

SVI Fee Overview

- 'Identify' incentive fee - for identifying and qualifying new opportunities for IBM middleware.
- 'Sell' incentive fee - for influencing/convincing the customer to make the IBM middleware purchase.
- Premium incentive fee - for sales to accounts designated by IBM as General Business (GB).
- Reward for 'Identify' is dependent on eligibility for 'Sell'; rewards can be for Identify and Sell or Sell-Only but not Identify-Only.
- Fees are earned independently of how the transaction is fulfilled.
- Value Advantage Plus rebate is mutually exclusive with the SVI 'Sell' incentive fee.
- Fee payments made directly to the Business Partner after they have submitted their SVI payment request and have met all program rules. Fee payment schedules are country specific.

SVI Enrollment Rules

- Must be a PartnerWorld® member at any level.
- Must accept SVI Ts & Cs.
- Must enroll in SVI in each country in which you wish to participate (exception: EEU).
- Fulfilling Business Partners (Resellers) must choose a Preferred Distributor.
- Must have 3 or more current IBM Software Certifications (in one of the 5 power brands) of which 2 must be technical certifications or pass a Technical Sales Mastery test (Certifications by Business Partner by country) OR Have an effective Software ValueNet Agreement for one or more Software ValueNet portfolios participating in SVI.
- Must maintain certification qualifications to pass re-evaluation every January.

Submit Opportunity for SVI Eligibility Decision

- Business Partner firm must have a technical certification or pass a Technical Sales Mastery test in the brand(s) being registered OR be approved for the Software ValueNet Portfolio of that product in order to submit the opportunity

for SVI – automatically checked by GPP with each revenue record created (Brand Certification Achieved = Y).

- Opportunity must be submitted for Eligibility at least 15 days prior to IBM sales order date.
- Opportunity must be for the sale of eligible products – new licenses or trade up licenses fulfilled via Passport Advantage (see SVI eligible Part Number list). Sales order line item must match an eligible brand family registered in opportunity to be eligible for fees. Maintenance renewal/maintenance reinstatement or media/doc P/Ns are not eligible.
- License compliance, license management or fulfillment-only transactions not eligible for SVI fees.
- Opportunity must be for sale to eligible end user. Sales within Business Partner enterprise, sales to government, and sales to IBM are not eligible.
- Business Partner must be the first to register the opportunity for SVI eligibility consideration.

Before submitting an opportunity for SVI eligibility, ensure that the following information is included. This will facilitate the eligibility decision process. Opportunity must contain the following:

- **Account** – End-user customer name and address; either Search for Account or create new account.
- **Description**/Project Name
- **Sales Stage** – must be '04 Validated/Qualifying' (or higher)
- Customer/Account **Passport Advantage Agreement/Site** number (not required, but helpful for IBM to match sales order when payment claim submitted).
- **Decision Date**
- **Probability %**
- **Currency**
- **Detailed Revenue Data** – Must create revenue record for each brand family being sold. Must have at least one revenue record that is eligible for SVI consideration to be able to submit opportunity for SVI. Revenue records must contain:

- **Type** (Software)
- **Brand Family** (see SVI Eligible P/N list) – Brand Family SVI Participation = Y.
- **Win Probability %**
- **Quantity**
- **Price** (End-user Entitled price or End-user Special Bid price).
- **Revenue**
- **Opportunity Currency**
- **Bill Date**

'Recalculate Revenue' to update opportunity header Revenue field.

- Customer (decision maker's) **Contact** information - name, job title phone #, email.
- **Attach** completed **BANT** form.
- Add **Sales Team** members (not required for SVI).
- Set opportunity restriction flags (Is Restricted / Work in GPP) if applicable (not required for SVI).
- **'Submit'** for Eligibility.

Close the Opportunity

- Eligible Sales Documentation is created during the sales process.
- The deal must close in order to be eligible for SVI fees.
- Opportunities expire from SVI consideration 270 days after they are submitted for SVI eligibility. A single three-month extension for the opportunity may be requested.
- If you are fulfilling the opportunity, your preferred distributor must be used. When placing a Passport Advantage order, include the GPP opportunity number on the PO to your VAD. This will facilitate matching the IBM Sales Order to your opportunity when you request payment.
- Value Advantage Plus Business Partners approved for SVI eligibility on an opportunity that also fulfill it with the sale of their authorized Value Advantage Plus solution are not required to submit sales documentation for the Value Advantage Plus content in the opportunity.

Submit Opportunity for SVI Payment Request

Payment Rules

- IBM Sales Order line items matched to a brand family in the opportunity must meet country minimum revenue threshold.
- Opportunities must be submitted for SVI Eligibility at least 15 days prior to IBM sales order date.
- Payment Request must be submitted prior to Opportunity Expiration Date.
- Payment Request must be submitted no more than 30 days before IBM sales order date.
- Payment Request must be submitted no more than 60 days after IBM sales order date.
- If Business Partner is fulfilling the opportunity, their Preferred Distributor must be used.
- Eligible Sales Documentation must meet all criteria and must be attached to opportunity prior to submission for payment.
- Refer to SVI Operations Guide for specific Software ValueNet business rules.

In order to expedite payment processing, Business Partners should execute the following steps prior to submitting an opportunity for SVI Payment Request:

- **Attach Sales Documentation** - Eligible Sales Documentation must meet all criteria and must be attached to opportunity prior to submission for payment. Business Partners should review their attached sales materials against the following summary of the SVI eligible sales documentation requirements to ensure that all criteria are met.
 - 1) Proof of Influence: Does the material authored by the Business Partner provide clear evidence of influence?
 - 2) Evidence of two or more two way communications: Does the material provide clear evidence of two or more communications between the Business Partner and the end user?
 - 3) Configuration (Sizing)/quantity documentation: Does the material provide the configuration (sizing) or quantity of the recommended IBM products?

Please ask yourself the following questions regarding your sales documentation prior to submitting the opportunity for payment:

1. Does the material show that we (the Business Partner) authored the material?
2. Does the material document a clear recommendation for the use or purchase of eligible IBM software products?
3. Does the material show two or more two-way communications for this specific opportunity?
4. Does the material outline the sizing of the opportunity or the quantity of products?
5. Are all documents dated?

If you answered "no" to any of these questions, please review your attachments and add the needed documentation prior to submitting the opportunity for payment.

- **Update Opportunity Revenue Records** - Ensure that the revenue records in the opportunity reflect what was actually sold by updating them accordingly:
 - **Bill Date**
 - **Win Probability %**
 - **Quantity**
 - **Price** (End-user Entitled price or End-user Special Bid price).
- **'Recalculate Revenue'** to update opportunity header Revenue field.
- **Update Opportunity Header** information:
 - Change **Sales Stage** to '07-Won/Implementing'.
 - Business Partners who fulfilled the transaction are also required to enter/submit the following information; however, all Business Partners are encouraged to provide this information, if known, as it can expedite the SVI payment process:
 - Update the **Passport Advantage Agreement #** and/or **Site #**.
 - Place a check in the box next to **Fulfilling Business Partner** if you fulfilled the transaction.

- Enter the **IBM Invoice Date** of the Passport license sales order.
- Provide or update the IBM Sales Order number in the Opportunity **Comments for SVI** field, or include the information in a document added to the Attachments view.

- **'Submit'** Payment Request.
- If IBM requests additional information or sales documentation, your prompt response will expedite payment processing.

Additional Resources:

PartnerWorld® SVI Page

<http://www.ibm.com/partnerworld/softwarevalueincentive>

- SVI Overview , SVI Program Guide
- SVI Operations Guide (Agreement tab)
- Education Materials (Learn tab)
 - SVI Quick Reference Card
 - Self-study including simulations

List of currently accepted software certifications

[http://www-](http://www-03.ibm.com/certify/partner/mem/na/mem_skillsreq.shtml)

[03.ibm.com/certify/partner/mem/na/mem_skillsreq.shtml](http://www-03.ibm.com/certify/partner/mem/na/mem_skillsreq.shtml)

For SVI purposes, only those certifications listed under Information Management, Lotus, Rational, Tivoli, or WebSphere brands are eligible.

Technical Sales Mastery Tests

http://www-03.ibm.com/certify/mastery_tests/index.shtml

GPP On-Line Help

http://sc4.ihost.com/gpp/2_0/prod/olh/enu/bp/gpp_pp.htm

SVI Eligible Part Number List

http://sc4.ihost.com/gpp/permanent/svi_eligible_part_numbers.pdf

PartnerWorld® Contact Services For GPP/SVI tool questions & technical issues. Contact information varies by Geo/Country http://www-1.ibm.com/partnerworld/pwhome.nsf/weblook/cpw_index.html