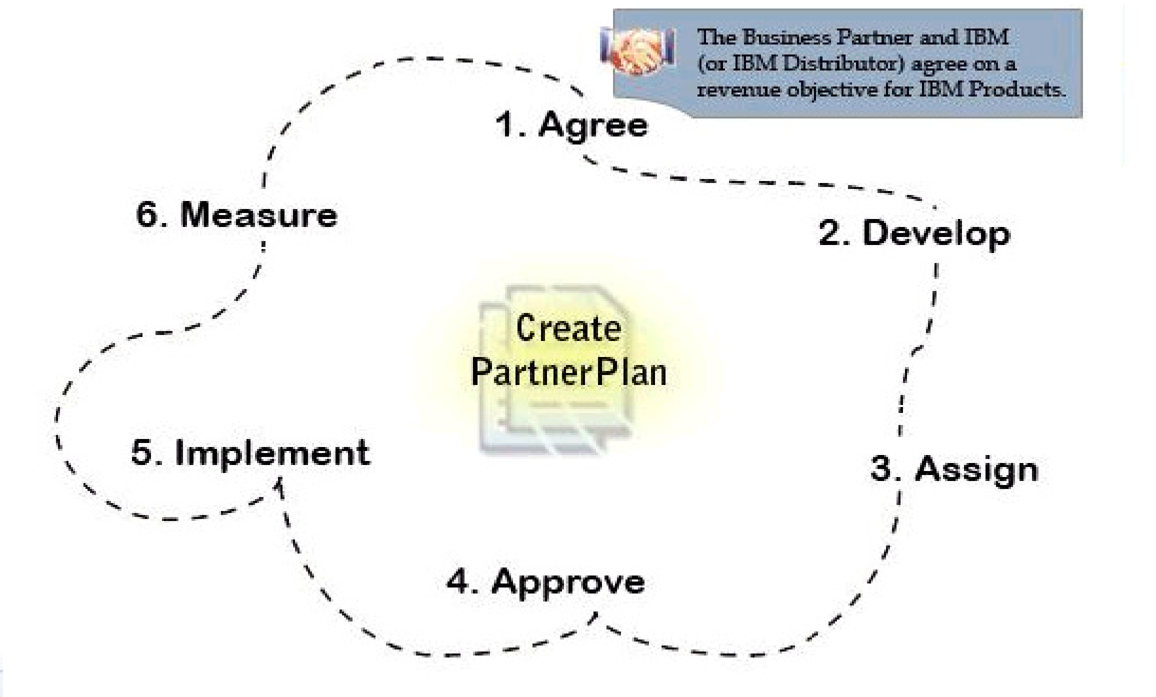
PartnerPlan 2010

User Education



Anne Henderson

PartnerPlan Project Manager

Agenda

Section A (Charts 3 – 12):

- **What does PartnerPlan do? Who uses it?**
- **Access Requirements**
- **How to reach PartnerPlan**

Section B (Charts 13 – 58):

- **How to find a PartnerPlan**
- **How to copy an existing PartnerPlan and use it as the basis for your 2009 plan**
- **How to create a PartnerPlan**

Section C (Charts 59 - 68):

- **Tips and helpful hints for Plan owners**
- **Information for Plan and Activity Approvers**

Section D (Charts 69 – 76):

- **Reports/Helpdesk/Education**

Section E (Charts 77 - 87):

- **Distributor Growth Fund/Marketing Investment Fund charts**

(Note – this section does not cover general usage. You must review the rest of the education to understand how to use the tool.)

PartnerPlan

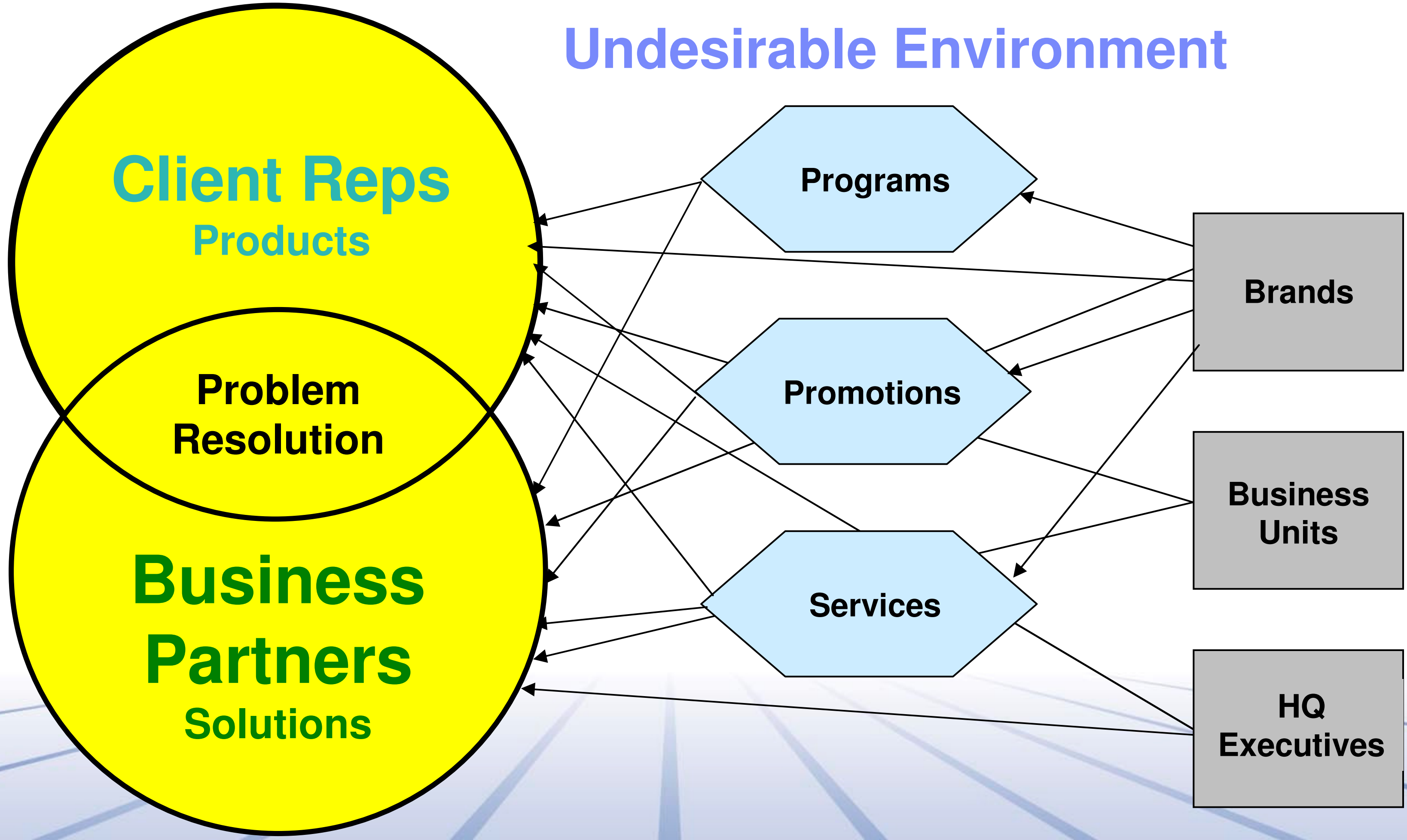
Section A:

- **What does PartnerPlan do? Who uses it?**
- **Access Requirements**
- **How to reach PartnerPlan**

What is PartnerPlan? Who uses it?

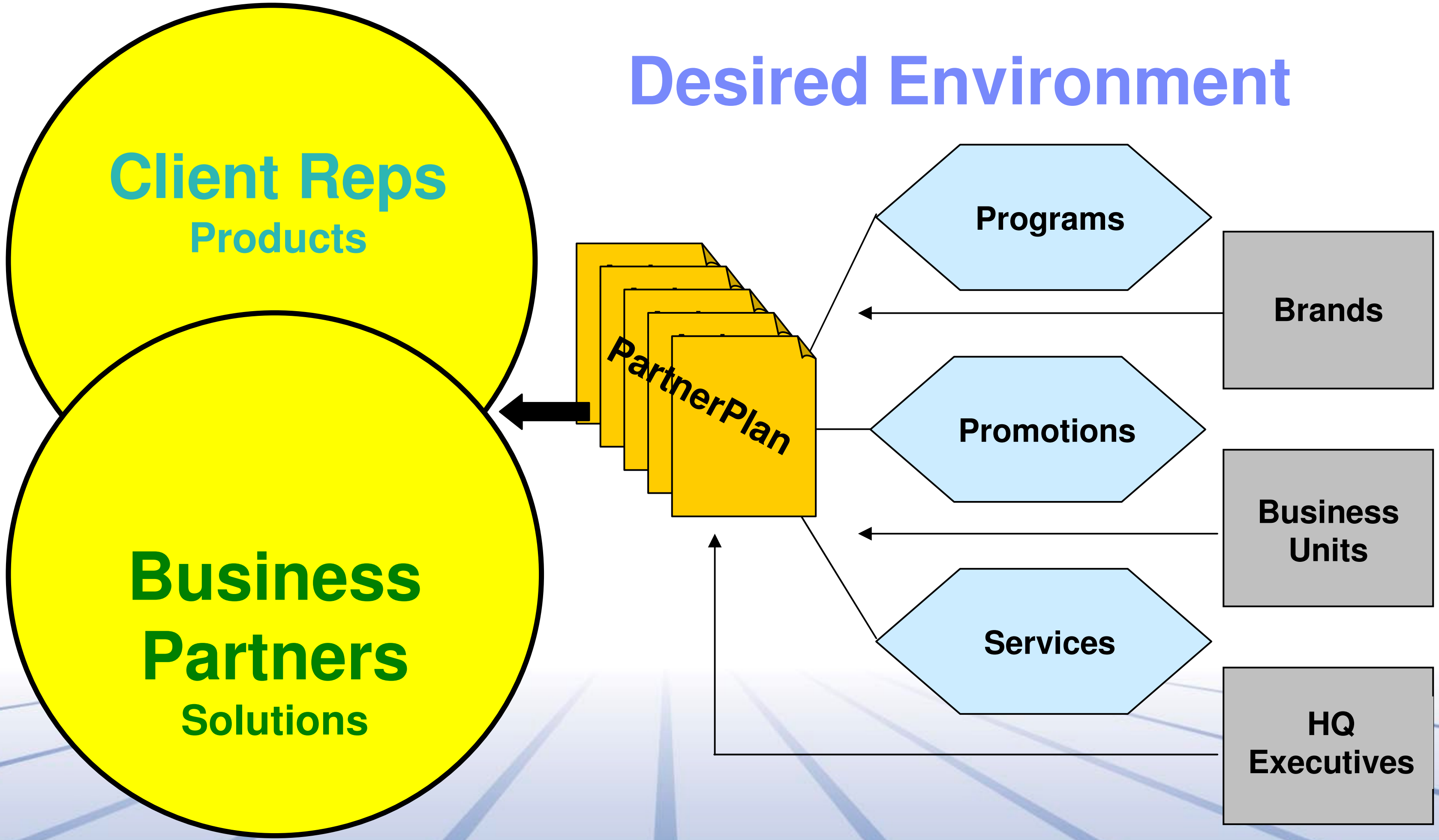
- PartnerPlan is a global database designed to assist you in developing a marketing plan. The database provides a standardized format, collaborative opportunities and is the entry tool for many co-funding programs.
- Business Partners, IBM and/or Distributor representatives work together to build a plan which will meet the revenue targets jointly agreed to. Management approval assures the Business Partner that IBM or the Distributor has agreed to support the Plan.
- Premier partners are required to have an approved PartnerPlan to obtain and retain their Premier status.
- PartnerPlan is available to all Business Partners of IBM and all Business Units within IBM.

Many Business Partners have multiple contacts with IBM. An efficient method for sharing information among teams, both at IBM and at the Business Partner saves everyone time and effort.



PartnerPlan offers a single planning tool for all units of IBM, providing a consolidated and confidential picture of IBM's relationship with the Business Partner. Documents can be posted and shared among the teams working on Plan execution. Business Partner/ IBM Management can create custom reports based on their specific needs. Instead of answering the same question many times, users can be directed to log into PartnerPlan.

Desired Environment



PartnerPlan Access

PartnerPlan is reached at this URL: www.ibm.com/partnerworld/partnerplan

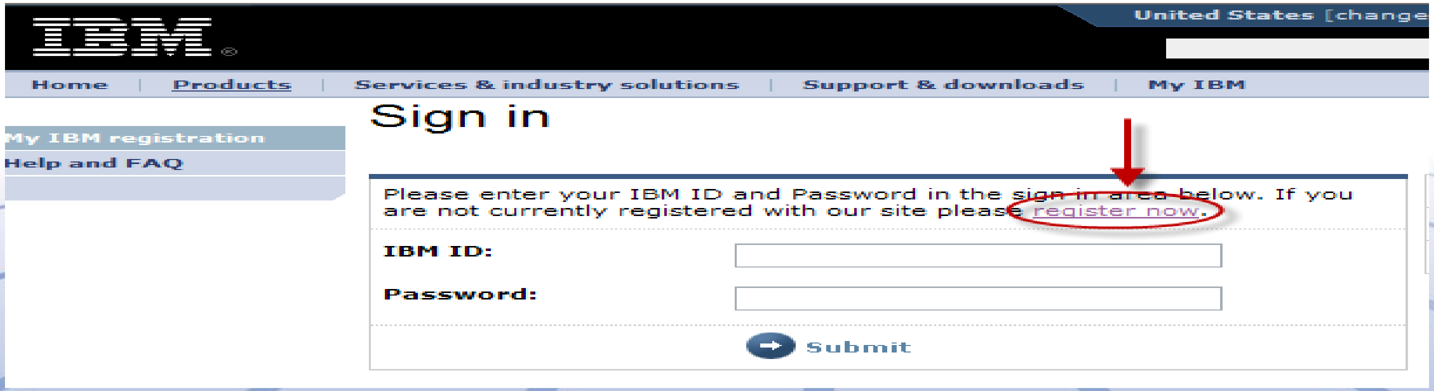
Access Requirements:

a) **Users require an IBM id to access PartnerPlan. If you don't have an IBM id, you can apply for one by clicking on the Register Now link, circled in the chart.**

b) **All users must register in the PartnerPlan Registration Database and select their Privacy settings once only. Your Privacy setting must be updated annually. The system will ask you to reselect your settings when the original request has expired.**

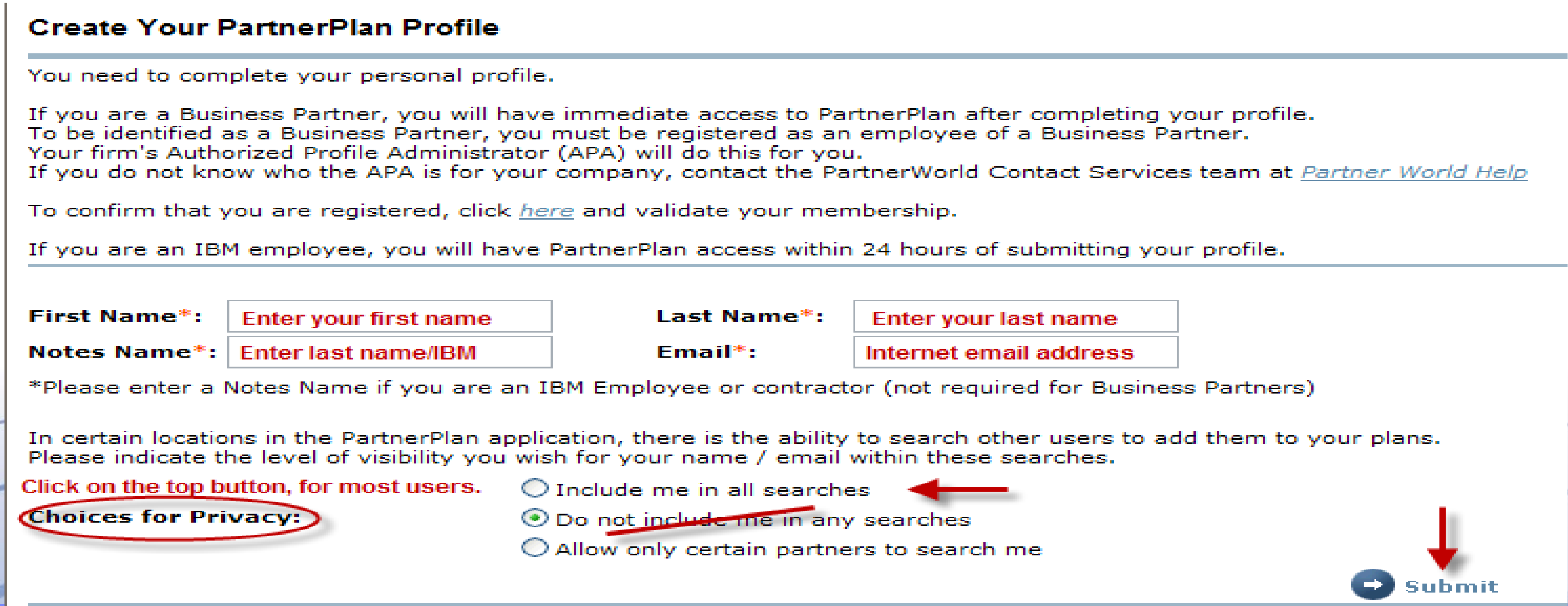
- **If you attempt to log in and see a message that your id cannot be validated, you need to register by clicking on the Register now link.**
  > You will be presented with IBM id registration form.
  > If you have an IBM id but have not registered in the PartnerPlan Registration DB, you will be presented with a request for your first name, last name and email address.
  IBMers will be required to enter their Notes mail in the format of John Smith/UK/IBM.

- **Your Privacy settings are valid for one year. If they have expired, you will be presented with the Privacy settings screen. Simply select the correct option and click submit. More on the Privacy settings on the next chart.**



PartnerPlan Access

- Its <u>critically</u> important to set your privacy settings. The default, as required by privacy legislation, is to <u>not</u> display your name to anyone.
- If you want to be added to plans or approve plans as a Manager or Override Manager, you MUST change the setting to the first button. Click on "Include me in all searches"
- If you do not approve plans or want to be added only to a few plans, click on the last option "Allow only certain partners to search me".
- Click Submit.
- This section can be updated at a later time by going to the Privacy Settings at the bottom of the blue Navigation column.



Create Your PartnerPlan Profile

You need to complete your personal profile.

If you are a Business Partner, you will have immediate access to PartnerPlan after completing your profile.
To be identified as a Business Partner, you must be registered as an employee of a Business Partner.
Your firm's Authorized Profile Administrator (APA) will do this for you.
If you do not know who the APA is for your company, contact the PartnerWorld Contact Services team at *Partner World Help*

To confirm that you are registered, click *here* and validate your membership.

If you are an IBM employee, you will have PartnerPlan access within 24 hours of submitting your profile.

First Name*:	Enter your first name	**Last Name*:**	Enter your last name
Notes Name*:	Enter last name/IBM	**Email*:**	Internet email address

*Please enter a Notes Name if you are an IBM Employee or contractor (not required for Business Partners)

In certain locations in the PartnerPlan application, there is the ability to search other users to add them to your plans.
Please indicate the level of visibility you wish for your name / email within these searches.

Click on the top button, for most users.

Choices for Privacy:
- Include me in all searches
- ~~Do not include me~~ in any searches
- Allow only certain partners to search me

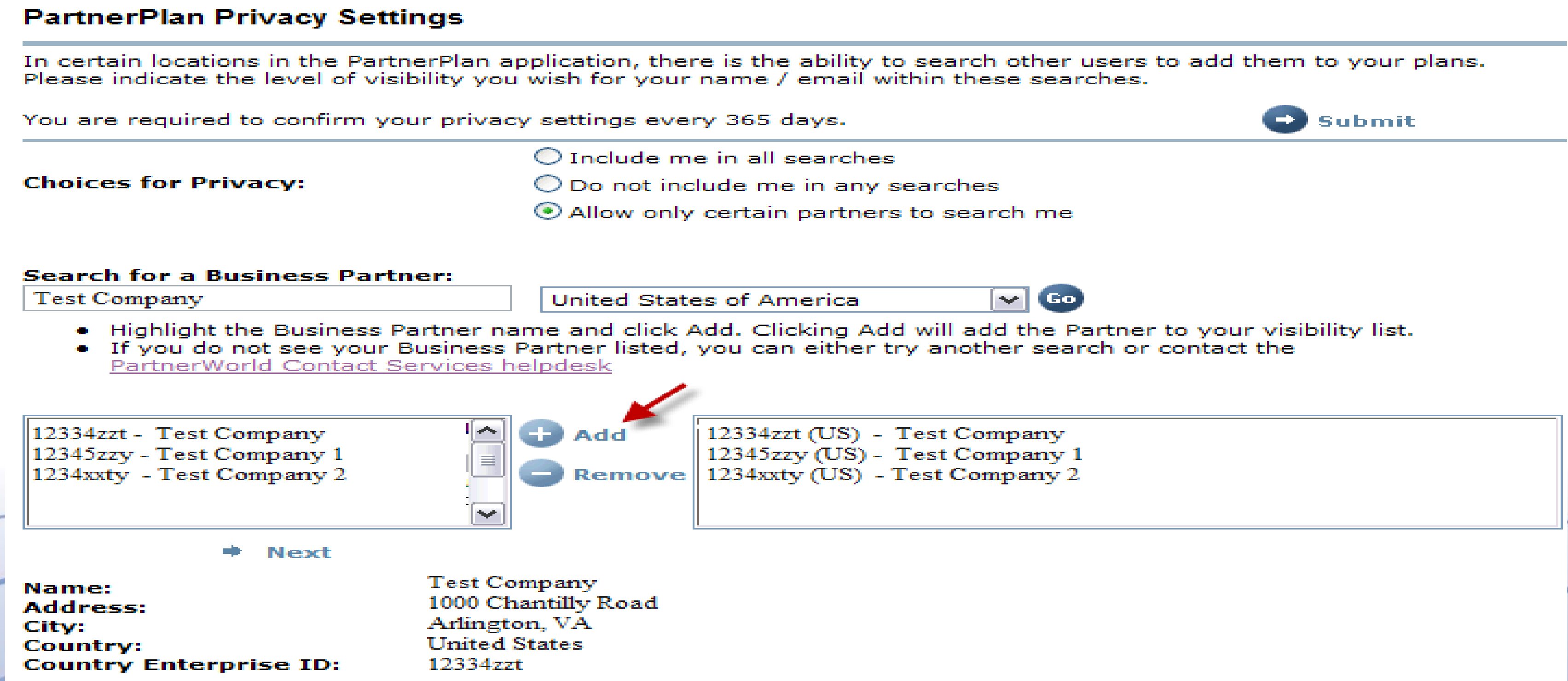
Submit

PartnerPlan Access - IBM

Privacy settings allow you to determine who can see your name and add you as a teammember.

The system defaults to "Do not include me in any searches". If you want to be added as a teammember to other plans, you must change the setting to either the first option "Include me in all searches" or to "Allow only certain partners to search for me ".

To use the "Allow only certain partners to search for me", enter the name of the company you wish to be added to, enter the country where they operate and click on the Add button when the firm appears in the list.


PartnerPlan Privacy Settings

In certain locations in the PartnerPlan application, there is the ability to search other users to add them to your plans. Please indicate the level of visibility you wish for your name / email within these searches.

You are required to confirm your privacy settings every 365 days. Submit

Choices for Privacy:
- ○ Include me in all searches
- ○ Do not include me in any searches
- ◉ Allow only certain partners to search for me

Search for a Business Partner:
Test Company | United States of America | Go

- Highlight the Business Partner name and click Add. Clicking Add will add the Partner to your visibility list.
- If you do not see your Business Partner listed, you can either try another search or contact the PartnerWorld Contact Services helpdesk

12334zzt - Test Company
12345zzy - Test Company 1
1234xxty - Test Company 2

Add
Remove

12334zzt (US) - Test Company
12345zzy (US) - Test Company 1
1234xxty (US) - Test Company 2

Next

Name:	Test Company
Address:	1000 Chantilly Road
City:	Arlington, VA
Country:	United States
Country Enterprise ID:	12334zzt

PartnerPlan Access

- If you are a Business Partner and do not have an IBM id, your Authorized Profile Administrator (APA) must register you with the PartnerWorld Profiling System.
  Once the APA has registered you, please go to the Register now link (shown on the previous slide) and complete the IBM id request form.
  If you do not know who your APA is, contact the PartnerWorld Contact Services (PWCS). Contact information is available by following the link on the PartnerPlan page.

PartnerPlan Registration Process

Your information cannot be validated.

If you are a Business Partner, you must be registered as an employee of a Business Partner to access PartnerPlan.
Your firm's Authorized Profile Administrator (APA) will do this for you.
If you do not know who the APA is for your company, contact the PartnerWorld Contact Services team at Partner World Help

To confirm you are registered, click here and validate your membership.

Once in the PartnerWorld system, you will have immediate access to PartnerPlan.

NOTE: PartnerPlan uses the Single Sign On (SSO) process. You can use the same log in and password for all sites using SSO.

PartnerPlan User Prerequisites

- **PartnerPlan users must use Internet Explorer, V6 or above or Firefox with the IE tab option selected.**
https://addons.mozilla.org/en-US/firefox/addon/1419

- **Other browsers will allow you view information in PartnerPlan.
If you perform any edits, such as creating an activity or approving an activity, you must use IE or Firefox with the IE tab option. Any other browser can result in failure to see information in the Plan. For example, dropdown selections may not be visible.**

- **You MUST ensure that the Pop-up Blocker is not checked. The Pop-up Blocker is found under Tools/Internet Options/Privacy.**

- **If the Business Partner is located in a country that does not use US or Canadian currency, you MUST go to the Tools/Internet Options/Language Settings and modify them. The next chart shows you how.**

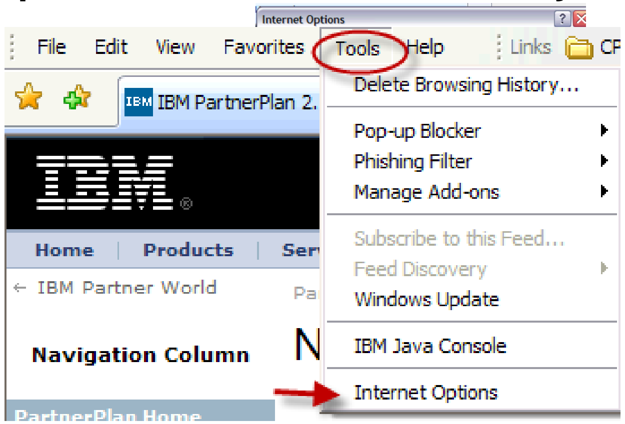
- **Lastly, clear your Internet History regularly. Having a very large history can affect performance and create errors. The option to clear your history is also found on the Tools menu, under Internet Options/General.**

PartnerPlan User Prerequisites – Currency Settings

If the Business Partner is located in a country that does not use US or Canadian currency, you MUST update settings on your Browser to allow the numbers to appear correctly in the tool.

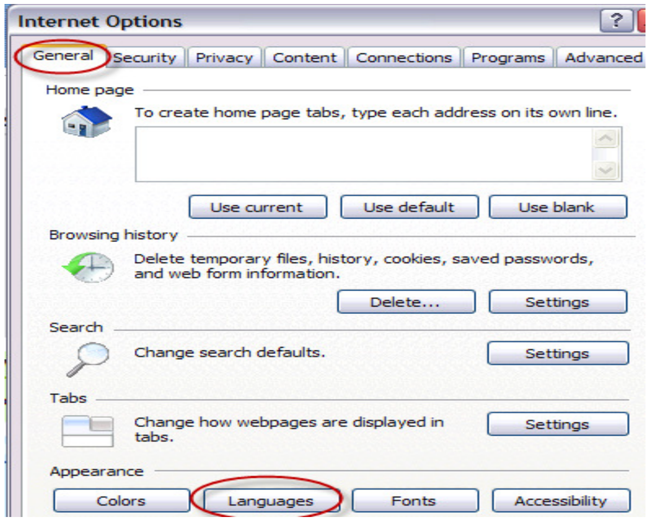
Step 1: Go to the Tools menu on your browser and select Internet Options.

1



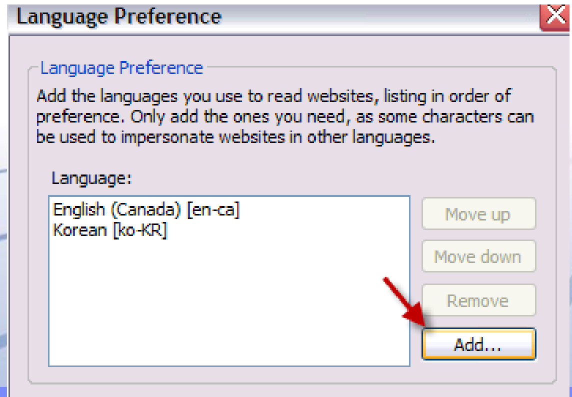
Step 2: On the General Tab, select the Languages button.

2



Step 3: Add Canadian or US English in the first position. Keep your local language in the second position. Click OK after adding the language.

3



PartnerPlan

Section B:

- How to find a PartnerPlan
- How to copy an existing PartnerPlan and use it as the basis of your 2010 plan.
- How to create a new PartnerPlan.

The Home Page of PartnerPlan provides an overview of the process for creating a PartnerPlan. Run your curser over the numbers, 1 through 6.

IBM Partner World

Navigation Column

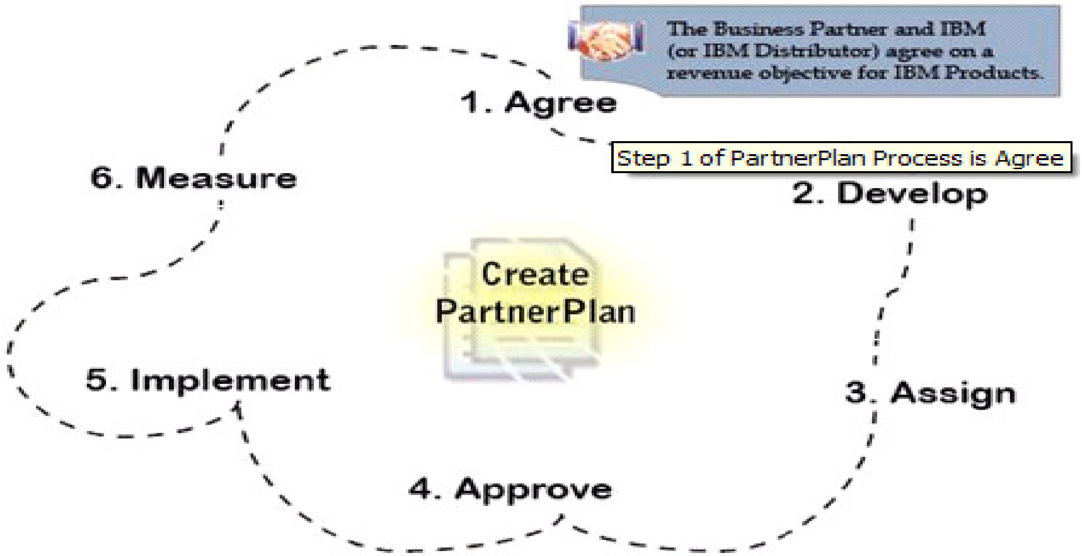
- PartnerPlan Home
- Education/Aids/Tools
- View PartnerPlans
- Create/Copy/Find Missing PartnerPlan
- Help
- Manager's Page
- Funding & Sales Prg.
- Reports
- Archive Retrieval
- Change Privacy Settings

IBM Confidential

PartnerPlan 2010

A relationship process for use with IBM Business Partners

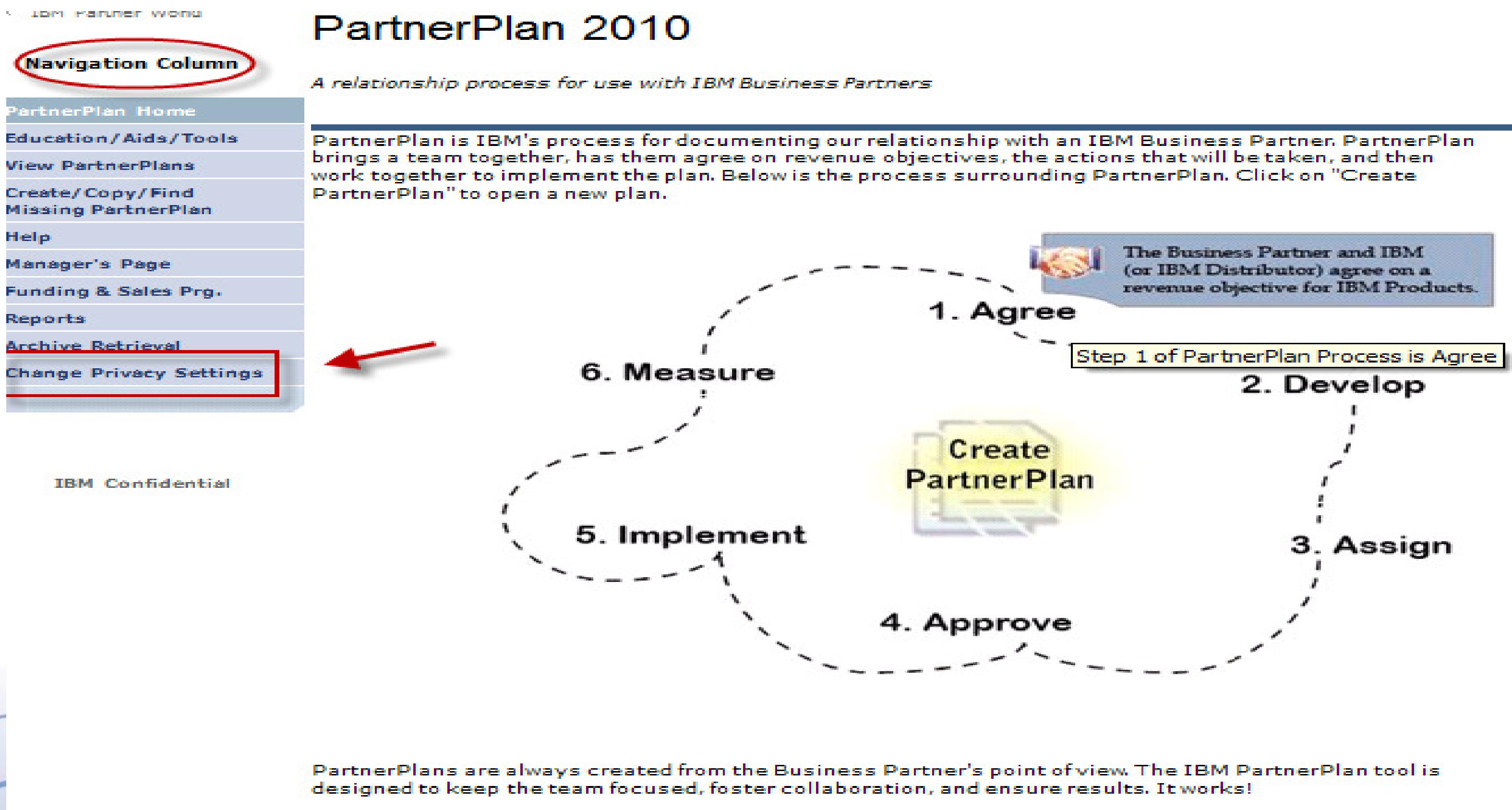
PartnerPlan is IBM's process for documenting our relationship with an IBM Business Partner. PartnerPlan brings a team together, has them agree on revenue objectives, the actions that will be taken, and then work together to implement the plan. Below is the process surrounding PartnerPlan. Click on "Create PartnerPlan" to open a new plan.



PartnerPlans are always created from the Business Partner's point of view. The IBM PartnerPlan tool is designed to keep the team focused, foster collaboration, and ensure results. It works!

The Navigation Column is the starting point for all of your PartnerPlan actions. You will create or copy your prior year plan from the Create/Copy/Find Missing PartnerPlan view. Once it is created or copied, it will appear in the View PartnerPlans view.

Note the opportunity to change your privacy settings on the Navigation column.



To find an existing PartnerPlan:

1) Click on the Create/Copy/Find Missing PartnerPlan view.

Choose the Find my missing plan link.

2) Enter the company name or CEID and click Go.

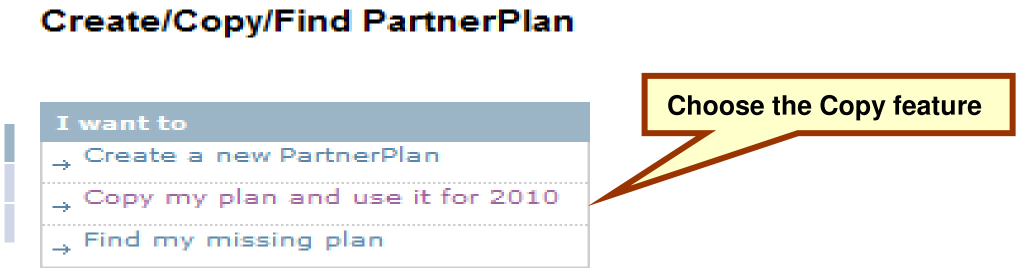
Click on the 'here' link for help.

Enter the Company Name OR Country Enterprise ID and Click "Go"

NOTE: PartnerWorld Contact Numbers in each geography are available by clicking on the link provided in the tool. Contact them if you have any problems.

To copy a prior year plan for use in the current year, you must be the Plan Owner:

1) Click on the Copy my plan link.



2) Enter the name of the plan you are searching for and click Go. You can also search by Country Enterprise ID, available from the PWCS team.

To copy a prior year plan for current year use:

Click on the copy link (red arrow) and the system will create a new plan with "2010" appended to the name.

NOTE: Only the Plan Owner or Plan Owner's Manager can copy the plan.
If you are the new owner, contact the Plan Owner using the link. Ask the current owner to make you the plan owner by replacing his name and IBM id with your name and IBM id on the Access tab.

The PartnerWorld Contact Services (PWCS) can assist you if the owner is not available.

Copy PartnerPlan

STOP: You cannot copy a plan if you are not the plan owner in the tool. If you are the new owner of a plan and it is not visible below, then use the "Find my missing plan" function on the previous page to contact the current plan owner. Contact that person, ask the owner to remove his or her name, and replace it with yours.
If the current owner is not available, ask the PWCS desk for assistance. See the 'here' link below for contact information.
Once your name is in the Plan Owner's field, you will have edit access to the plan.

- Enter all or part of the Business Partner name. Enter the name matching the contact name in the PartnerWorld Profilng System.
- You can also search by Country Enterprise ID (CEID). The CEID can be obtained from the PartnerWorld Contact Services (PWCS) helpdesk.
- PWCS contact information is provided here

Search for Business Partner

accenture Go

OR

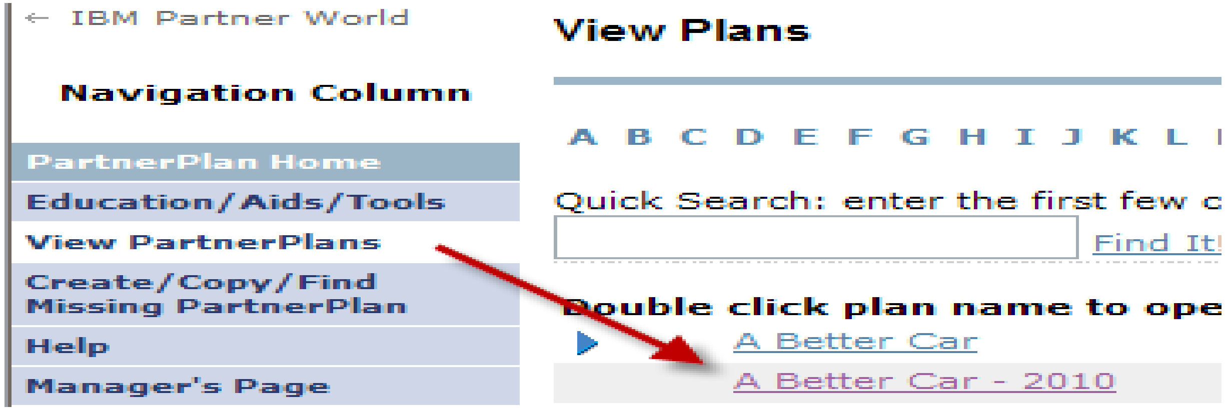
Search for Country Enterprise ID

Go

Plan Name	Country	Enterprise ID	Status	Contact Plan Owner	
A Top Plan	United States of America	18z7gey8	ACTIVE	Email Owner	Copy

To copy a prior year Plan for the current year:

After being copied, your new plan will be visible in the View PartnerPlans view. Only copied plans appear with a year following the name.



NOTE:

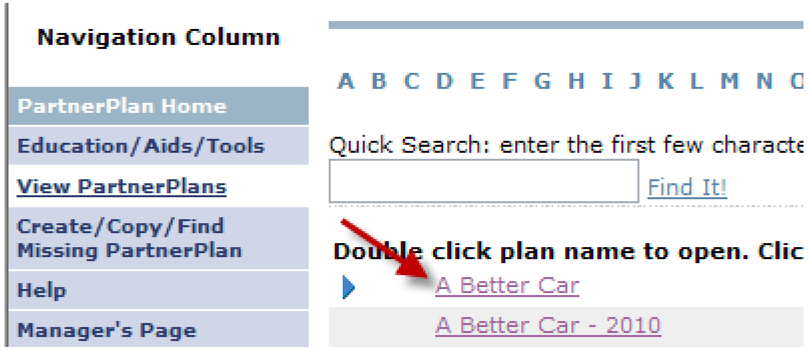
You see only the plans that you have access to. There are several thousand plans in the database. It is important to archive your prior year plan to ensure good response time.

Archiving removes the old Plan from the active database. You can restore it at any time. Restoration takes 24 hours or less.

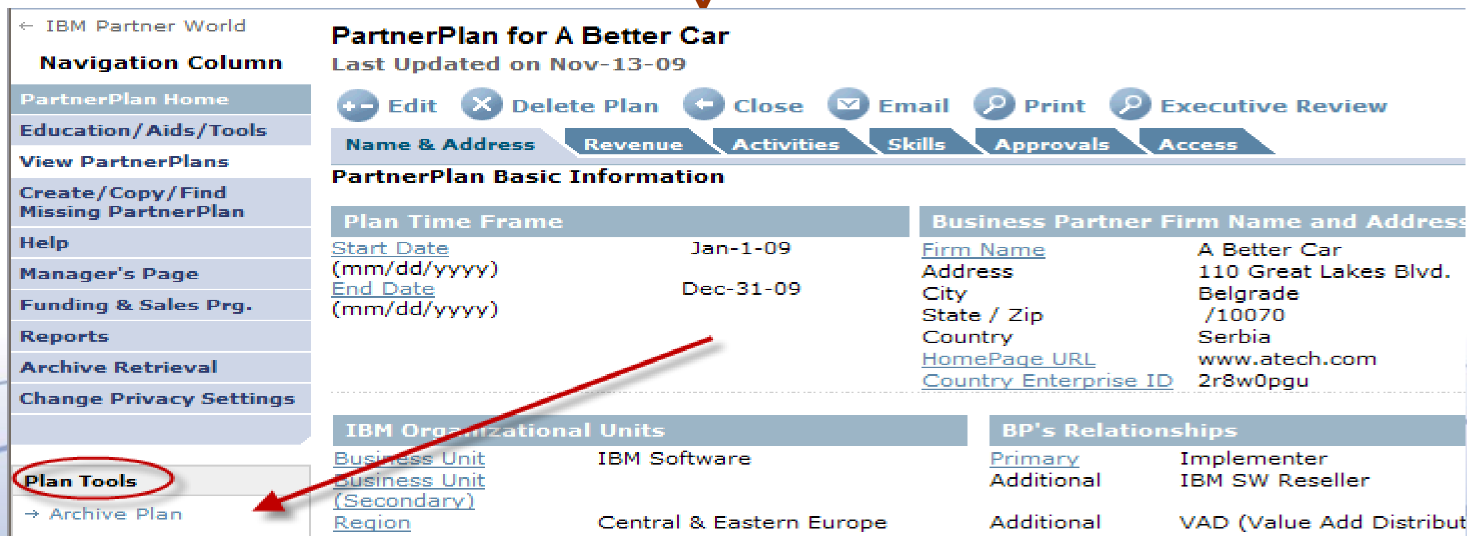
The next slide shows how to archive your prior year plan.

To archive a PartnerPlan:

1) Click on the link to the old plan.



2) A Plan Tools menu will appear. Click on Archive Plan. A popup message will tell you when the archive process is complete. Click on the word "Close" and go back to View PartnerPlans to use your new plan.

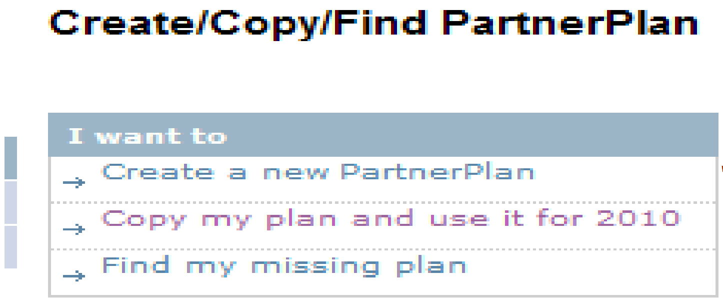


NOTE: Your old plan can be restored from the archives within 24 hours if needed. Go to the archives view on the Navigation column and click the Restore button when you find your plan.

Creating a New Plan:

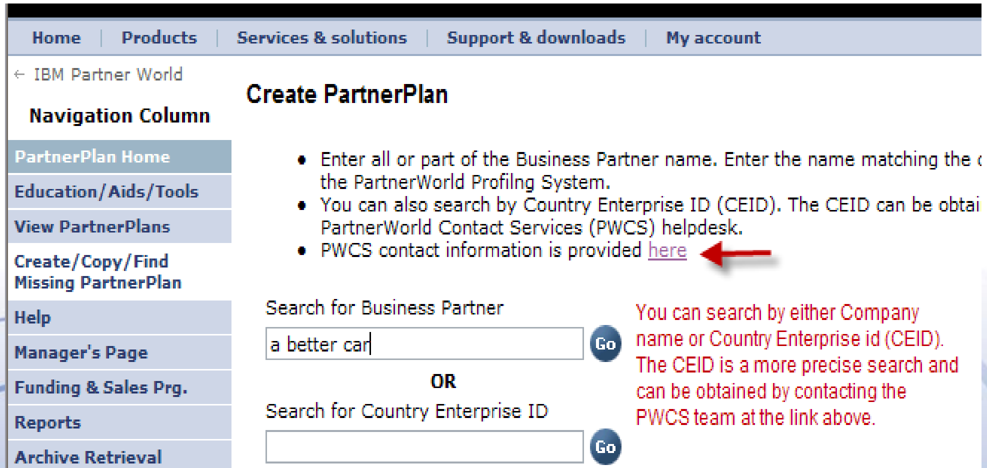
1) Open the Create/Copy/Find Missing PartnerPlan view.

2) Click on Create a new PartnerPlan.



Choose the Create a new PartnerPlan option

3) Enter either the Company name or CEID and click Go



Creating a New Plan:

4) **If a Plan exists in the active database for this Business Partner, you will be provided with links to create an email to the Plan Owner. Ask the Owner to add you with read or edit access based on your requirements.**

Create PartnerPlan

- Enter all or part of the Business Partner name. Enter the name matching the contact name in the PartnerWorld Profilng System.
- You can also search by Country Enterprise ID (CEID). The CEID can be obtained from the PartnerWorld Contact Services (PWCS) helpdesk.
- PWCS contact information is provided here

Search for Business Partner

acme Go

OR

Search for Country Enterprise ID

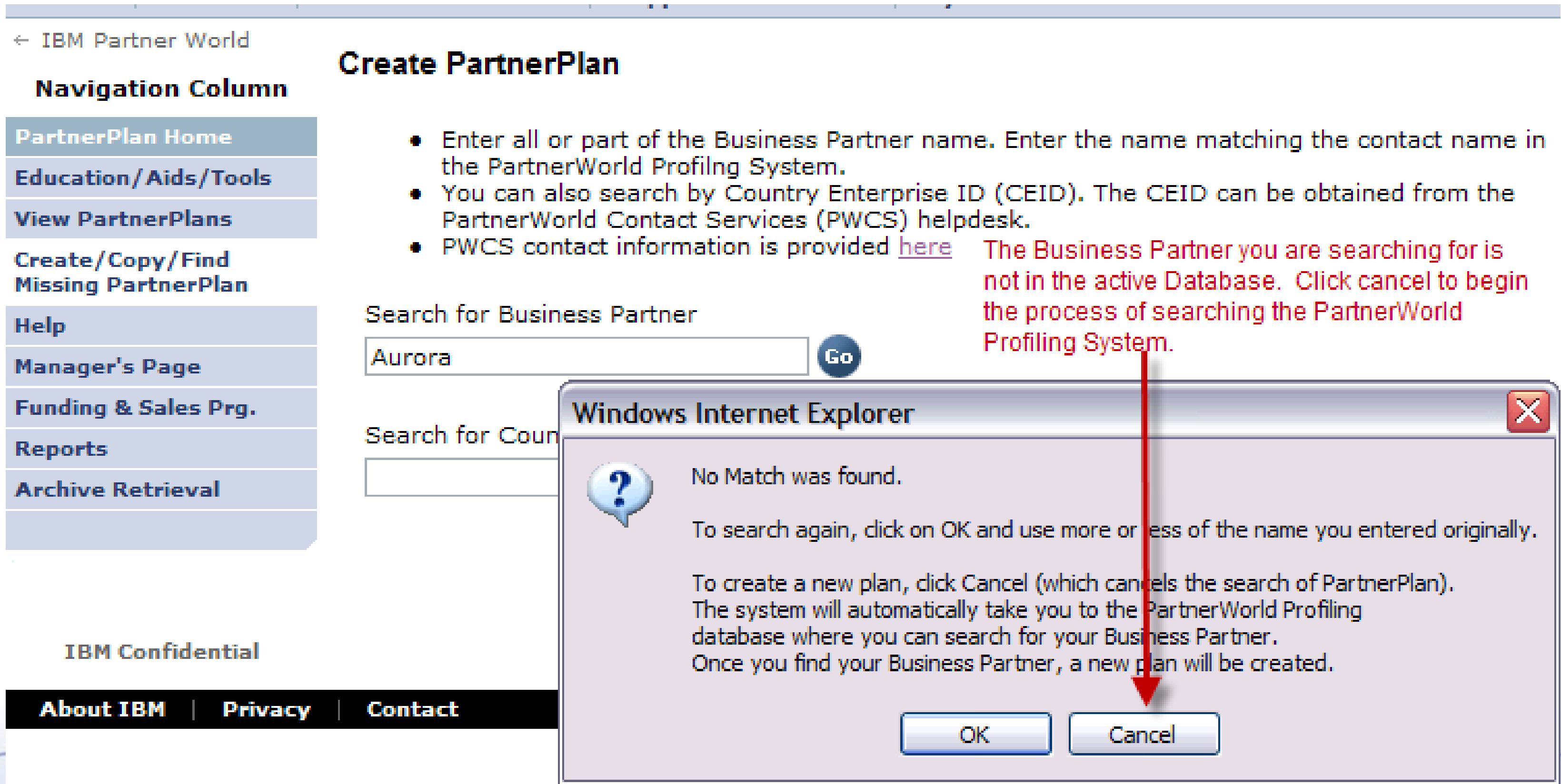
Go

1) If the Business Partner you are looking for appears in the list below, a PartnerPlan already exists. **DO NOT CREATE ANOTHER PLAN!**
2) Contact the Plan Owner by clicking on the link provided in the list. This will create an email for you. Ask the Owner to add you as a Teammember to the existing plan. Provide the Owner with your Web Identity id as follows: **IBMuniqueIdentifier=2700002GSK/cn=people/c=CA/l=world**. (Copy and paste the ID into the email)
3) If you do not get a response from the plan owner, contact the PartnerWorld Contact Services helpdesk (PWCS). Contact information can be found in the Help view

Plan Name	Country	Enterprise ID	Status	Contact Plan Owner
Acme Test Plan	United States of America	10ailDTY	ACTIVE	Email Owner

Creating a New Plan:

5) **If no Plan exists in the active database for this Business Partner, the system will search the PartnerWorld Profiling System. Click on Cancel to cancel the search of PartnerPlan.**

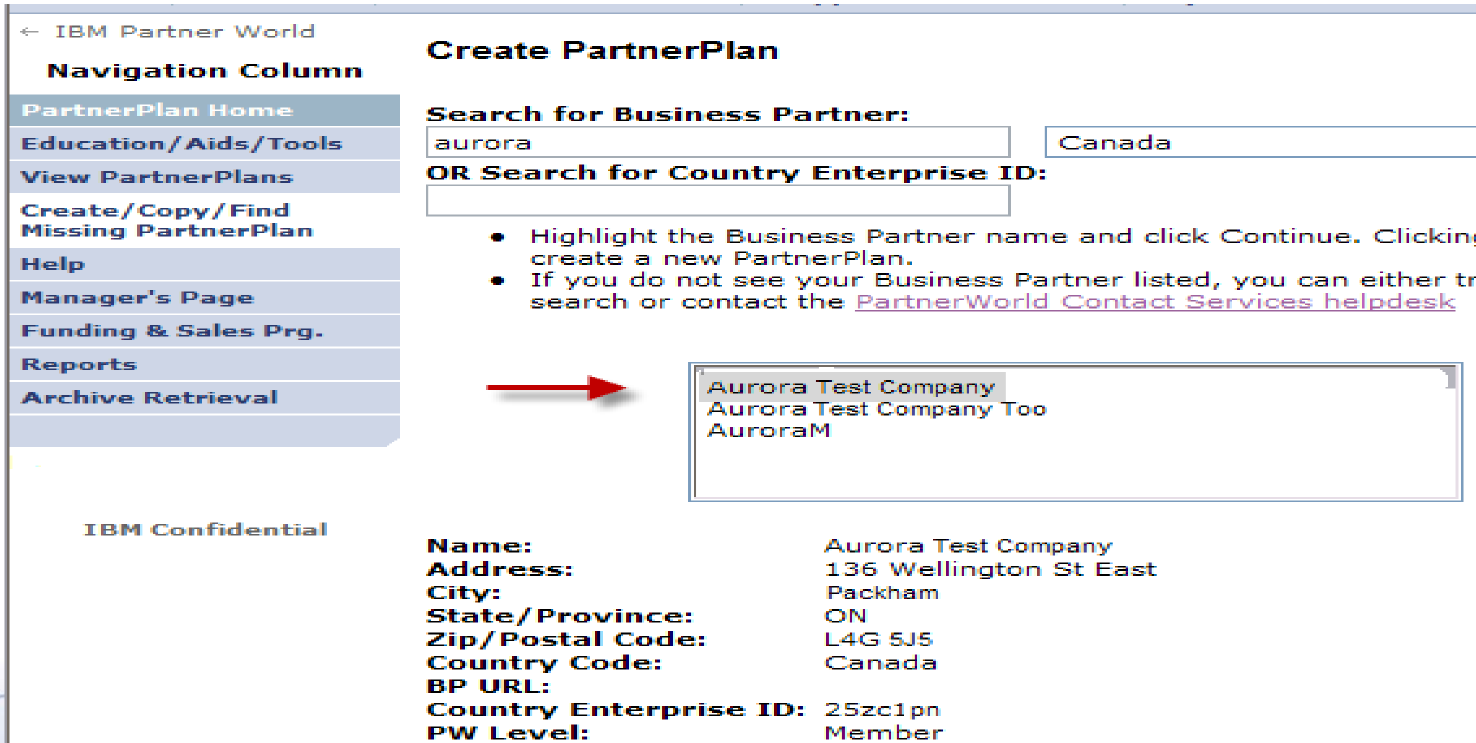


Creating a New Plan:

6) Enter the country where the Business Partner operates. Click Go.

Creating a New Plan:

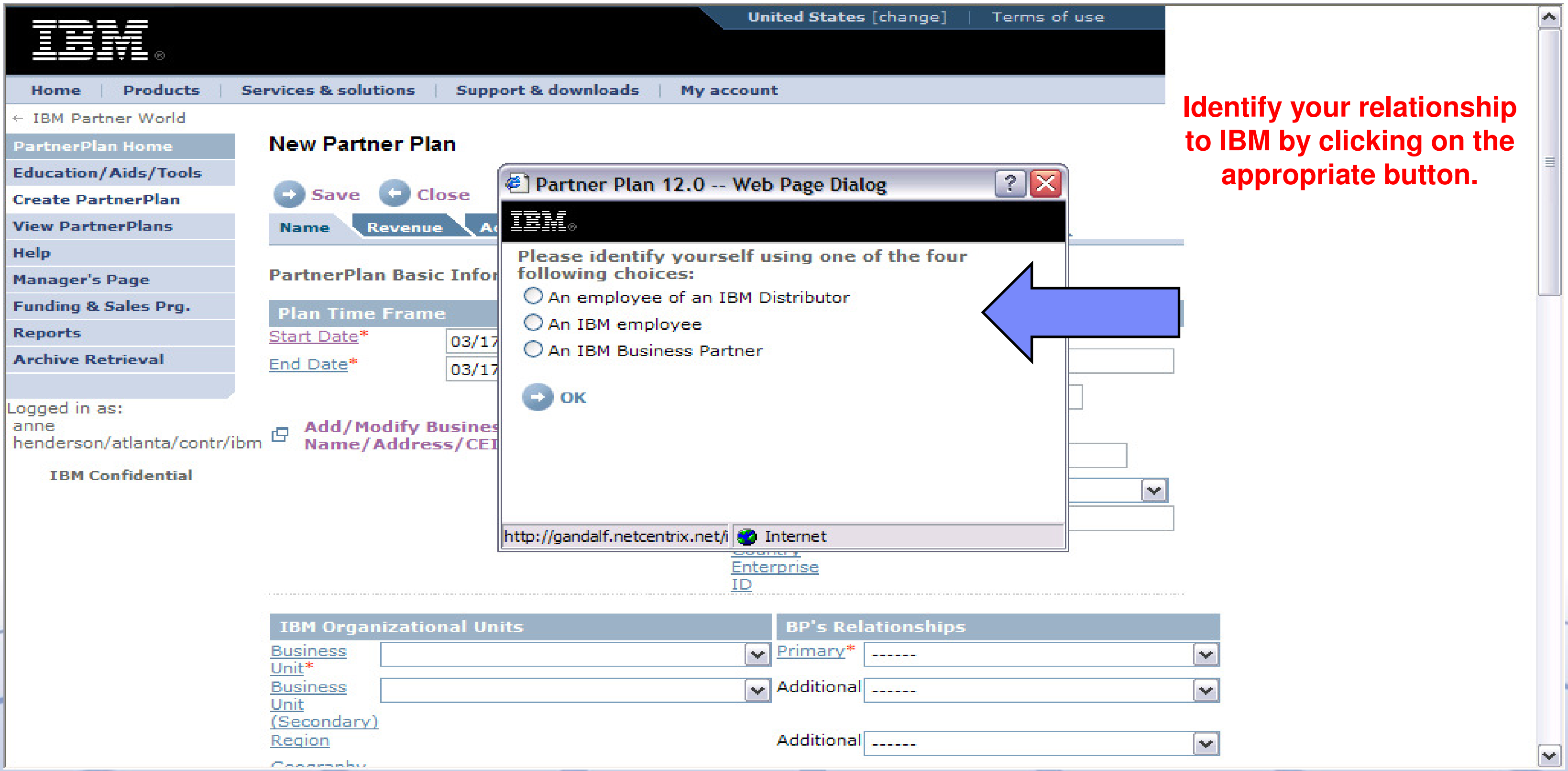
7) **Select the Business Partner from the list presented. Click Continue at the bottom of the screen. Your new Plan will be created.**



Creating a New Plan:

If you work for a Distributor, click on the "An employee of an IBM Distributor" button. If you are a Business Partner who is not a Distributor, click on "An IBM Business Partner" button.

After clicking on "An IBM Business Partner", you will see two additional choices. Click on Business Partners are given two additional choices. Click on "Yes" if you have a rep at IBM or the Distributor. Click on "No" if you do not have a rep.



Creating a New Plan

Move from section to section by clicking on the tabs. Clicking on the Access tab takes you to the section where teammembers are added to the plan.

Profile information, highlighted in yellow, is imported from the PartnerWorld Profiling System (PPS) for you.

NOTE: New plans do not have a year following the Firm Name. The year appears only on copied plans. Please do not copy your new plan to add the year; doing so creates inaccurate reports.

Creating a New Plan:

The First Tab > Name & Address

If the Business Partner has more than one relationship with IBM, for example, with the Business Partner Organization and IBM Software, select those units in the first and second Business Unit fields.

Under BP Relationships, up to three contractual relationships can be identified. If the Business Partner has only one contract, leave the other two fields blank.

IBM Organizational Units

*Business Unit — Which IBM Unit is your relationship with?

Business Unit (Secondary)

Region

Geography

SubRegion

If you are a Distributor or have a relationship with a Distributor, Select the Distributor name from the list. If the Distributor name is not in the list, Select Other.

BP's Relationships

*Primary — Which type of contract does the Business Partner have?

Additional — ------

Required fields have red asterisks

*Distributor

Select

* Rep Name (e.g John Doe)	Rep Phone-external	PartnerWorld Level
Julia Child		Member

* Main Business Partner Contact	Responsibility	Phone	Second Phone	Email
Sam Jones	VP, Marketing	877-158-1877		

The Other Contacts section is a reference section only. You can add an unlimited number of contacts from IBM or the Business Partner. Adding someone here does NOT give access to the Plan. Access is provided on the Access tab only.

Show Other Contacts |

Add Modify Remove

Use the table below to store the names of people who can help with the development or implementation of this plan

Other Contact Names	Responsibility	Phone	Second Phone	Email
Emilio Sabatini	IBM Program Manager	416-888-7676	---	esabatini@Aurora.com

Creating a New Plan:

The First Tab > Name & Address

Business Partner 's Core Business

Back to top

What does this BP sell, what are their main markets, and what are their key business issues?	Focus Brand Review
Add three or four lines to summarize the Business Partner's products or services and business issues.	Select

Field level help

This year's Revenue Objective		Last year's Revenue Objective	Percent In General Business
Business Partner's Revenue Objective	0	Add the Business Partner's Overall Revenue Objective	0%
IBM Revenue Objective	0	Add IBM's portion of the overall objective.	0%

Comments

Free text area to add additional comments.

Attachments

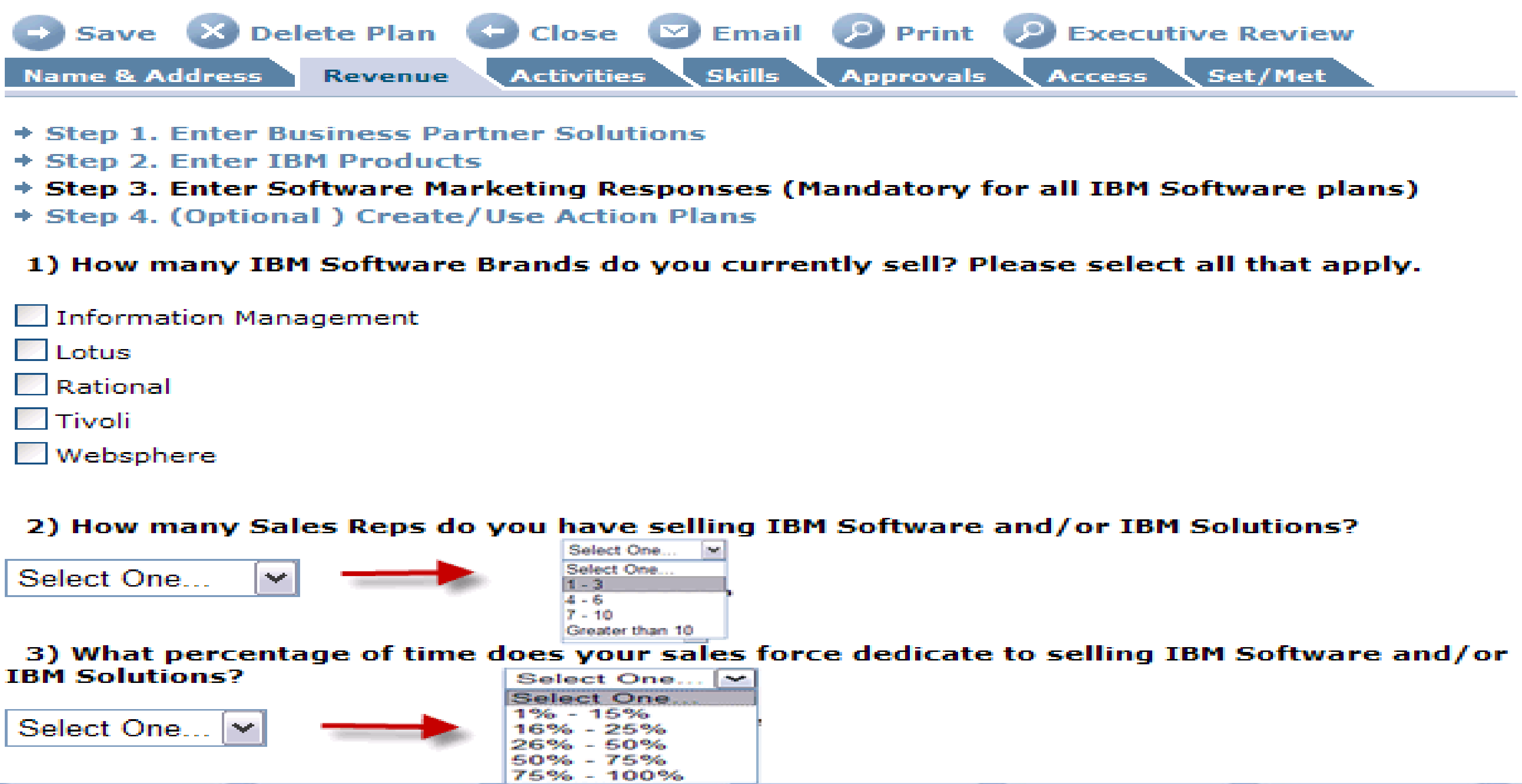
Attach any type of file here. Use the Plan as a central repository to share files with your team.

Browse...

Creating a New Plan (IBM Software only):

The Second Tab > Revenue

If you have selected IBM Software as the Business Unit on the Name and Address tab, there are 10 mandatory questions on the Revenue tab, Step 3. Prior to creating the PartnerPlan, obtain the answers to these questions. These are not mandatory for non-Software partners.



Creating a New Plan (IBM Software only):

The Second Tab > Revenue

Mandatory Software Questions continued:

*4) Which of the following competitive products listed, do you sell. Please select all that apply.

- [ ] Microsoft
- [ ] Oracle
- [ ] HP
- [ ] SAP
- [ ] CA
- [ ] BMC
- [ ] Borland
- [ ] Open Text & Documentum
- [ ] Other
- [ ] N/A

*5) In the column below, which of the following best describes your current business model? Please indicate using "1" for Primary and "2" for Secondary, where applicable.

a. ISV (majority of your profits from selling your own software):
1

b. Reseller (majority of your profits from selling software developed by other companies):
2

c. Systems Integrator (majority of your profits from selling technical consulting services):
Select One...

d. Consultant (majority of your profits from selling business consulting services):
Select One...

e. OEM:
Select One...

f. Value Added Reseller (majority of your profits from selling your portfolio of software solutions and associated service contracts):
Select One...

g. Solution Provider (majority of your profits from selling your own software and consulting services):
Select One...

Creating a New Plan (IBM Software only):

The Second Tab > Revenue

Mandatory Software Questions continued:

6) Have you ever teamed with another IBM Business Partner on a transaction?

◯ Yes ◯ No

6a) If yes, how many such transactions occurred in the last 12 months?

Select One...

Select One...
- Select One...
- 1 - 3
- 4 - 6
- 7 - 10
- Greater than 10

7) Do you currently sell and deploy a repeatable solution based on IBM Middleware?

◯ Yes ◯ No

8) Please indicate, from the list below, which Industries you currently sell IBM Software and/or IBM Solutions to. Please select all that apply.

- ☐ Aerospace and Defense
- ☐ Automotive
- ☐ Banking
- ☐ Chemical and Petroleum
- ☐ Computer Services
- ☐ Consumer Products
- ☐ Cross Industry
- ☐ Education - Higher Ed
- ☐ Education - K-12
- ☐ Electronics
- ☐ Energy & Utilities
- ☐ Engineering
- ☐ Environmental/Health/Safety
- ☐ Fabrication and Assembly
- ☐ Financial Markets
- ☐ Government
- ☐ Health Care and Life Sciences
- ☐ Insurance
- ☐ Manufacturing
- ☐ Media & Entertainment
- ☐ Professional Services
- ☐ Services
- ☐ Retail
- ☐ Telecommunications
- ☐ Travel and Transportation
- ☐ Wholesale

Creating a New Plan (IBM Software only):

The Second Tab > Revenue

Mandatory Software Questions continued:

9) What is your planned investment over the next 12 months in the following areas as it relates to IBM Software Middleware and/or IBM Solutions?

a. Certifications:
Select One...

b. Marketing:
Select One...

c. Headcount:
Select One...

d. Supporting expenses such as travel, equipment, other:
Select One...

Select One...
- Select One...
- Under $10K
- $10K - $50K
- $50K - $100K
- Over $100K

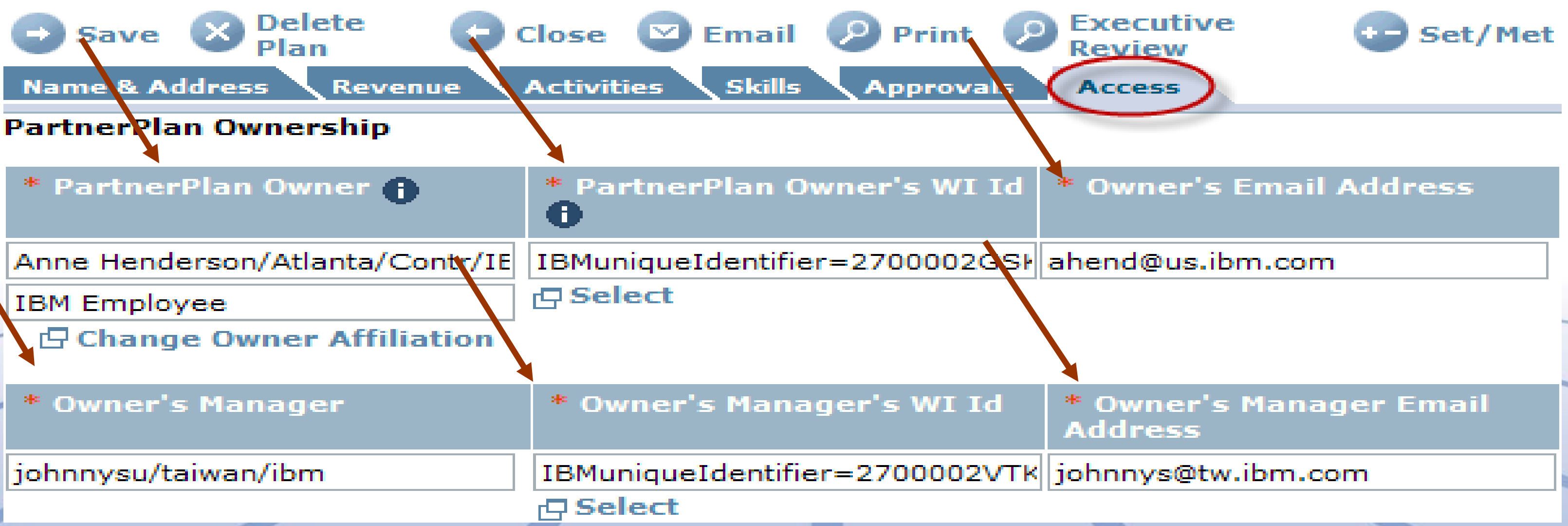
10) Can we share this information with the Distributor selected on the Name and Address tab (under BP Type)?

○ Yes ○ No

Creating a New Plan Access

Always save the Plan after completing the mandatory fields. This will help to ensure you do not accidentally loose information. You cannot save unless the fields below are completed.

- **Saving a plan requires that the six fields on the Access tab are completed. The system pulls in your IBM id from your browser and populates the Plan Owner's field.**
- **If you are an IBM employee, add your own Lotus Notes address (for example, John Smith/Atlanta/IBM) in the Plan Owner's field if it didn't automatically populate.**
- **Use the "Select" link to find your blue Page's Manager's WI id. All of the Manager fields should populate but if the Owner's Manager field doesn't display your Manager's Notes address, please update the field in the format of John Smith/Atlanta/IBM.**
- **If you cannot find the Manager in the list, contact the PWCS team for assistance. Contact information is available in the Help view on the blue Navigation column.**
- **NOTE: If you are a Business Partner and creating the Plan, add your Distributor Manager's IBM id or the IBM Manager's fields from the "Select" link. If you are not a Business Partner, add your own Blue Pages Manager or your Distributor Manager..**



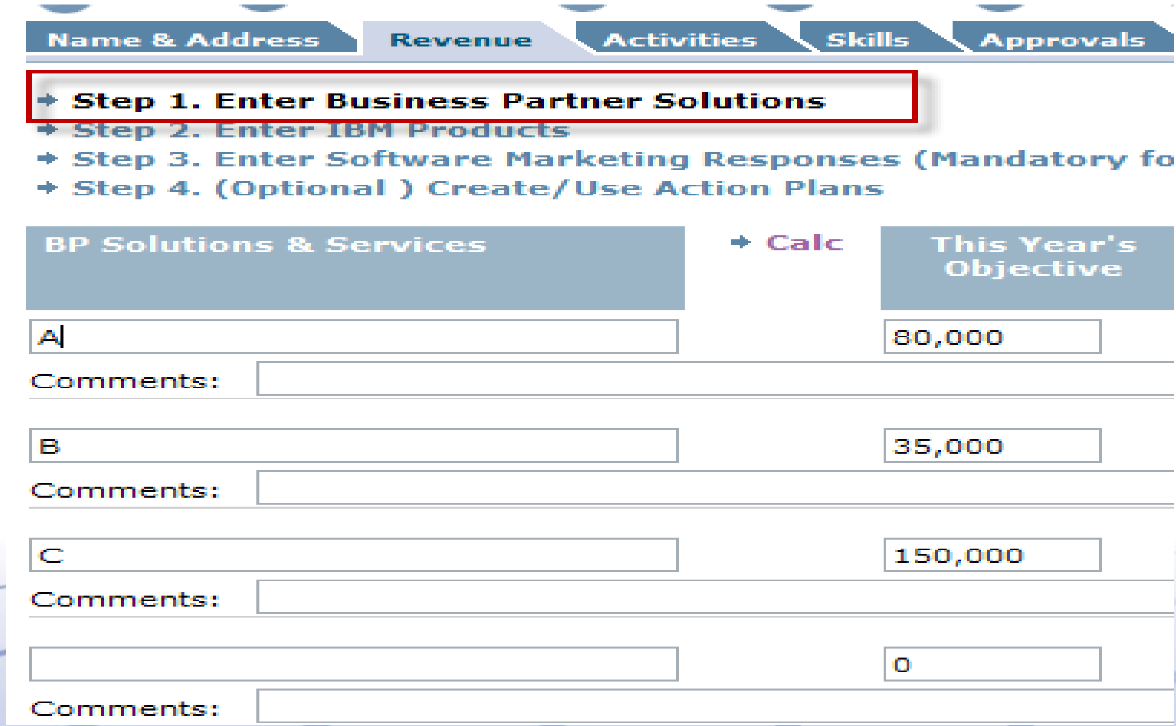
Creating a New Plan

Revenue Tab: Revenue

NOTE: After saving the plan, you must put it in edit mode to begin working.

On the BP Solutions tab, enter the Solutions or Services sold by the Business Partner. Add this year's revenue objective.

If desired you can enter the Prior Year revenue for comparison.

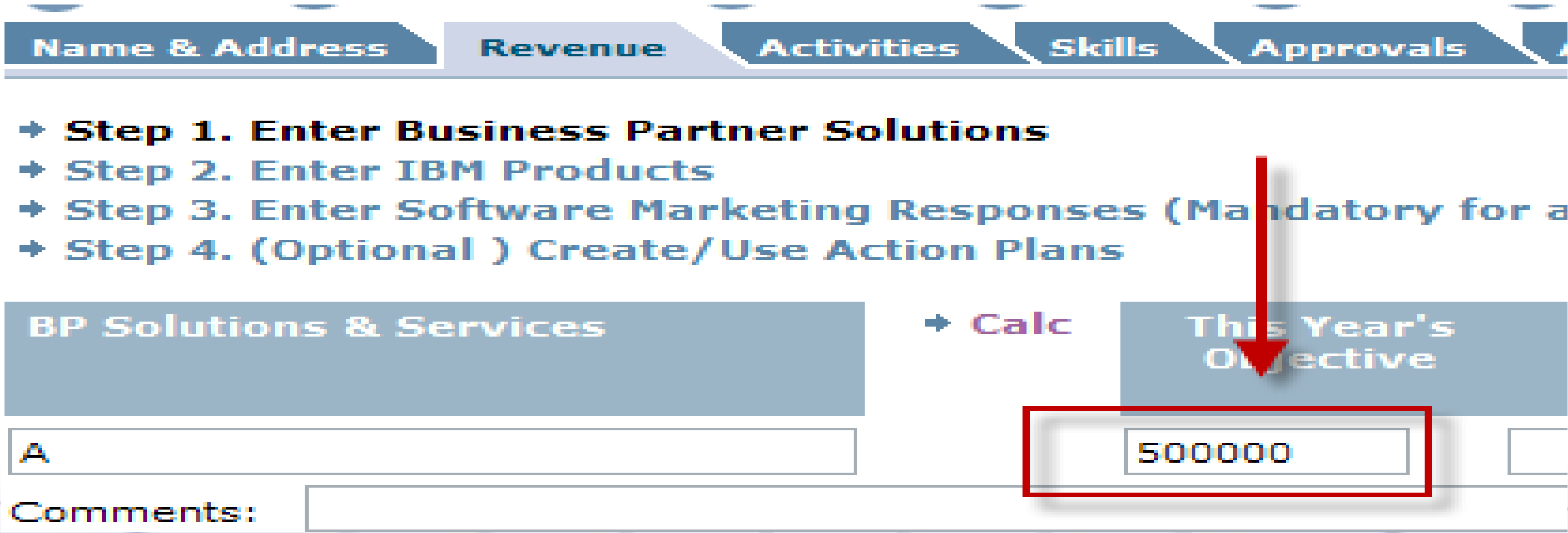


Creating a New Plan

Revenue Tab: Revenue

Enter all numbers as whole numbers; no parts of a dollar or pound or other currency. Most plans are in local currency unless otherwise identified on the individual activities.

The number below the red arrow would be read as Five Hundred Thousand dollars.



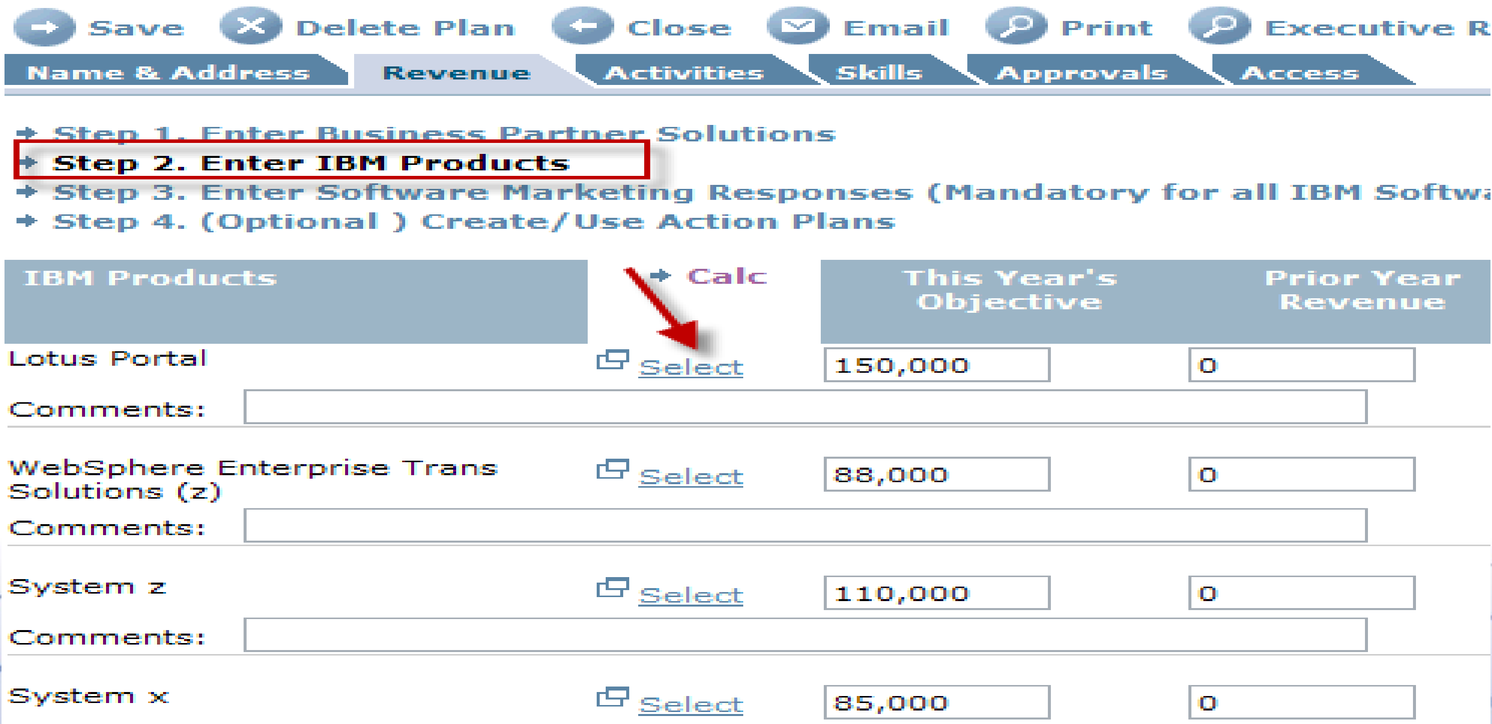
Creating a New Plan

Revenue Tab: 

Click on Step 2 to begin entering the IBM products sold by the Business Partner. Use the Select link to choose the product. Enter the revenue target for each product. The system will expand to 40 rows as required.

The brand selections from the Revenue tab flow through to the Skills tab with once exception. Any Software brand with the word Open Distribution in the name will not appear on the Skills tab.

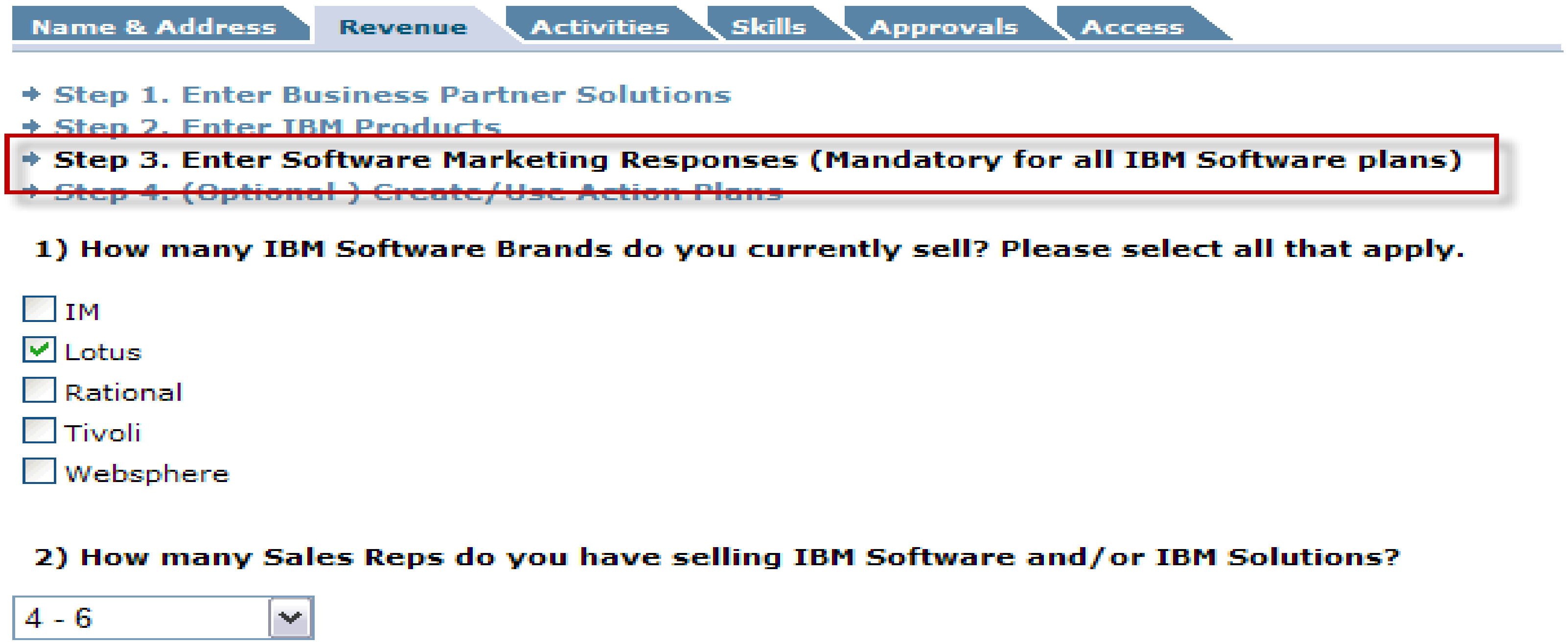
NOTE: Once you are finished your work on the Revenue tab, save the plan or the entries will be lost.



Creating a New Plan

Revenue Tab:

Step 3: If this is an IBM Software plan, all ten questions must be answered before the plan can be saved. If the plan does not involve IBM Software, the questions are not mandatory and you'll be able to save your plan without answering the questions.



Creating a New Plan

Revenue Tab: Revenue

The Revenue tab is mandatory for plans with IBM Software. It is not mandatory for other users. Completing the Revenue tab provides everyone with a clear picture of the revenue target by product.

At the bottom of the Revenue tab, totals will appear after Steps 1 and 2 are completed. Estimate the percentage of revenue that will be generated in each quarter and enter those in the Percent row. When you click Calc, you will see how much revenue you need to generate in each quarter to meet your targets. You need to build activities to reach these totals.

Total BP Solutions		→ Calc	1Q	2Q	3Q	4Q
Revenue Objective	150,000	Percent	10%	20%	30%	40%
Revenue Objective by Quarter			15,000	30,000	45,000	60,000
Actual Revenue			0	0	0	0

Total IBM Products		→ Calc	1Q	2Q	3Q	4Q
Revenue Objective	15,000	Percent	10%	20%	30%	40%
Revenue Objective by Quarter			1,500	3,000	4,500	6,000
Actual Revenue			0	0	0	0

Total All Products		1Q	2Q	3Q	4Q
Revenue Objective	165,000	16,500	33,000	49,500	66,000

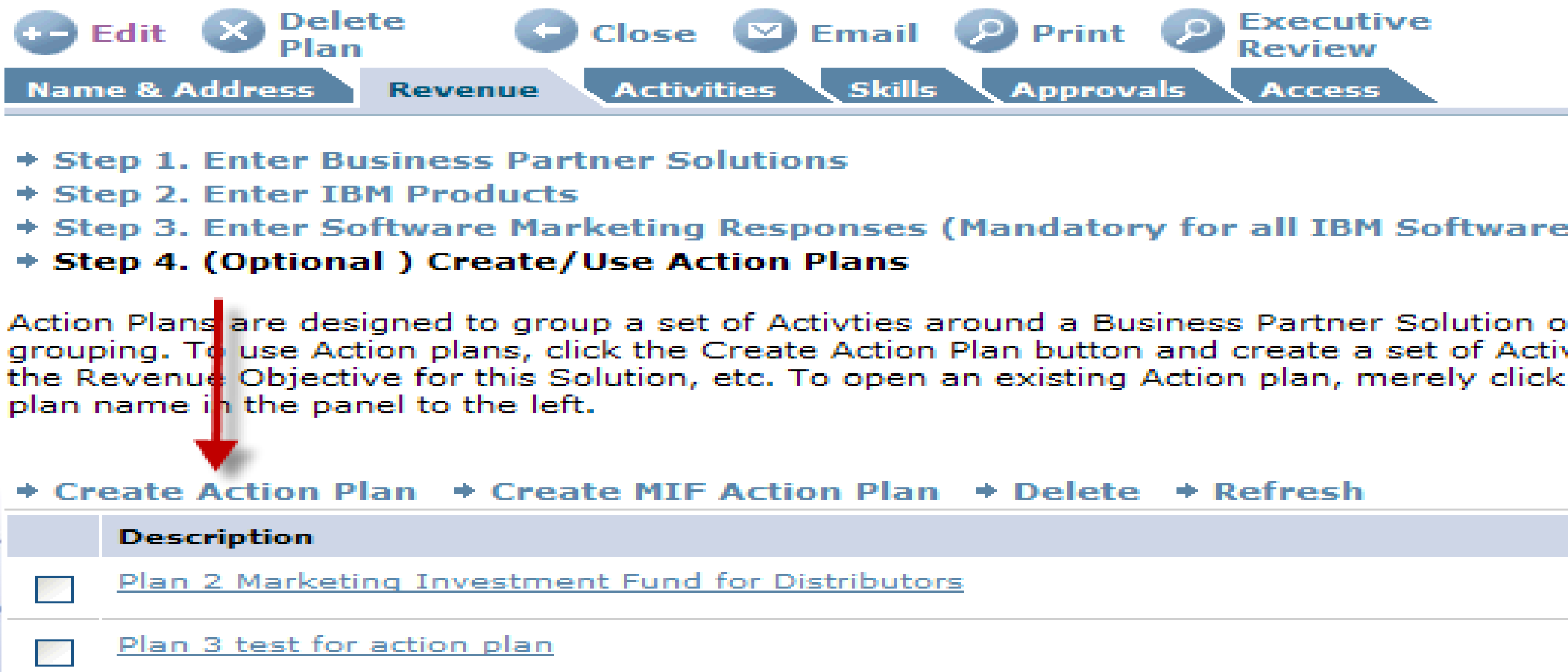
Creating a New Plan

Revenue Tab Revenue

Step 4 – Action Plans

An action plan is a grouping of similar activities, typically by product, solution or timeframe. Grouping activities allows you to see a subtotal for that group. It is not mandatory, except for users of the Distributor Growth Fund program (DGF) and Marketing Investment Fund (MIF). DGF and MIF activities must be created on the DGF or MIF Action plan to use program-specific code.

The DGF and MIF action plans will only appear on Distributor plans.



Creating a New Plan

Revenue Tab Revenue

Step 4 – Action Plans

Action Plan 1Q Activities

Save Delete Close Email

A standard action plan. You can rename from 1Q Activities to another name of your choice.

Action Plan No.	Action Plan Name	Revenue Objective for this Action Plan
1	* 1Q Activities	21,895,000

Solution Name	Description of Business Solution	Target Market

You can create your activities here or on the Activities tab and attach them to this action plan. You'll see how to do that in the Activities section.

- Create New Activity
- Copy One or More Activities
- Paste One or More Activities
- Import Activities
- Delete Activities
- Refresh View
- Submit One or More Activities
- Export to Excel
- IBM Sales Support

/ibm

	Funding Program	Activity Type	Activity	Person Responsible	Estimated Cost	Program Funding	Actual Cost	Start	End	Status	Lead Plan
				TOTALS:	0	0	0				0

Activities can be created on the Action plan or on the Activities tab (except for DGF)

Creating a New Plan: Activity

Revenue or Activities

PartnerPlan:
Action Plans:

Activity ID: 002574BB004DA6048725742E002B4581

All activities are assigned a 32 character activity id. If you call the helpdesk for assistance, give them this number AND the Activity name.

Set a Reminder for this Activity
Attach Connector

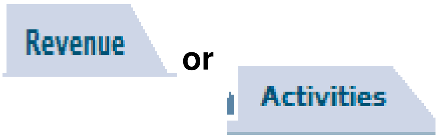
Co-funded Marketing Application

Activity has been sent to CMT
UCID: NECE6030708
Status: Claim Paid
Date Submitted:07/18/2008
Access the Co-funded Marketing Tool

If the funding program you select for this activity flows to the CoMarketing Tool, the progress of the activity through the CMT system will appear here. The UCID is the number assigned when the activity is imported into the CMT form.

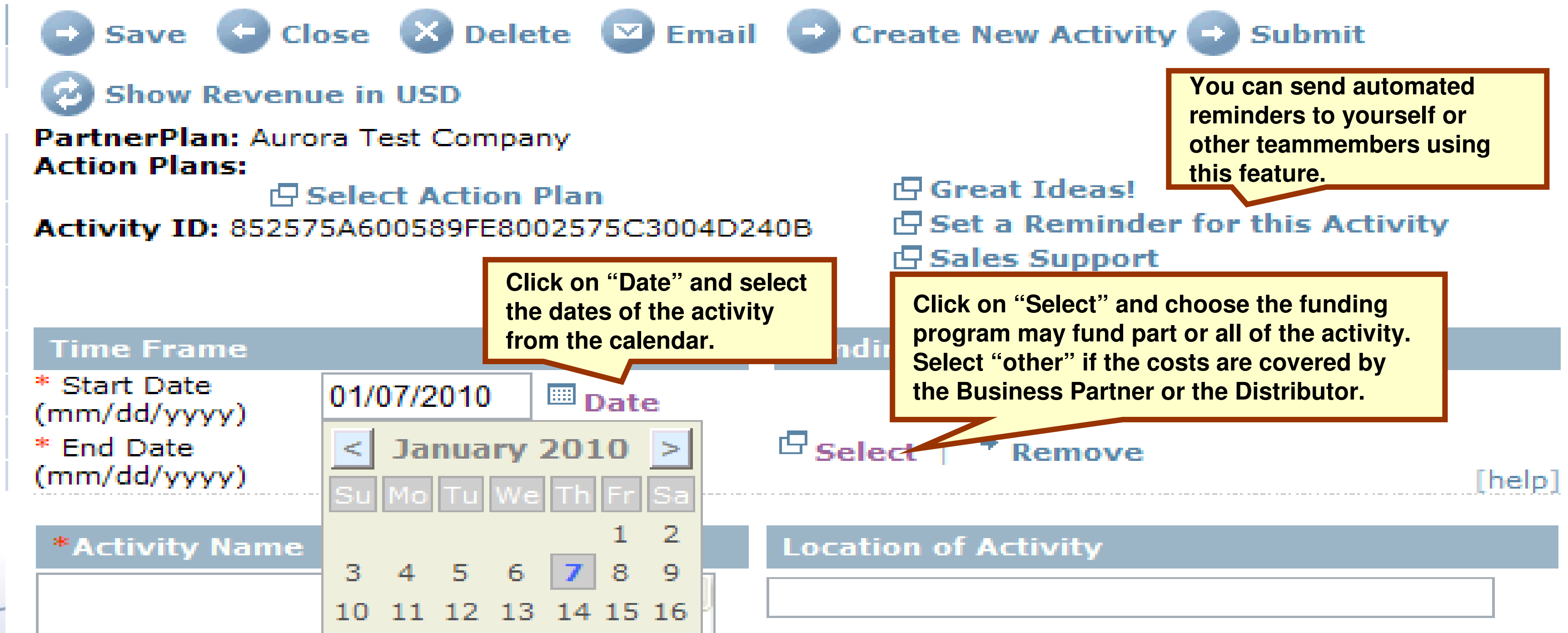
Time Frame	Funding Program
Start Date (mm/dd/yyyy)	
End Date (mm/dd/yyyy)	

Creating a New Plan: Activity



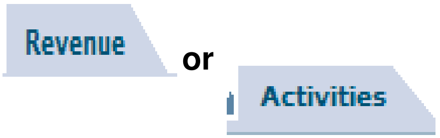
The Activity form is available from both the Activity Tab and the Action plan. If you are creating a DGF or MIF activity, it must be created on the DGF or MIF action plan.

On DGF and MIF activities only, the system defaults to the correct funding program.



NOTE: Activities will all appear on the Activities tab, regardless of where they are created. Activities created on an Action plan will also be visible on the Activities tab.

Creating a New Plan: Activity (continued)



Complete all mandatory fields, identified with a red asterisk.

There are ten new fields on the Activity form in 2010. Five of those new fields appear on this chart:

>BP Names (enter all Business Partners you have worked with on this activity if you are requesting funding from SWG Plug N Play or SWG VAD MDF).
>The Catering, Entertainment, Transportation fields allow you to enter estimated catering /entertainment and/or transportation costs.   Provide the name of the vendor and other detail describing the costs in the Expense Detail field. This information will flow through to the CoMarketing Tool if the program is linked.

The other fields are described in the following two charts.

The Activity Name field requires a short description of the activity

If you are working with other Business Partners on this activity for the SWG Plug N Play or SWG VAD MDF programs, you can enter the firm names here.

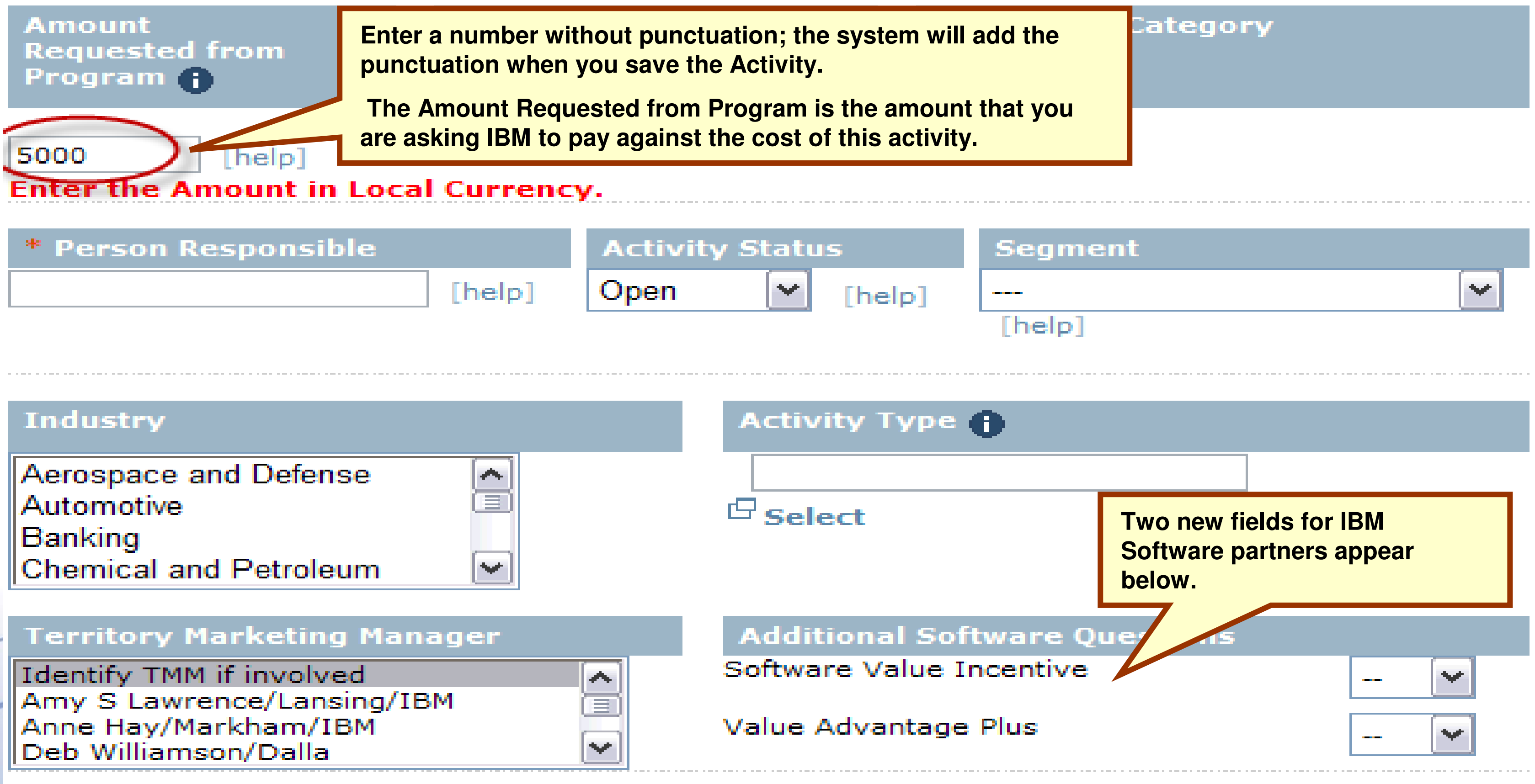
Enter your estimated catering, entertainment or transportation expenses here, if you will be claiming for them.

Creating a New Plan: Activity (continued)

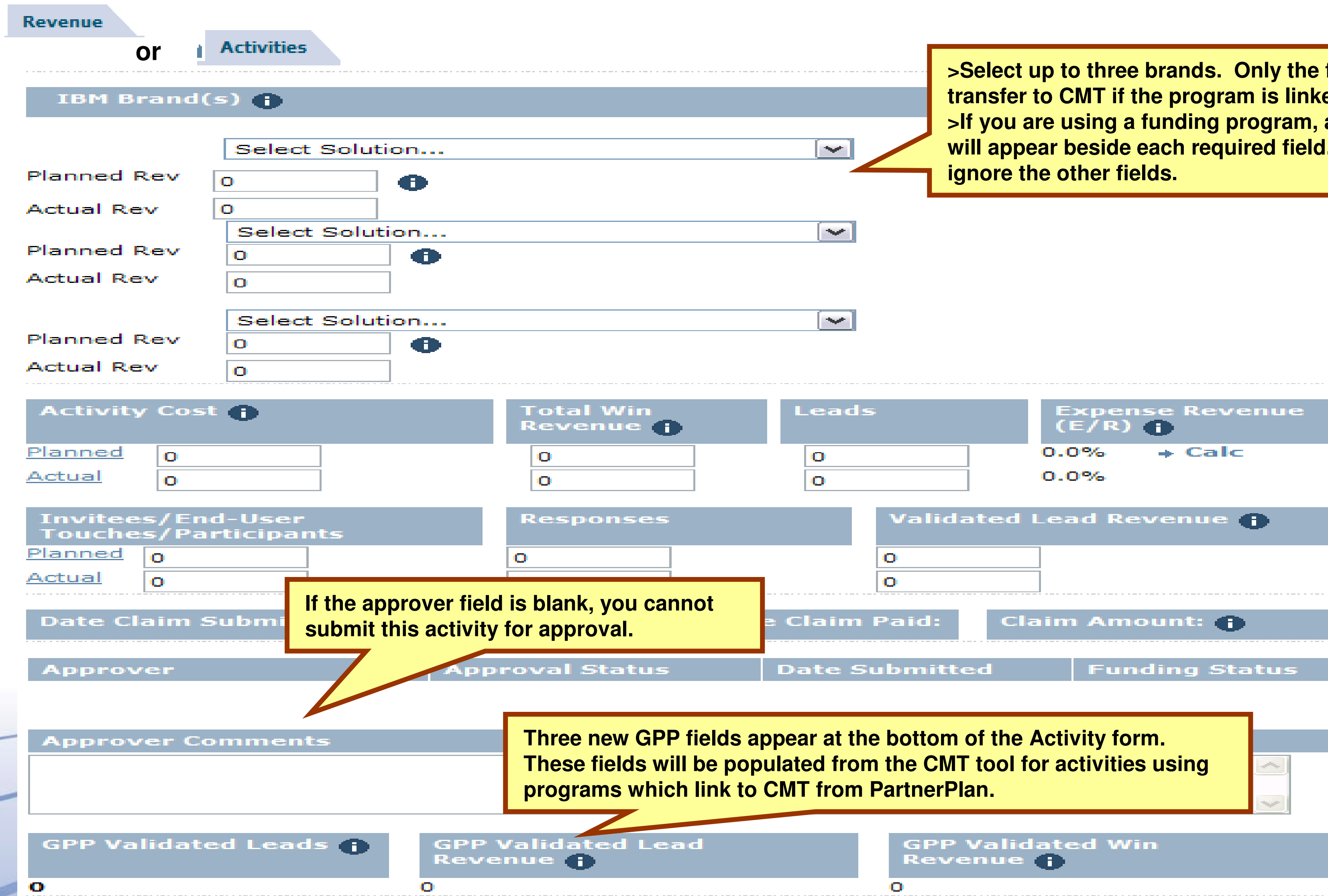
Revenue or Activities

Complete all mandatory fields, identified with a red asterisk.

The other new fields are found under the Additional Software Questions.



Creating a New Plan: Activity (continued)



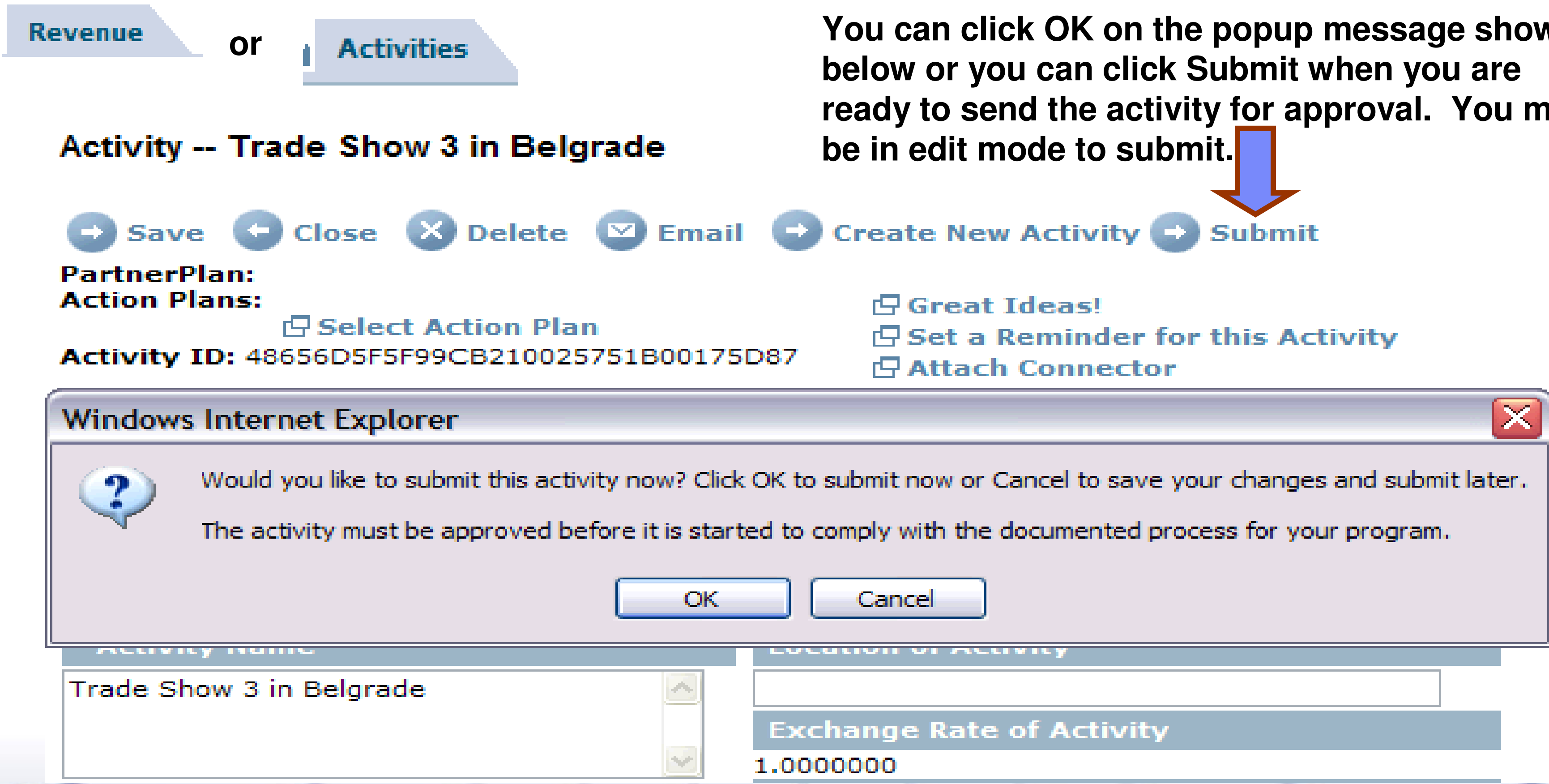
>Select up to three brands. Only the first will transfer to CMT if the program is linked.
>If you are using a funding program, a red asterisk will appear beside each required field. You can ignore the other fields.

If the approver field is blank, you cannot submit this activity for approval.

Three new GPP fields appear at the bottom of the Activity form. These fields will be populated from the CMT tool for activities using programs which link to CMT from PartnerPlan.

Submitting a New Activity – All Types

You can click OK on the popup message shown below or you can click Submit when you are ready to send the activity for approval. You must be in edit mode to submit.



Submitting a New Activity – All Types

Revenue or Activities

Activity -- Trade Show 3 in Belgrade

Edit Close Delete Email Create New Activity

- A request for review has been created.

When you submit an activity, this message appears at the top of the activity. An email is sent to the approver. The email contains a link back to the activity.

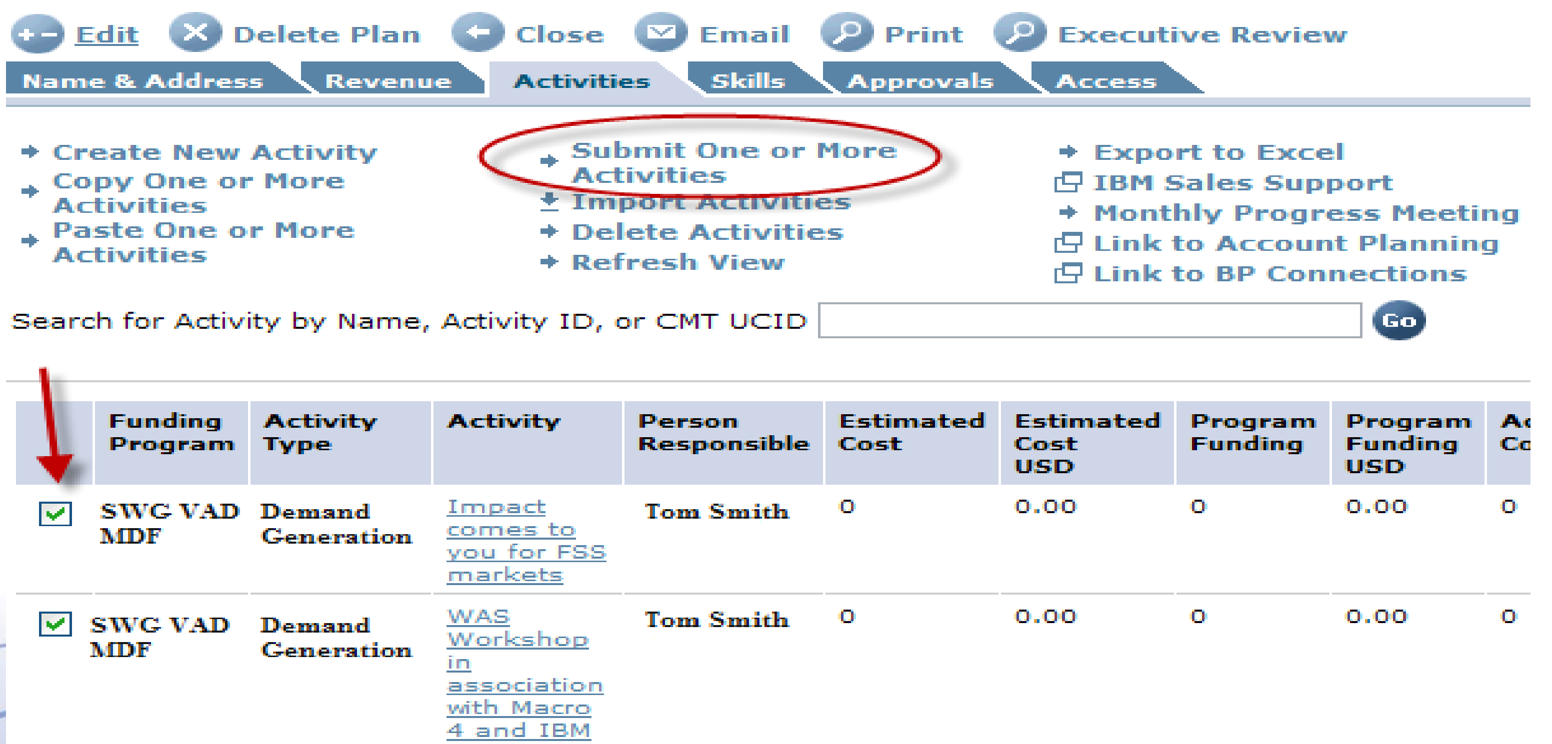
PartnerPlan:
Action Plans:
Activity ID: 48656D5F5F99CB210025751B00175D87

Set a Reminder for this Activity
Attach Connector
Sales Support

Time Frame | Funding Program

Submitting Activities from the Activities Tab

Tip: Multiple Activities can be submitted for approval by putting a check in box beside each activity you want to submit.



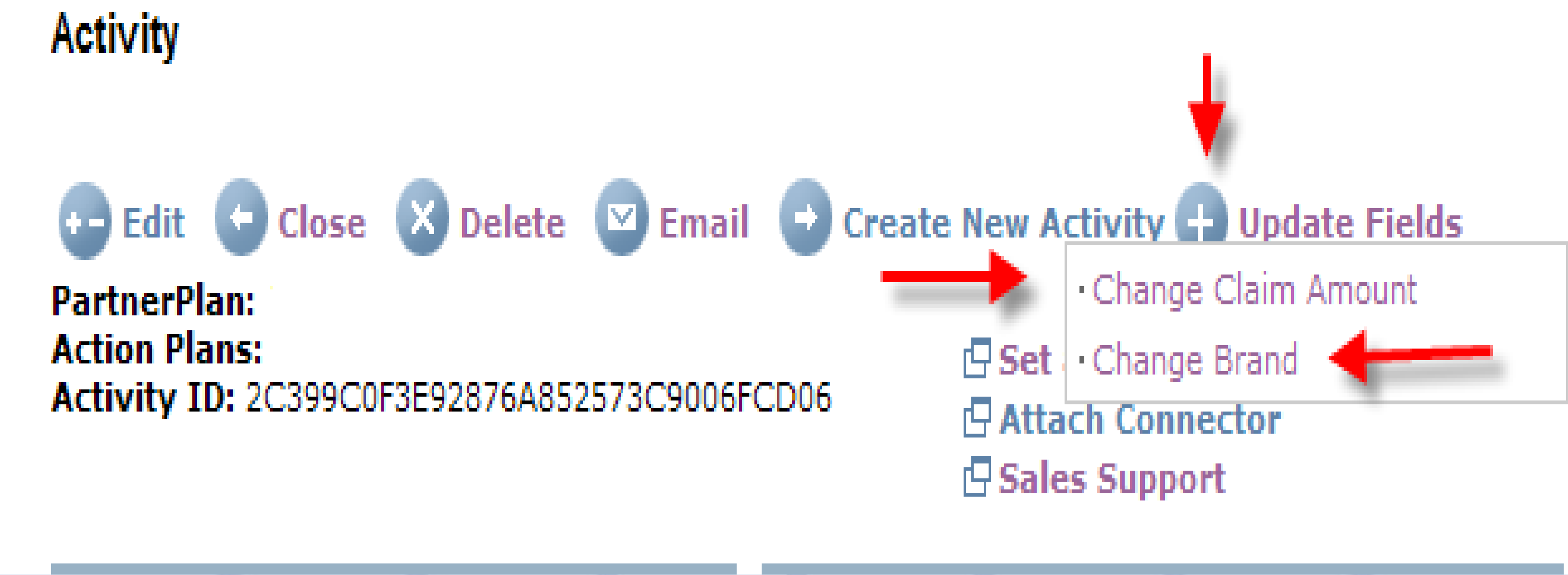
Changing the Claim Amount or Brand

Review This:

If your activity is approved and no application has been created in the Co-Marketing Tool, you can change the amount requested or brand by clicking on the Update Fields Button.
Click on the Change Claim Amount (Amount Requested from Program field) or Change Brand link and the corresponding field will become editable.

Editing the Claim Amount to a larger number will un-approve the activity. Editing the Claim Amount to a lower number will not affect the approval. Changing the brand will un-approve the activity.

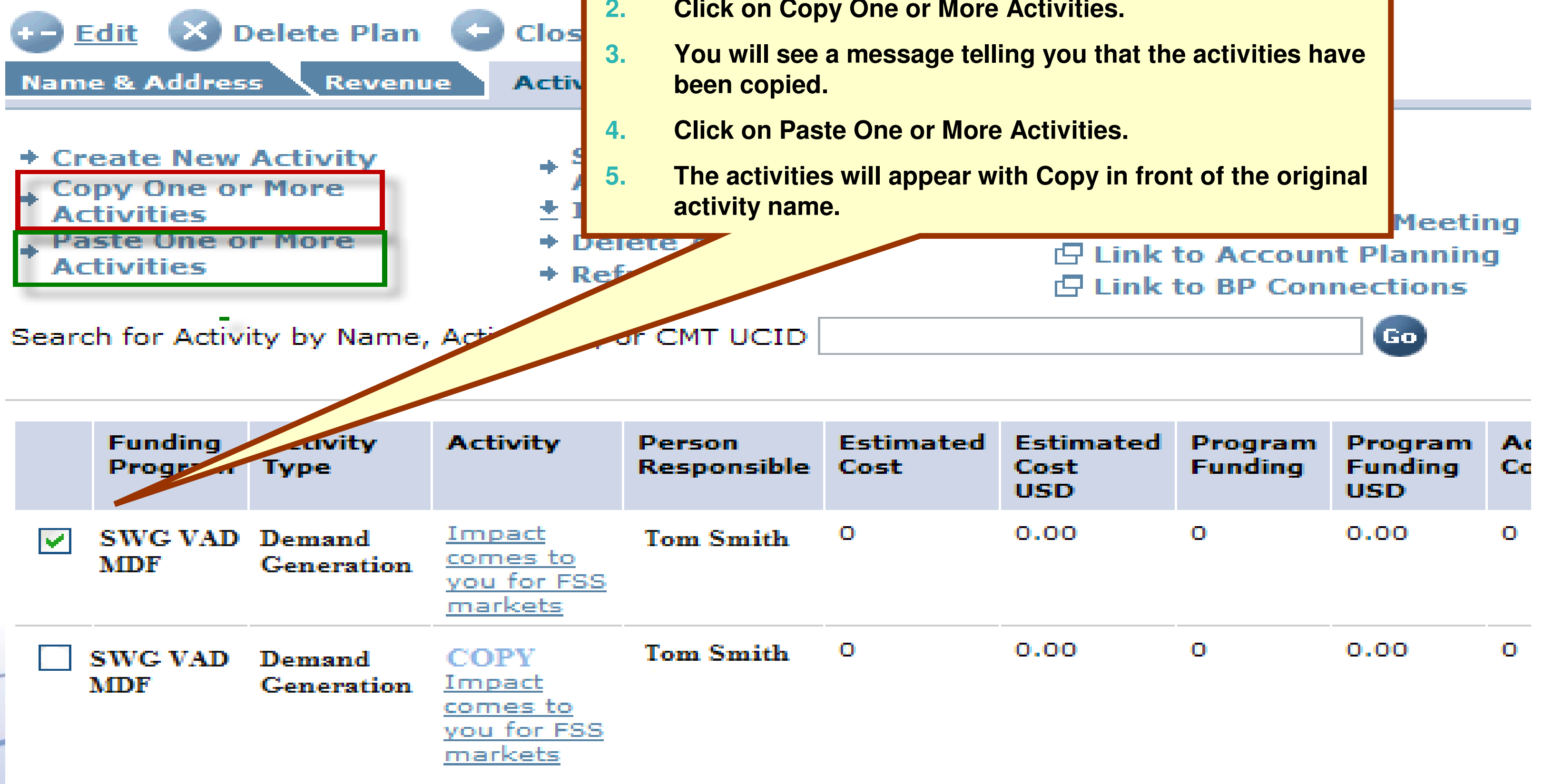
NOTE: You must resubmit the activity for approval if it becomes unapproved.



Activities Tab: Copy Feature

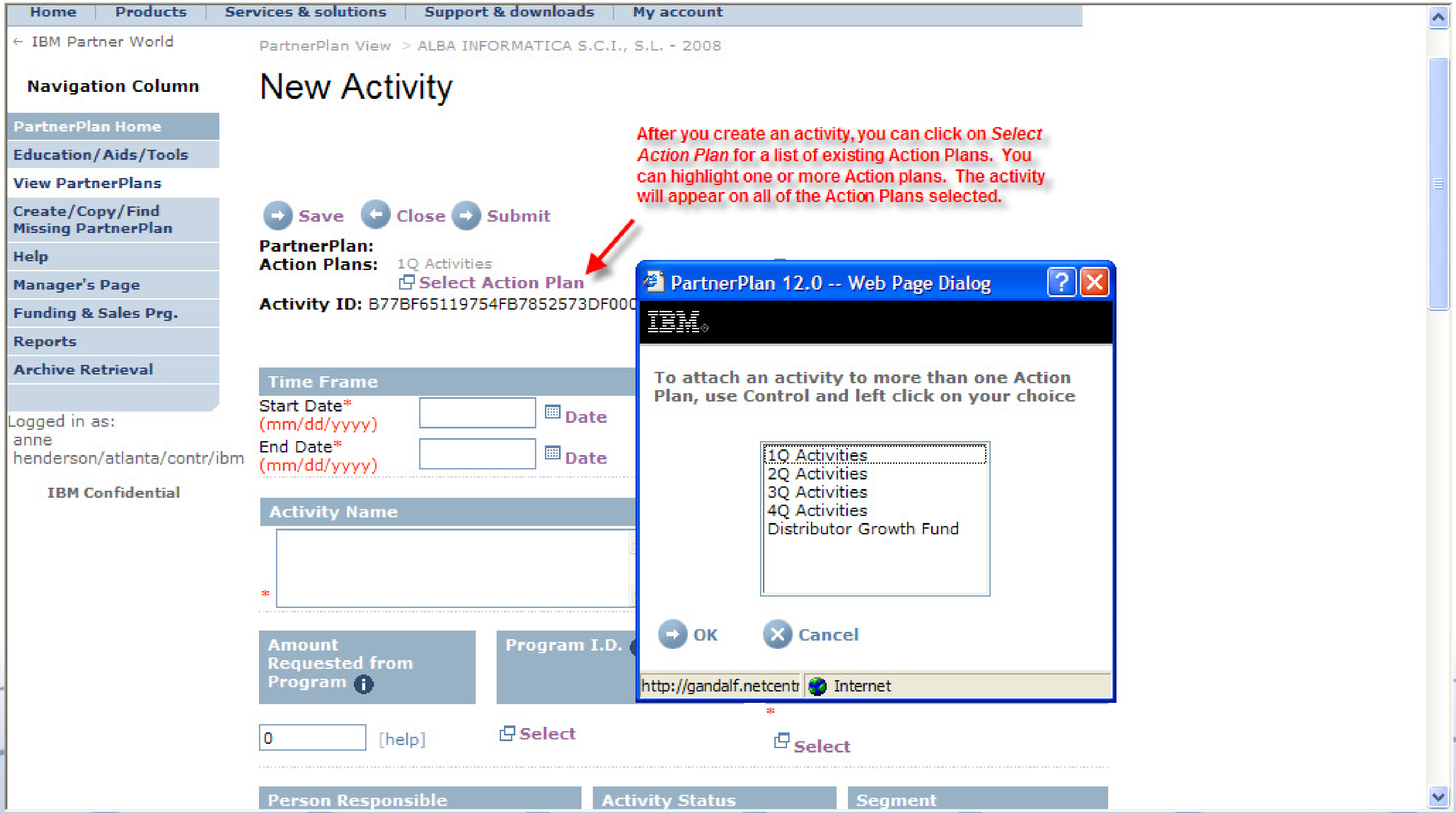
You can save time creating activities by copying and pasting into the same plan or another plan where you are the Plan Owner.

1. Put a check in the box beside each activity you want to copy.
2. Click on Copy One or More Activities.
3. You will see a message telling you that the activities have been copied.
4. Click on Paste One or More Activities.
5. The activities will appear with Copy in front of the original activity name.



Creating a New Activity

An activity can appear on one or multiple action plans, allowing you to group all activities both by quarter and by product if desired. Go to the Action Plans section and select as many action plans as desired.



Skills Tab

Brands selected on the Revenue step, Step 2 will flow through to the Skills tab. An agent runs overnight (North American time) to update the Skills tab with the certifications in the PartnerWorld Contact Services database.
A future tool update will capture hardware certs at the enterprise level.

Name & Address | Revenue | Activities | Skills | Approvals | Access

Education Vouchers 0

Certifications are displayed as totals against each product. For example, Websphere technical certifications 1004503, 1004701, and 15001502 will appear as a total of 3 against each Websphere product selected on the Revenue tab, Step 2. STG certifications are captured at the Enterprise level only.

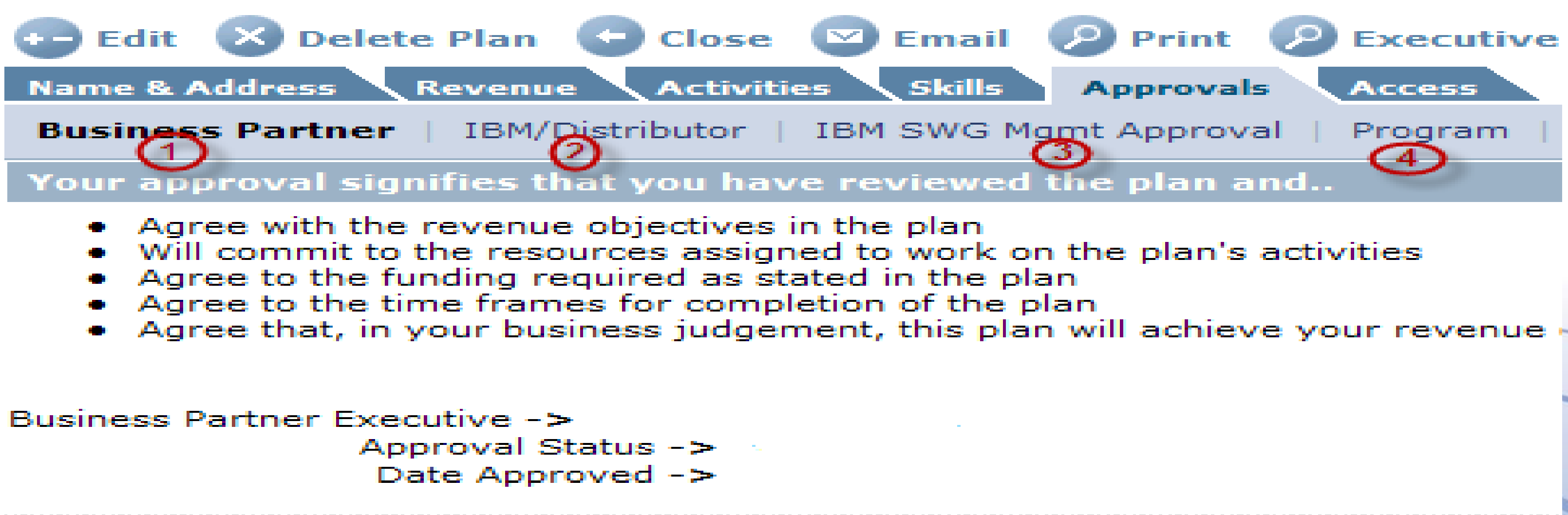
NOTE: A software brand followed by - Open Distribution Products after its name will not appear in the table below.

IBM Products sold by the Business Partner	Certifications		VAP
	Technical	Sales	
WebSphere Core	0	0	
IM Heritage Content Management	3	0	
Total Skills	3	0	

Approvals Tab:

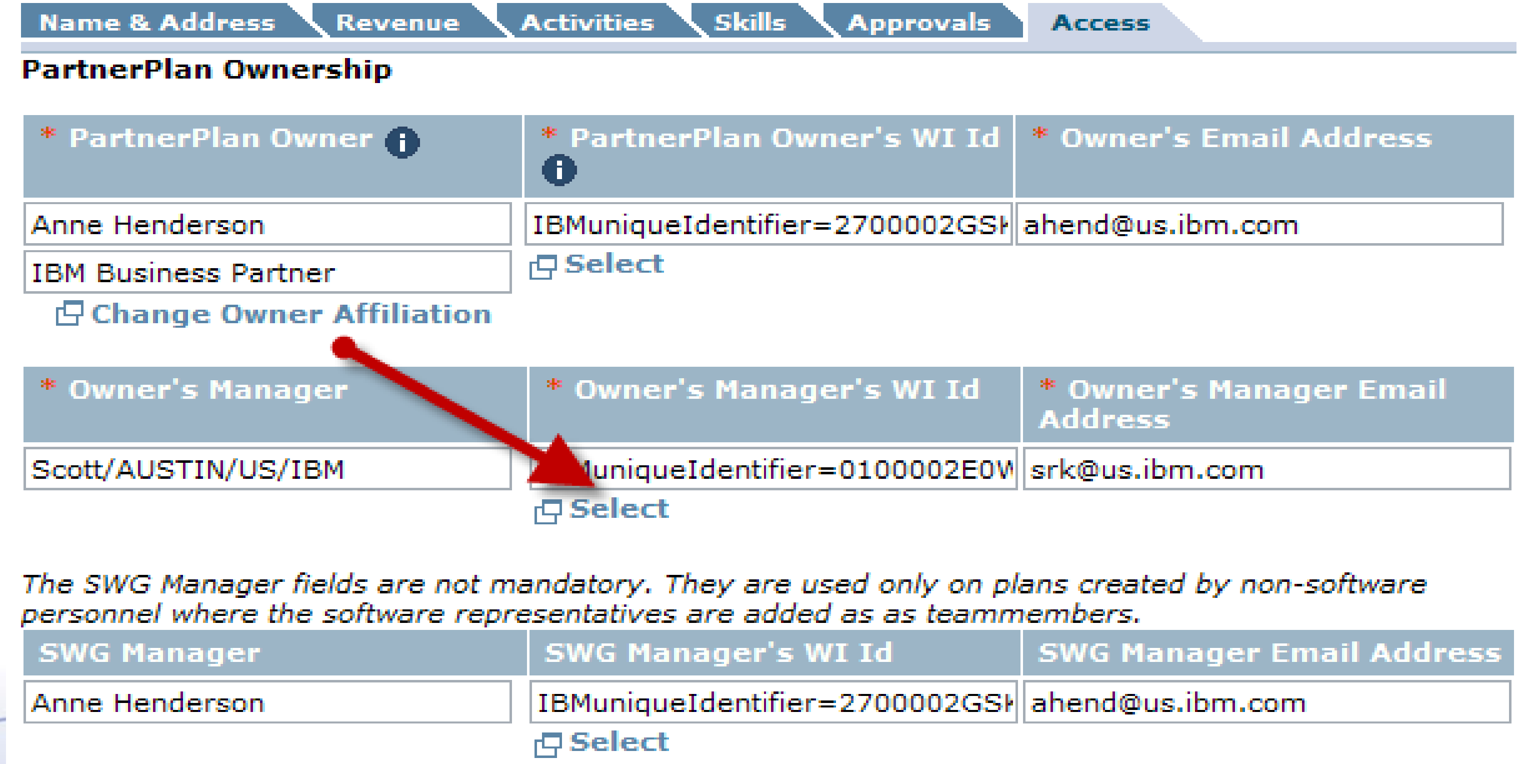
Three types of approvals are typically required in PartnerPlan.

1. The Business Partner Executive who agrees with the Revenue Objective and commits resource to accomplish the Objective.
2. The IBM or Distributor Manager of the person who created the Plan. The Manager agrees to support the plan, after reviewing the criteria listed below.
3. The IBM SWG Mgmt Approval is only used on plans which are not owned by the IBM SWG rep. Where the plan owner is from the Business Partner Organization, by default, his manager is the plan approver. The SWG team often want their manager to approve too. The SWG Mgr is added on the Access tab. His name will flow through to the Approval tab below. THIS FIELD IS NOT MANDATORY.
4. The Program Approver approves individual activities on behalf of the co-marketing program. The Approver agrees that the activity meets the requirements of the funding program. Once approved, the system sends an email to the "person responsible" in the activity. The person responsible has to be selected from the list presented in the field when the activity is created for the notification process to work. The list presented is built from the Teammembers list on the Access tab.



Access Tab: Access

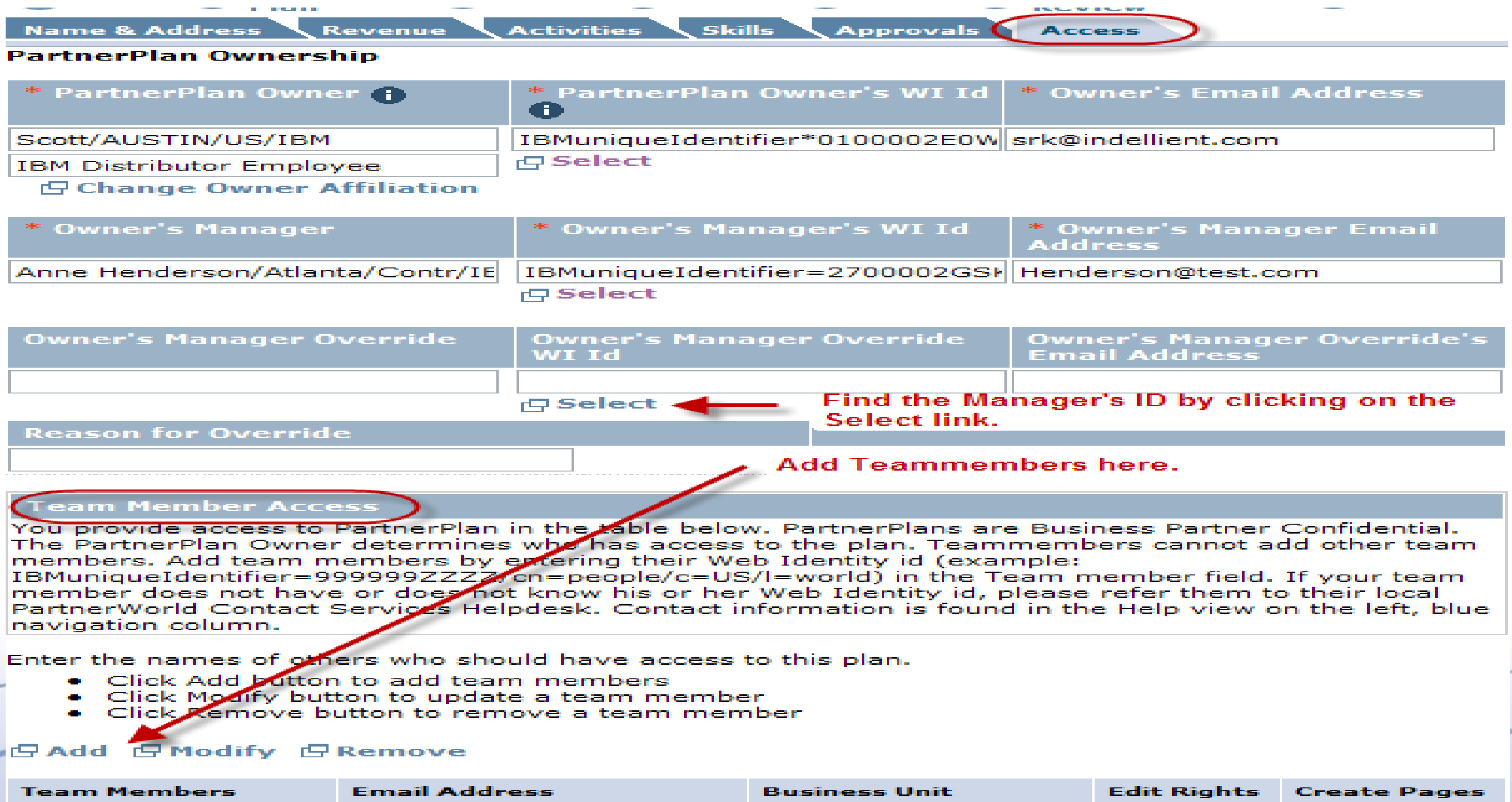
The PartnerPlan Owner acts as the Project Manager for the plan. The Owner adds and removes teammembers, follows up with activity owners to ensure activities are done on schedule and that all approvals are done within deadlines.



Access Tab: Access

Plan Owners or their Managers are the only people who can add Team members. Go to the Team Member Access section and click on the Add link.

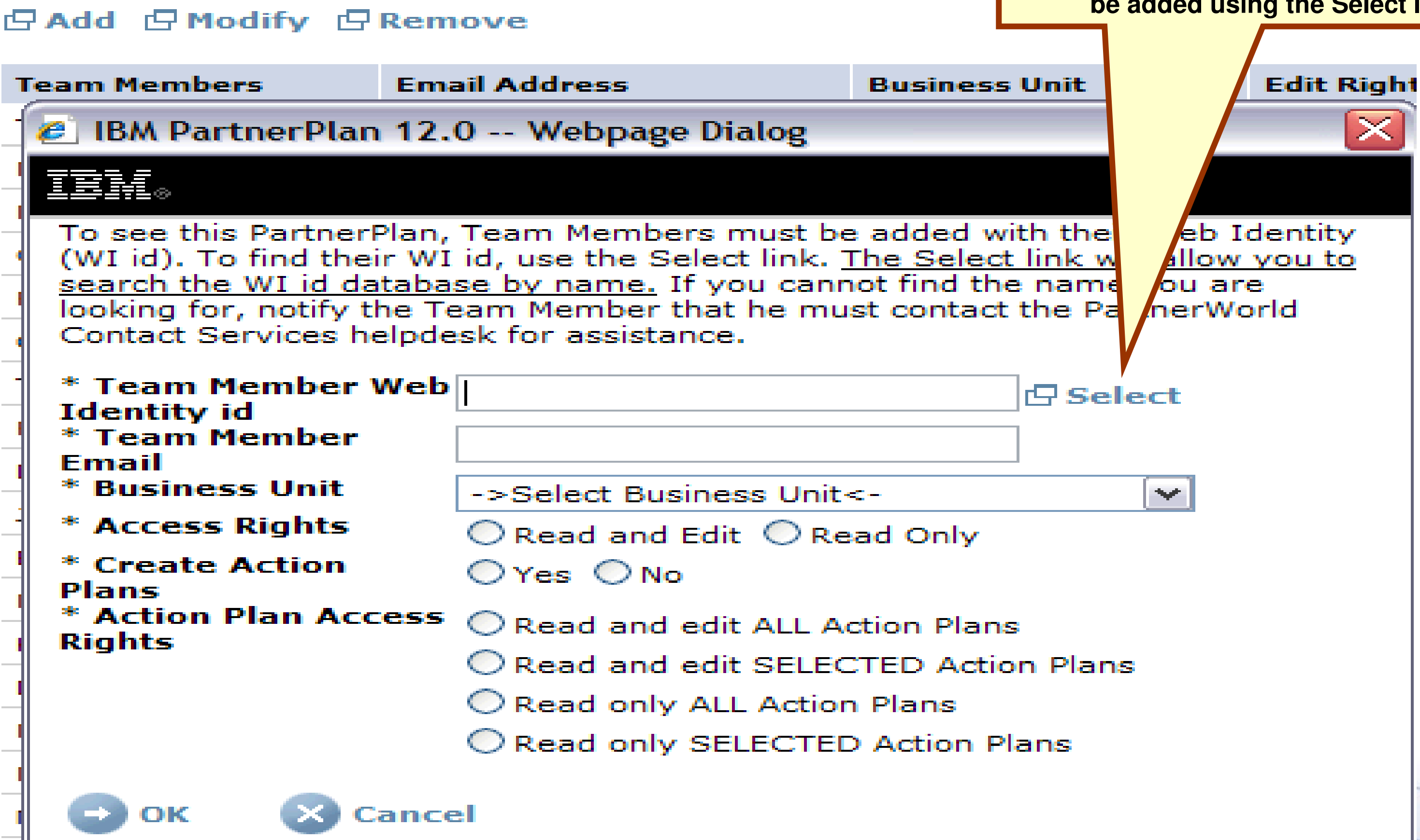
Plan Owners must add the Business Partner executive as a teammember with Edit access. This gives the Business Partner the access required to approve.



Access

Giving Access To Plan

1. **Always use the Select link to find IBMers, Distributor teammembers and the Business Partners to add to your plan.**
2. **Do not manually enter the Web id; it must be added using the Select link.**



TIP: If you can't find someone, they have either not registered in PartnerPlan or they have not set their Privacy settings to make themselves visible in the Select list.

Getting yourself added to an existing PartnerPlan

Use the Find my missing PartnerPlan search to find the Plan Owner

If the plan is in the active database, it will appear in the Status column as Active. Click on the link to Email Owner with your request to be added to the existing plan.

If the plan is in the Soft Deletes or Archives, the plan owner will need to restore the plan if you want to be added to it.

Plans that are more than 2 years old should not be restored. They are not current enough to have value.

If you are the owner, go to the Archives view from the Navigation column and do a name search for your plan. Click on the Restore button when you open the plan. The Restore button will send the plan back to the active database within 24 hours.

Find PartnerPlan

- Enter all or part of the Business Partner name … in the PartnerWorld Profilng System.
- You can also search by Country Enterprise ID … PartnerWorld Contact Services (PWCS) helpd…
- PWCS contact information is provided here
- There are only links to Plans that you have access to. Click on the Plan name to be taken to the Plan.

Find your local PartnerPlan support by clicking on this link or going to the Help view on the Navigation column

Search for Business Partner

acme Go

OR

Search for Country Enterprise ID

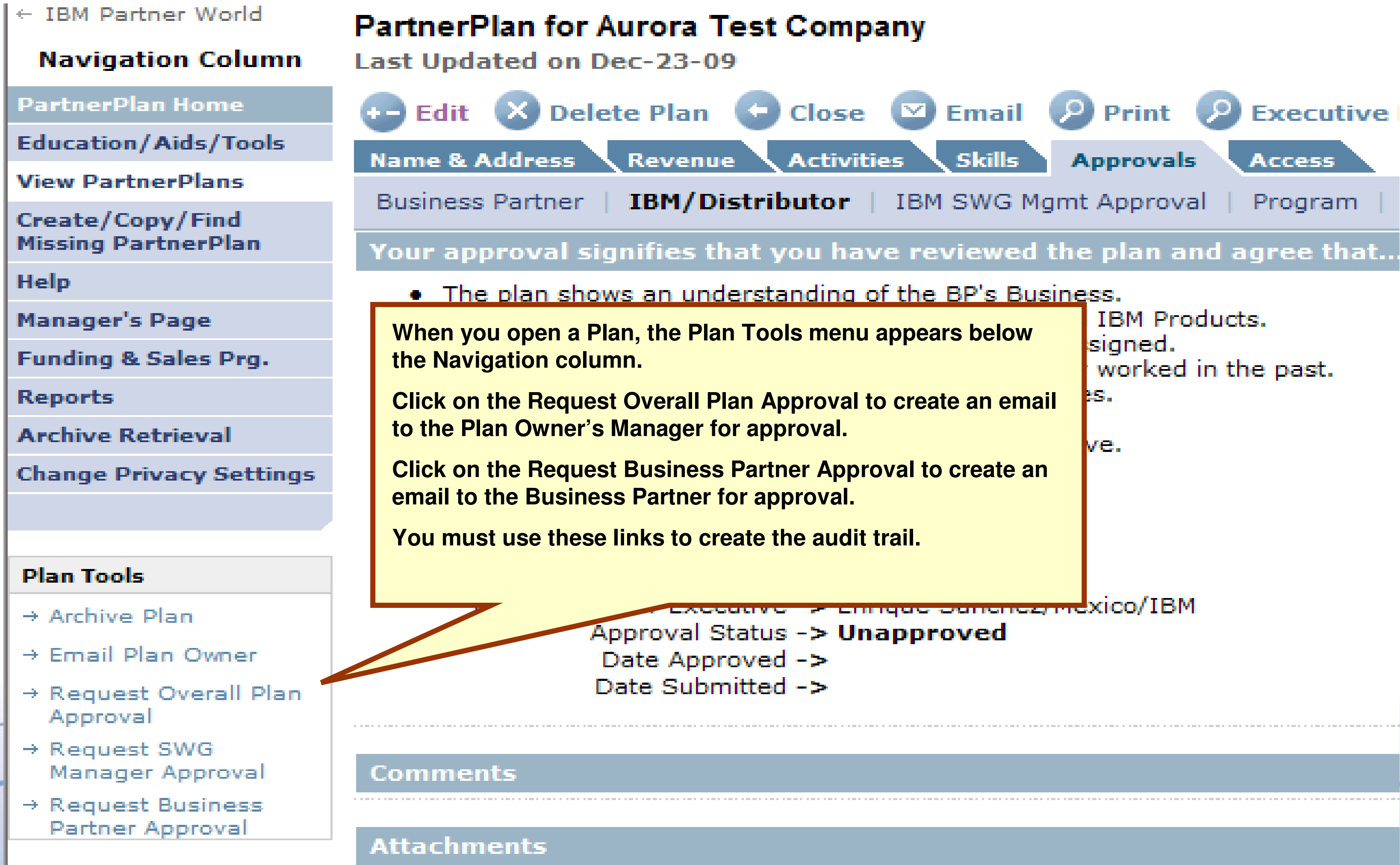
Go

Plan Name	Country	Enterprise ID	Status	Contact Plan Owner
ACME Inc.	Argentina	10ailjyy	ACTIVE	Email Owner
Acme	Brazil	10ailk22	SOFT DELETED	Email Owner

Section C

- **Tips and helpful hints for PartnerPlan owners**
- **Information for Plan and Activity Approvers**

How to notify the Business Partner and Plan Owner Manager when the plan is ready for approval.



When you open a Plan, the Plan Tools menu appears below the Navigation column.

Click on the Request Overall Plan Approval to create an email to the Plan Owner's Manager for approval.

Click on the Request Business Partner Approval to create an email to the Business Partner for approval.

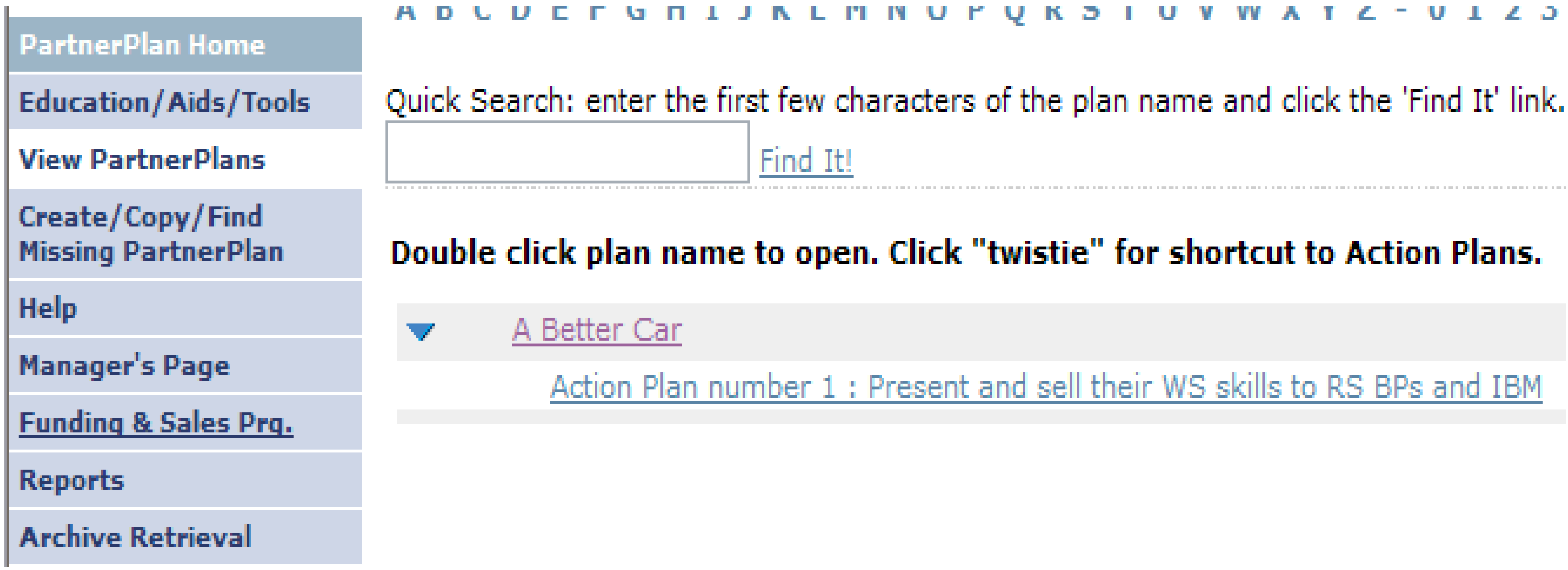
You must use these links to create the audit trail.

Faster Access to DGF or other Activities on Action Plans

Click on the triangle, called a twistie, beside the Plan Name.

The Action plan becomes visible.

Click on the Action plan. Open it to start creating activities.

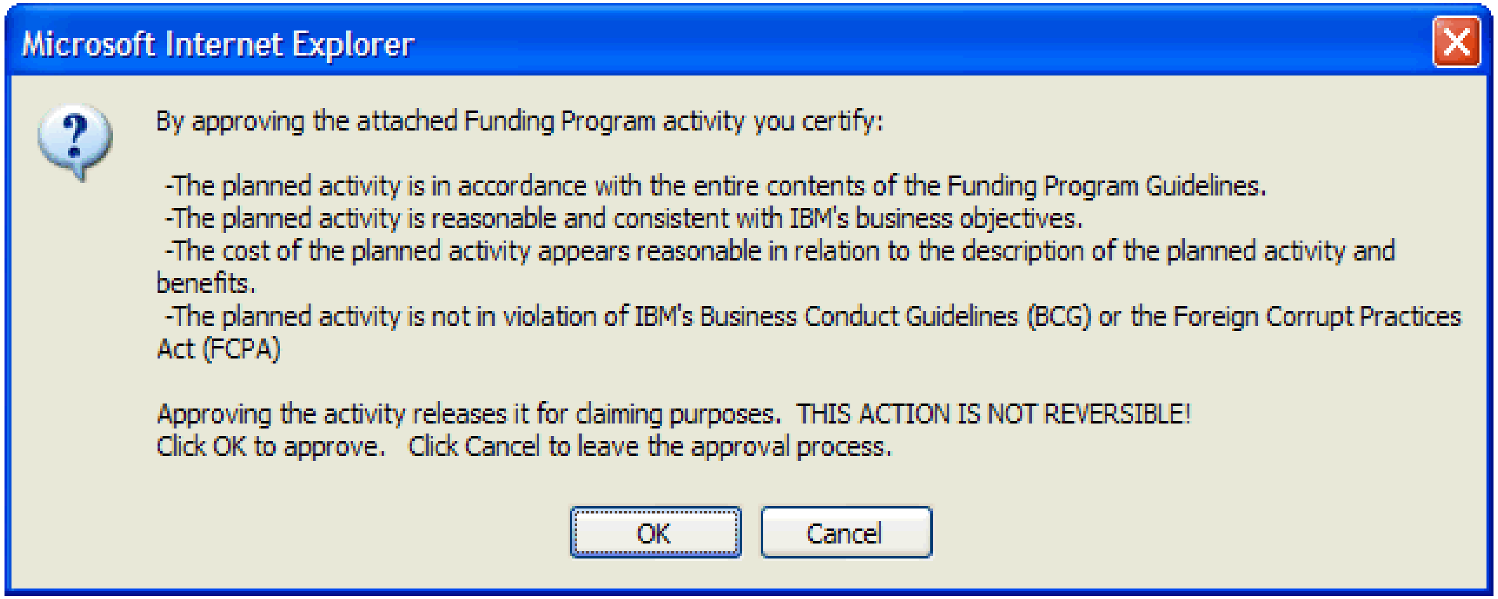


Copying activities on the DGF/MIF Action Plan

1. Put a check mark beside each activity you want to copy
2. Click on the Copy One or More Activities link.
3. Wait for the message which tells you that the activities have been copied
4. Click on Paste One or More Activities link.
5. The activities will be pasted onto the same tab and will appear with the word Copy in front of the name.

Funding Program Approver Certification

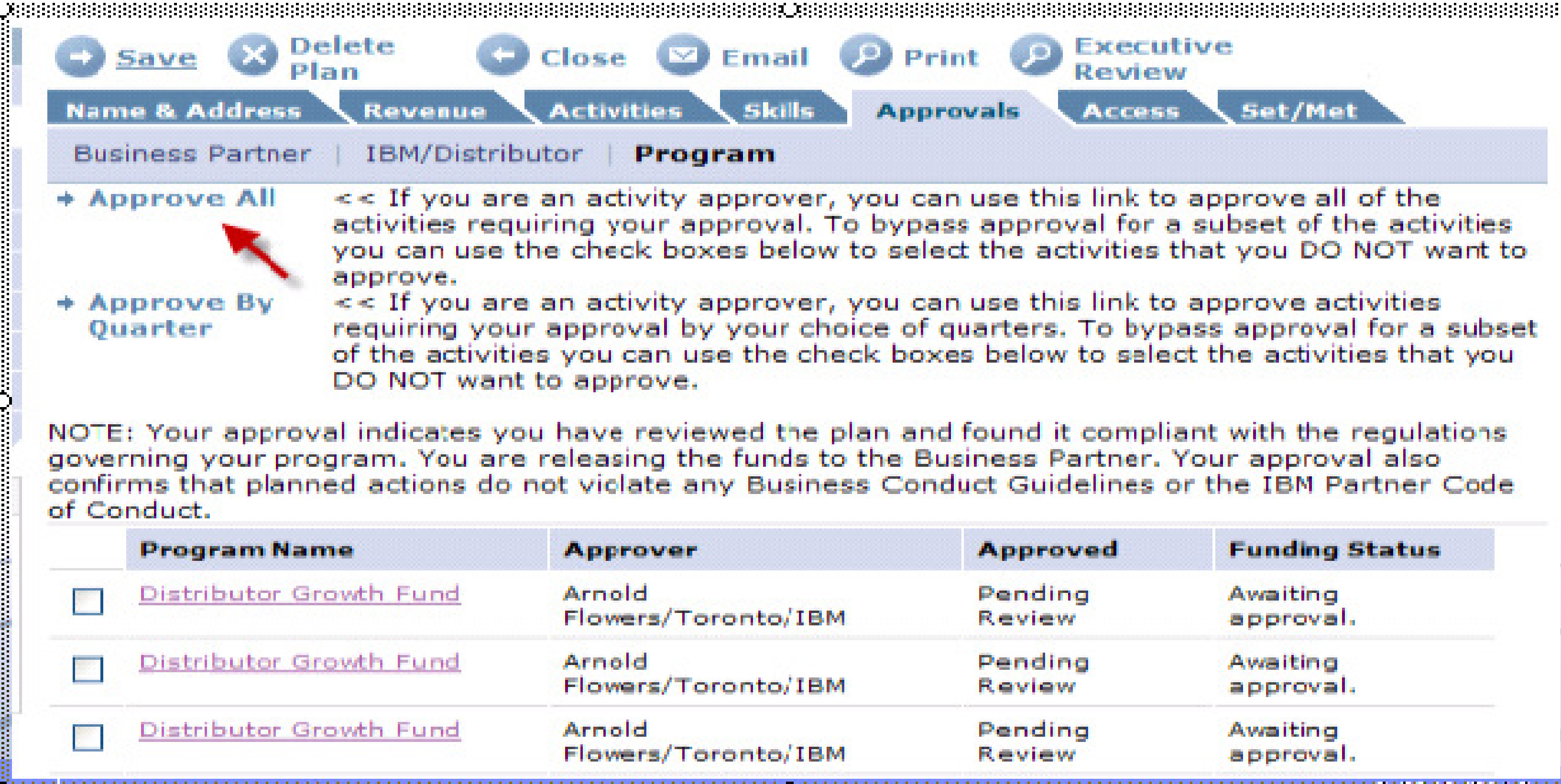
Clicking OK on this message approves the activity.



Activity Approvals

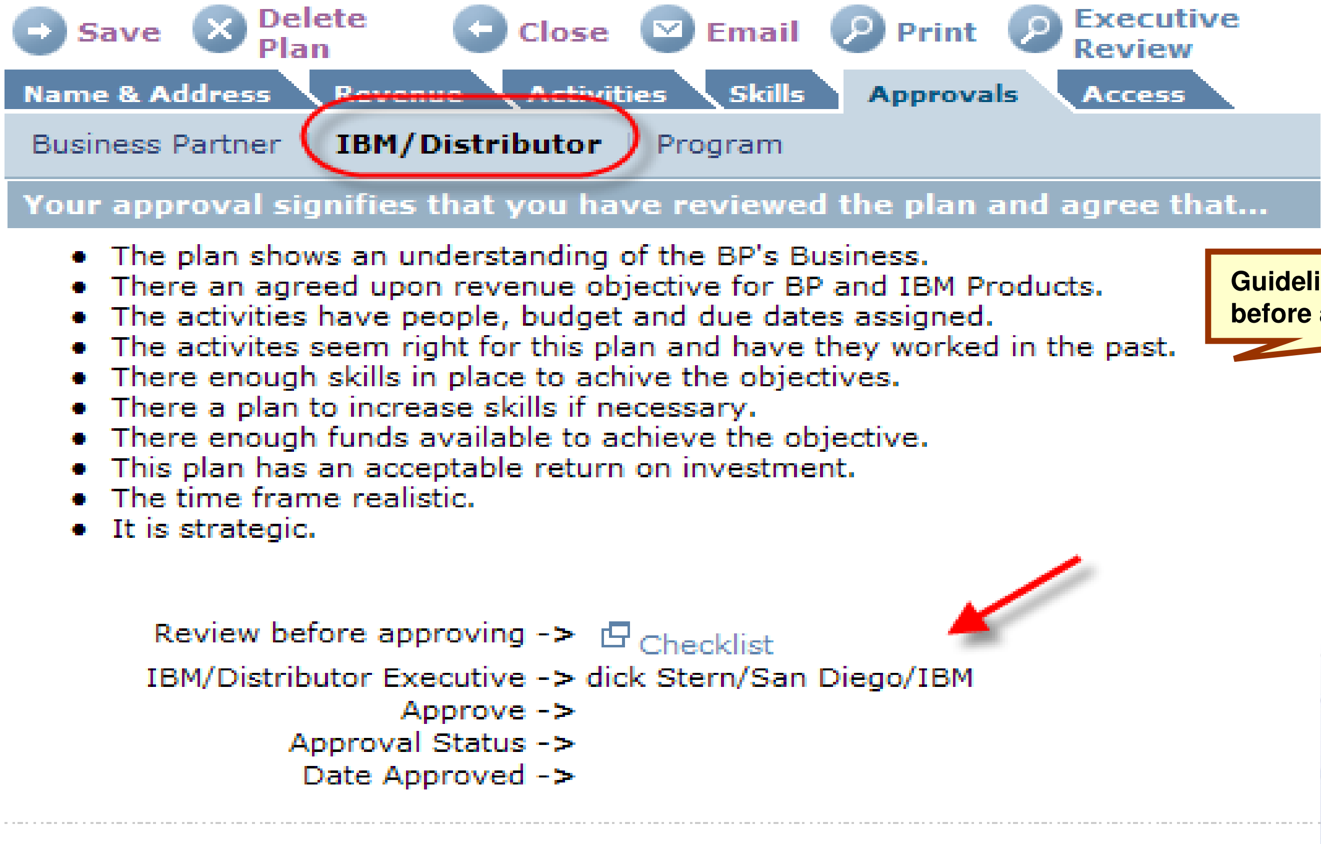
1) All activities, regardless of funding program selected, appear on the Activities tab, under the Program sub tab, with the name of the approver and the status of the approval.
2) If you approve for one or two plans, the fastest way to approve is to check which activities are awaiting approval on the Program tab.
3) Clicking on the program name will take you back to the activity to review it. Once you've reviewed all activities requiring approval, you can use the Approval All button if desired. You can approve them one at a time by going to the bottom of each activity and clicking on the 'yes' link if you prefer.

NOTE: you cannot approve an activity which has not been submitted. If there is no "awaiting approval", it is not approvable.



Approving a New Plan

The person appearing on the IBM/Distributor tab and the Business Partner will receive an email from the plan owner when the plan is ready for approval. The email contains a link back to the plan. The Owner's Manager and the Business Partner are expected to review Plans based on the list on the approval page.
>>>Note the guidelines listed for Approval.



Guidelines you should review before approving the Plan.

Sample Email To an Approver

The Approver receives an email with a link to the PartnerPlan for overall approval or activity approval. The Manager who approves the overall plan receives the same type of email and link.

IBMuniqueIdentifier=2700002GSK/cn=people/c=CA/l=world@noinboundmail.toronto.ca.ibm.com.mkm.can.ibm.com

12/29/2008 01:22 AM

Default custom expiration date of 12/29/2009

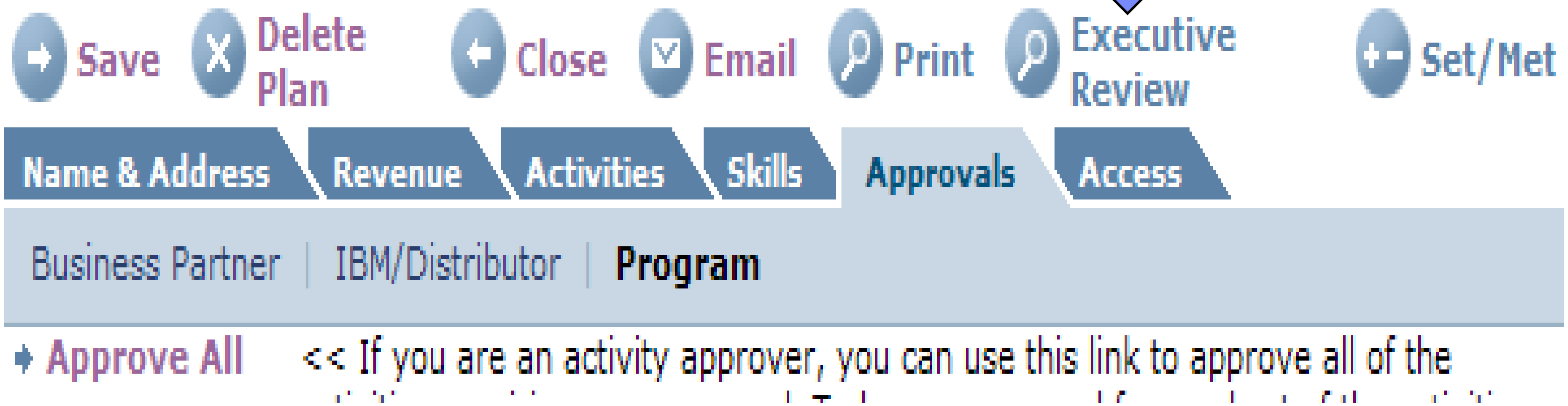
To	Anne Henderson/ATLANTA/Contr/IBM@IBMUS
cc	
bcc	
Subject	Activity Review Requested for DouTt - 2009

The DouTt AM - 2009 plan has an Activity ready for review/approval. Click the link below to open the Activity for review. If you feel confident that the activity will meet its objectives, indicate your approval by clicking on the "Yes" link in the Approval Status section. If you need more information from the activity owner, click on the "Response Requested" link. Clicking on the "Response Requested" link will produce an email to the activity owner.

Click this link to go to this activity ==>
http://www-sso.toronto.ca.ibm.com/partnerworld/partnerplan/partplanmaint.nsf/0/0DE93CEA20FE4E820025752E0022CD1D

Executive Review

Click on the Executive Review link to produce a one-page printout of the entire Plan if you need a summary for your Manager.



What have you learned?

- How do you determine if a plan exists? See chart 16
- If you are having problems entering numbers into the Plan, what browser setting do you need to update? See chart 12.
- What are the mandatory SWG marketing questions? See charts beginning on chart 30.
- Software certifications appear on the Skills tab. Where does the user need to enter the brands they sell to allow the certifications to appear? See chart 37
- How do you add a teammember to your plan? See chart 56
- How do you find local PartnerPlan support? See chart 73

Section D

- **Reports, Helpdesk and Webinars**

Reports In PartnerPlan

← IBM Partner World

Navigation Column

- PartnerPlan Home
- Education/Aids/Tools
- View PartnerPlans
- Create/Copy/Find Missing PartnerPlan
- Help
- Manager's Page
- Funding & Sales Prg.
- Reports
- Archive Retrieval

Reports

Here are some useful standard reports. Your PartnerPlan Advocate can advise you on hc customized versions of these reports or enter a requirement for additional reports. To fir Business Unit's PartnerPlan Advocate use HELP.

Subscription Reports
Subscribe to a report
My Reports
My Report Criteria

On Demand Reports
Brand Report (spreadsheet)
Funding Programs Report
Approved Plans by PartnerWorld Level
Approved with no Activities
PartnerPlan Locator
SetMet Report (spreadsheet)

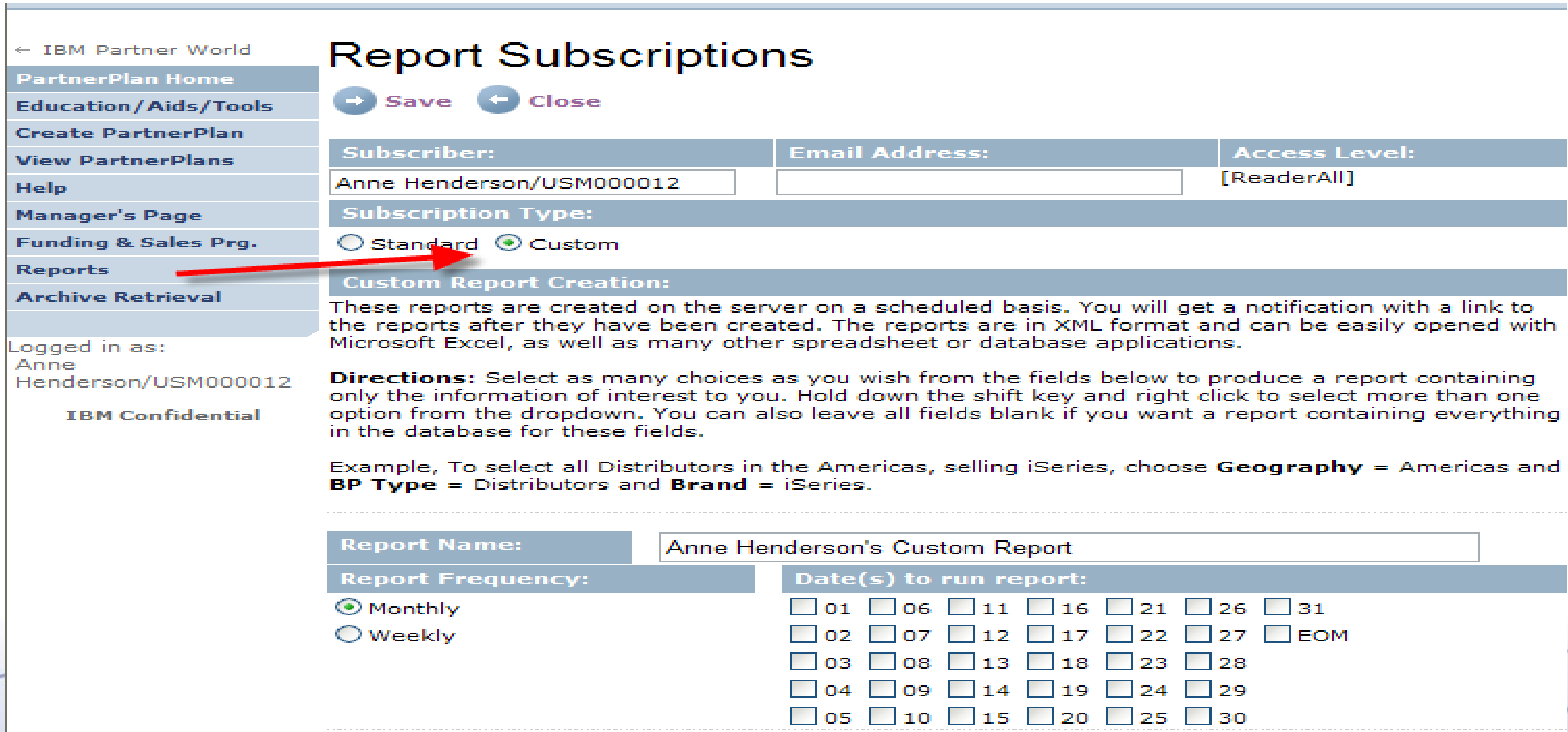
Creates an Excel spreadsheet of all activities in all plans that you own.

Reports

Subscription Reports are produced on the day you indicate. You define, in the custom view, which fields you want and the column order of the data as it will appear in the spreadsheet.

Your reports are not mailed to you. You must go to the Reports view//My Reports to download your report on the day you asked for it.

Note: Reports are created in the Eastern Time Zone.

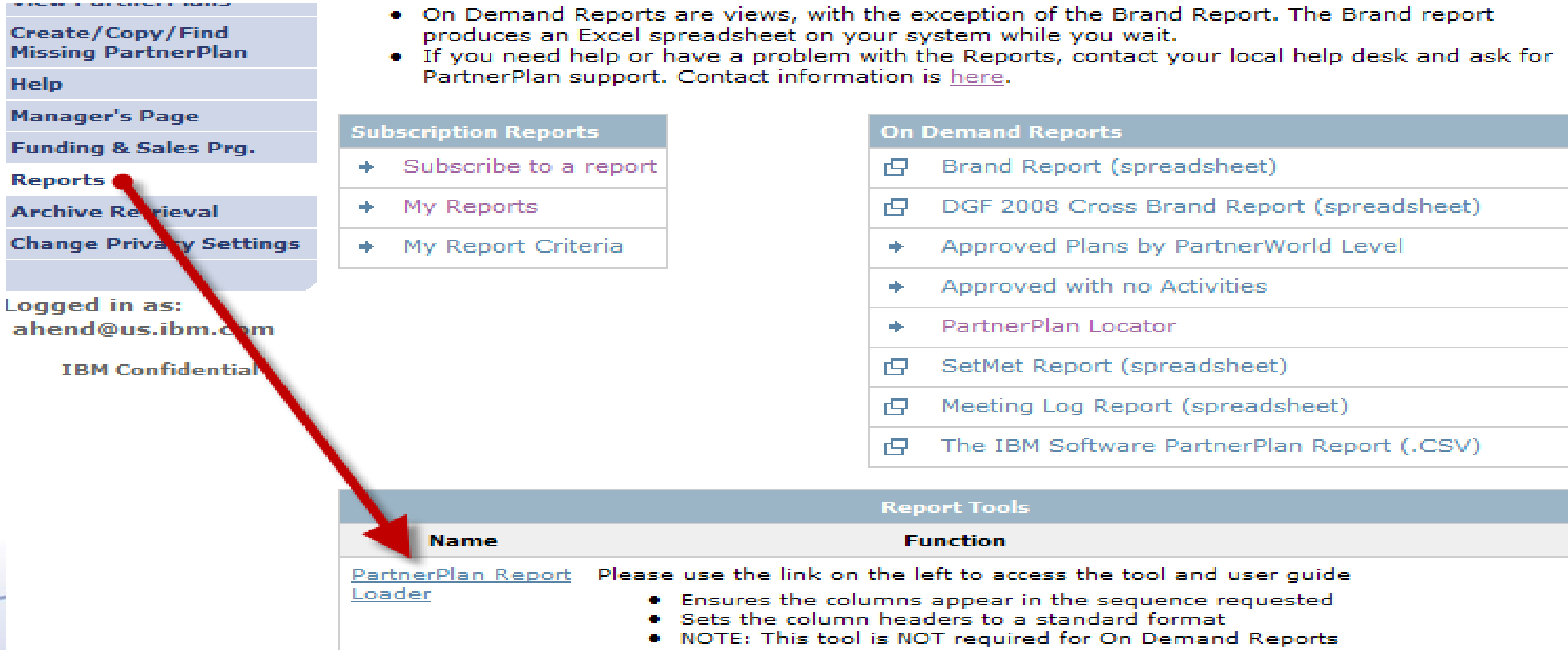


Reports

If you use any of the Subscription Reports, you must download the Report Loader to ensure the reports are formatted properly, with the exception of the IBM SWG PartnerPlan Rpt which is in .csv format.

You need to download the Report Loader once only. Instructions appear when you click on the link to the Report Loader.

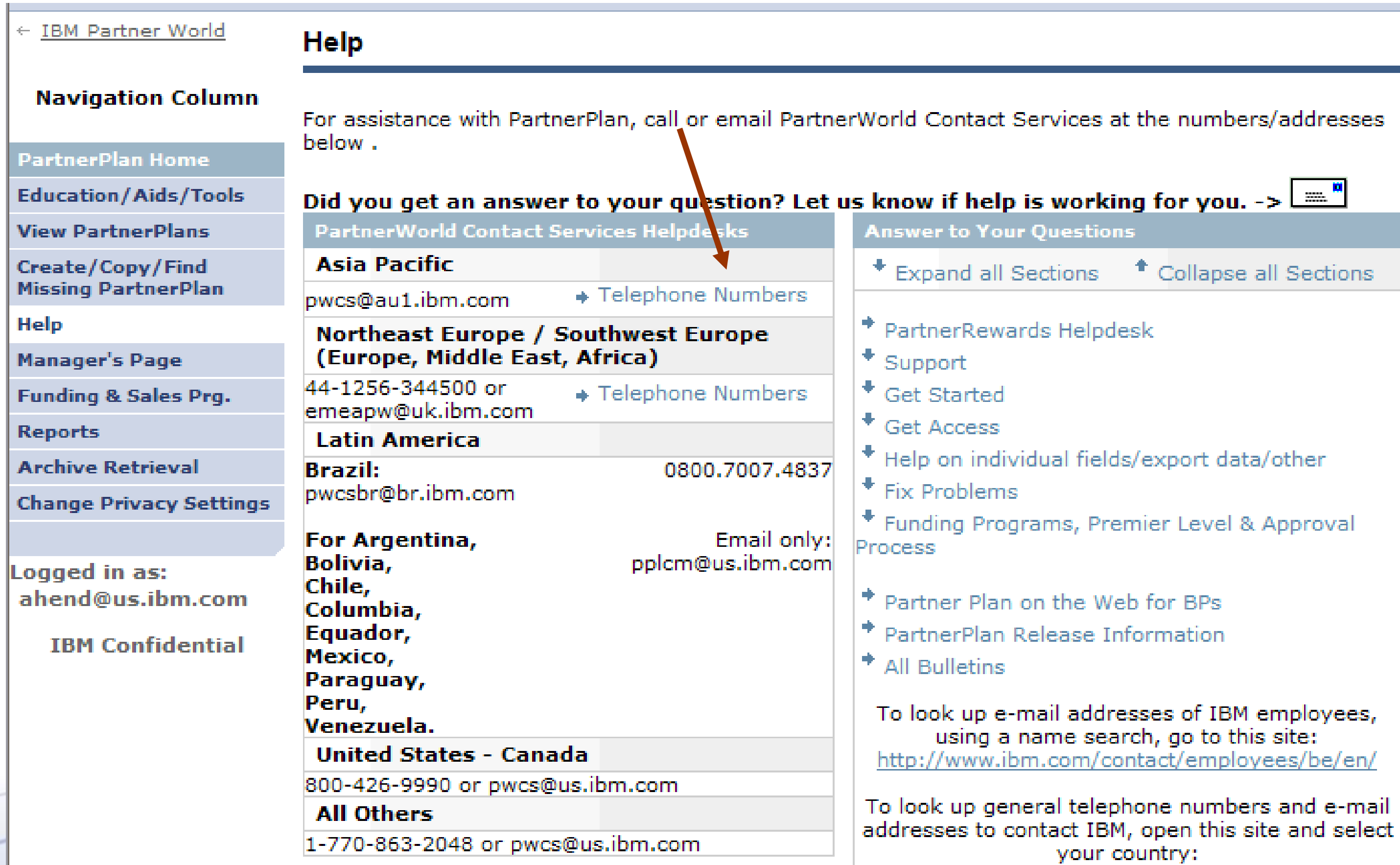
The Brand Report, which appears under the On Demand Reports, produces an Excel report while you wait. Choose this option if you cannot wait for the subscription report.



Getting Help

Click on the Telephone Numbers link to find local support.

Ask for PartnerPlan Support



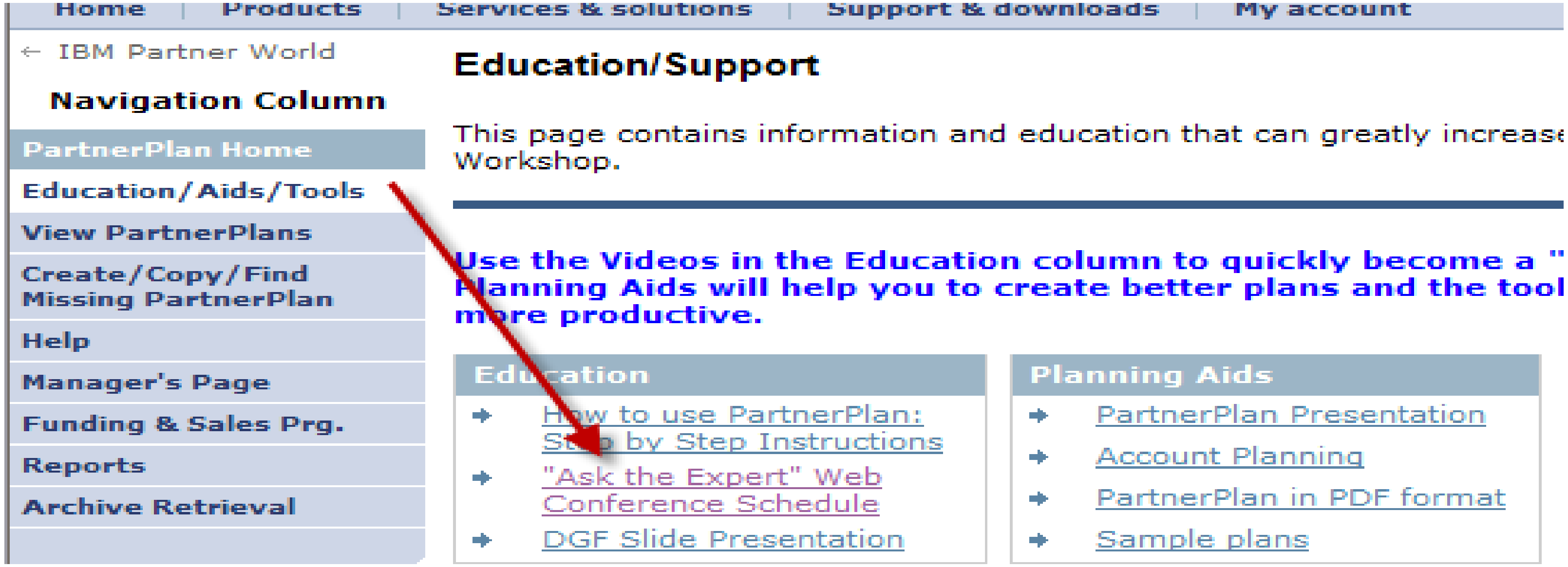
PartnerPlan Education Schedule - 2010

Webconferences are provided every Thursday at 11:00 a.m. ET (New York Time).

Conferences are open to all IBM and Business Partners. No pre-registration is required.

Information regarding cancelled conferences will appear in the Ask the Expert section.

If you require training at a different time or day, arrange this with Anne Henderson at ahend@us.ibm.com.



PartnerPlan Education Schedule - 2010

Please check the "Ask the Expert " view before logging into the call, found in the Education view. All cancellations are listed in the "Ask the Expert" view.

- **The education sessions are open to all users: IBM, Distributors and Business Partners.**
  All sessions are Thursday at 11:00 a.m. Eastern Time zone (E.T.) (New York time). No Registration is required.

  Call in Number for ALL sessions (Webconference information listed below)
  Toll-free dial-in (North America): 1-877-421-0528
  Tie Lie (North and South America): 421-0528
  International Toll Dial-in: 1-770-615-1258
  IP Telephony: 24210528
  Participant passcode: 278812

  Webconference:
  IBM employees and IBM contractors must use the following URL:
  https://wedc.lotus.com/meeting/join/?schedid=5081951

  Non-IBM employees/contractors must use:
  Go to http://www. lotuslive.com/join?schedid=5081951

  You may need to download the installation kit, found at the bottom of the LotusLive site once only during your first access.

  Once you have completed the installation, add your name and click on Join the Meeting.

The Help Process

As a final reminder, if you need help with PartnerPlan, you can either use this PowerPoint, found in the Education view and/or contact the PartnerWorld Contact Services helpdesk.

To find the local helpdesk, go to the Help view from the blue Navigation column.

Ask for PartnerPlan support to be routed to our trained support. It may take up to 24 hours, due to call volumes, for a response.

If the helpdesk cannot assist you, they will automatically escalate to a second level support team. The second level support will escalate to third level support if necessary.

Thank you for your attention during this presentation.

If you have recommendations which might either improve the presentation or the database, please forward directly to me, Anne Henderson, at ahend@us.ibm.com.

Section E

- **Distributor Growth Fund/Marketing Investment Fund for Distributors Guidance**

Creating a DGF Action Plan

Revenue Tab Revenue

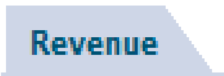
Step 4 – Action Plans

An action plan is a grouping of similar activities, typically by product, solution or timeframe. Grouping activities allows you to see a subtotal for that group. It is not mandatory, except for users of the Distributor Growth Fund program (DGF) and Marketing Investment Fund for Distributors (MIF).

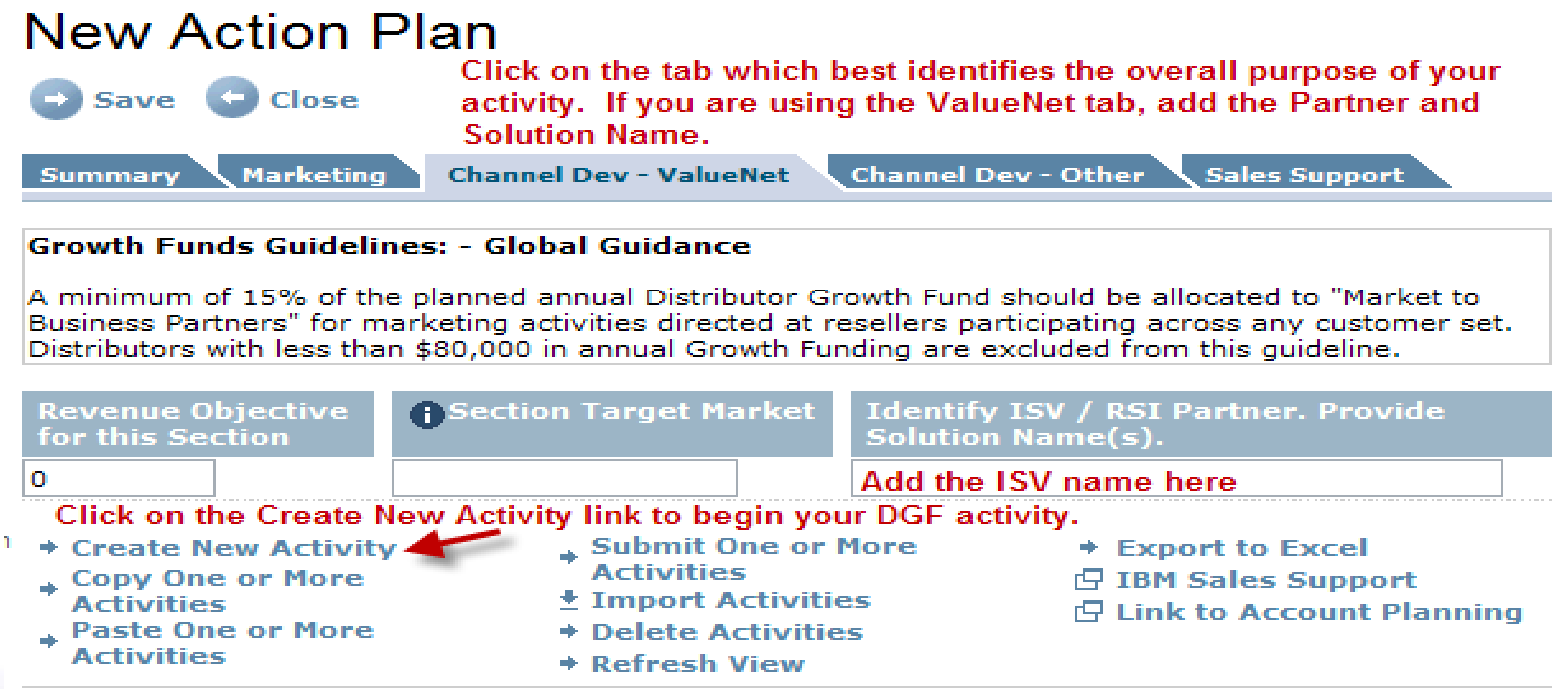
A DGF/MIF action plan is required for Distributor Growth fund and Marketing Investment Fund for Distributors activities. DGF/MIF activities must be created on the DGF/MIF Action plan to use program-specific code.

The DGF/MIF Action Plan will only appear on Distributor plans. MIF will appear only on North American plans. DGF appears in Asian countries.

Creating a New DGF/MIF Action Plan

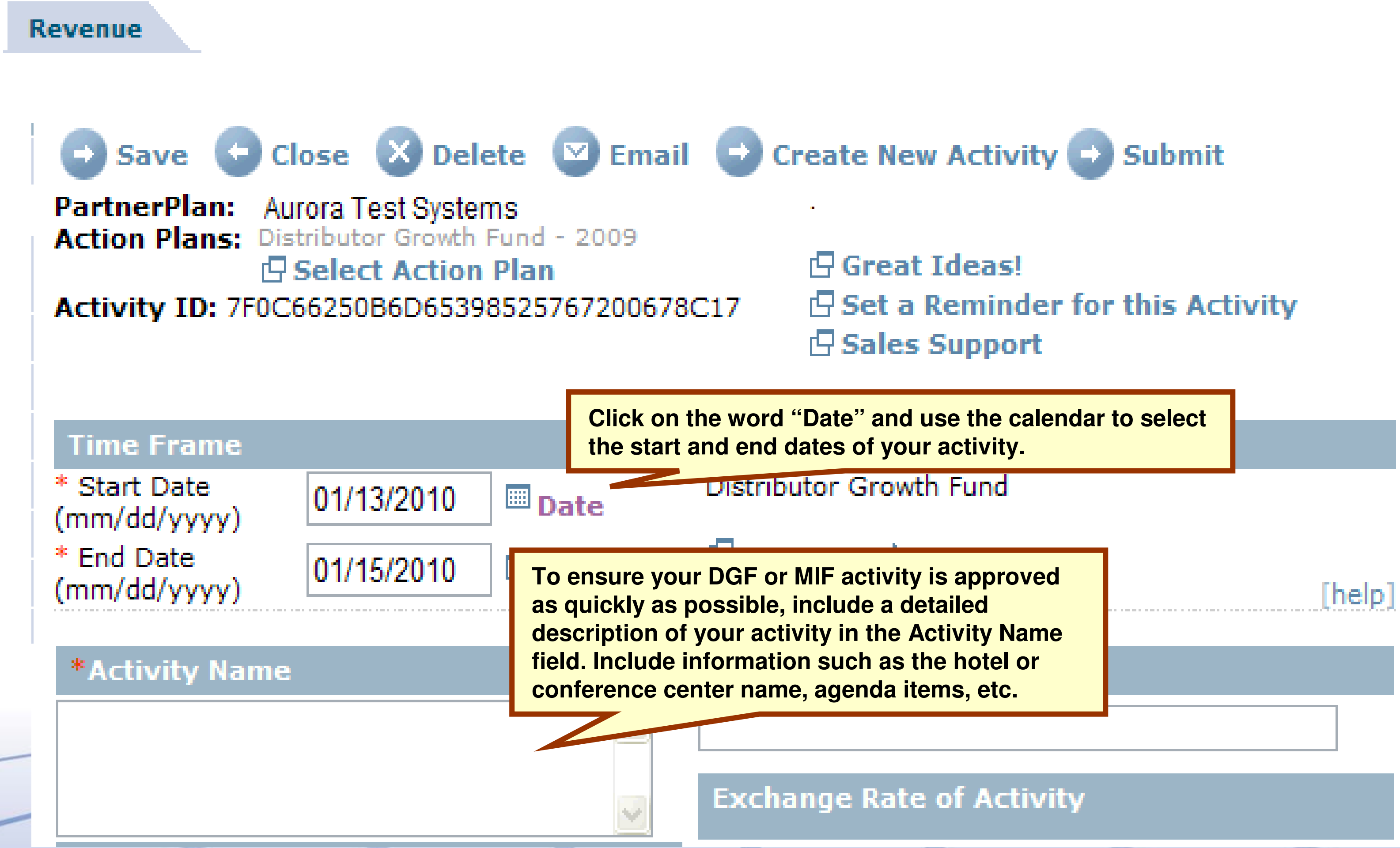


The Distributor Growth Fund (DGF) or MIF activities are created only on the DGF or MIF Action Plan, found on the Revenue Tab.



If an activity will be repeated, use the Copy One or More Activities. Place a check mark beside each activity you want to copy, click on the Copy link and then on the Paste One or More Activities link. You can paste activities into the same Action Plan or a new Action Plan.

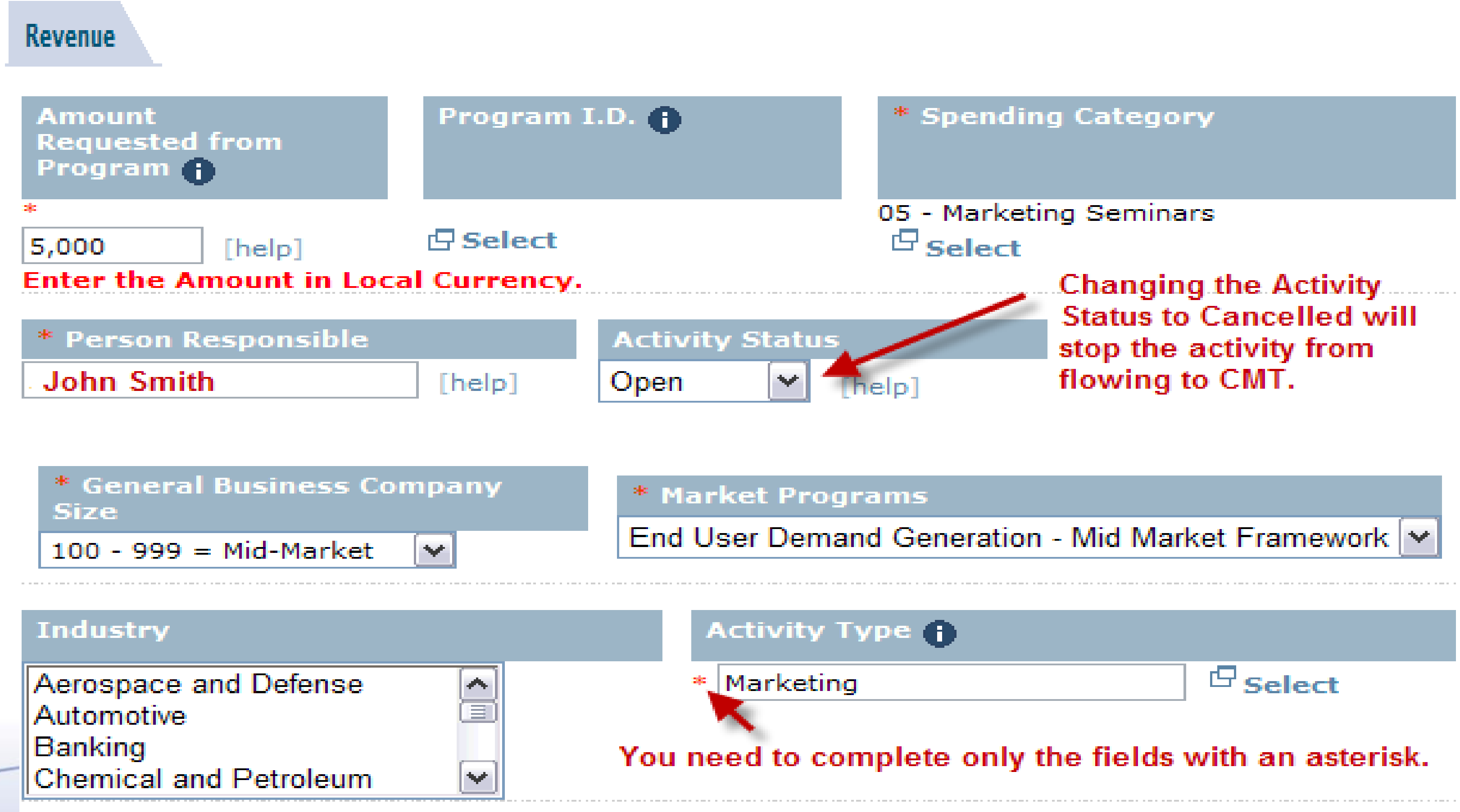
Creating a New Activity – Distributor Growth Fund



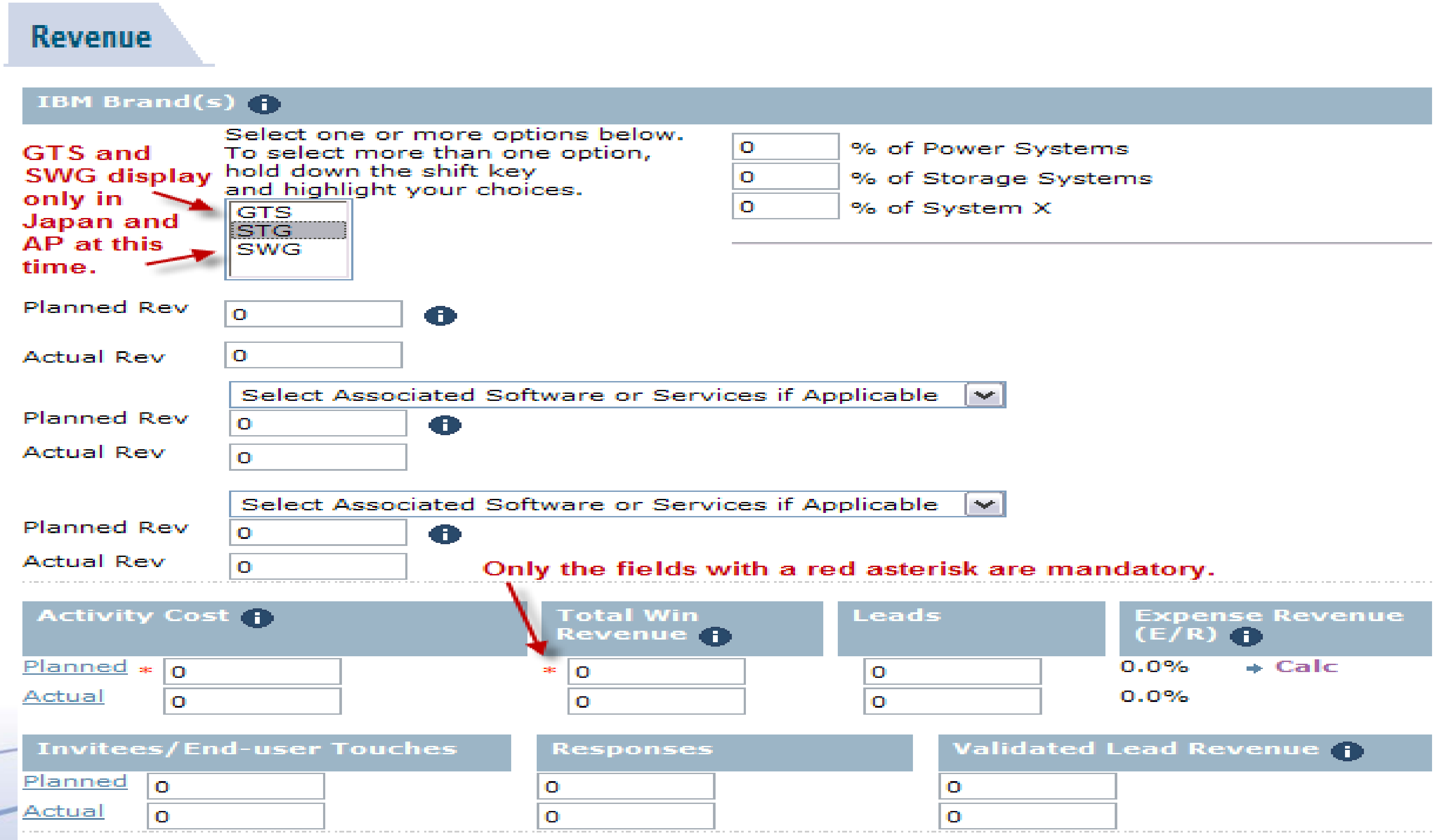
Click on the word "Date" and use the calendar to select the start and end dates of your activity.

To ensure your DGF or MIF activity is approved as quickly as possible, include a detailed description of your activity in the Activity Name field. Include information such as the hotel or conference center name, agenda items, etc.

Creating a New Activity – Distributor Growth Fund



Creating a New Activity – DGF



Creating a New Activity – Distributor Growth Fund

Revenue

Date Claim Submitted:	Claim Status:	Date Claim Paid:	Claim Amount:

Approver	Approval Status	Date Submitted	Funding Status
Anne Henderson/Atlanta/Contr/IBM IBMuniqueIdentifier=2700002GSK/cn=people/c=CA/l=world ahend@us.ibm.com			

This person is responsible for reviewing and approving your activity if it meets the program requirements.

Approver Comments

Show Fields for Business Partner use | **Hide Fields for Business Partner use**

Comments

Free text area for additional information about this activity.

Add presentations or other documents to share with your teammates.

Attachments

Browse... [help]

Submitting Activities from the DGF Action Tab

Tip: Multiple Activities can be submitted for approval by putting a check in box beside each activity you want to submit (same function as used on the Activities tab).

Summary | Marketing | Channel Dev - ValueNet | Channel Dev - Other | Sales Support

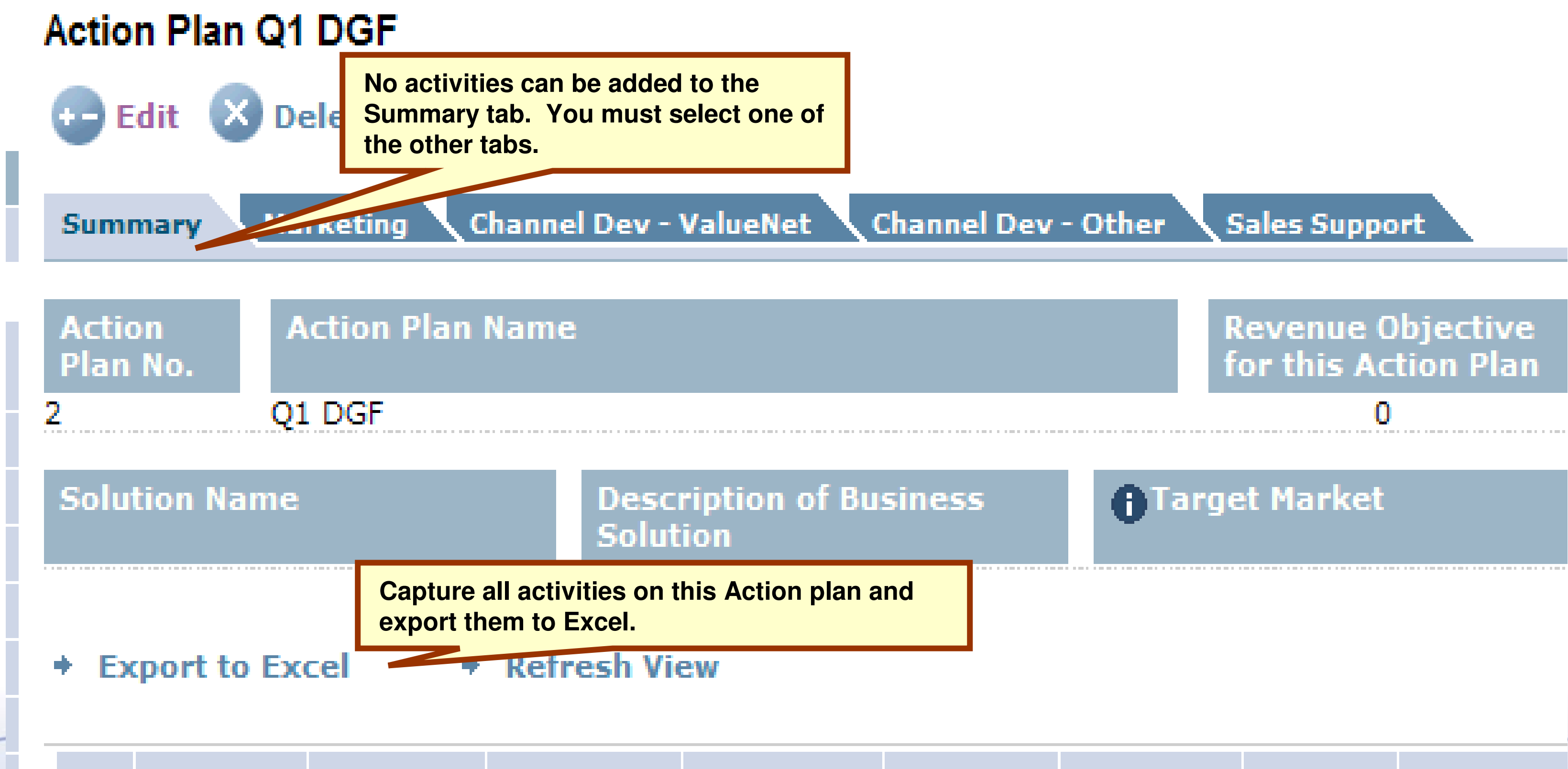
A minimum of 15% of the planned annual Distributor Growth Fund should be allocated to end user demand generation activities aligned to the IBM Mid-Market Program Framework. These funds should support activities targeting customers with 100-999 employees in the following marketing categories: Advertising, Campaign Services, Seminars, and Trade Shows.

Revenue Objective for this Section	Section Target Market	Description of Section Solution
0		

- Create New Activity
- Copy One or More Activities
- Paste One or More Activities
- Submit One or More Activities
- Import Activities
- Delete Activities
- Refresh View
- Export to Excel
- IBM Sales Support
- Link to Account Planning

	Funding Program	Activity Type	Activity	Person Responsible	Estimated Cost	Estimated Cost USD	Program Funding	Program Funding USD
☑	Distributor Growth Fund	Marketing	Trade Show in Vienna	John Jones	2,000	2,000.00	2,000	2,000.00
☑	Distributor Growth Fund	section1	Trade Show in Vienna, 2Q	John Jones	5,000	5,000.00	5,000	5,000.00

Summary of DGF/MIF Activities:



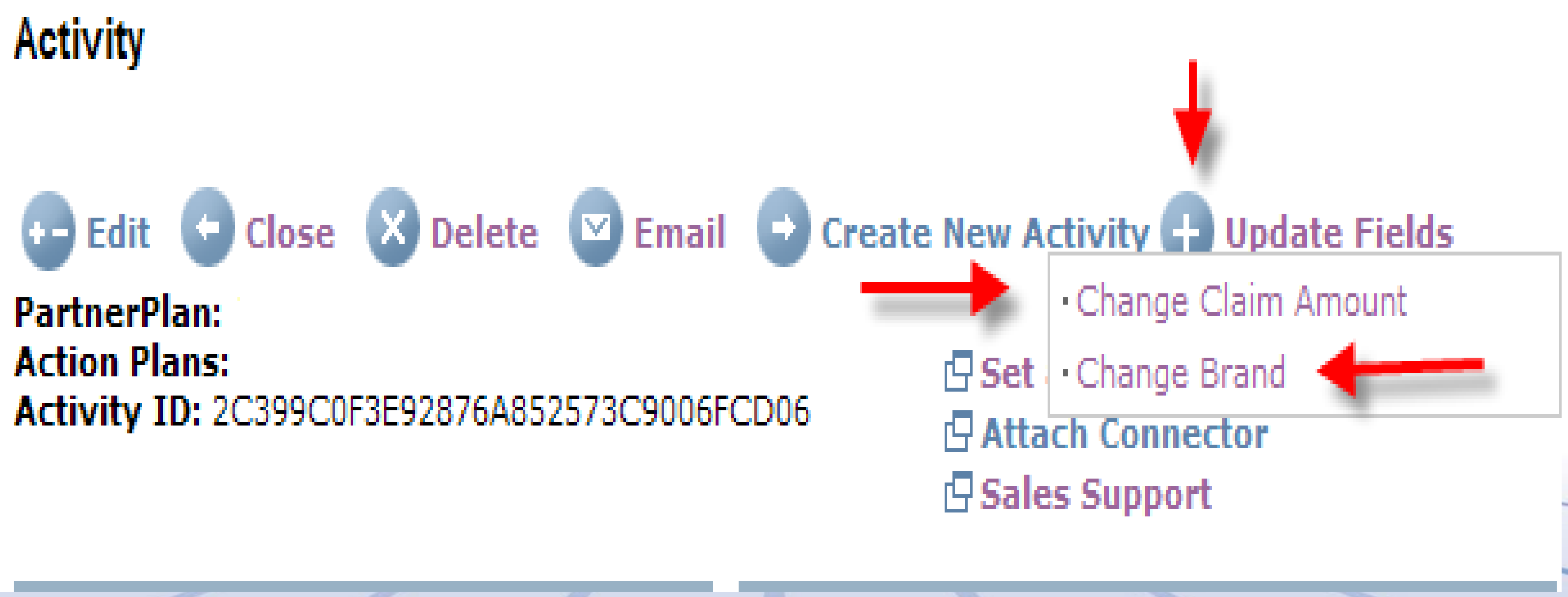
Changing the Claim Amount or Brand

Review This:

If your activity is approved and no application has been created in the Co-Marketing Tool, you can change the amount requested or brand by clicking on the Update Fields Button. Click on the Change Claim Amount or Change Brand link and the corresponding field will become editable.

Editing the Claim Amount to a larger number will un-approve the activity. Editing the Claim Amount to a lower number will not affect the approval. Changing the brand will un-approve the activity. NOTE: You must resubmit the activity approval after saving it.

The Update Fields button does not appear until the activity has been approved.



Thank you!

Thank you for joining me for the PartnerPlan education session.

If you have additional questions, please join me for one of the weekly education sessions noted earlier in this deck or contact the PartnerWorld Contact Services team.