

2004 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

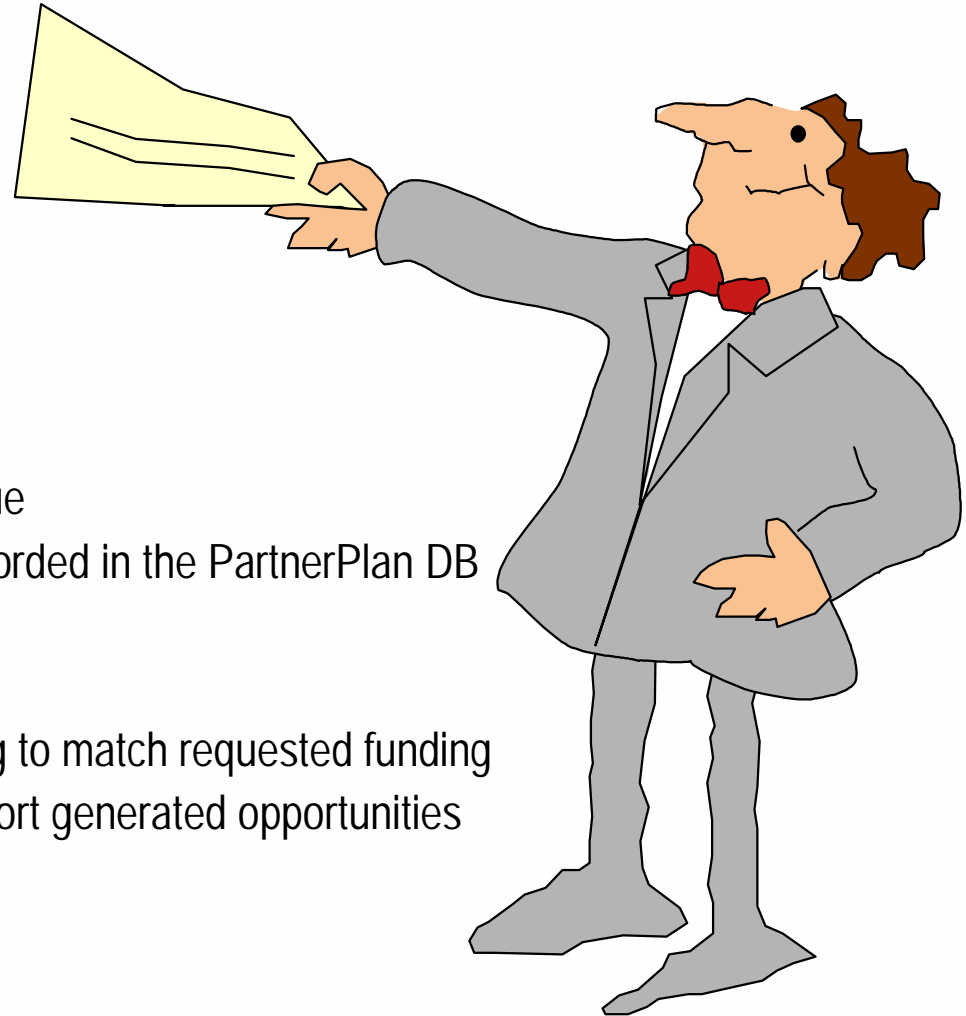
I. Understand your funding eligibility

■ Funding Sources

- ▶ Incentives
 - FastStart
 - VAP Activation (Agency Marketing)
 - "Q2-Q4 Big Play Incentive"
- ▶ VAD - Value Added Distributors
- ▶ 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 owner
- ▶ Each BP has to have enough own funding to match requested funding
- ▶ The BP has to be ready and willing 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 resources >Marketing Training
 - ▶ Telemarketing scripts, Seminar materials, Direct Marketing materials, Campaign Designer messaging and graphics
<http://www.ibm.com/partnerworld/software/zone> >Marketing resources >Marketing materials
- Agree on your activities with your IBM account manager/your VAD
- Update your PartnerPlan, or ask your IBM account manager to do so

Selling resources	Marketing training	Shortcuts
Marketing resources		DB2 Information Management highlights
<ul style="list-style-type: none">· 2004 Marketing programs· Market planning and research· Campaigns· 2004 Co-marketing funding· 2003 Co-marketing funding· Collateral and logos· Channel communications· Marketing training· Marketing materials	<p>Marketing Skills Development Series This education module consists of an online audio presentation and tools (how-to guides) to quickly build a plan to drive responses, leads and sales.</p> <p>Tivoli Direct Marketing Guidelines This "cookbook" consists of guidelines, templates and imagery for all Tivoli direct marketing communications.</p> <p>PartnerWorld for Software "How-to" Marketing Guides Improve your marketing for direct marketing, seminars and events, and telemarketing. You will come away with some great tips including the IBM resources you can leverage to create a successful campaign.</p>	<hr/> Pervasive Computing Highlights <hr/> Lotus Highlights <hr/> Rational highlights <hr/> Software Sales and Marketing Kits - EMEA <hr/> IBM PartnerWorld News: Software edition Subscribe to this newsletter and tailor it to your specific interests. <hr/> Tivoli highlights

III. Apply - Access your Partner Plan

■ Access the Partner Plan - WWW

- ▶ <http://www.ibm.com/partnerworld/software/zone>
 >Marketing resources >2004 Co-marketing funding >Fast Start > Partner Plan
- ▶ You can Access the Partner Plan directly at
<http://d03bpi07.partner.boulder.ibm.com/src/Partplan.nsf>

← [PartnerWorld for Software](#)

Co-marketing

Business Partner Zone

Switch Location

Selling resources

Marketing resources

Co-marketing Program *Updated 14 March 2003*

Custom Marketing Proposal

IBM PartnerWorld for Software is making available a number of Co-marketing offerings which IBM PartnerWorld for Software Business Partners can leverage to generate demand for IBM Software solutions.

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

By Product' and 'How to participate: IBM Authorized Business Partners must:'. Below that, there are three bullet points: 'Review the [eligibility requirements](#).', 'Read and agree to the [General Terms and Conditions](#).', and 'Submit a co-marketing application via [Partner Plan](#) (see the news item listed below) or via this web site (by selecting a co-marketing tactic/offering from the table above or from the left hand navigation bar).'. A blue arrow points from the 'Partner Plan' link in the screenshot to the URL in the text above."/>

Technical resources and support

Training and certification

Events and conferences

News and newsletters

Software membership

Contact PartnerWorld for Software

Co-Marketing Offerings: [By Product](#)

How to participate:

IBM Authorized Business 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 listed below) or via this web site (by selecting a co-marketing tactic/offering from the table above or from the left hand navigation bar).



III. Apply - Select an Action Plan from your PartnerPlan

The screenshot shows the IBM PartnerPlans web interface. On the left is a blue navigation sidebar with the IBM logo and 'My PartnerPlans' header. Below the header are links for 'Home Page', 'Setup', and 'My Partner Plans'. The main content area has a yellow background and a navigation bar at the top with letters A-Z and 'Refresh', 'Previous', and 'Next' buttons. Below the navigation bar is the title 'Miroslav's test plan ***test*** - Profile'. A list of links follows: 'Action Plan - 1 Test Initiative', 'Action Plan - 2 The 2nd Initiative', 'Executive Review Page', 'Solution and Revenue - test product Offering', 'Summary of all Solution and Revenue Pages', 'Personnel and Contacts', 'Executive Communications', 'SWG Co-Marketing Application (Accepted)', 'SWG Co-Marketing Application Test Initiative', and 'SWG Co-Marketing Application Test Initiative'. A large red arrow points from the right towards the 'Action Plan - 1 Test Initiative' link, with the text 'Enter the Action Plan' inside the arrow.

*To be able to access your plan, ask your IBM account manager for granting you access rights

If you cannot see your plan on the Web, please ask your IBM account manager to add your GPI ID into the "Team member access" section of your plan!

PartnerPlan Access Control

This table controls who has access to your PartnerPlan. You should be in office mode when filling this out so you can reach your address books.

Overall PartnerPlan Ownership

*PartnerPlan Owner	*Owner's Manager	Owner's Second Line Mgr	Owner's Manager Override	Reason for Override
<= Select NEW Owner	<= Select IBM Manager		<= Override Manager	
Miroslav Hofbauer/Slovakia/IBM	Miroslav Hofbauer/Slovakia/ibm	Boris Kekesi/Slovakia/IBM		

Team Member Access

Enter the names of others who should have access to this plan. Click Help to find out how to enter Business Partner Names. It's different.

Team Members	Business Partner	First Line Manager	Second Line Manager	Edit Rights	Create
Miroslav Hofbauer	IBM S...			Edit	Y
Miroslav Hofbauer/SKM000010					

Funding Program Approval Status*

Program Name	Program Approver	Delegate to...	Approval Status
Select a program name in the Business Partner Forecast Table on the Profile Page to make the program appear here.	The "Program Approver" is either the Owner's Manager or an IBM Program Approver identified by the sponsoring Business Unit.	The Program Approver may delegate their approval responsibility to another person using by entering that person's name here.	Approved/Unapproved Date Approved (If applicable)

Your GPI ID has to be in the "Team Member Access" section

III. Apply - Select "Edit" the Action Plan

Edit
← Edit the Action Plan
Close

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

Action Plan for Miroslav's test plan *** test			Action Plan No.
<u>Action Plan Name*</u>	<u>Type</u>	<u>Action Plan Owner*</u>	<u>* Start Date (mm/dd/yy)</u>
The 2nd Initiative	----	Miroslav Hofbauer	<u>* End Date (mm/dd/yy)</u>

<u>Overall Revenue Objective</u>	<u>IBM Revenue Component</u>	<u>Average Revenue Lead</u>	<u>Months to close a lead-></u>
100,000	20,000	0	<u>Last month to close a sale -></u>

<u>Market Segments</u>	<u>Leads</u>	<u>Sales</u>	<u>Revenue</u>	<u>Decision Maker's Job</u>	<u>Business Issues</u>
SMB Pharmaceutical	10	2	40,000		
SMB General	20	3	60,000		
Leads Required =>	0	0	0	<= Revenue Required	Prospect Required
Leads Planned =>	52		120,000	<= Revenue Planned	100
Leads Actual =>	0		0	<= Revenue Actual	

Comments

Tutorial

IBM Support Program Links

Monthly Progress Reports [Last report ->](#)

* Do you plan to use Executive Assessment?

* Do you plan to use the Harmony Cross Selling marketing materials?

<u>LINE</u>	<u>Category(s) Brands(s)</u>	<u>Major activities required to achieve this Initiative and Person Responsible</u>	<u>Total Cost</u>	<u>Available Funding Program</u>	<u>Amount of Program Funding</u>	<u>Activity Completion Date (mm/dd/yy)</u>	<u>Status (Open, Done, Late, etc.)</u>	<u>Leads Planned, Actual</u>
A	1 72	SMB Tradeshow Person: Miroslav Hofbauer	10,000	Top Contrib.	2,000	03/31/2003	Open	2 0

III. Apply - Access the application form via "Apply for Funding" button

Market Segments	Leads	Sales	Revenue	Decision Maker's Job	Business Issues
SMB Pharmaceutical	10	2	40,000		
SMB General	20	3	60,000		
Leads Required =>	0	0	0	<= Revenue Required	Prospects Required
Leads Planned =>	57		170,000	<= Revenue Planned	100
Leads Actual =>	0		0	<= Revenue Actual	

Comments

* Do you plan to use Executive Assessment? Yes

* Do you have an Innovation Center?

Marketing Programs

Apply for Funding

Open Monthly Progress Meeting Log

Show ALL Activities for ALL Action P

Line	Source of Funds	Brand	Catg	Activity	Responsible	Cost	Amt Funded by Program	Start Date	End Date	Status	Leads Planned	Leads Actual	Revenue Planned
2	OTH	7H	7	Telemarketing Follow-Um	Miroslav Hofbauer	5,000			4/22/03	In-process	50		110,000
1	Top Contrib.	TIV	1	SMB Tradeshow	Miroslav Hofbauer	10,000	2,000		3/31/03	Open	2		10,000
3	Top Contrib.			Seminar on Miroslav's Pharmaceutical Solut.	Miroslav Hofbauer	15,000	3,000		5/14/03	-	5		50,000
				TOTALS:		30,000	5,000				57		170,000

III. Apply - Open the SWG Co-Marketing Application

Close Submit Activity NEED INSTRUCTIONS? Go to SWG Co-Mkt Program

[Refresh](#) [← Previous](#) [Next →](#)

Activities for Miroslav's test plan **test******

Cost	Funded	Funding Program	Activity	Validated?	Created	Submitted	Processed	Status
50,000	15,000	▼ Top Contrib.						
10,000	2,000		<input type="checkbox"/> SMB Tradeshow	N	01/08/2003	03/21/2003		
10,000	5,000		<input type="checkbox"/> aaaa	Y	12/18/2003			
15,000	3,000		<input type="checkbox"/> Seminar on Miroslav's Pharmaceutical Solut.	N				
15,000	5,000		<input type="checkbox"/> test					
50,000	15,000							



III. Apply - Edit and save the application

Note: Click on [blue](#) field headings for information about that field. Fields marked with * are required.

PartnerPlan: Miroslav's test plan ***test***
Action Plan: Test Initiative

Line#	Activity ID	*Activity	Person Responsible	Start Date	End Date
1	XMI-2003-10-31-339350	test	test		02/28/2004

Available Funding Programs	Total Cost	Amount of Program Funding	Leads Planned	Leads Actual	Revenue Planned	Revenue Actual
Top Contrib. ▾	15,000	5,000	3	0	0	0

Status	* Brand	* Spending Category	Solution Type
Open ▾	Software (61)	07 - Trade Shows ▾	Business Intelligence

* Required field

[Privacy Statement](#)

[Change Log & Error Messages](#)

III. Apply - Select appropriate application(s) and submit it

Program Funding - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Favorites Google Search Web

Address <http://d03bpi07.partner.boulder.ibm.com/src/partplan.nsf/webProgramFunding?ReadForm&Start=1&Count=400&Expand=1>

Links IBM Intranet ISSI HH IBM Co-marketing Telefonny zoznam Zoznam Austrian Airlines Group ~Private Banky ~I

Close **Submit Activity** NEED INSTRUCTIONS? Go to SWG Co-Mkt Program

[Refresh](#) [Previous](#) [Next](#)

Activities for Miroslav's test plan *test*****

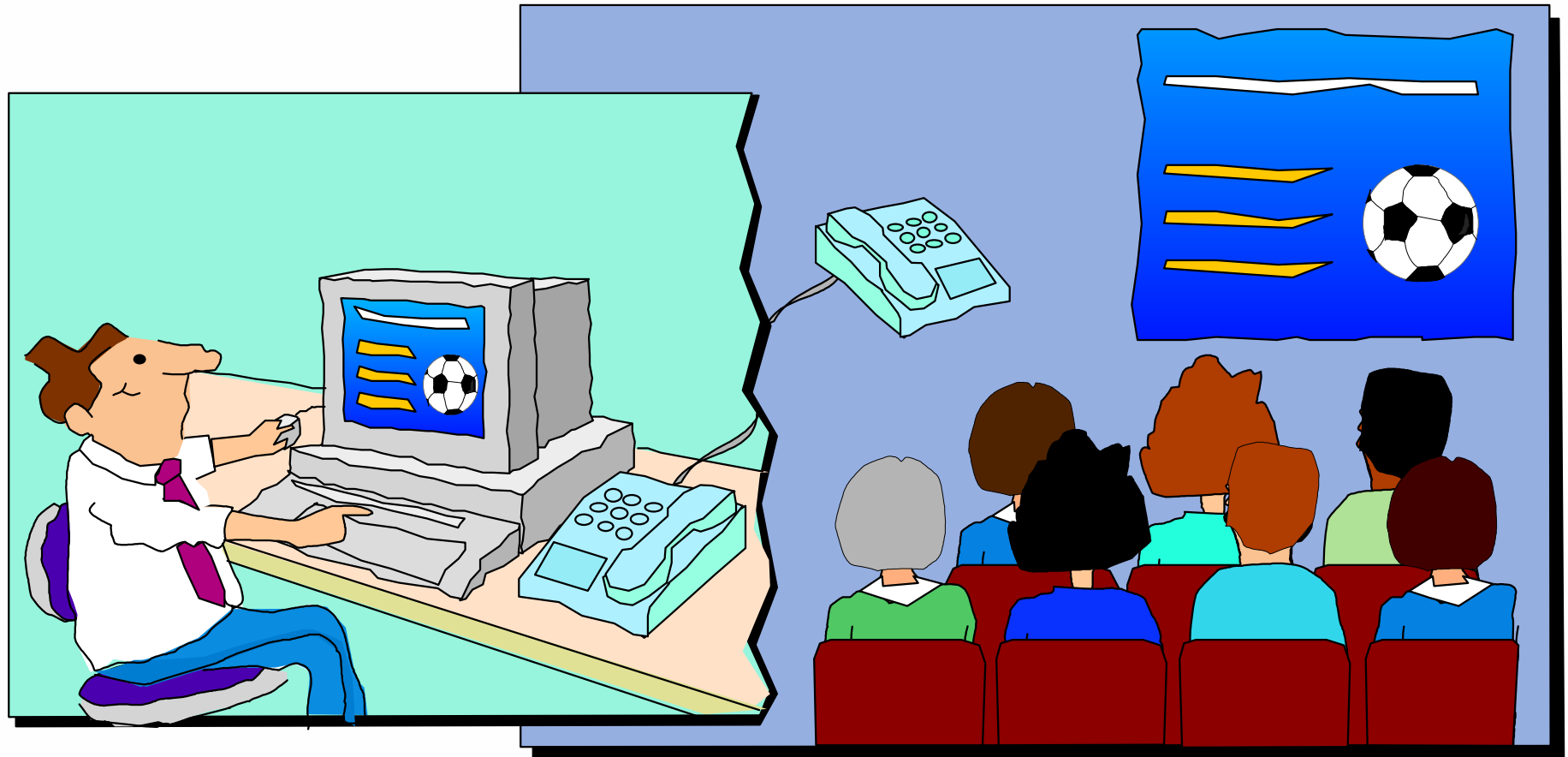
Cost	Funded	Funding Program	Activity	Validated?	Created	Submitted	Processed Status
50,000	15,000	Top Contrib.					
10,000	2,000		<input type="checkbox"/> SMB Tradeshow	N	01/08/2003	03/21/2003	
10,000	5,000		<input type="checkbox"/> aaaa	Y	12/18/2003		
15,000	3,000		<input checked="" type="checkbox"/> Seminar on Miroslav's Pharmaceutical Solut.	N			
15,000	5,000		<input checked="" type="checkbox"/> test	N			
50,000	15,000						

III. Apply - You can see your application on WWW



The screenshot shows a web application interface with a blue sidebar on the left and a main content area on the right. The sidebar contains the IBM logo and a menu titled "My PartnerPlans" with items: Home Page, Setup, and My Partner Plans. The main content area has a navigation bar with "Refresh", "Previous", and "Next" buttons, and a list of links including "Miroslav's test plan ***test*** - Profile", "Action Plan - 1 Test Initiative", "Action Plan - 2 The 2nd Initiative ----", "Executive Review Page", "Solution and Revenue - test product Offering", "Summary of all Solution and Revenue Pages", "Personnel and Contacts", "Executive Communications", "SWG Co-Marketing Application Test Initiative (Accepted)", "SWG Co-Marketing Application The 2nd Initiative<Line A> (Submitted)", and "SWG Co-Marketing Application The 2nd Initiative<Line C>". A large red thought bubble is overlaid on the right side of the screenshot, containing the text: "The status of your Application will be updated." The bubble has three smaller circles leading to it from the bottom right.

IV. Execute the Activity



V. Report generated Opportunities

Business Partner Zone >

Co-marketing

Welcome, Harte Hanks from
IBM PWSW - EMEA - UK, Hampshire

Updated 14 March 2003

IBM PartnerWorld for Software is making available a number of Co-marketing offerings which IBM PartnerWorld for Software Business Partners can leverage to generate demand for IBM Software solutions.

Co-Marketing Offerings

Direct Marketing	Direct Mail, Advertising, e-mail Blasts and more to generate demand.
Seminars	Offers you need to run traditional seminars, e-seminars, and teleseminars.
Customer Leads	Customer leads, capture useful information, and care for customers.
Custom Campaigns	Run your own custom campaign if you don't see your activities captured in the offerings above. <i>Requires IBM Management approval</i>

You are expected to report generated customer opportunities


Read Terms & Conditions

Submit and agree to the [General Terms and Conditions](#).

- ◆ Submit a co-marketing application via [Partner Plan](#) (see the news item on this web site (by selecting a co-marketing tactic/offering from the table on the left hand navigation bar).

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

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



V. Report generated Opportunities

Events
Membership centre

Related Links:

- Business Partner Directory
- PartnerWorld
- PartnerWorld for Developers

Prospect Information

Customer Legal Name*

Street Address*

City*

State/Province*

Zip*

Country*

Industry Classification*

Opportunity Information

Briefly Describe this Opportunity

Decision Date: *

Planned Customer Spending?*

Currency*

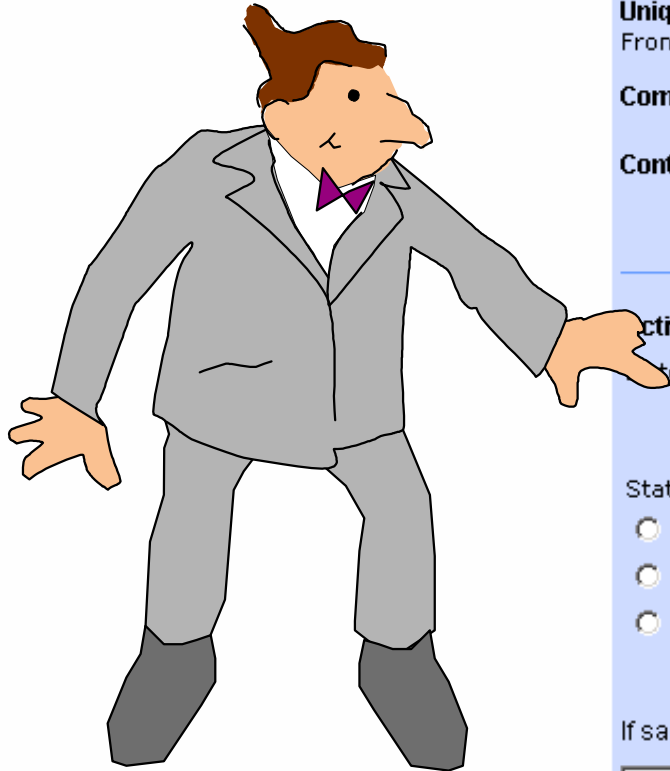
Sales Cycle*

Win Probability*



The Lead Tracking form is fairly simple

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

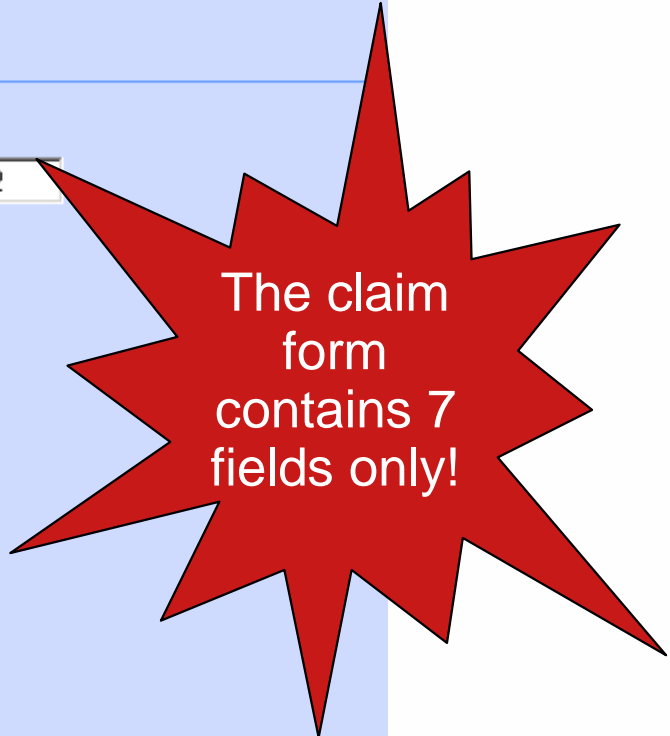
No Sale

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

- Connecting Business Partners
- IBM Start Now Family of Solutions
- 2004 Awards programs
- Marketing agencies
- Events and conferences
- News and newsletters
- Software membership
- Contact PartnerWorld for Software

How to participate:

IBM eligible Authorized Business Partners must:

- Understand and agree to the [General Terms and Conditions](#)
- Submit a co-marketing application via [Partner Plan](#). Please include Partner location id on all applications and claims. Failure to do so will result in your claim being denied. If you need help accessing your PartnerPlan, contact IBM via PartnerLine at 1256-344500 or via e-mail at partnerline@us.ibm.com.

A [Claim Form](#) must be submitted within 60 days of completing the marketing activity. The following documentation will be required prior to the payment of claims.

- Information on [Customer Opportunities](#) generated by this marketing activity.
- All supplier invoices with Proof of Performance "[Coversheet](#)". If some activities have been done in house, a letter from the Managing Director, Operations Director or Financial Director stating the scope of the work and the costs is required.
- A [Letter](#) from the Managing Director, Operations Director or Financial Director confirming that supplier invoices are related to the tactic being reimbursed. The letter must reference Partner Plan (e.g. "IBM Partner Plan Name", Action Plan name, Activity name).

Check and Meet all the Deadlines stated in Terms & Conditions!

Submit all supplier invoices

Submit a coversheet

Submit a confirmation letter

Not a member? Use your IBM identification number and password to sign on to [Global PartnerInfo](#) to access PartnerWorld. IBM includes DB2, Lotus, Rational, Tivoli and WebSphere. For more information, contact [TCI Co-marketing](#) (+353 1 8704735). If you have any questions regarding a marketing claim you can call the following regional representatives.

Name	Region	Telephone Number
David Simpson	South, West, CEMA	++ 353 1 704 7405
Ann-marie Flanagan	Central	++ 353 1 704 7474
	Nordics	++ 353 1 704 7479
	North	++ 353 1 704 7478

Keep detailed Proof of Performance at your location

Keep detailed "[Proof of Performance](#)" documentation at their location for IBM audit such documentation. When submitting a step-by-step description of the co-marketing process, please download the [Marketing Programme Guide](#) (PDF file).

VII. Invoice IBM AND close the business

- Once Your Claim has been approved, you will be asked to send your invoice to
TCI Co-Marketing Disbursements
IBM PDL, Unit 12
Airways Industrial Estate
Cloghran
Dublin 17
Ireland
- Invoice details will be described in the claim approval note



Need for Local Help?

■ Nordics

- ▶ Denmark: Louise Henriques: HENRIQL@dk.ibm.com
- ▶ Sweden: Caroline Tengvall-Hundt: carolinet@se.ibm.com
- ▶ Finland & Baltic countries: Tiina Tenhunen: tiina.tenhunen@fi.ibm.com
- ▶ Norway: Ina Dalviken: inadal@no.ibm.com

■ North

- ▶ UK & Ireland: Jayne Hudson: jayne_hudson@uk.ibm.com
- ▶ Netherland: Jeanine Verhaar: jeanine_verhaar@nl.ibm.com
- ▶ South Africa: Hanli Wood: hanliw@za.ibm.com

■ West

- ▶ France: Alexandra Paschenda: alexandra_paschenda@fr.ibm.com , Nathalie Crenn: nathalie.crenn@fr.ibm.com
- ▶ Belgium: Isabelle Van Iseghem: IVBR@be.ibm.com

■ Central - Austria, Germany and Switzerland

- ▶ Karl-Heinz Hirner: hirner@de.ibm.com

■ South

- ▶ Italy, Greece, Turkey and Israel: Paola Monnati: Paola_Monnati@it.ibm.com
- ▶ Spain and Portugal: Fernando Suarez Leon: fernandosuares@es.ibm.com

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

- ▶ Eniko Rajhona: Eniko_Rajhona@hu.ibm.com

Thank you!



IBM Software Group

