Partners can leverage to generate demand for IBM Software solutions. A table of offerings is provided in the table below. "Click on" the offering name for a detailed description of the offering.

Partners must:

- Review the eligibility requirements.
- Read and agree to the General Terms and Conditions.
- Submit a co-marketing application via [Partner Plan](#) (see the news item [Partner Plan](#)) via this web site (by selecting an offering from the table below or from the navigation bar)

Within 60 days of completing the offering, you should submit:

- A co-marketing [claim form](#)
- Supporting "Proof of Performance" documentation
- A list of [customer leads](#) as a result of completing the tactic/offering

For additional help (including step-by-step instructions with screen images) please download and refer to the [Co-marketing Programme Guide](#) (PDF file).

V. Report generated Leads

Events
Membership centre

Related Links:

- Business Partner Directory
- PartnerWorld
- PartnerWorld for Developers

Prospect Information

Customer Legal Name*

Street Address*

City*

State/Province*

Zip*

Country*
Select from List

Industry Classification*
Select From List



Opportunity Information

Briefly Describe this Opportunity

Decision Date: *

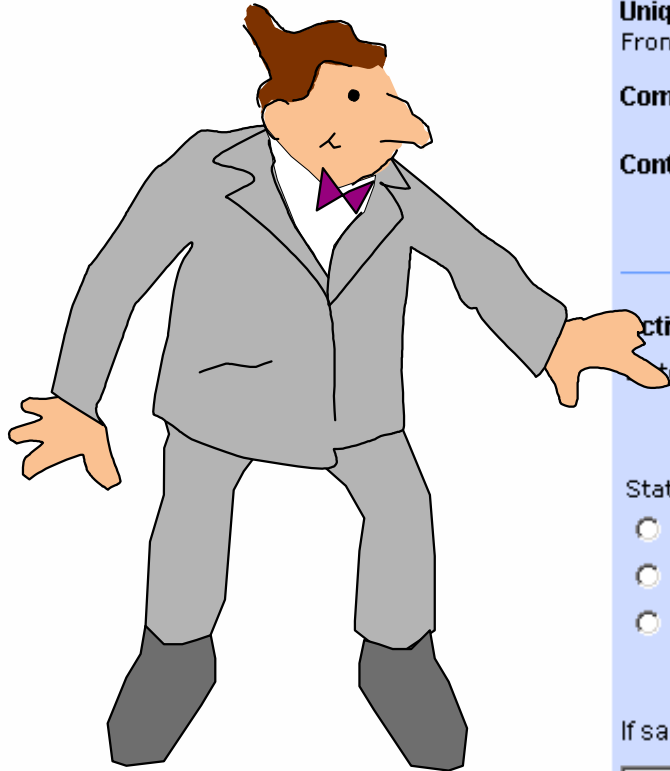
Planned Customer Spending?*
Currency*

Sales Cycle*
Select From List

Win Probability*
Select From List



VI. Claim - Submit The Claim



Unique Control Number: *
From your application form confirmation.

Company Name: *

Contact Email: *

Activity Information

Date activity completed: * (MM/DD/YYYY)

Status of Sale: *

Sold

Pending

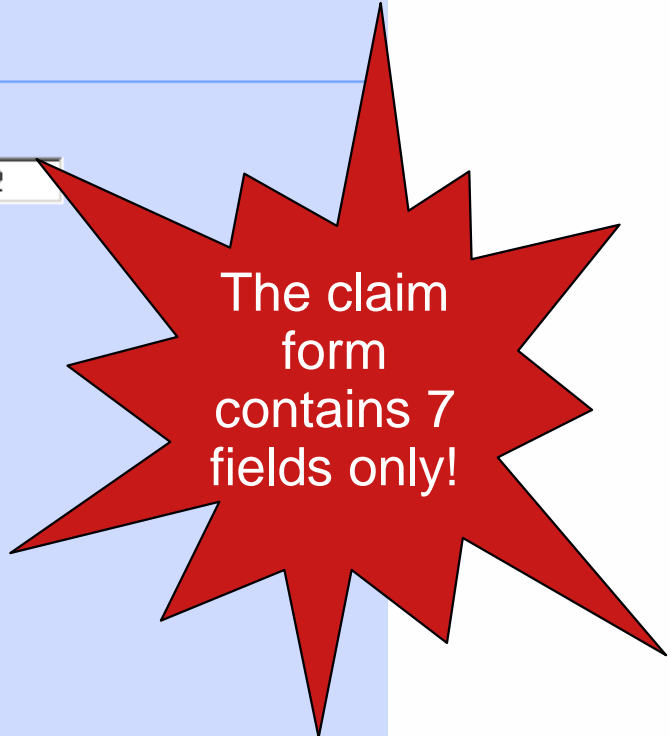
No Sale

If sale is pending, expected time frame for closing sale:

(MM/DD/YYYY)

Amount claimed for reimbursement: *

only - You are required to enter the requested amount in US
or the equivalent amount in Euro



VI. Claim - Submit Proof of Performance

- Don't forget to submit ALL the required proof. [Check T&Cs for more info.](#)
 - ▶ You can find appropriate Address/Fax # for submitting the proof of performance in the Terms & Conditions Document.
 - ▶ **Check and Meet all the Deadlines stated in Terms & Conditions!**

| Marketing Activity | Proof of Performance Required in addition to completed Claim form for selected activities |
|---|--|
| Customer Seminars/ Customer Teleseminars | <ol style="list-style-type: none"> 1. Agenda 2. Copies of all invoices to be reimbursed. 3. List of attendees. Names, Company name, title 4. Copy of invitation, where applicable. 5. Details about leads generated by the activity |
| Direct Mail (includes newsletters, product catalogs, direct mail packages, self-mailers) | <ol style="list-style-type: none"> 1. A completed sample of the direct mail package. 2. A detailed printer's invoice showing the number of pieces produced. 3. Postal receipts showing the quantity shipped, postage class, weight and date mailed. 4. If the mailing was done in-house, a signed letter from an officer of the company stating quantity mailed and postage costs. 5. Copies of other invoices to be reimbursed 6. Details about leads generated by the activity |
| Telemarketing | <ol style="list-style-type: none"> 1. Copy of Script. 2. List of call recipients. 3. Copies of invoices to be reimbursed 4. Details about leads generated by the activity |

VII. Invoice IBM AND close the business

- Once Your Claim has been approved, you will be asked to send your invoice to

Co Marketing/TCI BP Operations
Lotus Park
The Causeway
Staines, Middlesex
United Kingdom
TW18 3AG

- Invoice details will be described in the claim approval note and will be available on the Web



Need for Local Help?

■ Nordics

- ▶ Denmark: Maria Lund Hoepfner: malund@dk.ibm.com
- ▶ Sweden: Jenny Hoglund: jenny.hoglund@se.ibm.com
- ▶ Finland & Baltic countries: Miia Heliö: miia.helio@fi.ibm.com
- ▶ Norway: Marthe T Richardsen: mrichard@no.ibm.com

■ North

- ▶ UK & Ireland: Martin Geraghty: martin.geraghty@uk.ibm.com
- ▶ Netherland
 - Jeanine Verhaar: jeanine_verhaar@nl.ibm.com
 - Ine van Gisbergen: ivgisbergen@nl.ibm.com
- ▶ South Africa: Gaelyn Adamson: gaelyn@za.ibm.com

■ West

- ▶ France: Anna Armillotta: anna.armillotta@fr.ibm.com, Iban Courau: iban.courau@fr.ibm.com
- ▶ Belgium: Denise Dahlen: denise_dahlen@be.ibm.com

■ Central - Austria, Germany and Switzerland

- ▶ Karl-Heinz Hirner: hirner@de.ibm.com, Hartmann Rainer: hartmann_rainer@de.ibm.com

■ South

- ▶ Italy, Greece, Turkey and Israel: Paola Monnati: Paola_Monnati@it.ibm.com
- ▶ Spain and Portugal: Raul Garcia Lopez: raul_garcia@es.ibm.com

■ CEMA - Central & Eastern Europe, Middle East & Africa

- ▶ Sarka Kinclova: Sarka_Kinclova@at.ibm.com

Thank you!



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