IBM Value Advantage Plus for Government Sales

Operations Guide – External

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This guide and updated versions will be posted on the IBM PartnerWorld® website. See http://www.ibm.com/partnerworld/valueadvantageplus and select the Agreements tab. Click on operations guide for the most current version of this guide.

INTRODUCTION AND OVERVIEW

Purpose and Scope of Operations Guide

The purpose of this Operations Guide is to provide detailed guidance on the requirements and process steps necessary for Value Advantage Plus Business Partners to qualify to earn an "instant rebate" from their preferred distributor for reselling and fulfilling eligible IBM distributed software to a Government[1] End User.

The scope of this guide includes definitions, requirements, application and contract information, opportunity processing, operations, and supporting documentation (i.e., appendices).

[1] A Government End User shall mean a Public Sector End User defined as (i) the government of any country, state, province, city, county, town, territory or other municipality within the Geographic Scope, (ii) any corporation, educational institution or other entity that is owned or controlled by, or subject to the procurement regulations of, any entity in subsection (i) immediately above and (iii) any prime contractor who holds a contract with any entity in subsections (i) and (ii), immediately above. The following entities are not Public Sector End Users: privately-owned and controlled (1) utility companies (2) hospitals and (3) research institutes that operate using non-government funds.

Overview of IBM Value Advantage Plus for Government Sales

The objective of this initiative is to recognize Value Advantage Plus Business Partners that provide value beyond reselling and fulfilling sales orders for eligible IBM distributed software to Government End Users. The recognition is an "instant rebate" issued at the time the Government End User's sales order is processed through the Business Partner's preferred distributor.

In order to earn an "instant rebate" for the products that the Business Partner is authorized to resell, the Business Partner must be approved to participate in Value Advantage Plus for Government Sales, and must fulfill the sales order through their preferred distributor. The Business Partner must provide sales documentation that clearly demonstrates active engagement by the Business Partner in the sales cycle which resulted in the End User's decision to acquire the IBM distributed software. The Business Partner must be the first to register the sales opportunity with IBM through Global Partner Portal, and IBM must approve the opportunity as eligible.

Additionally, three previous sales to Government End Users are required at the time the Business Partner enrolls for Value Advantage Plus for Government Sales. Sales to government End Users may be IBM software or other software. Please see *Previous Instances of Government Sales* in this guide.

Relationship to other IBM Initiatives

Business Partners that participate in IBM Value Advantage Plus for Government Sales may also participate in IBM Value Advantage Plus, where delivering software with a qualified, approved "Value adding solution" to Commercial End Users or Government End Users is required. The Business Partner will be **eligible** to receive only one Value Advantage Plus "instant rebate" for a product sale.

Business Partners that participate in IBM Value Advantage Plus for Government Sales may also be Global Systems Integrators (having signed a Global Systems Integrator Alliance Agreement (local, country contract), but will not be eligible to receive a "rebate" under both initiatives for a product sale.

For information regarding processing Government sales opportunities delivered with a qualified, approved “Value adding solution” see the **Value Advantage Plus Guide** available at www.ibm.com/partnerworld/valueadvantageplus .

Definitions

Eligible Products

The **ONLY** eligible products are IBM distributed software products that are available through IBM Passport Advantage and are designated as “New License” part numbers, except as noted below. New License part numbers are part numbers in the IBM Distributed Software Price Book with the following Part Type:

New License + SW Subscription & Support

New Trade up License + Software Subscription & Support.

The IBM Distributed Software Price book is available at www.ibm.com/partnerworld.

- Sign in and select Selling.
- Under “Selling resources by sales cycle”, select Pricing
- Click on IBM Distributed Software Pricebook.

Software ValueNet products are not eligible EXCEPT for InfoSphere.

Note: When the IBM Software Compliance team has completed an audit and found the End User has deployed IBM software beyond the entitlements acquired directly from IBM or through a Business Partner and must acquire additional licenses to be considered compliant, these additional licenses are **NOT** eligible for any Value Advantage Plus “instant rebate”.

Eligible Opportunities

Eligible Opportunities are those opportunities where the Business Partner is reselling Eligible Products to a Government End User. The opportunity must be registered for Value Advantage Plus for Government Sales through the IBM opportunity registration system, Global Partner Portal, and must be explicitly approved by IBM as eligible for Value Advantage Plus for Government Sales. Only those revenue records of the opportunity for products for which the Business Partner is explicitly approved under Value Advantage Plus for Government Sales are eligible.

The first Business Partner to register and submit a validated opportunity (where the opportunity was not previously registered by another Business Partner or IBM) will be eligible to receive the “instant rebate”.

An opportunity will be considered eligible for an “instant rebate” for 365 calendar days from the Request Date of the Opportunity Registration record. An opportunity that is not closed in 365 calendar days will be set to a status of Expired in Global Partner Portal.

Before the Expiration Date, the opportunity must be closed as Won in Global Partner Portal and the sales order processed by IBM. If the opportunity is closed as Won on or after the Expiration Date because the opportunity has already expired, the sales order is ineligible for an “instant rebate”. If the IBM sales order date is on or after the Expiration Date then the sales order is ineligible for an “instant rebate”.

- IBM defines the sales order date as the date on which a sales order is created within the IBM ordering system.
- Each opportunity can only be associated with one sales order. If the opportunity is a long-term project and the licenses are ordered in phases, the Business Partner must create a separate opportunity or a child opportunity for each sales order. See NOTE under ***Eligible Transactions*** in this guide.

Eligible Transactions

An eligible transaction is a sales order of IBM distributed software to a Government End User for Eligible Products that are acquired through IBM Passport Advantage.

For Value Advantage Plus for Government Sales if the Business Partner's opportunity has been approved by IBM as eligible, then **the Business Partner must**:

- Process the sales order for the Government End User through the Business Partner's preferred distributor; and
- Include the Global Partner Portal Opportunity Number with the sales order submission; and
- Have registered the opportunity in Global Partner Portal at least 15 calendar days before the IBM sales order date; and
- Demonstrate active selling engagement with the Customer for the IBM products by providing supporting documentation that shows the Business Partner's activities that contributed to the Customer's buying decision. Sales documentation must meet all criteria and must be attached to the opportunity record in Global Partner Portal; and
- Include their Value Advantage Plus Government Solution ID for government sales in the sales order submission.

NOTE: If more than one Global Partner Portal Opportunity Number is associated with the sales order then the Business Partner must create a note using the Global Partner Portal Notes tab in the opportunity whose opportunity number was included in the Sales Order submission. In this Note the Business Partner must reference all other opportunity numbers that are associated with the sales order.

Validated Opportunities

When submitting a Government End User sales opportunity through Global Partner Portal, only validated opportunities will be approved as eligible. A validated opportunity is documented using the BANT template. See ***BANT*** in the **APPENDICES** section of this guide. A validated opportunity must include the following information:

- Account information - Company name, address, phone, e-mail
- Decision Maker's Contact information - Name, title, phone, e-mail
- Software Opportunity Description - Project name
- Budget, Authority, Need, Timeframe (BANT) attachment.
    - Budget – Describe how/if/when budget has been or will be identified and approved for this project
    - Authority – Decision Makers and Influencers
    - Need – Description of the Customer's business problem and the key benefits of the proposed solution using IBM distributed software that will be part of the solution.
    - Timeframe – critical dates in process, design date, decision date, purchase date, implementation dates

Please submit a completed BANT template as an attachment in the Global Partner Portal opportunity record to describe each validated opportunity.

The BANT document should be stored in the opportunity using the “Attachments” tab and not the “Attachments” section under the Opportunity Registration tab. See ***Attaching Documentation in an Opportunity Record*** in this guide.

Note: Seminar attendees, direct mail responses, business show attendees, etc. are not considered validated opportunities until they have been progressed to a validated sales stage and the above information can be provided.

The following information must be provided within each Opportunity Description or BANT attachment. This information is critical as it will be reviewed to determine if the Business Partner has submitted a validated opportunity. The opportunity description is also an important component in IBM’s search for duplicate opportunities. It should include:

- A Description of the Customer’s business problem:
  - "Problem statements" typically will contain phrases related to Concerns, Risks, and Performance and these typically focus on areas related to Costs, Profitability, Sales, Efficiency, and Employee/Customer Satisfaction etc.
  - "Impact of the problem" will typically be expressed as describing what is being impacted/affected, or what are the consequences/implications etc.
  - "Benefit statements" typically will contain phrases similar to: reduce costs, improve efficiency, increase security, increase reliability, comply with regulations, etc.
- A description of the suggested solution to the business problem that the Business Partner is recommending and where IBM distributed software will be used.
- A statement whether the End User Customer has budgeted funds approved for the project.
- The project’s name.
- The ‘Authority’ topic of BANT is addressed with creating contacts in the Global Partner Portal application and linking them to the opportunity.
- The ‘Timeframe’ is the timeline of key decision milestones and decision criteria that will be used. This is also addressed, in part, via the ‘Closing Date’ field in the opportunity header section of the opportunity record.

Note: Opportunity records lacking adequate descriptions of an End User Customer's BANT or descriptions of the Customer’s business problem and the recommended solution using IBM distributed software will be rejected as incomplete. The opportunity status will be set to ‘Returned’, and the Business Partner must resubmit the opportunity when they have added the necessary information.

Eligible Sales Documentation

When submitting a Government End User sales opportunity through Global Partner Portal, the Business Partner must provide sales documentation that supports the role of the Business Partner in the Customer’s decision to acquire IBM distributed software. Eligible sales documentation must clearly show involvement by the Business Partner in the sales cycle and the actions that convinced the Customer to acquire the Eligible Products. **The sales documentation must be dated before the sales order date. The sales documentation must be attached within 15 days after the sales order date.**

What constitutes eligible sales documentation?

Sales documentation presented to IBM by the Business Partner must include the following:

1. Shows that the Business Partner authored the documentation and clearly demonstrates the Business Partner recommended the Eligible Products that resulted in the End User Customer's decision to acquire the software. (To demonstrate the Business Partner authored the documentation, it must have a Business Partner Company logo, Business Partner Company name, or other identification on the documentation.)
2. Evidence of two or more two way communications between the Customer and Business Partner.
3. Reference to the Eligible Products and quantity or configuration of the products the Business Partner has recommended to the End User Customer.

Guidelines for documentation

- Individual pieces of documentation should contribute to requirements stated above, but there is no stipulation that each and/or every piece of documentation would meet all of these requirements.
- Eligible sales documentation must, in aggregate, provide proof points which clearly show Business Partner's involvement in the sales cycle and their actions that convinced the End User Customer to acquire the Eligible Products.
- All documents must be dated, either on the face of the document or in the body or context of the document, <u>before</u> the IBM sales order date for Eligible Products. The sales order date is when a sales order is created within the IBM ordering system as the result of IBM's receipt of a sales order from the Business Partner's preferred distributor for the sales transaction to a Government End User.
- The documents submitted must clearly prove that the Business Partner recommended acquisition of Eligible Products to the End User. Documentation that only names or references Eligible Products already in place or already chosen by the End User for this business solution does not qualify.
- Price quotes sent by the Business Partner to the End User must be dated on or after the document(s) used as evidence for criteria #1. Price quotes can ONLY be used to satisfy criteria #3. A stand-alone, executed End User price quote cannot be used for criteria #2 as evidence of two-way communication.

Note: Internal memos and notes, testimonials from IBM field sales or Business Partner employees, or other documentation that is not between the Business Partner and the End User is not accepted for verification.

Special Situations

For Business Partners that work jointly with IBM on an opportunity (fulfilled by the Business Partner), where the Business Partner authored the documentation jointly with IBM, then the documentation submitted must be accompanied by a letter from the IBM contact attesting to the joint development of the documentation. The requirement for the opportunity to be identified by the Business Partner is not impacted in any way by a joint effort with IBM.

Confidentiality

Business Partners must submit sales documentation in order to receive an “instant rebate”. In order to protect Customer confidentiality, however, any reference to the price that the Business Partner is proposing or charging the End User Customer may be removed or hidden in the documents the Business Partner submits to IBM. In addition, the Business Partner can remove or hide other information they consider sensitive or confidential, such as hourly rates, as long as the document meets the requirements outlined above.

Examples of Documentation

Examples of documents which could be used to meet the sales documentation criteria include (but are not limited to):

- Proposal for solutions
- Statement of work
- Proof of concept
- Prototype
- Architectural study
- Copy of an implementation plan
- Sizing or configuration document that is presented to the decision maker
- Evidence of Business Partners providing their own services or software as part of the solution
- Documentation of sales calls
- E-mails between the End User and the Business Partner
- Price quote (to validate the quantity requirement in criteria #3 only).

For further information, see ***Sales Documentation Descriptions*** in the **APPENDICES** section of this guide.

Note: For proof of concepts or prototypes that include a customized or developed software product, include screen captures of the application in a document or presentation file, such as PowerPoint or Word, with accompanying explanatory notes. Do not attach program executable (.exe) files.

Examples of documentation which cannot be used to meet the sales documentation criteria include:

- Documentation (Sales orders, Contracts, etc.) that show evidence of previous sales
- Documentation of relationship with the End User Customer
- Calls or e-mails from the End User to the Business Partner asking for a quote
- Social e-mails

- Day Timer calendar entries unless they are supported by actual meeting documents
- IBM Quick Proposal templates from IBM PartnerWorld® or IBM product presentations which have not been tailored to the End User Customer
- Product literature, such as PDF of an IBM product brochure
- Passport Advantage contract license management or compliance activities
- Sales order for IBM distributed software
- Any document in draft form
- Proof of Entitlements.

Participation Criteria

Reseller of IBM Distributed Software

Business Partners participating in Value Advantage Plus for Government Sales must be authorized to resell the product group where authorization is required.

IBM PartnerWorld® Membership

Business Partners participating in Value Advantage Plus for Government Sales must be an <u>active</u> member of IBM PartnerWorld® in every country where participating.

Information about IBM PartnerWorld® is available at www.ibm.com/partnerworld.

Acceptance of Terms and Conditions

Business Partners participating in Value Advantage Plus for Government Sales must sign the IBM PartnerWorld® Agreement and also the Value Advantage Plus Attachment to the IBM PartnerWorld® Agreement. See the **APPLICATION AND CONTRACT** section of this guide.

Previous Instances of Government Sales

Business Partners participating in Value Advantage Plus for Government Sales must demonstrate Government business orientation and/or experience in reselling software to Government End Users in order to participate in Value Advantage Plus for Government Sales and qualify to earn an "instant rebate" through their preferred distributor.

The evidence of business orientation and/or experience in reselling software to Government End Users must be provided during the application process for Value Advantage Plus for Government Sales. The evidence must consist of three separate invoices proving a completed sale to a Government End User. Instances to the same Government End User qualify, but each instance must be represented as a separate invoice. The invoices may include competitive software. Only instances with an invoice date within the previous two years qualify.

Preferred Distributor

Business Partners participating in Value Advantage Plus for Government Sales must select a preferred distributor through which all Government sales transactions are processed in order to qualify to earn an "instant rebate". The selection of a preferred distributor is required during the application process for Value Advantage Plus for Government Sales.

The preferred distributor must be the same for all IBM distributed software products and for all of the following IBM initiatives (if applicable) to the Business Partner participating in Value Advantage Plus for Government Sales:

- BPA for SW Remarketers
- Software Value Incentive
- Software ValueNet
- Value Advantage Plus.

APPLICATION AND CONTRACT

How to Enroll

Business Partners that are applying to resell eligible IBM distributed software to Government End Users under Value Advantage Plus for Government Sales must complete the following enrollment actions.

For information on how to enroll, please go to the Value Advantage Plus for Government Sales Registration Guide at www.ibm.com/partnerworld/valueadvantageplus.

The Business Partner, in each country where they wish to participate, must:

1. Become approved for Value Advantage Plus for Government Sales and sign the Value Advantage Plus Attachment to the IBM PartnerWorld® Agreement (Business selects I agree); and
2. Prove business orientation and experience with Government End Users. See ***Previous Instances of Government Sales*** in this guide. NOTE: If IBM can verify the revenue records which prove a completed IBM distributed software sale to a Government End User, then the Business Partner will not be required to submit a copy of the invoice. IBM will advise the Business Partner on how to submit the invoices, if required.

The Authorized Profile Administrator (APA) must apply for **Value Advantage Plus for Government Sales** in their PartnerWorld® profile by completing the following steps:

- Enter www.ibm.com/partnerworld/partnertools from their browser
- Enter IBM user id and password
- Click on 'Benefits and Relationships'
- Click on Value Advantage Plus
- Click on Company name under 'Apply for Value Advantage Plus'
- Click on 'I Agree' to accept the Value Advantage Plus Attachment
- Answer questions on revenue
- Select your designated software (preferred) distributor
- Click on 'Add a Solution'

The next several answers are unique to Value Advantage Plus for Government Sales and must be entered exactly as listed.

- Value Add = Services
- Primary Solution Area = Government
- Solution Name = Government Sales
- Value Add = Sales to Government
- Name of Contact = contact email address
- IBM Software Brand = select only those Product Groups where the ‘right to resell’ has already been established
- Cost of IBM Middleware = Less than 10%

Acceptance of the terms and conditions will be electronic, except where signed hard copies of contracts are required. See ***Countries in Which IBM Requires Hand-signed Agreements*** in the **APPENDICES** section of this guide.

The section on ‘**Customer Reference’** should reflect the required number of Business Partner’s **three instances of previous sales to Government End Users**. Following are the steps:

Click on ‘Add a Customer’ and add the following:

- Company Name = name of End User Company
- Country of Company Name = country where End User Company resides
- Contact Name = main contact of End User Company
- Email address = email address of contact name

Click ‘Next’ and add 2 more instances of sales to Government End Users. Once the third entry has been entered, click ‘Next’ until you return to the main application page. Click on ‘Save’. You will receive a Change Request number. Please retain this number for future inquiries about this transaction.

If you do not receive the above message, then your updates were not processed or saved. Read the messages on the screen to determine your next course of action.

IBM Approval to Participate in Value Advantage Plus for Government Sales

If the Business Partner is approved, the Business Partner will receive an automatic email notice from PartnerWorld®. Included in the notice will be a Value Advantage Plus Government Solution ID to use with Government opportunities registered in Global Partner Portal. An email will also be sent to the preferred distributor with appropriate information for placing an order.

Only one Value Advantage Plus Government Solution ID will be issued per Business Partner firm in each country that the Business Partner firm has received approval for participation in the Value Advantage Plus for Government Sales.

IBM will send an email to the appropriate Global Partner Portal Inbox ID to request enablement of the Business Partner for Global Partner Portal access, <u>and</u> also for Value Advantage Plus for Government Sales access.

In addition, the Business Partner will receive an email confirmation of their enablement for Global Partner Portal and a second email when enabled for Value Advantage Plus for Government Sales in Global Partner Portal

Note: If the Business Partner already has a profile established in Global Partner Portal, then the Business Partner will only need to be enabled for Value Advantage Plus for Government Sales to register Government opportunities in Global Partner Portal. These opportunities should be registered on the Opportunity Registration tab.

If the Business Partner is not approved for Value Advantage Plus for Government Sales (example: instance(s) of previous sales to Government End Users has/have not been included in the Value Advantage Plus application), then the Business Partner will receive a denial email.

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Value Advantage Plus Government Solution ID for Government End User Opportunities

During the application process, an approved Business Partner will be issued a solution identification number which is a Value Advantage Plus Government Solution ID that represents the eligible IBM distributed software products for which the Business Partner is authorized to receive an "instant rebate". Only one Value Advantage Plus Government Solution ID will be issued per Business Partner firm in each country that the Business Partner firm has received approval for participation in Value Advantage Plus for Government Sales.

In order to earn an "instant rebate" for a completed sales transaction to a Government End User under Value Advantage Plus for Government Sales, the Value Advantage Plus Government Solution ID **must be included** in:

- The Serial Number field of the opportunity registration record for all Value Advantage Plus for Government Sales opportunities, AND
- With the Government End User's sales order that is issued by the Business Partner to the Business Partner's preferred distributor.

Requirements to Resell

IBM distributed software products are categorized into Product Groups. A Product Group is designated as:

Open Distribution Product Group

Reseller Authorization Product Group.

Certain requirements must be met by the Business Partner participating in Value Advantage Plus for Government Sales in order to qualify for an "instant rebate" through their preferred distributor for the eligible products within a completed sales transaction.

Open Distribution Product Group

If a Business Partner participating in Value Advantage Plus for Government Sales is reselling IBM distributed software products within Open Distribution to a Government End User, then in order to qualify for an "instant rebate" through their preferred distributor the following must be met:

- The employees of the Business Partner country Enterprise, combined, must have at least three current software IBM Professional Certifications, of which two must be technical certifications or Technical Sales Masteries **at the IBM Software Group Brand level** and 1 Sales certification at **the IBM Software Group Brand level** on the day IBM evaluates the Business Partner's Value Advantage Plus enrollment.[2] The five major IBM Software Group Brands are IBM Information Management, Lotus, Rational, WebSphere, and Tivoli.

- The "instant rebate" for a completed sales transaction will be issued only on the products for which the Business Partner has SWG Brand level certifications.

[2] IBM will evaluate the Business Partner's certification(s) for Open Distribution products when the Business Partner enrolls for Value Advantage Plus for Government Sales.

Evaluation of the Business Partner's certifications for Open Distribution products will also occur during the re-validation of the Business Partner's profile. See ***Re-Validation of Business Partner's Profile*** in this guide.

Reseller Authorization Product Group

Some products require IBM authorization to resell. When a product requires authorization to resell, Business Partners participating in Value Advantage Plus for Government Sales must be authorized to the resell the IBM distributed software products in order to qualify for an "instant rebate" through their preferred distributor for the eligible products within a completed sales transaction.

Authorization to resell IBM software products within a Reseller Authorization Product Group is achieved by being approved under the IBM BPA Software Remarketers of Authorization Programs Agreement. There are multiple Reseller Authorization product groups across the five major IBM Software Brands. **There are specific requirements that Business Partners must meet to resell products within a Reseller Authorization Product Group**.

For reselling IBM distributed software products within a Reseller Authorization Product Group, see the information on IBM **Software Value Plus** under the IBM PartnerWorld® website at www.ibm.com/partnerworld/**.**

If a Business Partner participating in Value Advantage Plus for Government Sales is reselling IBM distributed software products within a Reseller Authorization Product Group to a Government End User, then in order to qualify for an "instant rebate" through their preferred distributor the following must be met:

- The Business Partner must be approved for that Reseller Authorization Product Group in the Software Reseller Authorization application
- The Business Partner must request and be approved for that Reseller Authorization Product Group in the Value Advantage Plus for Government Sales solution.[3]

[3] IBM will evaluate the Business Partner's authorization to resell products within the Reseller Authorization Product Group when the Business Partner enrolls for Value Advantage Plus for Government Sales.

Evaluation of the Business Partner's authorization to resell products within a Reseller Authorization group will also occur during the re-validation of the Business Partner's profile. See ***Re-Validation of Business Partner's Profile*** in this guide.

If a Business Partner is approved for an additional Reseller Authorization Product Group, the Authorized Profile Administrator (APA) of the headquarters location must update their Value Advantage Plus for Government Sales solution by doing the following:

- Logon to PartnerWorld® profile at www.ibm.com/partnerworld/partnertools
- Enter IBM userid and password
- Click on Benefits and Relationships
- Click on Value Advantage Plus
- Click on country enterprise that is enrolled in Value Advantage Plus
- Click on the solution named 'Government Sales'
- Add the additional Product Group
- Click on SAVE and record the change request number

IBM will review the request and approve or deny as appropriate.

OPPORTUNITY PROCESSING

Opportunity Submission

Business Partners must create a sales opportunity in Global Partner Portal and submit it for eligibility consideration for Value Advantage Plus for Government Sales in order to qualify for an "instant rebate".

A Business Partner needs to be enabled in Global Partner Portal before they can create and register opportunities. See the ***Global Partner Portal Access*** section in this guide for information about Global Partner Portal enablement.

Business Partners should register their opportunities for Value Advantage Plus for Government Sales in Global Partner Portal before discussing them with others, because an opportunity will only be eligible for an "instant rebate" for Value Advantage Plus for Government Sales if the Business Partner registered the opportunity in Global Partner Portal before another Business Partner and before IBM created an opportunity for the sale.

Business Partners are required to register and progress the sales opportunity to closure through Global Partner Portal.

The following is an overview of creating an opportunity in Global Partner Portal.

- Search for an Account from the account list Global Partner Portal. If one is not found then create a new Account
- Fill in the other required information for the opportunity header record
- Add Revenue records to the opportunity
- Add Contacts to the opportunity
- Add Sales Team Members to the opportunity (optional)
- Attach a completed BANT template to the opportunity

The BANT template serves to ensure that the Business Partner is engaged in the opportunity and provides information that may be used in compliance reviews. See Appendix D in this guide.

When the base opportunity creation is completed and all the information required for submitting an opportunity for Value Advantage Plus for Government Sales eligibility consideration is available, then, create an Opportunity Registration record for the Opportunity. From the Opportunity Registration tab of the opportunity, perform the following steps:

- Add a Value Advantage Plus for Government Sales Opportunity Registration record for the opportunity.
- In the Serial Number Replaced field enter your Value Advantage Plus for Government Sales Solution ID

NOTE: If you are submitting the opportunity for Value Advantage Plus for Government Sales, <u>DO NOT</u> submit the opportunity for SVI eligibility.

When completed, set the Incentive Status field to “Submitted for Eligibility”. Note: **The opportunity must be submitted 15 calendar days before the sales order date**.

Once you have set the Incentive Status to “Submitted for Eligibility” do not change Incentive Status field unless you want to withdraw the opportunity from consideration for a Value Advantage Plus for Government Sales “instant rebate”. If you do want to withdraw the opportunity, then set the Incentive Status field to “Withdrawn”. Once an opportunity registration record is set to “Withdrawn” it will be locked unless IBM changes the status. However, if you decide at a later date you want to submit the opportunity Value Advantage Plus for Government Sales eligibility consideration you can add another Opportunity Registration record for the opportunity.

Also, once you have set the Incentive Status to “Submitted for Eligibility”, do not add any revenue records to the opportunity or change the Brand Family selection of an existing revenue record. These types of changes to the opportunity record may result in a failure of the opportunity to pass the compliance review. See the ***Compliance*** section of this guide.

When the Business Partner has set the Incentive Status of the opportunity registration record to Submitted for Eligibility then IBM will evaluate the request.

If IBM determines the opportunity registration record is eligible, IBM will set the Incentive Status of opportunity registration record to “Approved”. IBM will send the Business Partner an email.

If IBM determines the opportunity registration record is ineligible, IBM will set the Incentive Status of opportunity registration record to Withdrawn. IBM will send the Business Partner an email. An opportunity will **not be eligible** for any of the following reasons:

1. The time and date the opportunity was submitted for eligibility consideration indicates the Business Partner was not the first to identify and register the opportunity, and/or
2. The End User is not a Government End User, and/or

3. The BANT information submitted is incomplete, and/or
4. The Business Partner has not been approved to participate in the Value Advantage Plus for Government Sales, and/or
5. One or more of the products that the Business Partner has included in their opportunity record(s) do not match the authorization(s) represented in the Business Partner's IBM-issued Value Advantage Plus Government Solution ID.
6. The Value Advantage Plus Government Solution ID does not appear in the opportunity record.

If IBM needs more information to make a determination then IBM will set the Incentive Status of opportunity registration record to "Returned". IBM will send the Business Partner an email with the list of information needed.

Once you have provided the necessary information then in the opportunity with the Opportunity Registration tab change the Incentive Status field to "Submitted for Eligibility'. This will indicate to IBM that you have provided to IBM the information that has been requested.

IBM determines if the opportunity is **eligible** based on the time and date the opportunity was submitted (first to register), whether or not the End User is a Government entity, the BANT information submitted, whether or not the Business Partner is approved to participate in Value Advantage Plus for Government Sales and, whether or not the products that the Business Partner has included in their opportunity record match the authorization(s) reflected in the Value Advantage Plus Government Solution ID issued by IBM to the Business Partner. See **Requirements to Resell** in this guide.

If the opportunity is eligible, IBM updates the opportunity record to **"Approved"** status in Global Partner Portal and sends an approval email to the Business Partner. After the opportunity has been marked with a status of "Approved", no additional revenue records should be added and the selected Brand Family for existing revenue records should not be changed by the Business Partner. These types of changes to the opportunity record may result in a failure of the opportunity to pass the compliance review. See the ***Compliance*** section of this guide.

If the opportunity is **not** eligible, IBM will complete either **a.** or **b.** as follows:

a. Deny the opportunity by setting the opportunity registration record to the "Withdrawn" status in Global Partner Portal and notify the Business Partner via email. Not Approved applies to items 1. 2. 4. and 5. (above).

If appropriate, the Business Partner may address the failure then resubmit the opportunity for eligibility consideration.

b. Place the opportunity record in a "Returned" status and notify the Business Partner that information is required. Items 3. and 6. (above) apply. When the Business Partner provides the necessary information, the Business Partner must re-submit the opportunity for eligibility. IBM will evaluate the Business Partner's re-submission and either approve or reject the request. If the specified amount of time has passed with no response by the Business Partner, then IBM will reject the request.

If the Business Partner's opportunity **is approved as eligible**, then IBM will set the opportunity registration record to "Approved" and the Business Partner completes the sales process.

Sales Completion

For opportunities approved to participate in Value Advantage Plus for Government Sales the Business Partner should continue to progress the opportunity in Global Partner Portal to a Sales Stage status of "Won" or "Lost".

If the opportunity is closed as Won, the Business Partner sets the sales stage to "7 Won" and processes the Government End User-issued sales order through their preferred distributor. **The sales order must include the Global Partner Portal opportunity number and the Business Partner's Value Advantage Plus Government Solution ID.**

In addition the Business Partner **must** attach sales documentation to the opportunity that proves the Business Partner's recommendation of IBM distributed software resulted in the End User's decision to acquire the IBM software. This documentation must be attached to the opportunity within 15 days after the Sales Order Date. The documents should be saved in the Attachments tab. See ***Attaching Documentation to an Opportunity Record*** in the **APPENDICES** section of this guide for how to create an attachment. However, in the Comments field enter a description of the document and that this document is for Value Advantage Plus for Government Sales. See ***Eligible Sales Documentation*** in this guide for a list of qualifying sales documentation.

Global Partner Portal will automatically update the opportunity registration to Incentive Status of "Completed" when the Sales Stage of the opportunity is changed to either a "7 Won" or "11 Lost".

An opportunity will be considered eligible for an "instant rebate" for 365 calendar days (one year) from the date the opportunity is submitted (requested) for eligibility. After the 365 days have elapsed, the opportunity will expire. The expiration date of opportunities submitted (requested) under Value Advantage Plus for Government Sales cannot be extended.

Thirty (30) days prior to the opportunity expiration date, a system-generated "Expiration Approaching" email from Global Partner Portal will be sent to the Business Partner.

At the time the opportunity record expires, a system-generated Opportunity Expiration email from Global Partner Portal will be sent to the Business Partner. The opportunity registration record in Global Partner Portal will be set to a status of "Expired" automatically.

Before the Expiration Date, the opportunity must be closed as Won in Global Partner Portal and the sales order processed by IBM. If the opportunity is closed as Won on or after the Expiration Date, or the IBM sales order date is after the Expiration Date, then the sales order is ineligible for the "instant rebate".

See **OPPORTUNITY PROCESSING** in this guide for further details.

For each completed sales transaction processed through IBM's ordering system where the Customer is a Government End User and an "instant rebate" has been issued, IBM will conduct a compliance review. See ***Compliance*** in this guide.

Placing a Sales Order through the Preferred Distributor

The following information must be provided to the Business Partner's preferred distributor for each completed Government sales transaction in order for an "instant rebate" to be processed with the sales order:

- End User information:
  - Name
  - Complete Address including City, State / Province, Zip / Postal code and Country

- The Value Advantage Plus Government Solution ID
- The opportunity number for the Government opportunity record that has been processed through Global Partner Portal
- Reseller Customer Number (which is known as the Business Partner's Value Advantage Plus Reseller Identification Number).

There will be no credits or rebilling of the IBM software unless IBM mishandled the order. It is the Business Partner's responsibility to provide correct information to their preferred distributor.

Operations

Global Partner Portal Access

For Business Partners **new to Global Partner Portal**, IBM creates a Business Partner Organization profile in Global Partner Portal for the Business Partner Company and creates the initial Business Partner Global Partner Portal Administrator for the Business Partner Company. In addition, IBM will activate the Business Partner for Value Advantage Plus for Government Sales in Global Partner Portal.

The Business Partner's PartnerWorld® APA will receive an e-mail notification from IBM with access instructions for the Global Partner Portal system. This action takes place after IBM completes the Business Partner's initial set-up in Global Partner Portal.

If the Business Partner is new to Global Partner Portal, the Business Partner's APA receives notification from IBM stating that the APA is the Business Partner Global Partner Portal Administrator for their Company and instructing the APA to set up Global Partner Portal user profiles for other employees in their Company.

After the enablement steps are completed for access to Global Partner Portal (via the link supplied to the APA in the Global Partner Portal acceptance e-mail), Business Partners may begin entering opportunities in Global Partner Portal.

Information regarding Global Partner Portal is available at www.ibm.com/partnerworld

- Sign in and select Selling.
- Under "Selling resources by sales cycle", select Leads and opportunities.
- Click on Opportunity management.
- Select Global Partner Portal overview.
- Select the appropriate link under Get Started now.

The Quick Reference Card will also be available on the Global Partner Portal web site under Training tab of Global Partner Portal.

Certifications

Please review **Requirements to Resell** in this guide.

Certifications are required by Business Partner Company by country.

- One employee in the Business Partner Company may hold all certifications required
- The certifications do not have to be unique (i.e., multiple employees in the Business Partner Company may have the same certification)
- An employee can only have their certifications counted in one Business Partner Company profile.

Changes to the Preferred Distributor

The preferred distributor (identified at the time of a Business Partner's Value Advantage Plus for Government Sales application is approved) must remain in place for **a minimum of one (1) year.**

After the initial one (1) year period, a Business Partner may choose to change the preferred distributor **once every twelve (12) months.**

The Value Advantage Plus Business Partner must advise IBM in writing, if they choose to change the preferred distributor. This must be done thirty (30) days in advance.

The Business Partner must send the written notification to the appropriate IBM Channel Sales Operations contact listed below.

North America:

Name	Jean Boursiquot
E-Mail	jean_boursiquot@us.ibm.com

The request to change the preferred distributor will take effect **thirty (30 days)** after written notification is received by IBM.

Compliance

For each completed sales transaction to a Government End User where an "instant rebate" has been issued to the Business Partner through their preferred distributor, IBM will conduct a compliance review to assess whether or not the requirements for earning the "instant rebate" were met by the Business Partner.

IBM will check the following items during the compliance review where an “instant rebate” was issued to the Business Partner by their preferred distributor:

- Was the Business Partner engaged in the sales cycle and does the sales documentation submitted prove the recommendation of IBM distributed software to the End User?
- Is the Global Partner Portal opportunity number included with the sales order submitted by the Business Partner to their preferred distributor?

NOTE: The preferred distributor must provide the opportunity number of the Government sales order processed through Global Partner Portal to IBM.

- Was the opportunity record submitted at least 15 days before the IBM sales order date?
- Was the sales order date before the expiration date of the opportunity?
- Were no additional revenue records added and/or there were no Brand Family changes by the Business Partner in existing revenue records? If it was changed, the opportunity as originally approved will be the basis for the compliance review.
- Do all of the part numbers on the sales order which received an “instant rebate” belong to a Brand Family which was registered and approved in the Global Partner Portal opportunity?
- Does the revenue as described in the opportunity in Global Partner Portal agree approximately with revenue in the sales order? Note: Up to a 25% variance will be considered acceptable.

Note: The Business Partner **must** attach sales documentation to the opportunity that proves the Business Partner’s recommendation of IBM distributed software resulted in the End User’s decision to acquire the IBM software. This documentation must be attached to the opportunity within 15 days after the Sales Order Date.

If all the questions (above) are answered “yes”, IBM will set the opportunity registration record in Global Partner Portal to a status of “Paid”.

If the sales documentation is missing or insufficient, or the opportunity number was not provided on the sales order, IBM will request additional information from the Business Partner through a **Compliance Notification Letter.**

The Business Partner will be given only one opportunity by IBM to provide the required information within a time period specified, which will be fifteen (15) days from the date the letter was issued by IBM for missing or insufficient sales documentation, or five (5) days for a missing opportunity number.

If the Business Partner does not provide the required information within the time specified, then IBM will change the status of the opportunity registration record in Global Partner Portal to a status of “Not Paid”. As a result, a **Conditional Letter** will be issued directing the Business Partner to repay the entire amount of the “instant rebate” to their preferred distributor.

If the opportunity record was not submitted at least 15 days prior to the IBM sales order date, or if the sales order date was on or after the opportunity expiration date, then the entire amount of the “instant rebate” will be considered unauthorized. As a result, a **Conditional Letter** will be issued directing the Business Partner to repay the entire amount of the “instant rebate” to their preferred distributor.

Compliance Letters

Sales Documentation Review Letter

The **Sales Documentation Review Letter** will request the information (sales documentation and/or opportunity number) that the Business Partner is required to submit.

- Within fifteen (15) business days after the **Sales Documentation Review Letter** is issued, IBM will check to verify that the sales documentation has been received.

Pass Letter

- The **Pass Letter** will be sent via e-mail to the Business Partner provided the Business Partner successfully submits all the required compliance information (sales documentation and/or opportunity number) within the timelines provided by IBM.

Conditional Letter

- The **Conditional Letter** will be sent by IBM via e-mail to the Business Partner following a failed review. This letter will request that the unearned rebate be paid back to IBM and will inform the Business Partner of the deadline in which to complete this rebate recovery process.

Suspension Letter

- A **Suspension Letter** will be sent by IBM via e-mail and courier to the Business Partner if the actions requested in the Sales **Documentation Review Letter** or **Conditional Letter** have not been taken.

- After the deadline date communicated in the **Sales Documentation Review Letter** or **Conditional Letter** have passed, the Business Partner organization will be considered “in violation” of the Value Advantage Plus Attachment. As a result, IBM will exercise the PartnerWorld® Agreement “right-to-terminate” clause and the Business Partner’s participation in Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable) will be suspended.

- If the Business Partner wishes to be reinstated into Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable) all the reinstatement requirements must be met.

Reinstatement Requirements

1) A minimum period of 12 months has passed
2) The unearned rebate has been paid back by the Business Partner to their preferred distributor and the recovery process has been completed by IBM
3) The Business Partner is in good standing with PartnerWorld®
4) The Business Partner can then re-apply for Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable) approval after requirements 1, 2 and 3 have been completed.

Value Advantage Plus for Government Sales Compliance Status Definitions

Pass Status

Definition - The Business Partner successfully submits all of the required compliance information (sales documentation and/or opportunity number) within the timelines provided by IBM.

Result – The Business Partner will remain in Value Advantage Plus for Government Sales and continue business as usual.

Conditional Status

Definition - The Business Partner does not submit required compliance information (sales documentation and/or opportunity number) within the timelines provided by IBM. The Business Partner did not receive proper IBM approval for the Government opportunity submitted through Global Partner Portal, or the Business Partner does not have authorization to use their Value Advantage Plus Solution ID for a Government sale.

Result – The Business Partner receives a **Conditional Letter** (with a Rebate Recovery Form) from IBM. The Business Partner will be given the option to:

a. Remain in Value Advantage Plus for Government Sales by agreeing to be re-invoiced the correct transaction amount. This amount will exclude the Value Advantage Plus for Government Sales "instant rebate". See **Rebate Recovery** in this guide.

or

b. Be suspended from Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable).

If the Business Partner wishes to be reinstated into Value Advantage Plus for Government Sales or Value Advantage Plus (if applicable), all the reinstatement requirements must be met. See the **Reinstatement Requirements** in the Compliance section of this guide.

NOTE:

1st and 2nd Infractions of the Guidelines: the Business Partner has the option to repay the Government "instant rebate".

3rd Infraction of the Guidelines: the Business Partner will be suspended from Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable).

Suspended Status

Definition

a) The Business Partner did not submit the required sales documentation and/or opportunity number within the timelines provided by IBM.

b) The Business Partner did not adhere to the terms and conditions of the Value Advantage Plus Attachment and this Operations Guide.

c) The Business Partner did not agree to a Conditional Status re-bill of the Value Advantage Plus for Government Sales “instant rebate”.

Result – The Business Partner receives a **Suspension Letter** from IBM. The Business Partner will be suspended from Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable).

- If the Business Partner wishes to be reinstated into Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable), all the reinstatement requirements must be met. See the **Reinstatement Requirements** in the Compliance section of this guide

Rebate Recovery

If a Value Advantage Plus for Government Sales Business Partner receives a Conditional Status and wishes to remain in Value Advantage Plus for Government Sales, the Business Partner must agree to be re-invoiced by their preferred distributor for the correct transaction amount. The correct transaction amount will exclude the Value Advantage Plus for Government Sales “instant rebate”.

Rebate Recovery Process/Correspondence

If the Business Partner agrees to the rebate recovery, the Business Partner will have a total of **twenty (20) business days** to have their order re-invoiced.

Step 1: The Business Partner will complete the Rebate Recovery Form (received with the **Conditional Status Letter**) and return it to IBM within **five (5) business days**.

By signing and returning this form, the Business Partner is confirming their intent to proceed with the rebate recovery.

Step 2: The Business Partner will return the original invoice to their preferred distributor and request a revised invoice.

The revised invoice will be less the Value Advantage Plus for Government Sales “instant rebate”.

Step 3: The preferred distributor will issue the revised invoice to the Business Partner.

Step 4: The Business Partner will issue payment to the preferred distributor.

Step 5: The Business Partner must forward the following “proof of re-invoice” documentation to IBM:

- ➢ A copy of the revised invoice (less the Value Advantage Plus for Government Sales "instant rebate").
- ➢ Proof of payment of this revised invoice.

NOTE:
If the Business Partner does not sign and return the Rebate Recovery Form and/or does not submit the required "proof of re-invoice" documentation, IBM will exercise the PartnerWorld® Agreement "right-to-terminate" clause. In this case, the Business Partner will be suspended from Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable).

If the Business Partner wishes to be reinstated into Value Advantage Plus for Government Sales and Value Advantage Plus (if applicable), all of the reinstatement requirements must be met. See the **Reinstatement Requirements** in the Compliance section of this guide.

Re-Validation of Business Partner's Profile

All Value Advantage Plus Business Partners will be required to revalidate their profiles once per year. IBM will evaluate the profile revalidation to ensure that revalidation requirements have been met.

- Business Partner Revenue
- APA contact
- Certification requirements for Open Product Groups

Termination

Value Advantage Plus for Government Sales

In accordance with the Value Advantage Plus Attachment, the Business Partner may choose to terminate the Value Advantage Plus Attachment, as long as the Business Partner provides IBM with **two (2) weeks** written notice.

Should the Business Partner decide to opt out of Value Advantage Plus for Government Sales and terminate their Attachment, the Business Partner must send a letter to IBM Channel Sales Operations.

North America:
Name Jean Boursiquot
E-Mail jean_boursiquot@us.ibm.com
Should IBM decide to terminate the Business Partner's participation in Value Advantage Plus for Government Sales, the primary business contact listed in the Business Partner's IBM PartnerWorld® Profile will be notified. Notification will also be sent to the Business Partner's preferred distributor.

NOTE:

Termination of the Business Partner's participation in IBM Value Advantage Plus for Government Sales will also result in the termination from the Business Partner's participation in Value Advantage Plus.

Termination does not preclude the Business Partner from other business-as-usual reselling activities. The Business Partner may still participate in any of the following:

- Resell any IBM product in open distribution to any customer set.
- Offer Passport Advantage volume licensing from a preferred distributor of your choice to any customer.
- Resell software subscription and support renewal business.

IBM Points of Contact

For Value Advantage Plus

North America:

Name	Jean Boursiquot
E-Mail	jean_boursiquot@us.ibm.com
VAP ID :	VAPREC@us.ibm.com

For Value Advantage Plus for Government Sales Opportunities Processed through Global Partner Portal:

North America:

Name	Lupe R Chavez
E-Mail	lrchavez@us.ibm.com

Shared ID for
Global Partner Portal Opportunities sviag@us.ibm.com

APPENDICES

A - Countries in Which IBM Requires Hand-signed Agreements

For the Value Advantage Plus Attachment (required for Value Advantage Plus for Government Sales), IBM requires hand-signatures in the following countries and any others IBM may specify to you.

Unless otherwise noted, only the Business Partner's signature is required. IBM's signature requirements are subject to change.

Albania Algeria Angola Argentina (1) Armenia Belarus Benin Bolivia (1) Bosnia and Herzegovina Botswana Brazil (1) Bulgaria Burkina Faso Burundi Cambodia Cameroon Cape Verde Chad Chile (1) Colombia (1) Congo Congo, The Democratic Republic of the Côte d'Ivoire Croatia Djibouti Ecuador (1) Equatorial Guinea Eritrea Ethiopia Fiji Gabon Gambia Georgia	Ghana Hungary Iceland India Indonesia Italy (3) Jordan Kazakhstan Kenya Kuwait (2) Kyrgyzstan Lao People's Democratic Republic Lebanon (2) Lesotho Liberia Macedonia, The former Yugoslav Republic of Malawi Mali Mauritania Mexico (1) Moldova, Republic of Mongolia Morocco Mozambique Namibia Niger Nigeria Oman (2) Papua New Guinea Paraguay (1)	Peru (1) Poland Qatar (2) Romania Russian Federation Rwanda São Tome and Principe Saudi Arabia (2) Senegal Serbia and Montenegro (2) Sierra Leone Solomon Islands Somalia Sri Lanka Swaziland Taiwan, Province of China Tajikistan Tanzania, United Republic of Timor-Leste Togo Tunisia Turkey Turkmenistan Uganda Ukraine United Arab Emirates (2) Uruguay (1) Uzbekistan Venezuela (1) Vietnam Yemen

- (1) No fax, no photocopy
- (2) Requires both Business Partner and IBM signatures

- (3) **I**talian Country Unique PWA must be signed only when Italian participant receives benefits from IBM Italia

The following are the mailing addresses for Business Partners that are required to submit hand signed agreements:

North America:
IBM Corporation
1 Rogers Street
Cambridge, MA 02142
USA
Attention: Jean Boursiquot

B - BANT

BANT for Value Advantage Plus for Government Sales Opportunities

Budget Authority Need Timeframe (BANT) Criteria Template V1

- Register only validated opportunities (Sales Stage 4 or higher). Customer **must be a Government End User as defined* below.**
- This BANT Criteria Template is considered **mandatory**. All fields are required.
- Enter the Project Name in the Description Field in Global Partner Portal.
- Opportunity records lacking descriptions of a Customer's Budget, Authority, Need and Timeframe (BANT) will be rejected as incomplete.
- Please save your attachment with a document name that includes the opportunity number and End User name (example: "BANT for XYZ Company 1JF-ABCDE.doc")

Value Advantage Plus for Government Sales Opportunity Number:	
Project Name: (Also enter the Project Name in the Description Field in Global Partner Portal.)	

Has IBM engaged you in this opportunity?	Yes No
If so, have you been added to their CRM Siebel record?	Yes No
Please provide IBM CRM Siebel opportunity number and/or name of IBM Direct Sales Representative:	

Eligible End Users include anyone in the country for which you have been approved for Value Advantage Plus for Government Sales, who is **not** part of the Enterprise of which you are a part, and who is acquiring products for their own use and not for resale. Enterprise is any legal entity and the subsidiaries it owns by more than 50 percent.	
Check here to certify that this Customer is not a part of the Enterprise of which you are a part.	
Is this Customer a Government or Government-Controlled Customer? (includes Federal, State and Local Government)	Yes No

List ALL names that Customer does business as (DBA) including all abbreviations, parent Company, divisions and subsidiaries.

PASSPORT: *Your preferred distributor can assist you in determining if the Customer has a current Passport Advantage Agreement and advise you of the full legal name and address that appears on the contract.*

Passport Agreement # (5 digits)	

Passport Site # (7 digits)	
Check here if Customer <u>does not</u> currently have a Passport Advantage Agreement	

What is the Customer Name and Address as it appears on the Passport Advantage Agreement (either current Agreement, or Agreement to be established) under which the licenses will be purchased?
In the Global Partner Portal tool, enter the Sold-To Name and Address in the Account record.

BUDGET:

Describe how / if / when budget has been, or will be, identified and approved for this project?

AUTHORITY:

Include at least one Customer C-level or Line-of-Business Executive on the Contacts tab in the Global Partner Portal record. First Name, Last Name, Title, Phone and E-mail are mandatory fields. Procurement and Purchasing contacts are not valid executive decision makers.

NEED:

What is the name of the suggested IBM distributed software? If available, please include the Passport Part Number(s) or full name of IBM distributed software being proposed for this solution.

Describe the Customer's business problem and the key benefits of the proposed solution using IBM distributed software:

TIMEFRAME:

What is the timeline of key decision milestones, and what decision criteria will be used?
Enter the forecasted "close date" on the Revenue Tab in the Global Partner Portal record. This is a mandatory field and must be at least 15 days from your opportunity submit date.

[1] A Government End User shall mean a Public Sector End User defined as (i) the government of any country, state, province, city, county, town, territory or other municipality within the Geographic Scope, (ii) any corporation, educational institution or other entity that is owned or controlled by, or subject to the procurement regulations of, any entity in subsection (i) immediately above and (iii) any prime contractor who holds a contract with any entity in subsections (i) and (ii), immediately

above. The following entities are not Public Sector End Users: privately-owned and controlled (1) utility companies (2) hospitals and (3) research institutes that operate using non-government funds.

C - Sales Documentation Descriptions

Note: The following are general, industry accepted definitions for some of the examples listed in the section, ***Eligible Sales Documentation***, These definitions are included for information purposes only; there is no stipulation that a Business Partner's sales documentation must contain all the elements listed in these descriptions, or that these descriptions are inclusive of all documentation types that could be acceptable as Eligible Sales Documentation.

Product Presentation

Business Partners commonly deliver Product Presentations to their Customers in the form of a slide presentation or written document. The discussion topics typically include the features, functions and benefits of the proposed solution, along with a statement of Customer's business issues, and how the proposed solution will address the Customer's requirements.

Proposal

In complex sales situations, the process of selling can take several weeks or even months to complete. In some cases, offer and counter offers will go back and forth. The proposal provides a formal way for both sides to communicate in writing during these negotiations. Prospective Customers sometimes issue a Request for Proposal, (RFP), or an Invitation for Bids (IFB) to guide the sellers and provide specific information about what products or services the Customer wants. These specifications become the Customer's requirements, and meeting requirements is a major objective in writing a successful proposal.

A properly accomplished proposal will put the Customer's requirements into a context that favors the seller's products and services, educating the prospective Customer about the full nature of their needs and the capabilities of the seller in satisfying those needs.

Basic components of a business proposal typically include:

- An orientation to the seller's capabilities or products
- A discussion of the Customer's key business issues
- A description of the solution offering and related benefits
- The cost of the offering and related products or services
- A schedule for delivery of the products or services
- An implementation plan for the installation of the product or services
- An education and training plan for end users of the products or services
- Testimonials from owners of products

Statement of work

Statement of Work (SOW) specifies the work to be done in developing or producing the goods or services to be delivered or performed by a contractor. The SOW is a legal document that binds the Customer and the project provider and is typically used to resolve situations where questions around project scope, delivery and financial aspects arise.

Areas that are typically addressed by an SOW as follows:
Scope of Work: This describes the characteristics of the product or service to be delivered, specifies the hardware and software involved, and the outcome of the project.
Location of Work: This describes where the work is to be performed. This also specifies the location of the hardware and software and where the people will meet to perform the work.
Period of Performance: This specifies the allowable time for projects such as start and finish time, number of hours that can be billed per week or month, where the work is to be performed and anything else that relates to scheduling.
Deliverables Schedule: This lists the specific deliverables describing what is due and when.

Applicable Standards: This describes any industry specific standards that need to be adhered to in fulfilling the contract.
Acceptance Criteria: This specifies how the buyer or receiver of goods will determine if the product or service is acceptable, what criteria will be use do state the work is acceptable.
Special Requirements: This specifies any special hardware or software, specialized workforce requirements, such as degrees or certifications for personnel, travel requirements, and anything else not covered in the contract specifics.

Proof of Concept
In the field of business development and sales, a vendor may allow a prospect Customer to trial the software product. This use of proof of concept helps establish visibility, technical issues, and overall direction, as well as providing feedback for budgeting and other forms of internal decision making processes.

In software development, a Proof of Concept (PoC) may also be referred to as a Proof of Technology or Pilot Project.

A Proof of Concept can refer to a partial solution that involves a relatively small number of users acting in business roles to establish whether the system satisfies some aspect of the requirements.

By contrast, the objective of a Proof of Technology (PoT) is to determine the solution to some technical problem, such as how two systems might be integrated or that a certain throughput can be achieve with a given configuration.

A Pilot Project refers to an initial roll out of a system into production, targeting a limited scope of the intended final solution. The scope my be limited by the number of users who can access the system, the business processes affected, the Business Partners involved or other restrictions as appropriate. The purpose of a pilot project is to test whether the system is working as it was designed while limited business exposure.

Prototyping is the process of quickly putting together a working model (a prototype) in order to test various aspects of a design, illustrate ideas or features and gather early user feedback. A prototype typically implements only a small subset of the features of the eventual program, and the implementation may be completely different from that of the eventual product. The purpose of a prototype is to allow users of the software to evaluate proposals for the design of the eventual product by actually trying them out, rather than having to interpret and evaluate the design based on descriptions.

Obviously, the POC or Prototype itself cannot be an attachment in Global Partner Portal, but there are multiple documents (such as e-mail strings, calendar invitations, SOW etc) related to the planning and execution of a PoC, PoT or Pilot that can provide evidence of it having been performed. For example, PoC documentation could include:
* Gathering of requirements for performing the PoC
* Agreement to perform a PoC
* Desired outcome/goals for performing the PoC
* Technical function (such as connectivity, response time) to be tested during the PoC
* Activities to be performed during the PoC and by whom
* Schedule of Personnel and Resources involved in performing the PoC
* Responsibilities and tasks assigned
* Screenshots of the installed solution
* Results of the PoC

Architectural study

Software engineering processes are composed of many activities, and developers (roughly) follow these steps in order. They state current environment, requirements, analyze them, design a solution approach, architect a software framework for that solution, develop code, test, deploy, and maintain. After each step is finished, the methodology proceeds to the next step, just as builders don't revise the foundation of a house after the framing has been erected. An Architecture Study typically defines the business objectives, and aligns the system requirements with the business goals.

Elements of an Architectural Study can include: Requirements Analysis, Specification, Design and Architecture, Coding, Testing, Documentation, and Maintenance.

The term also refers to documentation of a system's software architecture. Documenting software architecture facilitates communication between stakeholders, documents early decisions about high-level design, and allows reuse of design components and patterns between projects.

Architectural studies are typically authored by:

- Enterprise Architect - deals with strategic software decisions (aligning IT with the business), typically involving many software systems within an organization, across several projects teams, typically at more than one site.
- Application Architect - are concerned with a single software application.
- Solution Architect - are focused on driving a particular business solution, which needs interactions between multiple applications.

The architect is responsible for choosing a standard way of doing application development, and defining/creating an Application framework to use for the application.

Implementation Plan

A product software implementation method is a blueprint to get users and/or organizations running with a specific software product. The method is a set of rules and views to cope with the most common issues that occur when implementing a software product: business alignment from the organizational view and acceptance from the human view.

The complexity of implementing product software differs on several issues. Examples include the number of end users that will use the product software, timeline for the installation of the software and training of end users on the new solution, and the effects that the implementation has on changes of tasks and responsibilities for the end user.

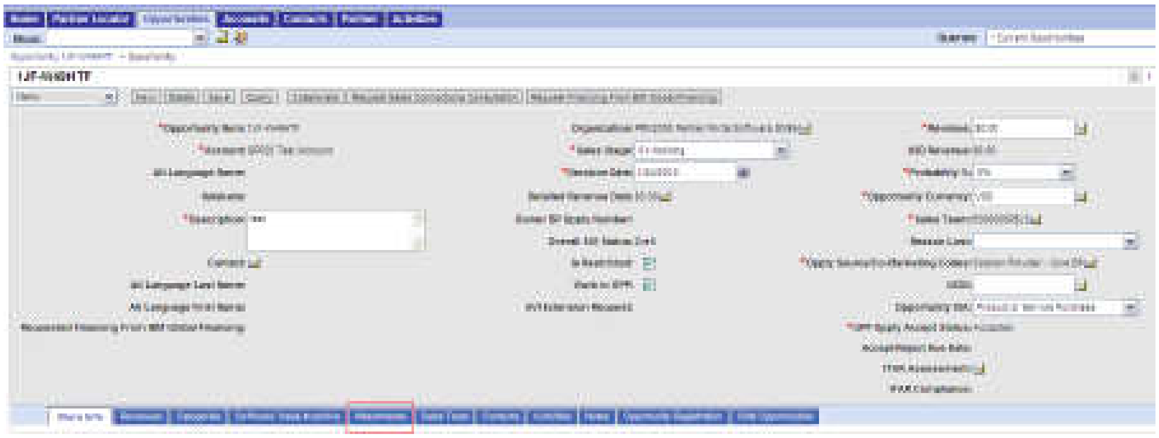
Sizing or configuration document

Sizing or Configuration documents typically address these topic areas: What exact version of the software product is being recommended, and what are the functional and physical characteristics of the product? What hardware and other system resources will be required to support the installation? What are the various components of the solution and how will each be installed? What are the process and tools used to manage the implementation?

D – Attaching Documentation in an Opportunity Record

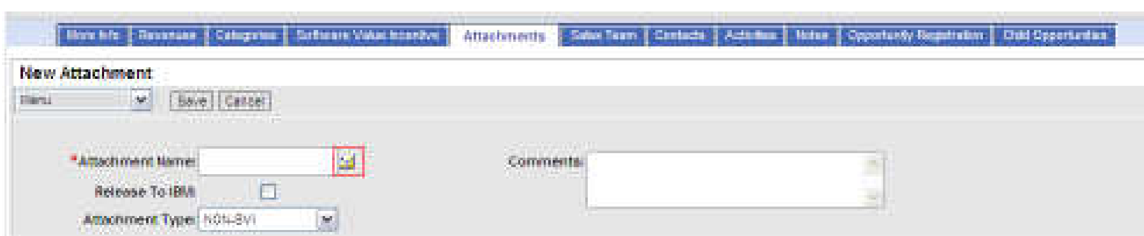
Following are the Global Partner Portal screenshots of how to save (attach) a document (e.g., BANT or sales documentation) in an opportunity record:

Step 1: After an opportunity has been created and saved, select the 'Attachments' tab.



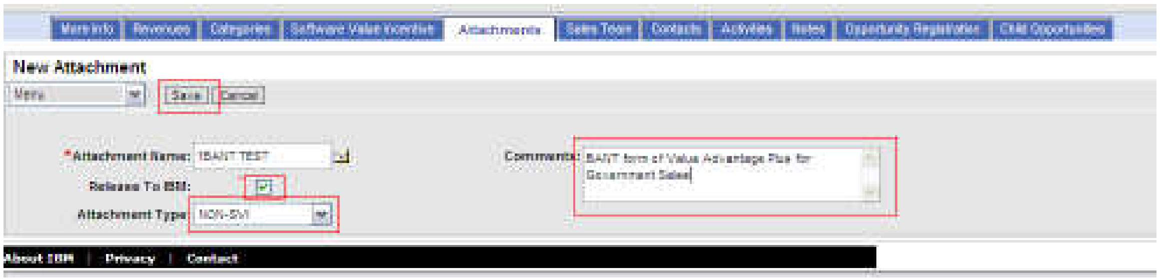
Step 2: Select 'New' action button.

Step 3: Click on the icon to the right of the Attachment Name field.



Step 4: Search for the document using the 'Browse' action button in the pop up window.

Step 5: Add the document, check the 'Release to IBM' check box, select NON-SVI as the 'Attachment Type' and enter in the 'Comments' field that this document is a BANT form for Value Advantage Plus for Government Sales or sales documentation. Then click the 'Save' action button.



E – Incentive Status/Description Matrix for an Opportunity Record

Incentive Status	Description
Submitted For Eligibility	The Business Partner has submitted (requested) that the opportunity be evaluated by IBM for approval to participate in Value Advantage Plus for Government Sales.
Pending	IBM is in the process of evaluating the opportunity's eligibility to participate or for payment.
Returned	IBM has returned the opportunity to the Business Partner and requested additional information.
Approved	Opportunity is eligible to participate in Value Advantage Plus for Government Sales.
Withdrawn	Either the Business Partner has withdrawn their request for the opportunity to participate in Value Advantage Plus for Government Sales or IBM has denied the Business Partner's request for the opportunity to participate in Value Advantage Plus for Government Sales.
Expired	The opportunity's Expiration Date has passed and the opportunity is no longer eligible to participate in Value Advantage Plus for Government Sales.
Completed	The Sales Stage for an opportunity that was Approved to participate in Value Advantage Plus for Government Sales has been changed to "07 Won/Implementing".
Paid	IBM has completed its compliance review of the opportunity and the opportunity passed compliance review.
Not Paid	IBM has completed its compliance review of the opportunity and the opportunity failed the compliance review. IBM will request repayment of the rebate.