

# 2003 EMEA Co-marketing Process - for BPs

Miroslav Hofbauer, EMEA VAR Mktg., IBM SWG

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# Co-Marketing - 7 Steps to increase your sales

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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

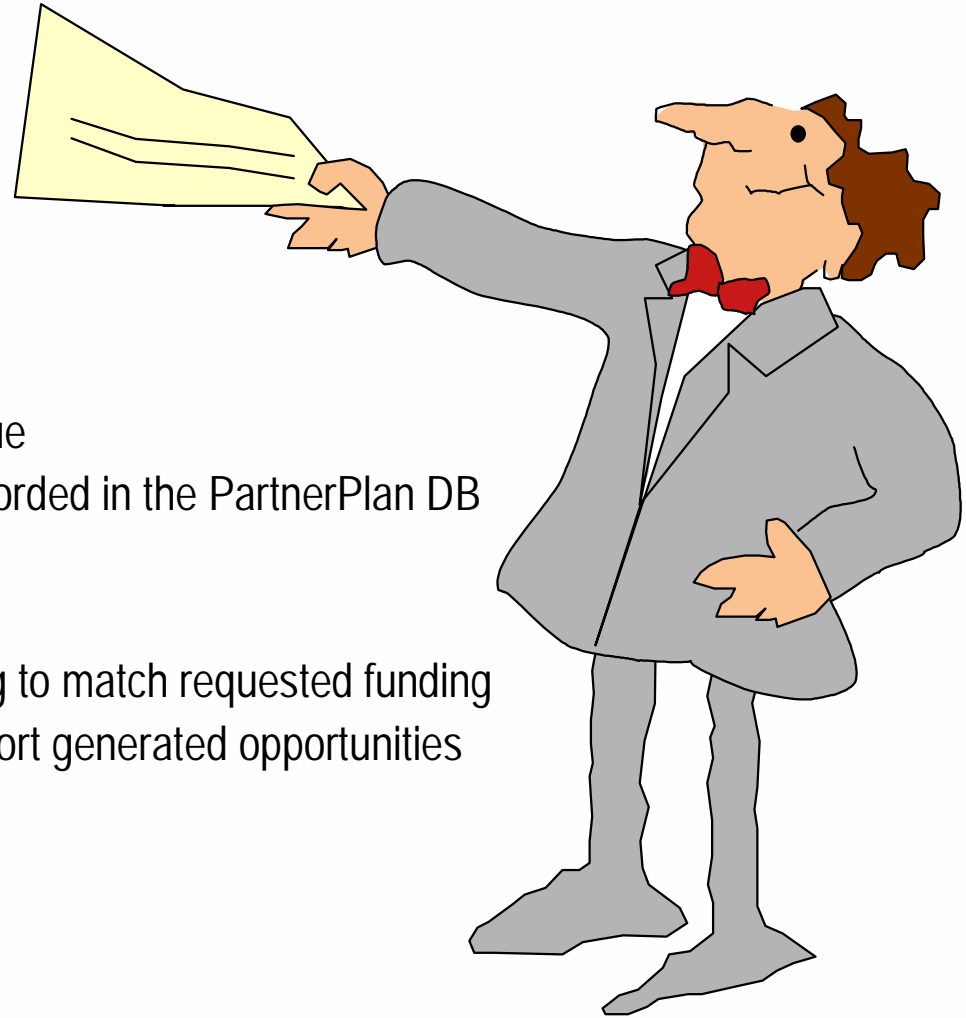
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## ■ Funding Sources

- ▶ Incentives
- ▶ VAD - Value Added Distributors
- ▶ IBM Brand PCM
- ▶ IBM SMB - Joint Campaigns
- ▶ 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

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- 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 >Co-marketing funding > Co-marketing Program Opportunities for Business Partners > "How-to" Marketing Guides
  - ▶ 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



### News/Updates:

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

# III. Apply - Access your Partner Plan

## ■ Access the Partner Plan - WWW

- ▶ <http://www.ibm.com/partnerworld/software/zone>  
>Marketing resources >Co-marketing funding > Co-marketing Program Opportunities for Business Partners > 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

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

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](mailto:partnerline@us.ibm.com)**

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 interface. On the left is a blue sidebar with the IBM logo and a 'My PartnerPlans' section containing links for Home Page, Setup, and My Partner Plans. The main content area has a yellow background and a navigation bar with letters A-Z and controls for Refresh, Previous, and Next. Below the navigation bar is a list of links for 'Miroslav's test plan - Profile'. A large red arrow points from the right towards the 'Action Plan - 1 Test Initiative' link.

**IBM**  
My PartnerPlans

- o Home Page
- o Setup
- o My Partner Plans

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

Refresh   ← Previous   Next →

**Miroslav's test plan - 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 \(Accepted\)](#)
- [SWG Co-Marketing Application Test Initiative](#)
- [SWG Co-Marketing Application Test Initiative](#)

Enter the Action Plan

\*To be able to access your plan, ask your IBM account manager/your VAD 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 Unit	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 <u>Profile Page</u> 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.

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

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

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

**Comments**

Tutorial  
IBM Support Program Links  
Monthly Progress Reports

Last report ->

LINE	Category(s) Brands(s)	Major activities required to achieve this Initiative and Person Responsible	Total Cost	Available Funding Program	Amount of Program Funding	Activity Completion Date (mm/dd/yy)	Status (Open, Done, Late, etc.)	Leads Planned, Actual
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 "SWG Co-Marketing Application" button

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

**Comments**

- Tutorial
- Calculate Totals
- IBM Support Program Links
- Monthly Progress Reports
- Last report ->

Do you plan to use Executive Assessment?  Yes  No

\* Do you plan to use the Harmony Cross Selling marketing materials?  Yes  No

SWG Co-Marketing Application

LINE	Category(s) Brands(s)	Major activities required to achieve this Initiative and Person Responsible	Total Cost	Available Funding Program	Amount of Program Funding	Activity Completion Date (mm/dd/yy)	Status (Open, Done Late, etc.)	Leads Planned/ Actual	Re Pl Ac
A	1	SMB Tradeshow	10,000	Top Cont	2,000	03/31/2007	Open	2	
	72	Person: Miroslav Hofbauer							
B	7	Telemarketing Follow-Um							
	7H								

**Microsoft Internet Explorer**

1 Co-Marketing Application(s) have been created. Go to the 'My PartnerPlans' view to complete and submit the application(s). You may need to refresh the 'My PartnerPlans' view to see the new documents.

OK

The Application will be created

# III. Apply - Open the SWG Co-Marketing Application

The screenshot shows the IBM PartnerPlans interface. On the left is a blue navigation menu with the IBM logo and the following items: Home Page, Setup, and My Partner Plans. The main content area has a yellow background and includes a search bar with letters A-Z, navigation buttons for Refresh, Previous, and Next, and a profile header for 'Miroslav's test plan \*\*\*test\*\*\* - Profile'. Below the header is a list of links: 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 The 2nd Initiative<Line A>, and SWG Co-Marketing Application The 2nd Initiative<Line C>. A large red arrow points from the right towards the 'SWG Co-Marketing Application (Accepted)' link.



# III. Apply by filling-in required fields and submitting the form

Note all fields below MUST be complete to save this form.

## Application Submitted by:

Name *	Phone *	eMail *
Miroslav Hofbauer	+421-2-4929-1394	miroslav_hofbauer@sk

Are you applying for the Linux Software Incentive? \*  Yes  No

## Funding Information (US Dollars):

Total Expense for Activity/Event *	*Maximum IBM Reimbursement *	SW Revenue expected as a result of the activity
\$10,000	\$2,000	\$10,000

## Activity/Event Information

Product Name *	Type of Activity/Event *	*Location of Activity/Event *	
Lotus Knowledge Management	n.a.	Bratislava, Slovakia	
Starting Date * =>	03/27/2003	Ending Date * =>	03/13/2003
Language(s) in which the Activity/Event will be performed. *	Estimated size of Audience or Mailing *	Estimated number of Responses *	Estimated number of lead
Slovak	1000	100	2

## Business Case

What is the objective of this Activity/Event? *	Telemarketing, prompting partners to attend the Seminar on Miroslav's SMB SC
What will the "call to action be"? *	Register by End of the week and you will be eligible for free Proof of Concept
How does this fit into your overall Marketing Plan? *	Part of Activity driving Miroslav's SCM solution in SMB

\* All fields must be completed in order to save this form.

Save

Submit

Close

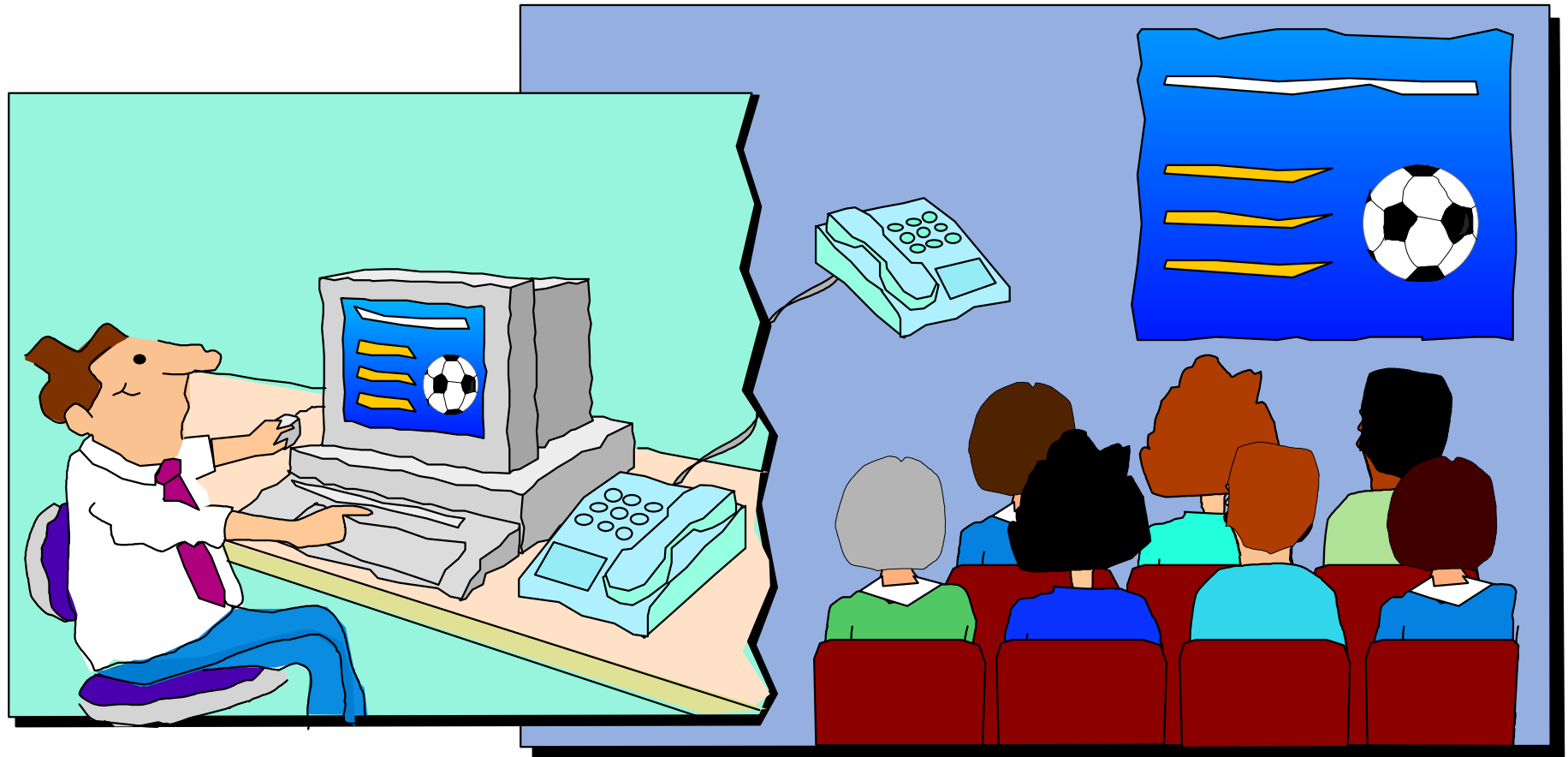
### III. Apply - You can see your application on WWW



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 with the following items: Home Page, Setup, and My Partner Plans. The main content area has a navigation bar with 'Refresh', 'Previous', and 'Next' buttons. Below the navigation bar, the page title is 'Miroslav's test plan \*\*\*test\*\*\* - Profile'. The main content area lists several links: 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 callout bubble with a black outline is positioned over the right side of the page, containing the text: 'The status of your Application will be updated by IBM. Enter the Application later, to understand the status.'

## IV. Execute the Activity

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# V. Report generated Opportunities

→ **Select a country**

← [PartnerWorld for Software](#)

**Business Partner Zone**

**Switch Location**

Selling resources

Marketing resources

Co-marketing Program *Updated 14 March 2003*

Custom Marketing Proposal

Direct Marketing

Seminar Solutions

Telemarketing

View By Product

Software products and technologies

Technical support

Training and events

News and newsletters

Software membership

Contact PartnerWorld for Software

Business Partner Zone >

## Co-marketing

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

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

<a href="#">Direct Marketing</a>	Direct Mail, Advertising, e-mail Blasts and more to generate demand.
<a href="#">Seminars</a>	Offers you need to run traditional seminars, e-seminars, and teleseminars.
<a href="#">Telemarketing</a>	Offers you need to run traditional seminars, e-seminars, and teleseminars.
<a href="#">Custom Campaigns</a>	Run your own custom campaign if you don't see your activities captured in the offerings table. <i>Requires IBM Management approval</i>

You are expected to report generated customer opportunities

[Read Terms & 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\*

Select from List

Industry Classification\*

Select From List

## Opportunity Information

Briefly Describe this Opportunity

Decision Date: \*

01/30/2003

Planned Customer Spending?\*

Currency\*

EUR - EURO

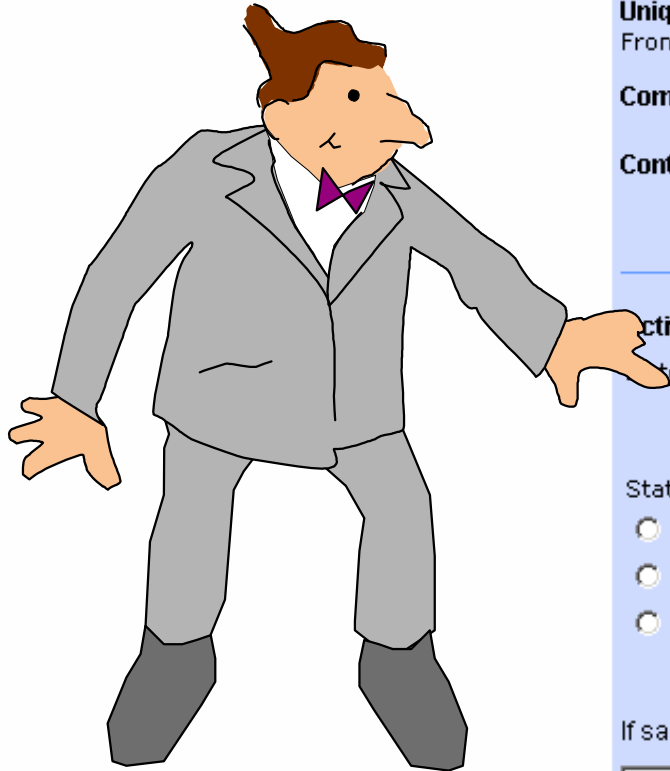
Sales Cycle\*

Select From List

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: \***

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**Activity Information**

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

Status of Sale: \*

Sold

Pending

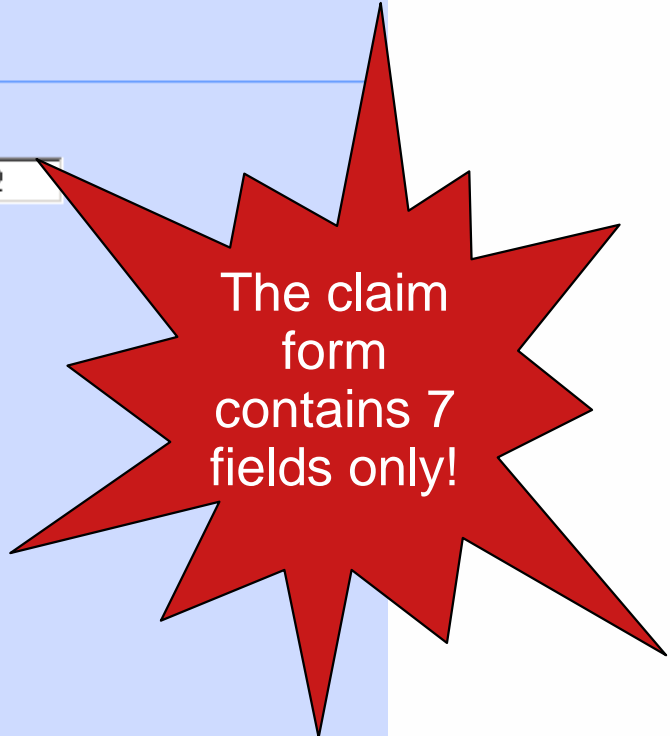
No Sale

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  
... since IBM in equivalent amount in Euro





# VI. Claim - Submit Proof of Performance

Business Partner Zone >

## Co-marketing

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Updated 14 March 2003

IBM PartnerWorld for Software is making available a range of co-marketing offerings for Software Business Partners can leverage.

### Co-Marketing Offerings

<a href="#">Direct Marketing</a>	Direct Mail, Advertising, etc.
<a href="#">Seminar Solution</a>	Seminars, Conferences, etc.
<a href="#">Telemarketing</a>	Telemarketing, etc.

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

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- 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

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

Don't forget to submit ALL the required proof. Check the "Proof of Performance" link for details

## VII. Invoice IBM AND close the business

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

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

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



# Need for Local Help?

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## ■ Nordics

- ▶ Denmark: Maria Lund Hoepfner: [malund@dk.ibm.com](mailto:malund@dk.ibm.com)
- ▶ Sweden: Caroline Tengvall-Hundt: [carolinet@se.ibm.com](mailto:carolinet@se.ibm.com)
- ▶ Finland & Baltic countries: Miiä Heliö: [miiä.helio@fi.ibm.com](mailto:miiä.helio@fi.ibm.com)
- ▶ Norway: Ina Dalviken: [inadal@no.ibm.com](mailto:inadal@no.ibm.com)

## ■ North

- ▶ UK & Ireland: Martin Geraghty: [martin.geraghty@uk.ibm.com](mailto:martin.geraghty@uk.ibm.com)
- ▶ Netherland
  - Jeanine Verhaar: [jeanine\\_verhaar@nl.ibm.com](mailto:jeanine_verhaar@nl.ibm.com)
  - Ine van Gisbergen: [ivgisbergen@nl.ibm.com](mailto:ivgisbergen@nl.ibm.com)
- ▶ South Africa: Hanli Wood: [hanliw@za.ibm.com](mailto:hanliw@za.ibm.com)

## ■ West

- ▶ France: Emilie Lieblich: [Emilie\\_Lieblich@fr.ibm.com](mailto:Emilie_Lieblich@fr.ibm.com), Iban Courau: [iban.courau@fr.ibm.com](mailto:iban.courau@fr.ibm.com)
- ▶ Belgium: Isabelle Van Iseghem: [IVBR@be.ibm.com](mailto:IVBR@be.ibm.com)

## ■ Central - Austria, Germany and Switzerland

- ▶ Karl-Heinz Hirner: [hirner@de.ibm.com](mailto:hirner@de.ibm.com), Hartmann Rainer: [hartmann\\_rainer@de.ibm.com](mailto:hartmann_rainer@de.ibm.com)

## ■ South

- ▶ Italy, Greece, Turkey and Israel: Paola Monnati: [Paola\\_Monnati@it.ibm.com](mailto:Paola_Monnati@it.ibm.com)
- ▶ Spain and Portugal: Raul Garcia Lopez: [raul\\_garcia@es.ibm.com](mailto:raul_garcia@es.ibm.com)

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

- ▶ Eniko Rajhona: [Eniko\\_Rajhona@hu.ibm.com](mailto:Eniko_Rajhona@hu.ibm.com)

Thank you!

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IBM Software Group

