

GPS Technical Engagement Framework

WW GPS Technical Team
FY22 Update

Includes:

- What, Why, How, Who
- Services Catalog Descriptions and RACI Models
- Technical Planning
- Tools Integration and Resources
- Insights Reporting

Disclaimer: Nothing in Microsoft's guidance or input should be interpreted as a certification by Microsoft of any specific partner solution.

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- TDP, TEP Form Templates
- Tech Service Partner Scenario Examples
- Technical Services Catalog Scope Details ([word doc](#))
- [CRM Video](#) - Drive Partner Technical motion in GPS CRM

WW GPS Technical Engagement Framework

| | |
|------|---|
| What | <p>Consistent framework of GPS technical services by role to guide partner solution and capability development. Services are mapped to business outcomes for accelerated partner driven cloud revenue and consumption. Integrated within GPS CRM to identify activities delivered to partners.</p> |
| Why | <ul style="list-style-type: none">• Provide predictable technical engagement services to Partners• Drive consistency in partner engagements and repeatable processes with role clarity• Enhanced ability to measure outcomes and improve technical engagement effectiveness• Better evaluate demand and capacity of technical team resources• Show technical team impact on partner development driving revenue and consumption |
| How | <ul style="list-style-type: none">• Leverage Technical Services Catalog selection of pro-active services to deliver to partners• Create Technical Plans in GPS CRM to outline partner execution strategy tied to business outcomes• Capture activity info in GPS CRM to identify tech services, who is responsible to deliver, when and expected outcomes• Use GPS Insights for Tech Team to report on partner development contributions |
| Who | <p>GPS Tech Team drives and executes technical partner development activities (PTS, CSA, PTM). RACI model included with each service in the Technical Services Catalog identifies who's responsible, accountable, consulted and informed. Collaboration with GPS PDM and PDM-R on partner strategy and desired business outcomes to be accomplished through tech services.</p> |

<https://aka.ms/gpstechhub>

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What: WW GPS Technical Engagement Framework

VISION

Provide GPS team with a consistent framework of technical **services by role** to guide partner solution and capability development.

Services are **mapped to business outcomes** for accelerated partner driven cloud revenue and consumption.

Integrated within GPS CRM to identify activities delivered to partners.

Includes:

- Technical Services Catalog
- Technical Planning
- GPS CRM Integration
- GPS Insights & Reporting

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Why: WW GPS Technical Engagement Framework

GOALS

Ensure quality partner solution development that drives accelerated Microsoft revenue and consumption

1

Provide predictable technical engagement services to Partners

2

Drive consistency in partner engagements and repeatable processes with role clarity

3

Enhanced ability to measure outcomes and improve technical engagement effectiveness

4

Better evaluate demand and capacity of technical team resources

5

Show technical team impact on partner development driving revenue and consumption

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How: Technical Service Engagement Types

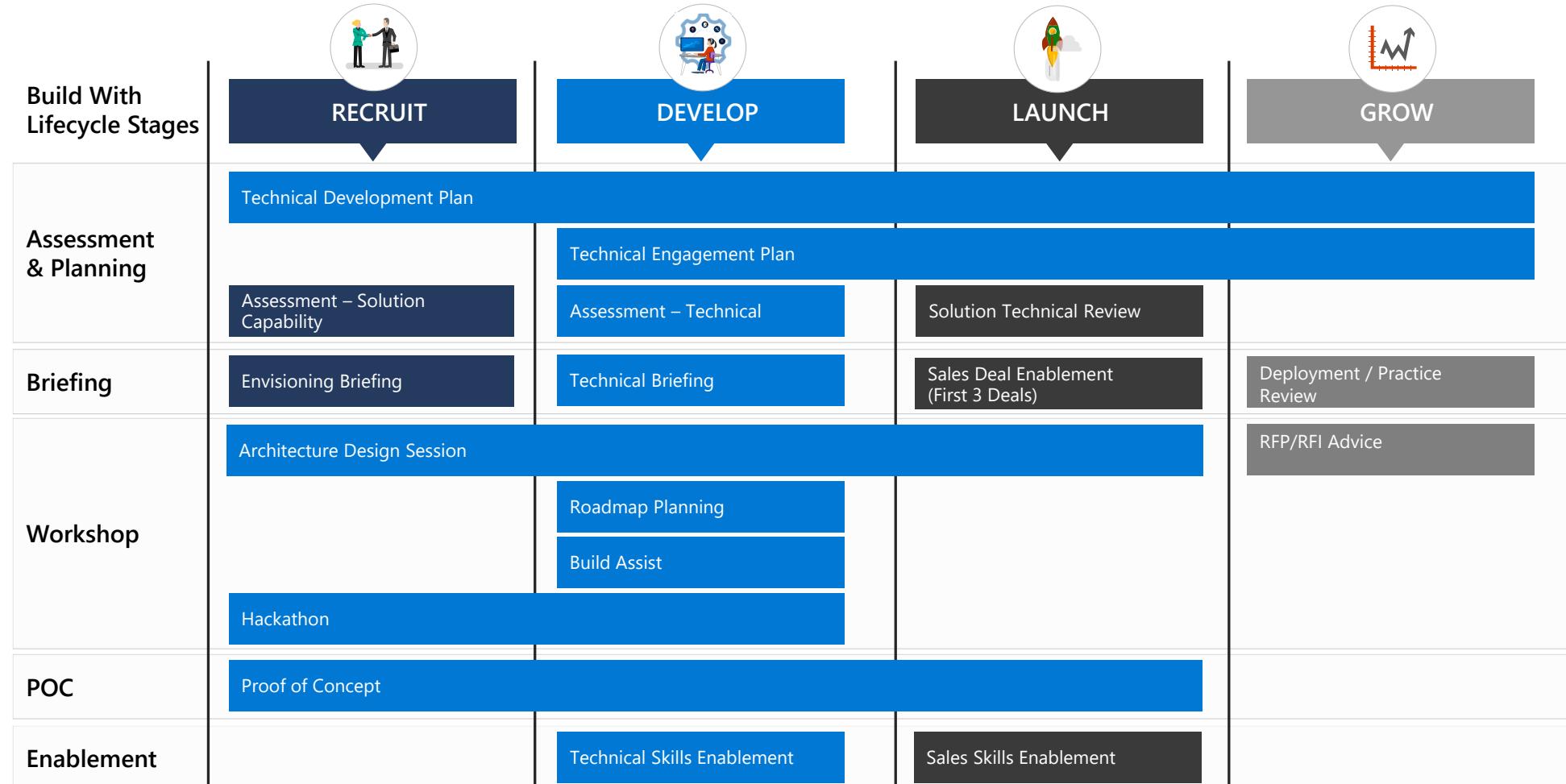
- 1 Assessment & Planning** Joint assessment and planning to analyze and initiate build-with engagements
- 2 Briefing** Educate on market opportunity, profitability, best practices on Microsoft platforms
- 3 Workshop** Creative and collaborative process resulting in technical plan for action
- 4 PoC** Provide input and expertise for the purpose of confirming or advancing an idea or solution build
- 5 Enablement** To build verifiable partner Skills and Capabilities

Who: GPS and Build With Role Definitions

| PDM | PTS | CSA |
|---|---|--|
| <p>Partner Account aligned, manages...</p> <ul style="list-style-type: none">• Overall Relationship• Revenue Growth• Cross-Team Orchestration | <p>Services, Global SI, ISV and Global ISV Partner Account aligned, manages...</p> <ul style="list-style-type: none">• Technical Relationship• Technical Strategy• Solution Build Orchestration | <p>Solution Area/ Workload aligned pooled resources, executes...</p> <ul style="list-style-type: none">• Deep Technical Solution Build Services to help deliver Partner Products/Services to market for all Partner types including GSI, Services, ISV and Recruit |

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GPS Technical Services Catalog



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GPS Technical Services Catalog PTS Managed Partners (MPL & Strategic Recruit)

Services, GSI and ISV Role Lead

| | Build With Lifecycle Stages | RECRUIT | DEVELOP | LAUNCH | GROW |
|--|-----------------------------|---|------------------------------------|--|-------------------------------------|
| | Assessment & Planning | Technical Development Plan | Technical Engagement Plan | | |
| | Briefing | Assessment – Solution Capability PTS | Assessment – Technical CSA | Solution Technical Review PTS | |
| | Workshop | Envisioning Briefing PTS | Technical Briefing CSA | Sales Deal Enablement (First 3 Deals) PTS | Deployment / Practice Review PTS |
| | POC | Architecture Design Session | Roadmap Planning CSA | | RFP/RFI Advice CSA |
| | Enablement | Hackathon | Build Assist CSA | | |
| | | Proof of Concept | | | |
| | | | Technical Skills Enablement CSA | Sales Skills Enablement PTS | |

GPS Technical Services Catalog MPL Partners without PTS

Services, GSI and ISV Role Lead

| | Build With Lifecycle Stages | RECRUIT | DEVELOP | LAUNCH | GROW |
|-----------------------|-----------------------------|----------------------------------|---------------------------------|---------------------------------------|------------------------------|
| Assessment & Planning | | Technical Development Plan | Technical Engagement Plan | | |
| Briefing | | Assessment – Solution Capability | Assessment – Technical CSA | Solution Technical Review | |
| Workshop | | Envisioning Briefing | Technical Briefing CSA | Sales Deal Enablement (First 3 Deals) | Deployment / Practice Review |
| POC | | Architecture Design Session | Roadmap Planning CSA | | RFP/RFI Advice CSA |
| Enablement | | Hackathon | Build Assist CSA | | |
| | | Proof of Concept | | | |
| | | | Technical Skills Enablement CSA | Sales Skills Enablement | |

Technical Services Catalog – Description Summary

| Technical Service | Description | Outcome |
|---------------------------------------|---|--|
| Assessment – Capability | Identify existing state of partner business, insights, goals and motivations | Understand background and assess probability for success |
| Assessment – Technical | Uncover partner and individual technical capabilities and skill sets | Partner tech resource list, skills, certs obtained and needed |
| Envisioning Briefing | Educate and set baseline understanding of Microsoft platform and business opportunities | Executive commitment to invest in practice or new solution based on business value |
| Technical Briefing | Deep technical overview, demo and best practices | Tech Lead commitment to invest time and energy to build |
| Technical Development Plan | Partner Account technical execution strategy aligned to PBP | Fiscal year tech execution plan to drive business goals |
| Technical Engagement Plan | Solution/Practice Build plan with goals and milestones for success | Agreed investments from Microsoft and Partner with timelines |
| Roadmap Planning | Product Futures overview | Partner solution alignment to Microsoft futures |
| Architectural Design Session | Guide partner to determine best architectural use of Microsoft products | Establish design plan with Architectural diagrams for MVP |
| Proof of Concept | Build out one path or use case of partner's solution | Proves suitability of product/service with documentation |
| Build and Assist | Supports and guides technical design, review and build phase | Partner created working code with implementation detail |
| Hackathon | Event where people solve specific problems and create prototypes | List of new ideas, problems solved, and solution build initiated |
| Technical Skills Enablement | L300-L400 skill guidance to supplement pre-packaged training content | Improve individuals all around deep technical skill level |
| Sales Skills Enablement | Coaching pre-sales teams on Microsoft technology and partner solution | Pre-sales team ready to find, develop and close deals |
| Solution Technical Review | Solution verification testing for marketplace, catalog and Co-Sell prioritize | Validation of GPS Solutions Catalog entry and MVP alignment |
| Sales Deal Enablement (first 3 deals) | Guidance on first three customer deals of a new offering, prepare for co-sell | Drives Co-Sell ready status and partner self sufficiency |
| Deployment/Practice Review | Customer deal deployment review or practice assistance after Co-Sell ready | Accelerated deployment with new solution capabilities |
| RFP/RFI Advice | RFP/RFI technical response advice and reference architecture | Moves opportunity fwd, develops new tech skills and capabilities |

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Guidance Only

Service Activity – Estimated Duration in hours

| | Service Activity | Services | GSI & GISV | ISV |
|---------|---|----------|------------|--------|
| RECRUIT | Assessment – Solution Capability (<i>prep time</i>) | 12 | 16 | 8 |
| | Envisioning Briefing (<i>prep time</i>) | 8 | 8 | 8 |
| DEVELOP | Assessment – Technical (<i>prep time</i>) | 16 | 24 | 16 |
| | Technical Engagement Plan (<i>prep time</i>) | 4-8 | 8-16 | 4-8 |
| | Technical Briefing (<i>prep time</i>) | 8 | 8 | 8 |
| | Roadmap Planning (<i>execution time</i>) | 2-4 | 2-4 | 2-4 |
| | Architecture Design (<i>execution time</i>) | 2-16 | 2-16 | 2-16 |
| | Build and Assist (<i>execution time</i>) | 1-2/wk | 1-2/wk | 1-2/wk |
| | Proof of Concept (POC) (<i>execution time</i>) | 8-24 | 8-24 | 8-25 |
| | Hackathon (<i>execution time</i>) | 16-24 | 16-24 | 16-24 |
| | Technical Skills Enablement (<i>execution time</i>) | 2-20 | 2-20 | 2-20 |
| LAUNCH | Sales Deal Enablement (first 3 deals) | 2-16 | 2-16 | 2-16 |
| | Solution Technical Review | 4-8 | 8 | 4-8 |
| GROW | Sales Skills Enablement (<i>execution time</i>) | 2-16 | 2-16 | 2-16 |
| | Deployment/Practice Review | 2-8 | 2-40 | 2-8 |
| | RFP/RFI Advice | 4-8 | 8-40 | 4-8 |

Services Partner Type includes Mainstream, Key Regional, CD, MSP

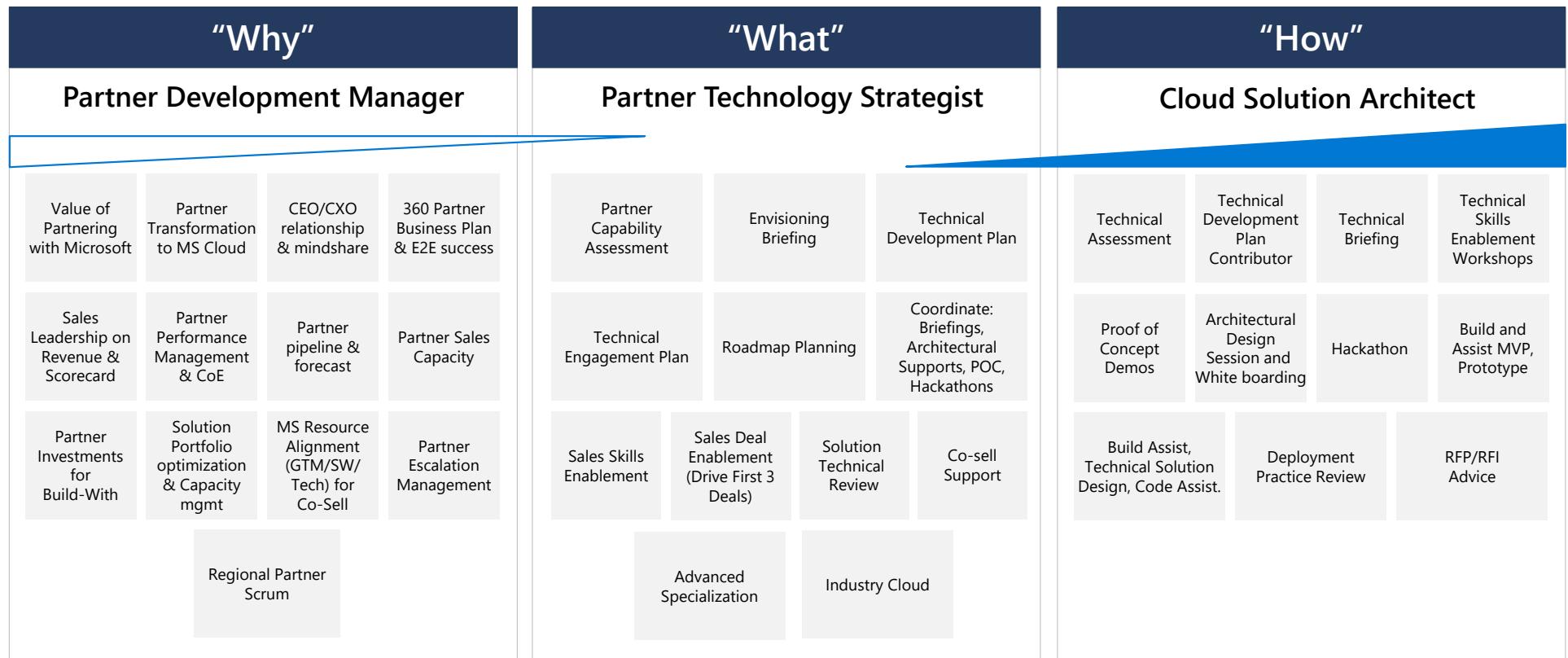
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GPS Technical Team Build-with Activities

| | Timeline Progression | | | | | | | | | | | |
|--|--|--|---|--|---|---|--|---|--|--|---|--|
| | Plan & Engage | | | Build Solutions | | | | Generate Co-Sell Pipeline | | | Strategic Sales | |
| | -1 | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | |
| Work done | Capability Assessment Tech Dev Plan Identify growth opportunities Agreement on which practices to build in which regions | Technical Engagement Plan Plan to develop new offerings/solutions with agreed timelines | Envisioning Briefings Exploration workshop | Roadmap Planning Workshop to align a solution with technology roadmap | Architecture Design Sessions Architecture design and revision | Proof of Concept Help build a PoC | Build Assist Advise and support building an MVP (multiple sessions) | Hackathons Multi day exploration with prototyping | Technical Briefings Deeper briefing technical component, application scenarios, best practices | Sales Deal Enablement (first 3 deals) Support to architect a solution based on a customer scenario | Deployment Review/RFP Support Provide Guidance on RFP and Deployed Architectures | |
| Who Leads | PTS | PTS | PTS | PTS | CSA | CSA | CSA | CSA | CSA | PTS | CSA | |
| Effort One time/y Recurrent/w | 120h 2-3h | 20-60h | 16h 8h | 24h 12-48h | 24h 48h | 20h-60h 1-6w | 10-60h 2-4w | 2-3w 4-6w | 8h 6h | 4-40h 2-3w | 2-6h 8-16h | |
| What Partners Get | <ul style="list-style-type: none"> Tech Strategy for the fiscal Skills Plan/ESI Strategic alignment | <ul style="list-style-type: none"> Commitment on PTS/Architect investments GTM roadmap | <ul style="list-style-type: none"> Envisioning Sessions Understanding the platform Best Practices & Patterns | <ul style="list-style-type: none"> Solution Blueprint Product/Platform roadmap | <ul style="list-style-type: none"> Architecture Reviews Pre-made proposals RFP Guidance | <ul style="list-style-type: none"> Recommended Tools and Methods Patterns | <ul style="list-style-type: none"> Best Practices Connection with Engineering Marketplace listing | <ul style="list-style-type: none"> Build Pipeline Generate excitement | <ul style="list-style-type: none"> Develop in depth scenarios and opportunity aligned technical depth | <ul style="list-style-type: none"> Build the muscle to launch the solution with success | <ul style="list-style-type: none"> Guidance for RFP Pre-design Proposals Optimization of Architectures | |
| Value | Increase Sales & Delivery Capability ↑Revenue | Alignment and Execution | Reduce Pre-Sales Estimation Mistakes Reduce "Contract Value" Risk ↓Risk | | Increase Operational Efficiency Increase Resource Optimization Increase Contract Value over Time ↑Revenue ↓Risk | | | | | | FY22 | |

Partner Dev Manager vs. Technology Strategy vs. Tech Solution Architecture role focus in field: **Services, GSI, ISV**

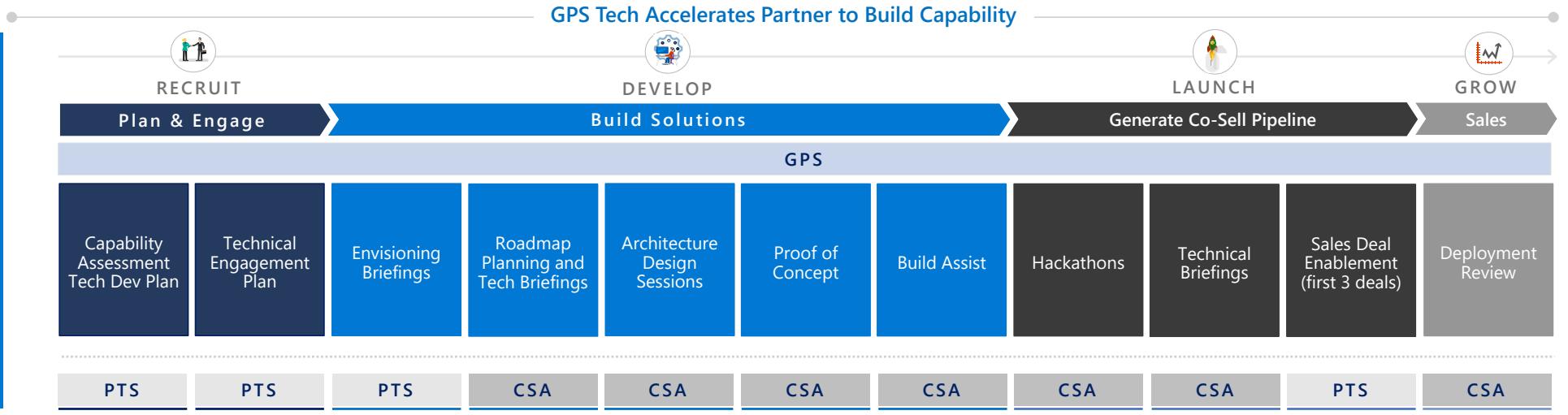


- (1) The triangles represents what the role can do... not what they should do
(2) Sample of activities, not meant to be comprehensive or in order

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Continuum of Building practices to Selling with Partners

GPS Partner Build-With



EOU Customer Consumption

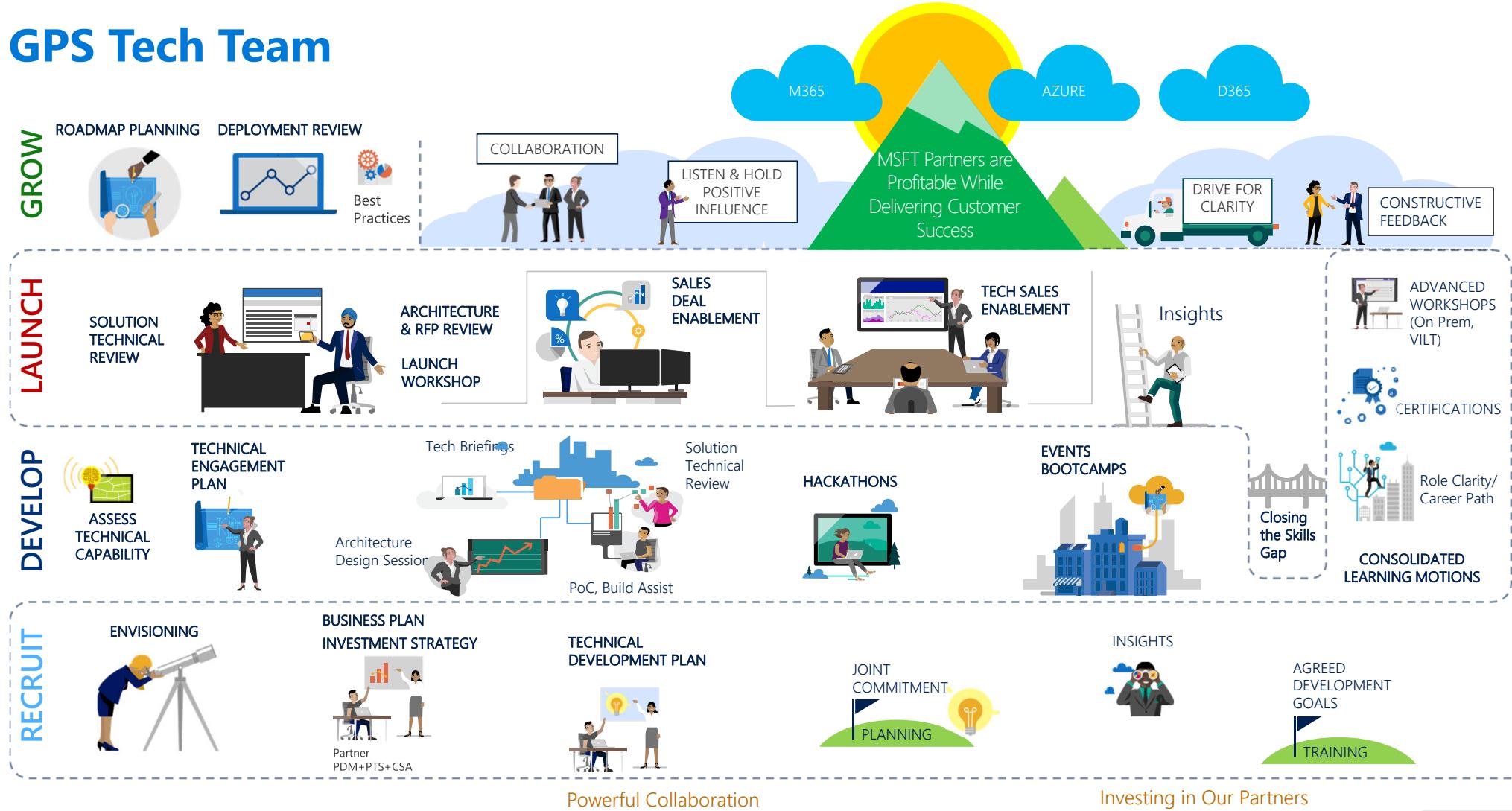


FY22 Enterprise Partner Workflow – GPS PDM/CS-E

| | ← | 1 | 2 | 3 | 4 | 5 | → |
|--------------------|---|---|---|---|---|---|---|
| | Know your Customer & Partner | Envision | Validate | Commit | Onboard | Realize Value | |
| Roles | Account Executive + ATS / Partner | Account Executive + ATS / Partner | Solution Specialist / Partner | Solution Specialist / Partner | Account Executive Solution Specialist / Partner | CSAM + Cloud Solution Architect / Partner | |
| Key Activities | CS-E Maps partners to IPS/sales plays | CS-E Organizes co-sell days & actively identify new opportunities | PDM Drives aggregated pipeline reviews w partner CS-E Activities supporting acceleration of pipeline | PDM PDM actively engage in Top opportunities with their partners over an agreed threshold while STU / ATU drives customer opportunity | PDM Orchestrates partner facing SCRUM and removes velocity blockers | CS-E Identifies upsell and cross sell opportunities in customer accounts & build further pipeline | |
| Measure of Success | Partner inclusion in EOU Account & Territory plan | New opportunities* | Pipeline velocity* | | Rev & Consumption acceleration | Wins. Case studies & references | |

* Opportunities/Engagements always owned/forecasted by Enterprise sellers

GPS Tech Team



OUR PURPOSE: Drive Practices and Solutions/IPs to build Partner Capacity and Capability that enable mutual success

How to use the Technical Services Catalog

- 1 Download GPS Technical Engagement Framework word doc from GPS Tech Hub for more details to get familiar with the service activities and scope. Use this PPT deck for short service descriptions
- 2 Use with Partners to **describe** pro-active services available during partner development
- 3 Leverage the purpose and scope verbiage to **set expectations** with partners on engagement activities
- 4 Map services to Technical Engagement Plan activities for an outline on "how" to build a solution/practice
- 5 Use the descriptions to **guide** preparation and execution of technical service activities
- 6 Each service has a **RACI chart** for roles and responsibilities to guide execution

| RACI | Description |
|------|---|
| R | the person responsible to deliver and execute the activity |
| A | the person accountable but may not be the one executing the activity. This is often the case with PTS once a CSA is engaged during the develop stage |
| C | a person that may be consulted to provide background information or guidance to help ensure success of the activity |
| I | a person that is simply informed or made aware of the activity |

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GPS Technical Engagement Framework

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Services Catalog and RACI Models

Full Description Word Doc: [Technical Engagement Framework - Services Catalog](#)

Tech Services Catalog Example (From detailed [Word Doc](#))

Envisioning Briefing

Activity Scenario includes

- Description/Purpose
- Duration
- Scope
- Success Metrics
- Inputs and Outcomes
- Managing the Activity
- RACI Roles and Responsibilities

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---|-----------|-----|-----|
| Envisioning Briefing – PTS Assigned | A | R | (R) |
| Envisioning Briefing – PTS Not Assigned | A | | (R) |

Legend:

| | | | |
|----------------------|----------------------|--------------------|-------------------|
| R Responsible | A Accountable | C Consulted | I Informed |
|----------------------|----------------------|--------------------|-------------------|

Role Clarification: PDM is accountable as part of capacity planning to recruit practices and solutions with business profitability insight. PTS when assigned to MPL or Strategic Recruit is to guide the partner technically. PTS will determine need for Architect depending on audience; if so CSA responsible to deliver. When PTS is not assigned, the PDM or PDM-R leads the service and needs business justification to engage CSA on this activity.

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Envisioning Briefing

Definition / Purpose

This service is to educate and set a baseline understanding of the Microsoft platform and business opportunities for a partner. It guides the partner towards potential solution areas which enables brainstorming offer ideas on a specific technology. The session can also focus on Digital Transformation of a partner's business.

Content focuses on the "Art of the Possible" for building practices, solutions or applications as well as digital transformation based on Microsoft technology. Examine current and future state possibilities, picture ways partner can address market gaps, inspire growth through building solutions in a Microsoft technology area. Briefing is Microsoft-led either in-person or virtual typically as a precursor to develop stage of the partner lifecycle.

Participants: Business decision maker teams from the partner are required to attend.

Scope

Envisioning includes one or more Microsoft-led sessions that impart foundational knowledge with overviews, scenarios and solution demos customized to the partners business and priorities. It should answer the question "What is the opportunity and how can a partner go beyond what's already in market or improve on it to make money"? The session covers:

- The "Art of the Possible" with Microsoft technology
- Revenue streams in a solution area and how they align to partner capabilities
- Products and platform business value and capability overviews connected to partner's area of focus
- Customer use case scenarios
- Solution scenarios with partner services and/or IP examples
- Partner ecosystem with examples of other solutions related to the technology area. Identify where competition and integration exist as well as market expansion opportunities
- Validation of current and future state desires and alignment with the product's roadmap
- ROI and financial investment modeling – in some cases this is a follow up meeting after the briefing. Profitability overview typically accountable by PDM

| | |
|------------------|---|
| Type of Activity | 1: 1 or 1: Many |
| Duration | 2-8 hours estimated to deliver this activity depending on the complexity and maturity of the Partner. |
| Roles | Owner: PTS Supporting: CSA, PDM |
| Owner | PTS owns when the session is conducted during the Recruit Phase with a managed partner. If a CSA has been engaged the PTS may leverage the CSA to assist in leading the effort. |
| Inputs | <ul style="list-style-type: none">• Solution Capability and Technical Assessment• Technical Development Plan |

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Assessment – Solution Capability (Recruit)

| | |
|---|---|
| Definition/ Purpose  | Partner Assessment to gain deeper insights into partner's existing state of business from a solutions perspective. Including basic capabilities, desire, motivation and goals around building a new practice or solution. It includes a business overview from the partner for Microsoft to gain deeper understanding of their business and start to analyze the profit areas and likelihood of execution on a new practice or solution area. Can be coupled with an Envisioning Briefing. Often done when partner needs baseline understanding of the solution area and possibilities before it makes sense for Microsoft team to speak a common language and assess their capabilities. |
| Scope  | A Solution Capability Assessment focuses on the partner with careful attention to clues and indicators of specific Microsoft workloads and building blocks. The meeting should cover: <ul style="list-style-type: none">• Current state of the partner's business, solution capabilities and cloud focus• Interest in building a new solution, exploring possibilities• Future state desires with a new solution or practice• Basic ability and ambition to build something new• General discussion on the "Art of the Possible"• Basic understanding of current technical and sales skills in the new solution area• Basic understanding of how partner goes to market with solutions• Roles and Responsibilities for success |
| Inputs  | <ul style="list-style-type: none">• Partner Business Plan and Profile Assessment from PDM• Partner Insights, LinkedIn, Owler, Partner Website, Hoovers, 10k documents, etc. |
| Outputs/ Success Criteria  | <ul style="list-style-type: none">• Executive buy-in to build a practice or solution• Understanding Partner background, products, solutions, business capabilities• Usage scenarios identified• Geographical Reach, Expansion plans, Competitor Alliances, other P2P/ISV relationships, Industry Focus |
| Duration  | 1-2 hours execute a virtual meeting, 8-16 hours preparation and analysis |

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Assessment – Solution Capability RACI – Services, GSI, ISV

Description: Partner Assessment to gain deeper insights into existing state of business from a solutions perspective. Includes basic capabilities, desire, motivation and goals around building a new practice or solution.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---|-----------|-----|-----|
| Solution Capability Assessment – PTS Assigned | R/A | (R) | - |
| Solution Capability Assessment – PTS Not Assigned | R/A | - | - |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Confirmation of partner capabilities, desire, motivation and goals around building a new practice or solution
- Understand Partner's background, products, solutions, business capabilities

Role Clarification: PDM is accountable as part of capacity planning to recruit practices and solutions. PDM to engage PTS to guide the partner technically as needed during the discussion and lead follow on build with development. When PTS is not assigned, the PDM leads this activity.

FY22

Envisioning Briefing (Recruit)

| | |
|--|---|
| Definition/ Purpose | Educate and set common baseline understanding of Microsoft platform and business opportunities. Guide the partner towards potential solution areas and enable brainstorming offer ideas based on a specific technology. Such a session can also focus on Digital Transformation of partner's business. Outlines fundaments on the "Art of the Possible" for building practice, solution or application as well as digital transformation based on Microsoft technology to: <ul style="list-style-type: none"> • Examine current and future position in a solution area • Picture ways to address potential gaps in the market or with partner's offering • Explore scenarios of how Microsoft technologies enable partners to achieve business success • Inspire partners to build and grow with Microsoft underlying technologies |
| Scope | Includes overviews, scenarios and solution demos customized to partners business. Scope depends on the audience. Typical areas covered: <ul style="list-style-type: none"> • The "Art of the Possible" with Microsoft technology • Revenue streams within a Solution Area and how align to partner capabilities. • Products and platform business value and capability overviews connected to partner's area of focus • Customer use case scenarios • Solution scenarios with partner services and/or IP examples • The partner ecosystem with examples of other partner solutions related to a technology area. Identify where competition and integration exist as well as market expansion opportunities • ROI and financial investment modeling – in some cases this is a follow up meeting after the briefing. Profitability overview typically accountable by the PDM <p>Questions answered: How can the partner go beyond what's already in market or improve upon it to make money?</p> |
| Inputs | <ul style="list-style-type: none"> • Solution Capability and Technical Assessment • Technical Development Plan • List of partner resources • Usage scenarios • Other Partner solution examples |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Validation of what's possible in relation to partner's goals • Executive buy-in to invest in building a new solution • Establish next steps for development • Update Technical Development Plan, Partner Business Plan and/or deliverables from Assessment as necessary • Extract usage scenarios • Establish outline for Solution Blueprint • Revenue and consumption targets of products and services for new solution over next 12 months |
| Duration | 2-8 hours to execute this activity, 8 hours preparation |

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Envisioning Briefing RACI – Services, GSI, ISV

Description: Educate and set baseline understanding of Microsoft platform and business opportunities. Guide partner towards potential solution areas and enable brainstorming of offer ideas based on a specific technology.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---|-----------|-----|-----|
| Envisioning Briefing – PTS Assigned | A | R | (R) |
| Envisioning Briefing – PTS Not Assigned | A | - | (R) |

OUTCOME

- Executive buy-in to invest in a practice or solution based on business value
- Validate what's possible in relation to partner's goals
- Extract Usage Scenarios

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

Role Clarification: PDM is accountable as part of capacity planning to recruit practices and solutions with business profitability insight. PTS when assigned to MPL or Strategic Recruit is to guide the partner technically. PTS will determine need for Architect depending on audience; if so CSA responsible to deliver. When PTS is not assigned, the PDM or PDM-R leads the service and business justification to engage CSA on this activity.

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Assessment – Technical (Develop)

| | |
|--|---|
| Definition/ Purpose | Assessment focused on partner's current technical capabilities and skill sets in relation to building a new solution or practice based on a set of products and technologies. Insight on ability to design, build, test, deploy and sell a new solution offering. Provides foundation for CSA to focus on skill building areas. In some cases, this is coupled with a Solution Capability Assessment. The information gathered feeds into the Technical Development Plan to address skill gaps. For ISV's this can also focus on the solution itself and feasibility migrating from another platform. |
| Scope | Along with assessing partner's skills, the CSA shares expected skills required for building the practice or solution and proficiency levels for different types of roles. Assesses the following: <ul style="list-style-type: none"> Number of technical resources, functional roles and responsibilities <ul style="list-style-type: none"> Who is responsible for building, designing, packaging, deploying and supporting? Microsoft product skills by technology and workload with rating of 100-400 based on the GPS Skills Assessment rating scale (100=basic, 200=intermediate, 300=self-sufficient, 400=expert) Certifications and Competencies obtained, dates and gaps necessary to build expertise For ISV's, explore current solution and ability to migrate to Microsoft platform as well as capabilities to build additional functionality Product and integration dependency skills as well as possible constraints Cloud maturity and digital transformation of the partner Industry specific skills Competitive alliances and skill levels Partner-to-Partner relationships that effect the solution performance, support or adoption |
| Inputs | <ul style="list-style-type: none"> Solution Capability Assessment Partner Profile Assessment GPS CRM Partner Profile, Partner Insights, LinkedIn, Owler, Partner Website, Hoovers and 10k documents. |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> Documented Technical Assessment to contribute to the Technical Engagement Plan List of partner's technical resources and skills, certifications and competencies attained and needed Partner learning paths with specific technical enablement and estimated timeframes Roles and responsibilities by partner and Microsoft Next Steps (e.g. Technical Engagement Plan update, Skills Enablement, ADS, POC, Hackathon, etc.) Documented Risks, Actions, Issues and Decisions Verification of partner's commitment to building necessary technical skills and timeframes |
| Duration | 2-4 hours to execute the activity, 16-24 hours preparation and analysis |

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Assessment – Technical RACI Services, GSI, ISV

Description: Assessment focused on partner's current technical capabilities and skill sets in relation to building a new solution or practice based on a set of products and technologies.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---|-----------|-----|-----|
| Technical Assessment – PTS Assigned | C | A | R |
| Technical Assessment – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- List of all partner tech resources, capabilities, skills, certs. Identify skill gaps
- Establish partner's technical ability and scope to execute a new solution/practice
- Creation of partner Technical Engagement Plan

Role Clarification: CSA delivers for deep technical specialization and scalability. PTS when assigned to MPL or Strategic Recruit is accountable for the outcomes.

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Technical Development Plan (TDP)

| | | |
|---------------------------------|---|---|
| Definition/ Purpose |  | A Technical Development Plan (TDP) is dedicated to technical aspects of driving partner capacity and capability. It outlines the execution strategy for a Partner Business Plan to guide the partner and the Microsoft team focus areas for the fiscal year. |
| Scope |  | A TDP is created at the beginning of a planning cycle, which typically is at the beginning of Microsoft's fiscal year. It contains a high-level partner technical strategy in line with the PDM's Partner Business Plan (PBP) with an approach to realize the PBP's goals and objectives. The PTS is responsible to coordinate efforts with the partner and to create the plan document, often in collaboration with the PDM and may consult an Architect as required. PTS works with key technical leaders at the partner such as the CxO, Cloud Leader, Sales Leader, Practice Lead and Marketing Lead. It's recommended the PTS execute a whiteboard session with the partner to discuss their business and technical strategy to gather the insight needed to create this plan. |
| Inputs |  | Whiteboarding planning discussion and TDP output includes: <ul style="list-style-type: none">Review of Partner Business Objectives and Priorities from PBPTechnical Priorities and Strategy: Current and Proposed Projects identify Solution Area, tech priority workloads, and execution strategyCapacity and Capabilities: skilling and training required for each prioritized areaIdentify key technical stakeholdersChallenges, risks, blockers and mitigation strategyStrategic Next Steps such as Technical Services, Workshops, or Training Plans |
| Outputs/ Success Criteria |  | <ul style="list-style-type: none">Partner Business Plan with defined business objectives and revenue goals, business priorities, and risks and challenges,Prior fiscal year performance metricsCurrent fiscal year targets set for the partnerPIN metricsPartner background from Partner website, GPS CRM, LinkedIn, Hoovers |
| Duration |  | 8hr – 40hrs over the course of 2-4 wks |

FY22

Technical Development Plan RACI – Services, GSI, ISV

Description: Document that outlines the technical execution strategy of a Partner Business Plan to guide the partner and the Microsoft team focus areas for the fiscal year.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---|------------------|-----|-----|
| Technical Development Plan – PTS Assigned | C | R/A | C |
| Technical Development Plan – PTS Not Assigned | <i>See below</i> | - | - |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Documented Technical Priorities
- Documented Technical Execution Strategy
- Agreed upon plan on how to reach Business Objectives and Goals for the fiscal year
- Creation of Technical Enablement Plan (skilling plan)

Role Clarification: PTS is responsible to create the Technical Development Plan. For Recruit partners the PDM-R is responsible to set the context prior to engaging a CSA. This is accomplished with a high-level plan that outlines what they want to achieve with the partner to justify engaging a CSA for build with capacity and capability growth.

FY22

Technical Engagement Plan (Develop)

| | |
|--|--|
| Definition/ Purpose | Provides a document that outlines the Solution/Practice Build plan and partner milestones for success during solution development. Created as follow up after an initial Assessments to document goals and next steps. This document sets the stage for what the partner must technically accomplish to successfully launch a new solution or practice in market. It answers the questions "What are we going to do together" and "How are we going to do it" while aligning with the Partner Business and Technical Plan goals and objectives for the partner. |
| Scope | <p>Document a path of activities and training to partner's desired end state. Consider what is needed in these areas:</p> <ul style="list-style-type: none"> • Investments required for staffing, building, training, operating • Resources needed to build and operate the solution • List Service Catalog activities necessary for a partner's specific solution development with timeframes. E.g. Technical Briefing, ADS, POC, Pre-Sales Enablement • Readiness both technical and sales to get up to speed and stay current • Individual certifications and partner competencies to obtain Gold Cloud Competency • Technical considerations that need to be evaluated and decided upon for the solution including tools, services, and architectural design elements • Microsoft services and programs such as Cloud Solution Provider (CSP), Azure subscriptions, Internal Use Rights (IUR), AppSource, FastTrack • Consideration for 3rd party partnerships and P2P motions • Post-sale Technical Support model ideas <p>Document the partner's desired outcome, timelines, expected impact, key stakeholders and associated responsibilities, as well as commitments from both the partner and Microsoft. Then list the areas of focus required to build the solution from the considerations above.</p> |
| Inputs | <ul style="list-style-type: none"> • Partner Business Plan and Technical Development Plan • Solution Capability Assessment • Technical Assessment (if complete) • List of partner resources • Usage scenarios • Roles and responsibilities |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Documented plan for partner technical solution development • Agreed upon investment and training requirements • Timelines for development and major milestone activities • Validation of partner commitment to build new practice or solution |
| Duration | 4-8 hours estimated duration to complete this activity |

FY22

Technical Engagement Plan RACI – Services, GSI, ISV

Description: Document that outlines the Solution/Practice Build plan and partner milestones for success during solution development. Created as follow up after initial Assessments to document goals and next steps.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|--|-----------|-----|-----|
| Technical Engagement Plan – PTS Assigned | C | R/A | - |
| Technical Engagement Plan – PTS Not Assigned | C | - | R/A |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Documented plan for partner's technical development of a new solution/practice
- Agreed upon investment and skilling requirements
- List major milestone activities and timelines for success of a new build engagement

Role Clarification: PTS when assigned to MPL or Strategic Recruit is responsible to create the Technical Engagement Plan to accompany a solution build engagement. When CSA is engaged, they contribute to the plan and execute deep technical services therein. When a PTS is not assigned and there is a build-with Engagement opportunity, the engaged CSA creates the plan.

FY22

Technical Briefing (Develop)

| | |
|---|---|
| Definition/ Purpose  | Overview that builds on technology and solution area concepts from an Envisioning Briefing with deeper level technical content. Includes best practices for using the technology and examples for implementing a solution. Typically delivered after partner has committed to building a new solution and is ready to deep dive into the underlying technology with partner's technical team. Gains tech lead agreement to invest in a new solution |
| Scope  | Microsoft provides technical overview, demos, roadmap and architectural ideas. Partner shares technical questions, current architectural challenges, and inquiries about technical roadmap. This sharing of technical knowledge helps accelerate development planning, execution and remove technical roadblocks. Areas covered: <ul style="list-style-type: none">• Technical product overview with demo• Product roadmap (may require NDA)• Architectural ideas• Technical considerations and requirements• Technical Q&A• Best Practices for Solution Development on a product or technology with partner services examples• 3rd party partner solutions that extend, support, drive adoption• ISV's may need guidance on migrating from other cloud platforms to Azure as well as compete platform comparison |
| Inputs  | <ul style="list-style-type: none">• Technical Development Plan, Technical Engagement Plan• User scenarios and initial solution design ideas• Microsoft's current Technical Roadmap |
| Outputs/ Success Criteria  | <ul style="list-style-type: none">• Partner gains deep technical understanding of Microsoft products and services, consideration of roadmap in development planning• Establish next steps to drive solution development• Updated Technical Development or Engagement Plan and Partner Business Plan as necessary• Solution Blueprint outline• Partner understands design change trade-offs and takes appropriate action to continue moving forward• Risks, Actions, Issues and Decisions |
| Duration  | 1-4 hours virtual, or 4-8 hours in person, 8 hours preparation |

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Technical Briefing RACI – Services, GSI, ISV

Description: Overview that builds on technology and solution area concepts from an Envisioning Briefing with deeper level technical content. Includes best practices for using the technology and examples for implementing a solution.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---------------------------------------|-----------|-----|-----|
| Technical Briefing – PTS Assigned | I | A | R |
| Technical Briefing – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

Role Clarification: When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service

OUTCOME

- Partner has deep technical understanding of Microsoft products/services in a specific solution area and workload
- Partner initiates development planning with new insight
- Solution blueprint outline

FY22

Roadmap Planning (Develop)

| | |
|---|--|
| Definition/ Purpose  | Overview that's designed to help partners develop a roadmap or a plan for their specific set of products, solutions and services by aligning to Microsoft product/technology futures roadmap. Also an overview on new emerging technologies and updates for consideration on solution impact. |
| Scope  | A Roadmap session can be delivered during both the Develop and Grow stages depending on where the partner is at with their initial development or service updating needs. An initial Roadmap session is typically required during the Develop stage to understand the future direction of the product/technologies to guide partner initial investment and development. Such a session should be repeated during the Grow stage as Microsoft product/technologies evolve and effect how the partner is either delivering or developing on the technologies. The session typically involves a PPT futures roadmap presentation, scenario discussion and video. |
| Inputs | <ul style="list-style-type: none">Partner ready content from Infopedia, EdX Courses, Microsoft Virtual Academy, C+E Portal, Office On-Ramp, Dynamics Hub, Dynamics – The Hive, Ready ContentCheck Partner NDA as necessary |
| Outputs/ Success Criteria  | <ul style="list-style-type: none">Partner guidance to develop or update their solution/servicePartner solution alignment to Microsoft futures |
| RACI  | Develop stage: CSA responsible to deliver, PTS accountable to ensure it takes place Grow stage: PTS responsible to deliver and accountable to ensure it takes place |
| Duration  | 2-4 hours to deliver |

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Roadmap Planning RACI – Services, GSI, ISV

Description: Overview that's designed to help partners develop a plan and roadmap for their specific set of products, solutions and services by aligning to Microsoft product/technology futures roadmap. Typically NDA content.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|-------------------------------------|-----------|-----|-----|
| Roadmap Planning – PTS Assigned | I | A | R |
| Roadmap Planning – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Partner solution alignment to Microsoft futures
- Partner has ability to update solution/service development effectively

Role Clarification: During the Develop phase the CSA is responsible to deliver, however during the Grow phase the PTS when assigned to MPL or Strategic Recruit partner is responsible to deliver as a periodic update.

FY22

Architectural Design Session (ADS) (Develop)

| | |
|--|--|
| Definition/ Purpose | Determine best architectural use of Microsoft products and services for solution development, and/or solve a specific end-customer problem presented by the partner. It creates a documented design that clearly defines the technologies used at each layer of the architecture. This is a Microsoft-led workshop delivered in-person or virtual (best delivered in-person). For ISV's this can be an architectural migration mapping along with solution improvement design on Microsoft's platform. |
| Scope | <p>Focus on exploring new ideas and services for digital transformation with a new solution offering. Align business objectives to specific attributes of the Microsoft platform. Provide partner's development team with architectural guidance, input about preferred practices and risk analysis for a new solution or application build. Areas covered:</p> <ul style="list-style-type: none"> • Partner solution objectives aligned to specific attributes of the Microsoft platform • White-boarding the solution architecture • Content based on usage scenarios and solution blueprint • Architectural diagram of major components for each layer of the architecture • Detailed description of each component along with requirements • Technical validation and solution mapping document as necessary <p>It is critical this activity be performed collaboratively with active involvement from the partner teams so common design build understanding is achieved.</p> |
| Inputs | <ul style="list-style-type: none"> • Solution outline • Usage scenarios • Industry landscape and insights • Assessment findings, Envisioning and Technical Briefing findings |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Shared understanding of partner development objectives • Solution design summary and overview documented by Microsoft • Architecture diagrams in .pdf or .vsd • Agreement on next steps leading toward a POC or initial deployment • Updated Risks, Actions, Issues, and Decisions (RAID) documented by Microsoft |
| Duration | 2-4 hours virtual as often as needed to complete Architectural Design (typically no more than 6 times), or 1-2 days in person |

FY22

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Architectural Design Session (ADS) RACI – Services, GSI, ISV

Description: Guide partner to determine best architectural use of Microsoft products and services for solution development, and/or solve a specific end-customer problem presented by the partner.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---|-----------|-----|-----|
| Architectural Design Session – PTS Assigned | I | A | R |
| Architectural Design Session – PTS not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Solution/service design plan and summary going into build phase
- Architectural diagrams for viable solution
- Updated dependencies, risks, actions, issues, decisions

Role Clarification: When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with CSA.

FY22

Build and Assist (Develop)

| | |
|--|--|
| Definition/ Purpose | Build and Assist is typically conducted over a period of time. It can take a few forms as it's not a specific session or workshop. The first is prototyping which can take several iterations to allow progress from a generic solution to a more granular detailed one. The prototype process discovers strengths and weaknesses of a design, process or tool specific to the solution. The purpose is to assist the partner during the design and build cycles to make technical decisions, remove roadblocks, and improve overall solution design. At the end of the activity partner has a working and interactive end-customer solution which can serve to prove out the design and act as a demo. |
| Scope | CSA works with partner's architect or lead developer responsible for the design and solution build to provide technical support and ensure the design requirements are met and run smoothly. CSA does not drive the design such as in a POC, the partner does. Together they coordinate with the partner's technical team members to ensure the solution specifications and needs are clearly understood. The activity usually requires several cycles to complete compared to a POC. Build and Assist is designed to: <ul style="list-style-type: none">• Demonstrate the feasibility of a solution during prototyping, but may not represent the final build• Provide an idea of the solution design and layout leading to MVP• Support and guide technical design review and publishing of a solution in Microsoft commerce engines• Assist with governance models around a solution• Guidance on implementing new product features aligned with the solution• Provide feedback on how to improve solution performance and remove roadblocks during design and initial delivery• Answer technical questions on what the partner is trying to do/build and ideas on how to do it |
| Inputs | <ul style="list-style-type: none">• Solution blueprint• Architecture Design documents• Usage Scenario identified• Sample partner/end-customer data |
| Outputs/ Success Criteria | <ul style="list-style-type: none">• Partner owned working code and implementation details (if applicable)• Documentation of the solution implementation or MVP• Identification of the business and technical working features and requirement recommendations (fixes and workarounds)• Generation of white papers and/or reference material on the technical underpinnings of the solution |
| Duration | 1-2 hours per week ongoing during solution build. This does NOT include estimated effort to complete the service, that is dependent on the partner's build needs. Duration and total effort are different. |

Disclaimer: Nothing in Microsoft's guidance or input should be interpreted as a certification by Microsoft of any specific partner solution.

FY22

Build and Assist RACI – Services, GSI, ISV

Description: Supports and guides technical design, review and build phase over a period of time. Can take a few forms as it's not a specific session or workshop.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|-------------------------------------|-----------|-----|-----|
| Build and Assist – PTS Assigned | I | A | R |
| Build and Assist – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Working code and implementation detail
- Identification of business and technical working features of solution
- Written requirement recommendations
- Generate white papers and reference materials on technical solution detail

Role Clarification: When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with a CSA.

FY22

Hackathon/Hackfest (Develop/Recruit)

| | |
|---|---|
| Definition/ Purpose  | <p>Event of any duration where people come together to solve specific problems. Enables the creation of minimum viable products/solutions or prototypes from ideas.</p> <p>A Hackathon helps:</p> <ul style="list-style-type: none"> • Innovate and inspire partners • Explore industry scenarios on how Microsoft technologies can enable partners achieve business objectives • Early stage prototypes <p>Participants typically form groups of about 5-6 individuals, take out their laptops, and dive into problems. Technical training workshop tracks are usually run in parallel to help improve participant skills. At the end of the event, the CSA and partners are left with working code and working solutions in the form of prototypes.</p> |
| Scope  | <p>An event is typically focused on a specific partner/customer segment based on a theme. Highly recommend not to exceed 120 people with no more than 20 groups. Ideal group size is 5-6 individuals. Most partners tend to have groups with only their own resources. Occasionally some partners allow to mix resources to form groups. Key partner targets include:</p> <ul style="list-style-type: none"> • Developing partners with a need for building skills • Problem-solving specific end-customer problems to confirm the need for a solution • Partners who are just getting started, lack time to educate their teams or bring teams skill up to date <p>PTS coordinates while CSA typically delivers sessions. Collaborate with PDM, partners and partner's end-customers to identify the themes, ideas, and problems to solve in the Hackathon. The entire process of creating a hackathon, marketing the event, driving registrations, ideating, and content for the tracks workshops typically takes 30 to 45 days.</p> |
| Inputs  | <ul style="list-style-type: none"> • Themes/Topics • Problems to be solved or Ideas (partner's interests and needs) • Technical Readiness Tracks • List of target partners/attendees • Hackathon event count-down (checklist) |
| Outputs/ Success Criteria  | <ul style="list-style-type: none"> • List of ideas worked on, solutions built, and problems solved • Partner owned working code • Videos showcasing solutions built • Practice Development Engagements generated by event |
| Duration  | <p>2-3 days to execute, 30-45 days preparation</p> |

FY22

Hackathon RACI – Services, GSI, ISV

Description: Event of any duration where people come together to solve specific problems. Enables the creation of minimum viable products/solutions or prototypes from ideas.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|------------------------------|-----------|-----|-----|
| Hackathon – PTS Assigned | I | A | R |
| Hackathon – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- List of new ideas, solutions built, and problems solved
- Working code to build from
- New practice development engagement from the event

Role Clarification: PTS when assigned to MPL or Strategic Recruit partner is accountable to orchestrate the service with CSA responsible to deliver the content. When PTS is not assigned the PDM or PDM-R is accountable to orchestrate and set context with partners.

FY22

Proof of Concept (POC) (Develop)

| | | |
|---------------------------------|---|--|
| Description/ Purpose |  | Build out a proof-of-concept (POC) of at least one path of the partner's solution as defined during an Architecture Design Session (ADS). Prove the suitability of the targeted products and services for end-customer specific solutions. Co-led session between Microsoft and partner typically delivered in-person. At the end of the activity, partner has a working and interactive solution to prove out the design and functionality along with possible demo environment. |
| Scope |  | CSA leads in collaboration with PTS. Together with partner explore solutions and confirm direction to take for POC execution. Best to use real data with a customer scenario when possible to prove out a solution with a working sample. It is critical this activity be performed collaboratively with active involvement from the partner's team to make best decisions and move towards final build of the solution. A POC is designed to: <ul style="list-style-type: none">• Share best practice knowledge between Microsoft and partner teams• Conduct in-depth session introducing solution implementation details as well as best practices for a POC and standard deployment• Create a visualization of how the product or service associated with the end-customer solution will work• Demonstrate the feasibility and functionality of a solution, but may not represent the final build• Provide an idea of the solution design and layout• Drive the design and development of the solution |
| Inputs |  | <ul style="list-style-type: none">• Solution blueprint• Architecture design documents• Usage Scenarios• Sample partner/end-customer data |
| Outputs/ Success Criteria |  | <ul style="list-style-type: none">• Partner owned working code and implementation details (if applicable)• Documentation of the solution implementation• POC scope and requirements met and accepted by partner• Identification of the business and technical working features and requirement recommendations (fixes and workarounds)• Generation of white papers and/or reference material on the technical underpinnings of the solution |
| Duration |  | 1-3 days in-person, or 1-2 hours per week ongoing virtual (typically no more than 6 times) |

Disclaimer: Nothing in Microsoft's guidance or input should be interpreted as a certification by Microsoft of any specific partner solution.

FY22

Proof of Concept RACI – Services, GSI, ISV

Description: Build out a proof-of-concept (POC) of at least one path of the partner's solution as defined during an Architecture Design Session (ADS). Proves the suitability of the targeted products and services for end-customer solutions.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|-------------------------------------|-----------|-----|-----|
| Proof of Concept – PTS Assigned | I | A | R |
| Proof of Concept – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Documentation of solution implementation
- Working code and implementation detail
- POC scope and requirements met and accepted by Partner

Role Clarification: When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with a CSA.

FY22

Technical Skills Enablement (Develop)

| | |
|--|--|
| Definition/ Purpose | Provides partners with a Microsoft technical subject matter expert to improve understanding and skill of a solution area's underlying technologies at L300-L400. Supplements or re-delivers corp pre-packaged training content. Emphasis on improving partner architect, development and delivery team capabilities. Includes presenting on deep technical aspects of a solution or technology, new technology considerations, how to deliver a solution, or improving technical capabilities. Format typically delivered in 1:1 depth motion including presentations, chalk talks, workshops, webinars, train the trainer, onboarding/shadowing programs. |
| Scope | This activity supplements corporate technical enablement curriculums available for partners and is typically executed 1:1. It can be 1:Many for depth reach scalability. It's deeper more focused content compared to Technical Briefing. PTS should guide partner to online L100-200 engines prior to engaging CSA for depth enablement. Once engaged, CSA identifies technical area of focus, establish enablement goal and leverage corp packaged content where applicable. CSA reviews and updates Technical Skills Assessment with progress made and identifies gaps between current and required skills. It is critical to ensure participation from appropriate partner technical team to drive impact. Activity covers the following: <ul style="list-style-type: none"> • Skilling partner resources on specific technologies for a new solution offering • L300-L400 Technical content overview with open dialog • Partner's technical delivery teams receive hands-on experience, technical depth training on planning and deployment skills • Technical Certification Exam prep coaching • FastTrack Architect Endorsement – provide partner architects with shadowing support guidance to drive skills and effectiveness |
| Inputs | <ul style="list-style-type: none"> • Technical Development Plan, Technical Engagement Plan • Attendee types to identify technical depth and focus areas • Partner ready enablement content from EdX Courses, Microsoft Virtual Academy, Learning Paths, Infopedia, C+E Portal, Office On-Ramp, Dynamics Hub, Dynamics – The Hive, Ready Content |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Improve technical skill level of partner attendees • Drive understanding of all technical aspects of a solution for partner development and delivery • Partner's delivery and support team trained on planning and deployment and trouble shooting • Re-usable content and demos delivered • New partner certifications • Partner ability to create standard SOW template |
| Duration | 2-4 hours execution, multiple deliveries dependent on partner size and scope typically no more than 6 sessions per partner |

FY22

Technical Skills Enablement RACI – Services, GSI, ISV

Description: Provides partners with a Microsoft technical subject matter expert to improve understanding and skill of a solution area's underlying technologies at L300-L400. Supplements pre-packaged training content.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|--|-----------|-----|-----|
| Technical Skills Enablement – PTS Assigned | I | A | R |
| Technical Skills Enablement – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Improve partner skill level of individuals
- Understanding of all technical aspects of a solution for partner development and delivery
- Re-usable content and demos for partner
- Partner ability to create and execute a SOW for new solution

Role Clarification: PTS ensures use of online enablement engines and content prior to engaging Architect in this depth activity. CSA delivers for deep technical specialization and scalability. When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with a CSA.

FY22

Sales Skills Enablement (Launch)

| | |
|--|---|
| Definition/ Purpose | Coaching pre-sales teams responsible for selling and designing solutions on their new offering and the underlying Microsoft technology at L100-L200. Goal is to teach partner how to deliver Microsoft presentations and demo, identify good fit customers and handle objections as they launch a new offering. It ensures comfort with the solution capabilities and functionality and how it fits into the partner's portfolio of offerings. This is a 1:1 depth coaching activity related to a specific partner's new solution. |
| Scope | <p>Solution should be built and ready for pre-sales efforts prior to this activity. Delivery best executed in collaboration with partner's practice lead. Participation from pre-sales technical and sales teams is critical to drive impact and ensure team is ready to sell the solution. For partners with multiple sales offices, best to identify regional team leads and ensure their attendance. This is often someone that already has a customer opportunity or recently closed sale. Areas covered:</p> <ul style="list-style-type: none"> • Solution and underlying technology overview with customer ready slides • Good fit customer scenarios • Competitive positioning • Objection handling • Licensing associated with the solution, sizing and/or costing • How and when to work with Microsoft teams for collaborative selling • Available funding programs and applicability for partner sales of specific solutions • Partner delivers scope of their offering and how it fits in their portfolio • Partner delivers their unique value proposition • Partner delivers how pre-sales teams will be compensated for the offering |
| Inputs | <ul style="list-style-type: none"> • Technical Engagement Plan, Readiness Tracks • Determine attendee role types including pre-sales architects and sellers • Partner/Customer ready content from Infopedia, Microsoft Virtual Academy, Learning Paths, C+E Portal, Office On-Ramp, Dynamics Hub, Dynamics – The Hive, Ready Content, Microsoft Case Studies |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Partner's field sellers trained on new practice/solution offering • Partner's pre-sales architect team trained on planning and solution design • Solution understanding and enablement so pre-sales leads can deliver similar overviews to customers and handle objections • Re-usable content and demos delivered • Pipeline: number of new partner opportunities after the session |
| Duration | 2-4 hours execution, 8-24 hours preparation, multiple deliveries depending on partner size and scope |

FY22

Sales Skills Enablement RACI – Services, GSI, ISV

Description: Coaching partner pre-sales teams responsible for selling and designing solutions on their new offering and the underlying Microsoft technology at L100-L200.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|--|-----------|-----|-----|
| Sales Skills Enablement – PTS Assigned | A | R | C |
| Sales Skills Enablement – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Pre-sales team trained on new practice/solution offering
- Architects trained on planning and solution design
- Partner can target good fit customers
- Partner can deliver overviews, demos, handle objections and competitive positioning
- Re-usable customer ready content delivered

Role Clarification: PDM assists with licensing and pipeline conversation as well as how to engage with Microsoft sellers; PDM is accountable for managing the pipeline that comes from this activity. PTS is responsible to deliver the session and may consult or engage CSA as necessary for deeper specialization. When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with a CSA.

FY22

Sales Deal Enablement (first 3 deals) (Launch)

| | |
|--|---|
| Definition/ Purpose |  Microsoft assists partner with a customer opportunity whereby it's one of their first three deals of a new offering. Executed during build-with stages before partner is Co-Sell ready. Microsoft acts as an extension of partner's team to guide and teach partner pre/post sales activities to ensure success. This is often a set of virtual meetings or can be in-person with the customer for technical guidance to advance or close a sale and ensure successful delivery that drives consumption. |
| Scope |  Determine customer scenario and assistance needed to ensure partner has successful pre-sales and delivery of a new solution. Uncover details about customer environment and situation leading up to the sales opportunity. What is customer trying to solve for and what does partner need to accomplish to land and deliver their solution successfully? Are any 3 rd party partner solutions needed for success? Activity often referred to internally as a three-step approach called the "I, We, You model". The first time, Microsoft assists partner with a customer opportunity and leads the effort with partner watching and learning. Next time Microsoft is co-leading in an equal effort with partner. And by the third time, Microsoft is simply supporting while partner leads efforts with the customer. This is a simplistic model to teach by example that provides partner the assurance needed to close a deal and deliver a new solution successfully. The partner needs to see success on first few deals in order to continue investing in the resources and workstream. Areas that can be covered: <ul style="list-style-type: none"> Teaching of business value presentations Technology/roadmap overviews Demos Setting up a customer POC Reviewing the architecture of a deal Reviewing a project SOW Assisting with an RFP Reviewing capacity sizing to help partner with cost estimates Removing roadblocks Validating a deployment |
| Inputs |  • Findings from technical briefing, technical skills enablement, ADS, POC • Customer usage scenario and expected outcomes • Timeframe expectations |
| Outputs/ Success Criteria |  • Partner learns pre-sales skills such as delivering demos, POC, developing SOW for accuracy to do on their own • Customer has a solution to their usage scenario backed by Microsoft partner support • Customer has confidence in Microsoft platform technology and in partner's ability to execute their solution offering • Partner lands a customer win, successfully implements or delivers their offering, lands new customer reference |
| Duration |  2 hours – 2 days depending on customer scenario and assistance needed |

Disclaimer: The partner is ultimately responsible for the customer deal response. Information provided by Microsoft should not be interpreted as a commitment from Microsoft relating to any licensing or product terms.

FY22

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Sales Deal Enablement RACI – Services, GSI, ISV

Description: Activity devoted to an individual customer opportunity where Microsoft is assisting partner with their **first three deals of a new offering**. Executed during build-with stages before partner is Co-Sell Ready.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|--|-----------|-----|-----|
| Sales Deal Enablement – PTS Assigned | A | R | C |
| Sales Deal Enablement – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Partner learns pre-sales skills such as overviews and demos with real customer scenario
- Customer has a solution to their usage scenario
- Customer and partner have confidence in Microsoft platform and partner's ability to execute the solution
- Partner lands first 3 wins with successful deployments

Role Clarification: PTS when assigned to MPL or Strategic Recruit partner is responsible to assist and coach with overviews, engage CSA for deeper technical guidance on demos, POC, RFP, ADS, deployment and complex deals. PDM is accountable for pipeline management deal success and Microsoft account team engagements as needed. PDM-R is accountable for 1-2 initial customer deals. When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with a CSA.

FY22

Solution Technical Review (Launch)

| | |
|--|---|
| Definition/ Purpose | Supports programs in GPS and engineering that require technical and scenario review of a partner's product, solution or service against specific program requirements for validated Co-Sell solutions. The goal is to ensure program consistency with eligible solutions to meet technical qualification and Solution Area tagging requirements for the marketplace and Co-Sell eligibility. The result generates program eligibility, compliance records, and a Microsoft FTE accountable for the technical review results and Solution Area tagging classification. |
| Scope | Covers multiple programs and activities such as: IP Co-Sell, ISV Cloud Embed Technical Review, and Local Governance – Solution Area Technical Scenario Review. This activity validates a partner solution against taxonomy (solution area, workloads, industry), and technical against different technical requirements defined by each program. A solution technical review is initiated in GPS CRM with a Technical Service (TS). A group of Tech Tasks is then identified to be performed by different GPS roles. Typically, two Tech Tasks are mandatory as part of a review: Scheduling the review and creating the compliance results document or documenting the confirmation of a Technical Scenario review. |
| Inputs | <ul style="list-style-type: none"> • Solution Area and priority scenario taxonomy mapping • Program requirements and criteria documented regionally/locally • User and technical scenarios to validate against • Predefined Tech Tasks and associated program tags |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Entry in Partner Center validating or not validating the solution against requirements • Compliance results with notes with observations in case the review has failed to meet the requirements • Ensure partner's solution is mapped correctly to Microsoft fiscal year Solution Area Technical Scenarios • All Co-Sell solutions have Technical Scenarios reviewed |
| RACI | <p>Several steps involved in this activity with different roles of responsibility:</p> <ul style="list-style-type: none"> • PTM, in each region there is a group of PTMs accountable for defining the process and requirements for solution technical reviews • PDM is accountable for the process to ensure completion but not the execution • PTS submits the solution for review, creating the Technical Service in GPS CRM associated to the right engagement/account • CSA execute technical review against solution requirements and updates tech tasks and technical service with the result. • PTS and/or PDM communicates technical review results to the partner |
| Duration | Technical review execution is 30 minutes - 2 hours depending on the complexity of the solution. Total process can be 2-3 weeks to complete. |

FY22

Solution Technical Review RACI – Services, GSI, ISV

Description: A review or verification test to be executed with each solution against the technical requirements and Solution Area tagging. Serves as a gate to make a solution visible in Partner Center and Co-Sell eligible.

RACI Chart (Roles and Responsibilities Matrix) – Services

| Area of Focus | PDM/PDM-R | PTS | CSA | PTM | OUTCOME |
|---|-----------|-----|-----|-----|--|
| Solution Technical Review Process – PTS Assigned | A | R | C | | <ul style="list-style-type: none">Validation of GPS Solutions Catalog entry |
| Solution Technical Review Execution – PTS Assigned | I | A | R | | <ul style="list-style-type: none">Ensure Partner solution mapped to Microsoft sales play and Industry taxonomy |
| Solution Technical Review Process – PTS Not Assigned | R/A | - | C | | <ul style="list-style-type: none">Specific programs have additional outcomes identified |
| Solution Technical Review Execution – PTS Not Assigned | A | - | R | | |
| Defines the regional/local process and requirements | I | I | I | A/R | |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

Note: When PTS assigned to MPL or Strategic Recruit they are responsible for managing the review process and keeping things on track while CSA executes the technical review. When PTS not assigned, the PDM or PDM-R is responsible to manage the process and ensure CSA executes on the review activities to fulfill this service.

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Deployment/Practice Review (Grow)

| | |
|--|--|
| Definition/ Purpose | This activity assists partners by providing guidance during strategic customer engagements on the product, technology, service deployment and/or practice typically after the partner has reached Co-Sell ready solution status. Build-with tech teams engage to help partners develop new skills and capabilities and introduce updated best practice concepts supporting an existing solution or practice. Partner is responsible for their submission to their customer; Microsoft's input is based only upon the information provided by the partner. |
| Scope | Customer centric activity that can include: <ul style="list-style-type: none"> • Architectural assistance • Design guidance • Technical best practice sharing • SOW and deployment review for optimal success • Roadmap Updates • New feature/function guidance for demo and POC strategies • Facilitate Microsoft PG/Engineering discussions • API discussion and testing |
| Inputs | <ul style="list-style-type: none"> • Documented scope for engagement • Inventory of components for review • Current deployment and architecture diagrams • Check any workload dependent checklists • Customer account background info |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Action plan with refinement of delivery, POC process or best practices • New customer deployment supporting scorecard metrics that deliver on cost, capacity and performance KPIs • Deployment review write up on findings, insights, areas for improvement with diagram • Identify current and future revenue projections • Success is measured through accelerated deployment, repeatable IP creation, and partner growth with new capabilities in the solution area |
| RACI | PTS (or Global Account Aligned CSA) owns this activity along with PDM coordination and pipeline strategy. Often supported by CSA specialists for architectural elements, as necessary. |
| Duration | 2-40 hours delivery on average depending on scenario complexity |

Disclaimer: The partner is ultimately responsible for the customer deal response. Information provided by Microsoft should not be interpreted as a commitment from Microsoft relating to any licensing or product terms.

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Deployment/Practice Review RACI – Services, GSI, ISV

Description: This activity assists partners by providing guidance during strategic customer engagements on the product, technology, service deployment and/or practice typically after the partner has reached Co-Sell ready solution status.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|---|-----------|-----|-----|
| Deployment Practice Review – PTS Assigned | A | R | C |
| Deployment Practice Review – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Action plan with refinement of delivery, POC process or best practices
- New customer deployment
- Deployment review write up on findings, insights, areas for improvement with diagram
- Accelerated deployment, repeatable IP creation, and partner growth

Role Clarification: PTS owns this activity along with PDM coordination and pipeline strategy. Often supported by CSA specialists for architectural elements as necessary. When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with a CSA.

FY22

RFP/RFI Advice (Grow)

| | | |
|--|---|---|
| Definition/ Purpose |  | Assists partners by providing RFP or RFI response advice for strategic customer opportunities typically after partner has reached Co-Sell ready solution status. Build-with tech teams engage to help partners develop new skills and capabilities that address deep subject matter questions and build reference architectures to fulfill customer requirements and answers a set of specific technical questions. |
| Scope |  | Engagement for duration of RFP/RFI response allotted timeframe. Deep subject matter expertise required. Activity may require connection with Microsoft product team to discuss features and roadmap. |
| Inputs |  | <ul style="list-style-type: none"> Customer account background and use case insight Copy of RFP/RFI Competitive insight Technical artifacts such as architecture, constraints, regulatory or security requirements |
| Outputs/ Success Criteria |  | <ul style="list-style-type: none"> Completion of customer defined RFP/RFI requirements to meet customer scenario in the given timeframe New customer win supporting scorecard metrics Referenceable account Partner growth in the solution area |
| RACI |  | PTS or Global Account Aligned CSA owns this activity along with PDM coordination and pipeline strategy. Often CSA specialists are engaged to drive execution. |
| Duration |  | Typically, 4-8 hours for regional partners and 8-40 hours for global partners depending on scenario complexity. Formal RFP/RFI response requests is typically is 1-2wks, however large complex deals can require 3-6mo to complete with support until customer decision is made. |

Disclaimer: The partner is ultimately responsible for the RFP/RFI response to the customer. Information provided by Microsoft should not be interpreted as a commitment from Microsoft relating to any licensing or product terms.

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RFP/RFI Advice RACI – Services, GSI, ISV

Description: Assists partners by providing RFP or RFI response advice for strategic customer opportunities typically after partner has reached Co-Sell ready solution status.

RACI Chart (Roles and Responsibilities Matrix)

| Area of Focus | PDM/PDM-R | PTS | CSA |
|-----------------------------------|-----------|-----|-----|
| RFP/RFI Review – PTS Assigned | A | R | C |
| RFP/RFI Review – PTS Not Assigned | A | - | R |

Legend: **R** Responsible **A** Accountable **C** Consulted **I** Informed

OUTCOME

- Completion of RFP/RFI requirements to meet customer scenario in given timeframe
- New customer win supporting scorecard metrics
- Referenceable account
- Partner growth in the solution area

Role Clarification: PTS owns this activity along with PDM coordination and pipeline strategy. CSA specialists are typically engaged to lead the execution. When PTS is not assigned the PDM or PDM-R is accountable to orchestrate the service with a CSA.

FY22

Breadth Evangelism (Recruit)

| | |
|--|--|
| Definition/ Purpose | Breadth Evangelism covers several types of 1: Many activities intended to reach broad partner audiences without a tangible business outcome. Typically performed as a recruit effort to entice new potential partners to get onboard with a Microsoft solution, or to expand the solution portfolios and capabilities of existing partners. If the effort can be measured, then it might be more appropriately classified as another service activity in the Technical Engagement Framework. |
| Scope | This is broad reach, not a pro-active service tied to developing a unique partner practice or solution. The goal is to entice multiple partners at once to invest in building a new solution, practice or extension of an offering. Examples of community-based thought leadership activities include: <ul style="list-style-type: none"> • Roadshows • Partner Conference participation • Awareness Seminars and Webinars • Broad reach Envisioning Briefing and Technical Skills training • Blogging to keep partners updated with new technology ideas and trends • Social networking updates such as LinkedIn driving excitement on new technologies |
| Inputs | <ul style="list-style-type: none"> • WW Learning & Readiness events • Subsidiary Learning & Readiness events • Product/Technology updates ready for mainstream • Best practices and insights from GPS team |
| Outputs/ Success Criteria | <ul style="list-style-type: none"> • Entice unmanaged partners to build a new practice, solution or application • Entice managed partners to expand current practices and offerings with a new solution or extended offering • Technical update drip campaign so partners stay current |
| RACI | This effort can be delivered by one or multiple GPS Technical team members including the PTS or CSA |
| Duration | Depends on the scope of the activity |

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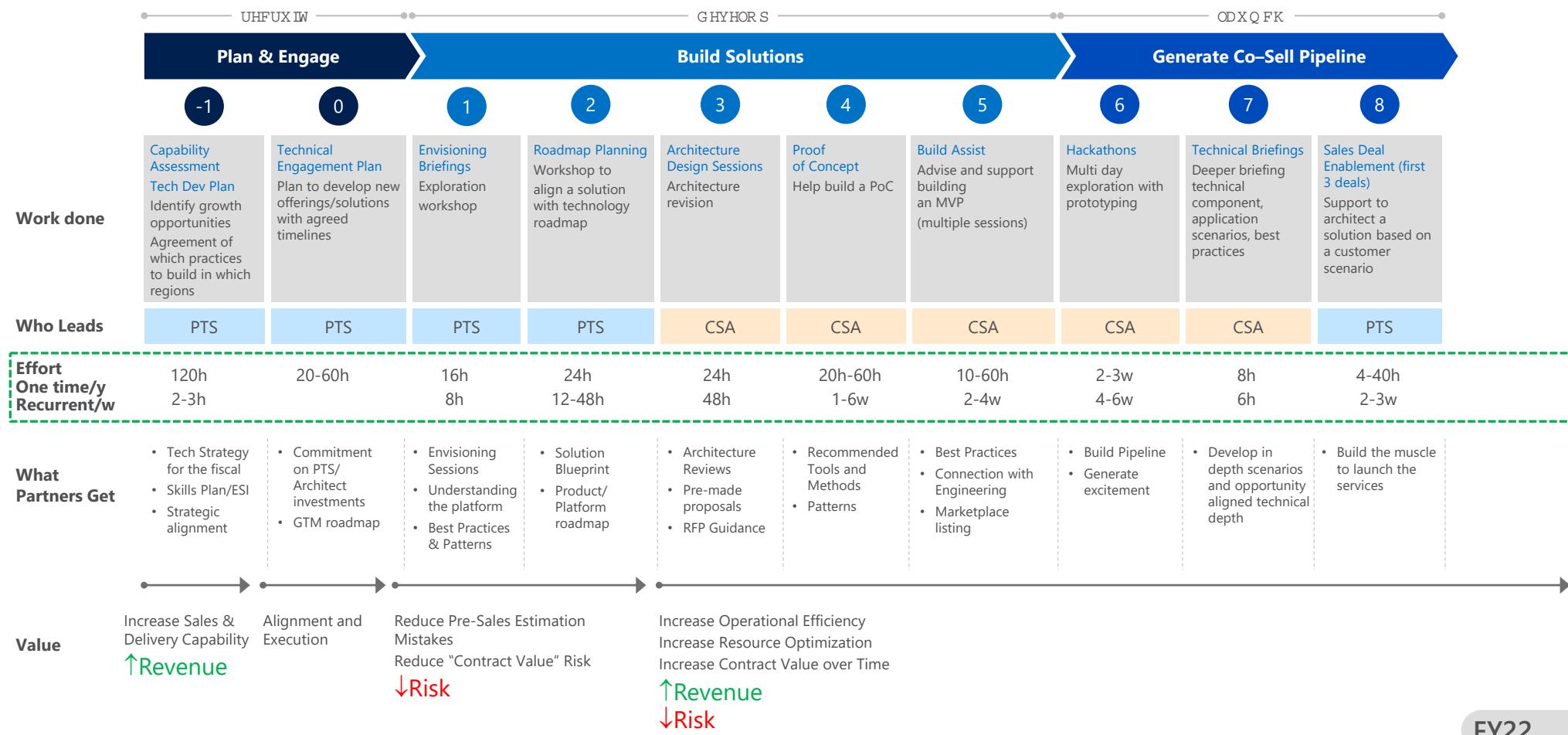


GPS Technical Engagement Framework

WW GPS Technical Team
FY22 Update

Technical Planning

GPS Technical Team Build-with Activities



FY22



Partner Planning Journey

| Kick-Off | | Agree on outcomes | | | Develop the Business and Technical Plans | | | | | Complete & sign-off | | | |
|-------------------|-----------------------------|--|---|--|--|--|--|--|---|--------------------------------|----------------------------------|---|--|
| Work done | | | | | | | | | | | | | |
| Who Leads | PDM | PDM, PTS | PDM | PDM | PTS | PTS | PTS | PTS | PTS | PDM | PTS | PDM, PTS | PTS |
| Duration in weeks | 2-3w | 2-8w | 2-8w | 2-4w | 1-2w | 2-8w | 1-3w | 1-3w | 2-4w | 1-2w | 2-8w | 2-8w | 1-3w |
| Effort in Hours | 2-8h | 2-40h | 2-20h | 1-8h | 4-40h | 2-16h | 2-20h | 2-20h | 2-40h | 2-8h | 2-20h | 2-20h | 2-8h |
| Outcomes | Planning process initiation | Partner Stakeholder & Executive Sponsor list | Alignment on partner direction and goals for the year | Alignment on what's needed for success | Partner technical stakeholders identified by role/responsibility | TDP outlined (engagements, skilling, strategic investments to achieve revenue goals) | Definition & Alignment on key engagements, with all stakeholders | Alignment on execution milestones & timelines for engagement build | Partner Enablement Plan in alignment with internal teams (e.g. PCMM-E, WWL) | Microsoft Stakeholder sign-off | Partner Business Plan signed-off | Partner Technical Development Plan signed-off | Documented partner planning in one central location |
| | | | | | | | | | | | | | Milestone updates, partner performance (monthly/quarterly) |

- Ideal time to start Partner Planning for a fiscal year is Q4 of previous year and complete by early Q1 of the fiscal year. Some regions have fast start timeline goals to follow.
- The Partner Business Plan (PBP) and Partner Technical Development Plan (TDP) go hand in hand with goals and strategy execution detail. Both should have partner buy in and agreement.
- Both Partner Development Manager (PDM) and Partner Technology Strategist (PTS) contribute to PBP and TDP, however PDM leads the effort for PBP and PTS leads the effort for TDP.
- Partner decision makers provide agreement on the PBP partnership goals and objectives while the Partner technical stakeholders provide agreement on TDP. Executive sponsors in Partner organization and Microsoft ensure the outcomes are achieved and provide executive guidance during times of execution hardships.



Key elements of Tech Planning

Partner Planning Journey

| The Partner Planning Journey | | | | | | | | | | | | | | | |
|--------------------------------------|-----------------------------|--|---|-------------------|--|--|--|--|--|---|--------------------------------|----------------------------------|---|---|--|
| | Kick-Off | | | Agree on outcomes | | | Develop the Business and Technical Plans | | | | Complete & sign-off | | | | |
| Work done | | | | | | | | | | | | | | | |
| Who Leads | PDM | PDM, PTS | PDM | | PDM | PTS | PTS | PTS | PTS | PTS | PDM | PTS | PDM, PTS | PTS | |
| Duration in weeks Effort in Hours | | 2-3w 2-8h | 2-8w 2-40h | | 2-4w 2-20h | 1-2w 1-8h | 2-8w 4-40h | 1-3w 2-16h | 1-3w 2-20h | 2-4w 2-40h | 1-2w 2-8h | 2-8w 2-20h | 2-8w 2-20h | 1-3w 2-8h | |
| Outcomes | Planning process initiation | Partner Stakeholder & Executive Sponsor list | Alignment on partner direction and goals for the year | | Alignment on what's needed for success | Partner technical stakeholders identified by role/responsibility | TDP outlined (engagements, skilling, strategic investments to achieve revenue goals) | Definition & Alignment on key engagements, with all stakeholders | Alignment on execution milestones & timelines for engagement build | Partner Enablement Plan in alignment with internal teams (e.g. PCMM-E, WWL) | Microsoft Stakeholder sign-off | Partner Business Plan signed-off | Partner Technical Development Plan signed-off | Documented partner planning in one central location | Milestone updates, partner performance (monthly/quarterly) |

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Technical Planning

Tech team partner planning is dedicated to technical aspects of driving partner capacity and capability. It outlines the execution strategy for a Partner Business Plan as well as details out how a new solution or application will be developed and brought to market. Tech Planning consists of a Technical Development Plan, a Technical Engagement Plan and Technical Development Services

Technical Development Plan (TDP) (Partner Account level strategy)

- Technical profile and execution strategy to compliment a PDM's Partner Business Plan
- Includes technical priorities and goals by Solution Area aligned to partner's Business Opportunities
- Identifies active solution engagements in development phase
- Outlines key technical stakeholders

Technical Engagement Plan (TEP) (Solution Engagement build strategy)

- Used for solution build Engagements as a project plan to outline the focus, strategy, goals and milestones for success
- Answers the question "What is being built and Why" with partner input on investments and success criteria
- Provides alignment between partner and Microsoft as well as drives clarity on expected business outcomes for engaging CSA resources
- Typically, a 1:1 correlation to a Solution Engagement, but can include more than 1 CRM Engagement for similar development efforts driving a single big bet

Technical Development Services (Technical Service Activities)

- Shows how the tech team engages with activities to build a practice/solution/application
- Identifies Technical Services (TS) and Tech Tasks (TT) required to reach development goals and milestones
- Answers the question "How is the tech team engaging for success" to drive impact

Partner Enablement Plan (Skilling Plan)

- Guided readiness and skilling plan tailored by role and Solution Area
- Created to identify a detailed learning path for a partner to follow to obtain certifications, advanced specialization/s and competencies to drive development goals
- Lists training courses and certifications to target by role and shows progress over time

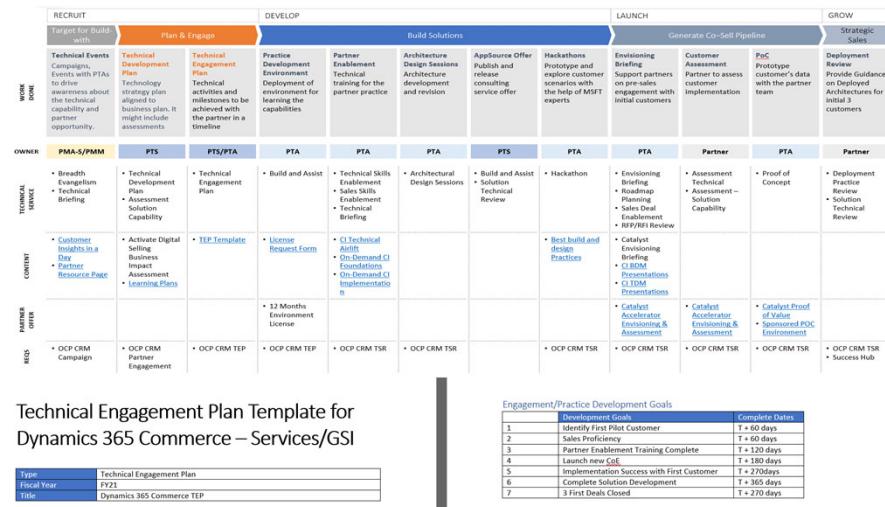
Tech Engagement Journey + Engagement Template

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Tech Engagement Journeys & Technical Planning

- A recipe, or set of documents to support technical planning for Business Applications
- Two components, a Journey Map, and engagement template
- Map addresses content assets for technical activities and other partner resources that can be attached to an engagement
- Engagement Template addresses milestones, timelines, and technical services and tech tasks that can be used in the engagement
- Map can also be used to track build-with progress



Technical Engagement Plan Template for Dynamics 365 Commerce – Services/GSI

| Type | Technical Engagement Plan | |
|---------------------------------|--|---|
| Fiscal Year | FY21 | |
| Title | Dynamics 365 Commerce TEP | |
| Business Outcomes | Partners to be a customer commerce deployment that utilizes the e-commerce functionality with at least one successful implementation within next 18 months | Partnership Description |
| Technology Used & Supported | Dynamics 365 Commerce | Partnership Description |
| Technology Used & Supported | TBD with Partner | Success Metrics |
| Technology Used & Supported | TBD with Partner | on Rapid Start Guide Deliver 1 new customers projects |
| Technology Used & Supported | TBD with Partner | Risks/Blockers/Dependencies |
| Technology Strategy Description | Microsoft Programs Description | Commerce Product strategy alignment |
| TBD with Partner | TBD | Identifying first pilot customer |
| TBD with Partner | TBD | Onboarding, licensing for practice development environments |
| TBD with Partner | TBD | Lack of experience with Dynamics 365 Commerce |
| TBD with Partner | TBD | Project Scope and Implementation Notes |

| Engagement/Practice Development Goals | | Development Goals | Complete Dates |
|---------------------------------------|--|-------------------|----------------|
| 1 | Identify First Pilot Customer | T + 60 days | |
| 2 | Sales Proficiency | T + 60 days | |
| 3 | Partner Enablement Training Complete | T + 120 days | |
| 4 | Launch First Call | T + 120 days | |
| 5 | Implementation Success with First Customer | T + 270days | |
| 6 | Complete Solution Development | T + 365 days | |
| 7 | 3 First Deals Closed | T + 270 days | |

1) Identify First Pilot Customer
There is nothing that motivates more a partner to adopt new technology than a potential customer. Based on the partner experience on other eCommerce platforms in the market and/or retail industry help them to identify potential targets as customers. Potential customers also help to better define the practice structure, number of people that will be required for an implementation.

Another aspect during this first milestone is to understand all the B2C, B2B and Connected Store capabilities of Dynamics 365 Commerce since the current customer base of the partner must have pre-functional gap areas that our solution can address. Use the Commerce Partner Playbook, and Commerce Practice Overview documents to get familiar with the concepts.

a. Potential Technical Services

- i. Assessment – Solution Capability
Assess current commerce and retail industry experience of the team and their service offers.
- ii. Breadth Evangelism
• Potential Task Tasks
a. Commerce in a Day
- iii. Envisioning Briefings
iv. PoC

2) Sales Proficiency
Get sales professionals from the partner on-boarded with BDM content, D365 Commerce growth strategy followed by the TDM materials.
Important goal here is for the sales team to understand the value proposition of the Dynamics 365 Commerce, focusing on connected commerce experience for customers providing retail, commerce, B2C and B2B experience all on one platform.

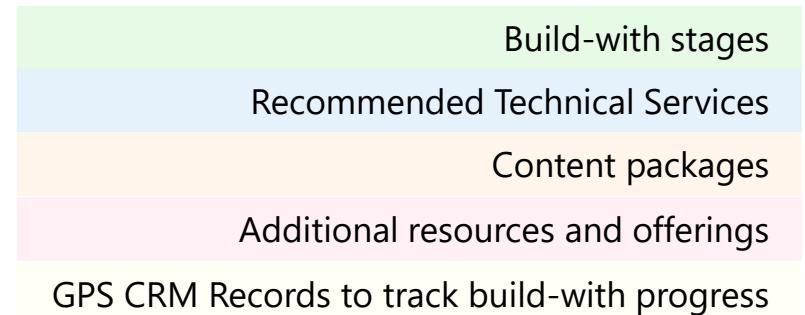
a. Potential Technical Services

- i. Sales Skills Enablement
 - D365 Commerce EBC sessions (recorded or 1:1 sessions)
 - Catalyst Framework training – (once per quarter – potential blocker depending on when we are engaging with the partner)
 - BDM and TDM materials – etc: Commerce playbook

The Tech Engagement Journey

- Recommended technical services, sequencing for the build-with engagement
- Technical Plan must have at least one technical service per stage, associated to a milestone
- Selection of technical services must be aligned to the partner's practice maturity
- All technical plans must have a PoC, and a Sales Deal Enablement
- PTMs use the journey to track progress of build-with activities for a given workload via PBI dashboards

| WORK DONE | RECRUIT | | | DEVELOP | | | BUILD SOLUTIONS | | | LAUNCH | | | GROW | | | |
|-------------------|---|--|---|--|--|---|---|---|--|--|---|--|--|---|---|--|
| | Target for Build-with | Plan & Engage | | Practice Development Environment Deployment of environment for learning the capabilities | Partner Enablement Technical training for the partner practice | Architecture Design Sessions Architecture development and revision | AppSource Offer Publish and release consulting service offer | Hackathons Prototype and explore customer scenarios with the help of MSFT experts | Briefing Support partners on pre-sales engagement with initial customers | Customer Assessment Partner to assess customer implementation | PoC prototype customer's data with the partner team | Deployment Review Provide Guidance on Deployed Architectures for initial customers | PTA | PTA | PTA | |
| OWNER | PMA-S/PMM | PTS | PTS/PTA | PTA | PTA | PTA | PTS | PTA | PTA | PTA | PTA | PTA | PTA | PTA | PTA | |
| TECHNICAL SERVICE | <ul style="list-style-type: none"> Technical Events Campaigns, Events with PTAs to drive awareness about the technical capability and partner opportunity. | <ul style="list-style-type: none"> Technical Development Plan A technology strategy plan aligned to business plan. It might include assessments | <ul style="list-style-type: none"> Technical Engagement Plan Technical activities and milestones to be achieved with the partner in a timeline | <ul style="list-style-type: none"> Build and Assist Technical Engagement Plan | <ul style="list-style-type: none"> Technical Skills Enablement • Sales Skills Enablement • Technical Briefing | <ul style="list-style-type: none"> Architectural Design Sessions | <ul style="list-style-type: none"> Build and Assist • Technical Review | <ul style="list-style-type: none"> Hackathons | <ul style="list-style-type: none"> Envisioning • Briefing • Roadmap Planning • Sales Deal Enablement • RFP/RFI Review | <ul style="list-style-type: none"> Catalyst Envisioning • Best build and design practices | <ul style="list-style-type: none"> Assessment • Deal • Solution Capability | <ul style="list-style-type: none"> Proof of Concept | <ul style="list-style-type: none"> Deployment Plan Review • Solution Technical Review | | | |
| CONTENT | <ul style="list-style-type: none"> Customer Insights in a Data Sheet Partner Resource Page | <ul style="list-style-type: none"> Activate Digital Selling Business Impact Assessment • Learning Plans | <ul style="list-style-type: none"> TEP Template | <ul style="list-style-type: none"> License Request Form | <ul style="list-style-type: none"> CI Technical Assets • On-Demand CI Foundations • On-Demand CI Implementation | | | | <ul style="list-style-type: none"> Best build and design practices | <ul style="list-style-type: none"> Catalyst Envisioning • Best build and design practices | | | | | | |
| PARTNER OFFER | | | | <ul style="list-style-type: none"> 12 Months Environment License | | | | | <ul style="list-style-type: none"> Catalyst Accelerator Envisioning & Assessment | <ul style="list-style-type: none"> Catalyst Accelerator Envisioning & Assessment | <ul style="list-style-type: none"> Catalyst Proof of Value Sponsored PoC Environment | | | | | |
| RECS | <ul style="list-style-type: none"> OCP CRM Campaign | <ul style="list-style-type: none"> OCP CRM Partner Engagement | <ul style="list-style-type: none"> OCP CRM TEP | <ul style="list-style-type: none"> OCP CRM TEP | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | <ul style="list-style-type: none"> OCP CRM TSR | |



Technical Engagement Plan Template

- Workload specific, designed to support PTS on planning the execution
- Lists common business goals, outcomes, risks for a workload
- Suggests milestones and timeline based on the global build-with experience
- For each milestone, suggest key technical services and tech tasks to be applied to the engagement, as well as more information and insights

Technical Engagement Plan Template for Dynamics 365 Commerce – Services/GSI

| Type | Technical Engagement Plan | |
|---|---------------------------------------|---|
| Fiscal Year | FY21 | |
| Title | Dynamics 365 Commerce TEP | |
| Business Outcomes | Partnership Description | Success Metrics |
| Partner to drive “3” customer Commerce deployments that utilizes the e-commerce functionality with at least one successful implementation within next 18 months | TBD with Partner | Publish AppSource offer based on Rapid Start Guide Deliver 1 new customers projects |
| Technology Used & Supported | Competitive Platforms | Risks/Blockers/Dependencies |
| Dynamics 365 Commerce | TBD with Partner | Commerce Product strategy alignment Identifying first pilot customer Onboarding, licensing for practice development environments Lack of experience with Dynamics 365 Commerce Project Scope and Implementation |
| Technical Strategy Description | Microsoft Programs Description | Notes |
| TBD with Partner | TBD | TBD with Partner |

| Engagement/Practice Development Goals | | |
|---------------------------------------|--|------------------|
| Engagement/Practice | Description | Completion Dates |
| 1 | Identify First Pilot Customer | T + 60 days |
| 2 | Sales Proficiency | T + 60 days |
| 3 | Partner Enablement Training Complete | T + 120 days |
| 4 | Launch new CoS | T + 180 days |
| 5 | Implement Solution Success with First Customer | T + 210 days |
| 6 | Complete Solution Development | T + 365 days |
| 7 | 3 First Deals Closed | T + 270 days |

1) Identify First Pilot Customer
There is nothing that motivates a partner to adopt new technology than a potential customer. Based on the partner experience on other eCommerce platforms in the market and/or relevant industry help them to identify potential targets as customers. Potential customers also help to better define the practice structure, number of people that will be required for an implementation.

Another aspect during this first milestone is to understand all the B2C, B2B and Connected Store capabilities of Dynamics 365 Commerce since the current customer base of the partner must have pre-identified functional gap areas that our solution can address. Use the Commerce Partner Playbook, and Commerce Practice Overview documents to get familiar with the concepts.

- Potential Technical Services
 - Analyze Current Solution Capability
 - Assess current commerce and retail industry experience of the team and their service offers.
 - Breadth Evangelism
 - Potential Tech Tasks
 - Commerce in a Day
 - Envisioning Briefings
 - PoC

2) Sales Proficiency
Get sales professionals from the partner on-boarded with BDM content, D365 Commerce growth strategy for the partner by BDM materials.
Important goal here is for the sales team to understand the value proposition of the Dynamics 365 Commerce, focusing on connected commerce experience for customers providing retail, commerce, B2C and B2B capabilities all on one platform.

- Potential Technical Services
 - Sales Skills Enhancement
 - Commerce EBC sessions (recorded or 1:1 sessions)
 - Catalyst Framework training – once per quarter – potential blocker depending on when we are engaging with the partner
 - BJDM and TDM materials – ex: Commerce playbook

PTS Actions for each stage of Partner Technical Development Plan



| Stage | PTS Action | Desired Outcome |
|---|---|--|
| Agree on business outcomes and partnership goals | Work closely with PDM and participate in partner business planning. | A common understanding on the partnership goals and business outcomes that is duly agreed by both Microsoft and Partner stakeholders. This may require further review and approval from Executive sponsors at both the organizations to land it with their respective teams. |
| Identify Partner Technical Stakeholder(s) | Identify key partner stakeholders in consultation with PDM and develop the Technical Stakeholder map. | An identified list of Partner Technical Stakeholders who can commit to an execution plan to achieve the desired outcomes in the Partner Business Plan. |
| Develop execution strategy to realize business outcomes and goals | Lead the Tech Planning workshop in collaboration with PDM to drive the discussion and arrive at consensus. | A robust strategy and execution plan that outlines the approach to accomplish the business objectives and outcomes agreed as part of PBP. |
| Define key engagements to build partner capability and capacity | Create engagements for new partner practices/solutions/IP, leverage existing active engagements where solution build still requires development and recruit partner stakeholders. | New and existing build with engagements are identified to build or enhance partner practices/Solutions/IP. Partner stakeholder buy-in is obtained to invest in the resources, time and energy associated with the build out |
| Review Tech Engagement Journey and Templates | Engage with a CSA for Business Apps and discuss the Tech Engagement Journey, activities and timeline for the engagement | A list of milestones and technical services to be executed as part of the plan. |
| Agree on the timelines to execute partner engagements | Develop the Technical Engagement Plan(s) associated with solution build strategy. | Agreement on major milestones, activities and timelines for the completion of the develop phase on solution engagement and Co-Sell readiness. |
| Agree on capability gaps and develop Enablement plan | Develop a Partner Enablement Plan for skilling partner resources. | Partner Enablement Plan for training and skilling is in place along with partner enablement goals and execution plan to accomplish agreed training and certification targets. |
| Review the Plan with Enablement and Specialist Teams | Reach-out to Partner Enablement Team and Specialist Architect Teams to obtain their feedback on partner planning efforts. | Agreement from Enablement Team and Specialist architect team where appropriate on the TDP. |
| Complete Partner Technical Development Plan and obtain sign-off | Once the TDP is finalized, share with key partner stakeholders for their review and agreement. | Ensure alignment and agreement from key Microsoft and Partner stakeholders on the contents of the Technical Development Plan. |
| Update CRM with PBP and TDP | Update the TDP data points into GPS CRM and if necessary, upload supporting documents. | Both business and technical partner planning are documented in GPS CRM as one central location. PTS confirms the TDP has been reviewed and agreed to by partner stakeholders. |
| Start Execution and periodic tracking | Lead the execution of TDP in collaboration with PDM. To ensure smooth stakeholder buy-in and alignment. | A robust execution of the Partner TDP in close collaboration with Microsoft and partner stakeholders. Periodic check-ins help to track the progress against interim milestones and align on next steps. |

FY22

Agree on business outcomes and partnership goals



Brief Description

The business outcomes and partnership goals are key elements of partner business planning that the PDM leads in collaboration with PTS. This is finalized based on market potential, partner growth targets, leadership expectations, market motions and pipeline trends.

Stakeholders

PDM (R,A)
PTS (C)

Partner Stakeholders (C,A)
Executive Sponsors (C,I)

Desired Outcome

The desired outcome at this stage is to have a common understanding on the partnership goals and outcomes that is duly agreed by both Microsoft and Partner stakeholders. This also may require further review/approval from Executive sponsors at both organizations to land within their respective teams.

Timing and Duration

It is desirable to start planning discussions to agree on the business outcomes and goals before the start of Microsoft fiscal year i.e. in Q4 of prior fiscal year. However, discussions may stretch to early Q1 of the fiscal year. The duration to finalize this may vary based on the partner size, operating geographies and desired changes to the business process and execution. The overall process may take about 2- 8 weeks.

How to accomplish outcome

The business outcome and goals are agreed based on multiple discussions with partner stakeholders and executive sponsors. The PDM leads the discussion in collaboration with other Microsoft/Partner stakeholders while the PTS participates in the discussions to provide input. The PTS evaluates the goals and business outcomes and identifies the right technical stakeholders in partner organization to further collaborate to develop a technical execution plan.

FY22

Identify Partner Technical Stakeholder(s)



Brief Description

Based on the partner business outcomes and goals, The PTS needs to identify the Technical Stakeholders in partner organization who can contribute to develop the Technical Development Plan and lead its execution strategy

Stakeholders

PTS (R,A)
PDM (C)

Partner Stakeholders (A)
Executive Sponsors (C,I)

Desired Outcome

The desired outcome at this stage is to have an identified list of Partner Technical Stakeholders who can commit to an execution plan that would help the partnership to achieve the desired outcomes in the Partner Business Plan. The Technical Stakeholder can be a CTO, cloud practice lead, Center of Excellence (CoE) lead, Industry/Geo focused practice lead, partner lead responsible for employee skilling, HR/recruitment leader, and cloud focused sales lead.

Timing and Duration

It is desirable to start the identification of Partner Technical Stakeholders at the same time business goals and outcomes are established so that they can contribute to the planning discussions and influence the PBP. Some of them may be the same stakeholders whom the PDM would work to develop the PBP and agree on the goals. The stakeholder identification may take about 1-2 weeks.

How to accomplish outcome

The size of the stakeholder community depends on the partner size, solution areas the partner operates, operating geographies and desired changes to the business process and execution. It is recommended to start with a smaller team of partner stakeholders to outline key organization tech strategy. Then as the plan is expanded to all the solution areas and geo/industry-based execution, relevant partner stakeholders should be involved to contribute and review plan details. As part of the Technical Development Plan, it is recommended to include the stakeholder names and their roles as key contributors to the plan.

FY22

Develop execution strategy to realize business outcomes and goals



| Brief Description | Stakeholders |
|---|--|
| Tech Planning workshops with key partner stakeholders are conducted to develop a robust Technical Strategy and Execution Plan. This can be achieved through one or several workshops to arrive at a consensus on the strategy and plan. | PTS (R,A) PDM (C) Partner Stakeholders (R) Executive Sponsors (I) |
| Desired Outcome | The desired outcome at this stage is a robust strategy and execution plan that outlines the approach to accomplish the business objectives and outcomes agreed in the PBP. The workshop acts as a platform to brainstorm ideas and options from key partner stakeholders and arrive at consensus. |
| Timing and Duration | Tech Planning workshops can be conducted in parallel with Partner Business Planning workshops as both may feed input into each other. The recommended timing to start these workshops is late Q4 of prior fiscal year or early Q1 of fiscal year. The duration to finalize this may vary based on the partner size, their operating geographies and desired changes to the business process and execution. The overall process may take about 2- 8 weeks same as the Partner Business Planning duration. |
| How to accomplish outcome | The partner stakeholders are key participants to the Tech Planning workshop leveraging the business outcomes and goals as key inputs. An ideal Partner Tech Plan would include: Technical Execution Strategy, Technical Stakeholder Map, Accelerated adoption of Advanced/EPP Workloads, Advanced Specializations, Additional Programs, and Partner Enablement Skilling Goals. Microsoft and Partner stakeholders need to discuss all these elements of Tech Strategy as part of the workshop and align the agreed upon strategy to partner's business priorities and objectives. If not recently completed, conduct a Partner Transformation Index assessment to baseline partner's current transformation journey. Leverage available playbooks as applicable to help guide execution strategy milestones. Where new Solution Build Engagements are in play, the PTS should identify the need for and develop a supplemental Technical Engagement Plan to outline activities necessary to execute a specific solution build strategy (such solution specific detail execution may come at a later date). The PTS leads these workshops in collaboration with PDM and drives the discussion to arrive at a consensus. |

FY22

Identify key engagements to build partner capability & capacity



| Brief Description | Stakeholders |
|---|----------------------|
| To realize the business outcomes and partnership goals, the PTS identifies key engagements to build partner capacity to meet market demand. The engagement can be creating/expanding a practice, build/reimagine a solution/IP aligned to Microsoft sales plays. | PTS (R,A) PDM (C) |
| Desired Outcome | |
| The desired outcome at this stage is to identify new build with engagements to build or enhance partner practices/Solutions/IP. Partner stakeholder buy-in is obtained to invest in building the same along with target customer profile. Each engagement will have an agreed outcome that is mutually beneficial to partner and Microsoft. These new or enhanced partner engagements will help in enhancing Microsoft solution footprint in key sales plays across focus industry areas. | |
| Timing and Duration | |
| The key engagements are identified as part of the execution strategy discussion. The duration to finalize this may vary based on the partner size, their operating geographies and solution area/sales play coverage. The overall process may take about 1-3 weeks, and this can be done along with development of execution strategy or right after it. | |
| How to accomplish outcome | |
| Once the strategy is defined, the discussion shifts to the capacity and capability of partner in line with Microsoft sales plays and focus industry scenarios. The PTS collaborates with partner stakeholders to identify the growth aspirations across solution areas and identifies the gaps in partner capacity. The key engagements are identified to bridge these gaps and become the future growth engines for partner. The PTS collaborates with partner practice leads, CoE leads and other Technical stakeholders to identify these engagements. As these engagements need mutual investment of technical and sales resources, the PTS works in collaboration with PDM to secure the buy-in from key partner stakeholders. | |

FY22

Agree on the timelines to execute partner engagements



Brief Description

Once the key engagements are identified, the execution timelines are defined for each engagement to secure the technical and sales resources to develop the engagements and launch them in market. The agreement on times help both partner and Microsoft to better plan the execution and track the progress.

Stakeholders

PTS (R,A)
PDM (C)

Partner Stakeholders (C,A)
Executive Sponsors (C,I)

Desired Outcome

The desired outcome at this stage is to have mutually agreed timelines for the completion of the develop phase of an engagement and Co-Sell readiness.

Timing and Duration

The timelines for the identified partner engagements can be developed as part of the identification of new engagements. The overall process may take same as of the time to identify the key engagements as the same stakeholders would agree on the timelines. The overall process may take about 1-3 weeks, and this can be done along with development of execution strategy or right after it.

How to accomplish outcome

Once the engagements are identified and mutually agreed, the PTS works with Microsoft and Partner technical SMEs/Architects to define the scope and timelines to complete the develop phase of the engagement. The PTS in collaboration with PDM would work with the respective sales/marketing teams to develop the GTM content and landing strategy along with identifying initial 3 customers. Based on the scope of the work and availability of resources, the timelines are developed and mutually agreed. The partner/end customer (for first 3 wins) fiscal cycle may be different than Microsoft fiscal cycle and this also may influence the timelines for securing investments and landing new offerings in market.

Leverage information from Tech Engagement Journey + Engagement Template to best define milestones and timeline for Business Applications engagements.

FY22

Agree on capability gaps and develop Enablement plan



Brief Description

With the growth of partner business comes a need to grow capability to correctly position Microsoft solutions with customers and deliver successful customer engagements. The Technical Enablement Plan helps identify these gaps and provides an approach to address the same.

Stakeholders

PTS (R,A)
PDM (C)

Partner Stakeholders (C,A)
Executive Sponsors (I)

Desired Outcome

The desired outcome at this stage is a mutually agreed Partner Enablement Plan that has partner skilling goals and an execution plan to accomplish the agreed training, readiness and certification targets. The enablement plan covers both technical and sales teams' enablement objectives and plan to bridge the skill gaps.

Timing and Duration

The Partner Enablement Plan is an integral part of a quality TDP and hence this should be developed along with TDP. The duration to complete this depends on the size of the partner, training/certification targets, # of employees and their geo/business distribution, and the different partner stakeholders who need to participate in the discussion and provide sign-off. The overall duration may take 2-4 weeks.

How to accomplish outcome

If a partner has an assigned enablement lead, the PTS works in collaboration with the enablement lead to build the Technical Enablement Plan. A typical enablement plan would consist of the training and enablement targets by Solution Area and role, approach, timelines, periodic milestones, and delivery engines. Some partners may have a dedicated team that owns the training/skill enhancement, and the PTS/Enablement lead collaborates with this team along with practice, CoE, Delivery leads to develop the enablement plan. The partner engagements aimed at building new practices would also have a specific enablement plan and the same should be part of the overall enablement plan.

FY22

Review the Plan with Enablement and Specialist Teams



Brief Description

This phase is to align with different teams inside/outside GPS and review the overall partner TDP. The feedback from these teams helps in identifying and bridging the gaps in TDP and execute as one Microsoft. This also provides capacity requirements for internal teams to support partner motions.

Stakeholders

PTS (R,A)
PDM (I)

Desired Outcome

The desired outcome at this stage is to get the TDP reviewed by internal Microsoft teams/stakeholders and obtain their buy-in. The key teams who should be consulted for the feedback are the Enablement Team, specialist architect teams, CSU, Microsoft Services etc.*

Timing and Duration

The TDP should be reviewed by internal Microsoft teams for their feedback and buy-in before it is finalized and shared with partner for their final sign-off. This will give opportunity to the PTS to incorporate the feedback and bridge the gaps in the plan. This process may take 1-2 weeks depending on the availability of the teams/stakeholders. This might be a mere formality if these stakeholders are actively participating and contributing to the TDP.

How to accomplish outcome

The enablement team and the specialist teams are key contributors to the execution of a partner TDP. Their feedback and buy-in on the TDP is very important to ensure smooth execution and represent one Microsoft view to the partner. If the specialist teams are outside of GPS, it is critical to have their buy-in to avoid any future execution gaps. The PTS should onboard these teams early in the Tech Planning phase so that their inputs are incorporated. These teams can also be co-contributors to the TDP and strong partners in the execution of TDP. The PTS need to work in collaboration with these teams and brief their leadership on the tech plan for their partner(s).

*Please refer to notes for examples on collaborating with other teams in Microsoft to review partner Tech Planning

Complete Partner Technical Development Plan and obtain sign-off



Brief Description

Once the tech planning is completed, PTS develops the Technical Development Plan and shares with key Microsoft/Partner stakeholders for their review/approval. The Tech Strategy then becomes the living document for rest of the fiscal year.

Stakeholders

PTS (R,A)
PDM (I)

Partner Stakeholders (R)
Executive Sponsors (I)

Desired Outcome

The desired outcome at this stage is to obtain sign-off from key Microsoft/Partner stakeholders on the contents of Technical Development Plan. An ideal TDP contains Technical Execution Strategy, Technical Stakeholder Map, Accelerated adoption of Advanced/EPP Workloads, Advanced Specializations, Programs, and Partner Enablement Goals.

Timing and Duration

The process to obtain sign-off from partner stakeholders would start as soon as each element of TDP is complete. The relevant partner stakeholder would review appropriate sections of TDP and provide their approval. Certain sections of TDP may require sign-off from multiple stakeholders, and hence the overall process may take about 1-3 weeks.

How to accomplish outcome

The PTS will lead the efforts to obtain partner sign-off on the TDP. Once the TDP is finalized, the PTS shares this with key partner stakeholders for their review and sign-off. The review process may require minor changes to the TDP before it is finally approved. The PTS works in close collaboration with all key partner stakeholders to incorporate the required changes and approval. Some approvals may require briefing with certain stakeholders to explain the contents in TDP and clarify their queries. During the process of the TDP approval, the PTS keeps the PDM informed on the progress and appraises on any reasons for delays in obtaining sign-off.

FY22



Update CRM with PBP and TDP

Brief Description

Once the planning is complete and partner sign-off is obtained, the PDM and PTS would update the PBP and TDP into GPS CRM respectively. This enables various teams in Microsoft to be aware of the partner plan and execution approach along with ability to generate an executive summary if required.

Stakeholders

PTS (R,A)
PDM (R,A)

Partner Stakeholders (I)

Desired Outcome

The desired outcome at this stage is for GPS CRM to be updated with PBP and TDP information and have the PTS attest the review of TDP with partner stakeholders. The PDM would update PBP in GPS CRM while the PTS is expected to update the TDP. If the PBP/TDP content is beyond the allowed forms in the tool, then PDM/PTS would upload the word/PPT version of the complete document. This would enable others to have a better understanding of the overall partner plan and execution strategy and supporting documentation.

Timing and Duration

The ideal time to accomplish this task is right after the completion of the PBP and TDP. As the PDM and PTS need to do this tool update themselves, this should be completed in 1-2 weeks time. The PDM/PTS may spend more time in finalizing the content if the PBP/TDP has content beyond the fields in the CRM form. The PDM/PTS would create the word/PPT versions of the document and upload it to the GPS CRM in their partner plan form.

How to accomplish outcome

The PDM and PTS would update the GPS CRM and complete all the relevant fields in the form. Optionally they would also upload the PBP/TDP finished document to the tool for future reference. A complete plan represents the quality of the planning and strategy discussion with the partner and represents the expertise of PDM/PTS in leading strategy conversation with partner stakeholders.

FY22

Start Execution and periodic tracking



Brief Description

The execution of the TDP starts soon after sign-off. The execution may involve starting/stopping or accelerating initiatives. The execution also involves periodic check-in to ensure the outcomes are accomplished in agreed timelines.

Stakeholders

PTS (R)
PDM (C)

Partner Stakeholders (R,A)
Executive Sponsors (I)

Desired Outcome

The desired outcome at this stage is to have a robust execution of the Partner TDP in close collaboration with Microsoft and partner stakeholders. The execution may hit hurdles and PTS would work in close collaboration with PDM to resolve them in a timely manner to achieve the outcomes/goals in agreed timelines. Periodic check-ins help to track the progress against interim milestones and resolve any roadblocks in a timely manner.

Timing and Duration

The execution is typically for a fiscal year. It may start at the beginning of the fiscal year after the sign-off and continue until end of fiscal year. In certain scenarios, the TDP may constitute a multi-year partner Tech Strategy where the duration spans across multiple fiscal years. Typically, periodic check-in occurs every quarter to track progress and address any roadblocks to enable smooth execution.

How to accomplish outcome

The PTS leads the execution of TDP and collaborates with PDM. To ensure smooth execution, PTS identifies interim milestones and tracks the progress therein. Where a detailed Solution Engagement development strategy is needed to execute a TDP, leverage a Technical Engagement Plan to track necessary major milestone activities. Periodic check-in is accomplished with a monthly or quarterly review with key stakeholders to discuss progress and resolve any challenges in execution. PTS engages the right technical SMEs across GPS, STU, CSU and Engineering teams to execute tech planning and achieve desired outcomes. The progress is monitored through appropriate tracking/reporting tools and stakeholders are kept apprised with relevant data points to ensure alignment on the progress.

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Roles and Responsibilities for developing a TDP



Roles and responsibilities in each stage:

| Stage | PTS | PDM | PTM | CSA | Partner |
|---|-----|-----|-----|-----|---------|
| Agree on business outcomes and partnership goals | C | R,A | I | I | C,A |
| Identify Partner Technical Stakeholder(s) | R,A | C | I | C | A |
| Develop execution strategy to realize business outcomes and goals | R,A | C | I | C | R |
| Define key engagements to build partner capability and capacity | R,A | C | I | C | C,A |
| Agree on the timelines to execute partner engagements | R,A | C | I | C,A | C,A |
| Agree on capability gaps and develop Enablement plan | R,A | C | I | C | C,A |
| Review the Plan with Enablement and Specialist Teams | R,A | C | I,C | C,A | - |
| Complete Partner Technical Development Plan and obtain sign-off | R,A | I | C | C | R |
| Update CRM PBP with TDP information | R,A | R,A | I | I | I |
| Start Execution and periodic tracking | R | C | C | C,A | R,A |

R Responsible

A Accountable

C Consulted

I Informed

FY22

Best Practices to develop a Tech Development Plan



Ensure strong correlation between PBP and TDP



Consider tech team services and pro-active activities as an investment, identify the gives and gets from partner and Microsoft for each of them



Ensure strong collaboration with PDM early on to drive best outcomes



Review the plans with your manager on periodic basis and seek their intervention to address any execution challenges



Engage other Microsoft teams supporting partner at the early stages of Tech Strategy to build a strong plan and smooth execution (PCMM-E, WWL, Industry, Engineering etc.)



Ensure your efforts are appropriately represented in the tools and reporting for better visibility



Validate the plans against S.M.A.R.T. (Specific, Measurable, Actionable, Realistic, and Timely)



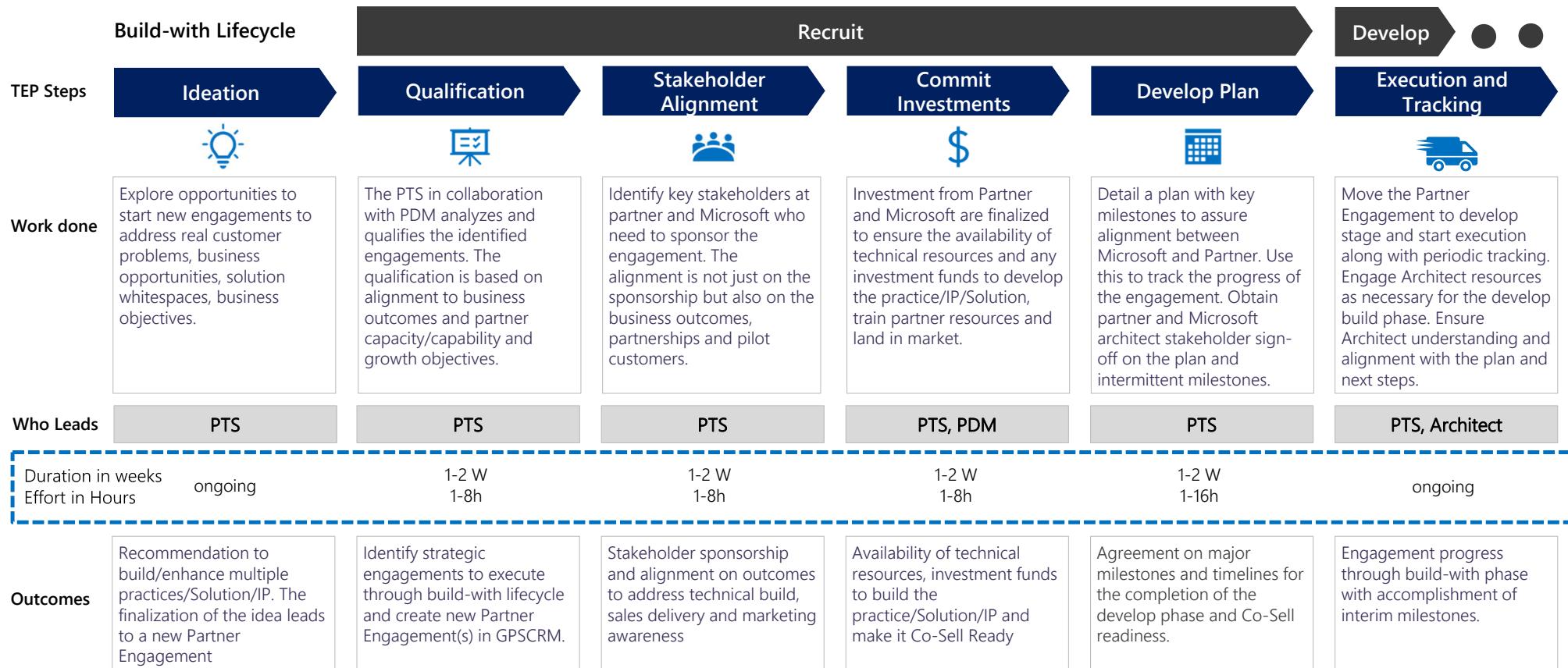
Share your learnings and best practices with the wider community



Update the plans periodically to keep current and relevant to partner goals and objectives

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Technical Engagement Plan Journey



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PTS Actions for each stage of Technical Engagement Plan



| Stage | PTS Action | Desired Outcome |
|------------------------|--|--|
| Ideation | Collaborate with Microsoft and Partner teams to identify new Practice/solution/IP build Partner Engagement opportunities. | Recommendation to build or enhance Practices/Solutions/IP. |
| Qualification | Collaborate with PDM to validate the engagement opportunities and identify the strategic scenarios. | Identify strategic scenarios for Partner Engagements to execute through build-with lifecycle and create new engagement(s) in GPSCRM. |
| Stakeholder Alignment | Identify key stakeholders who need to sponsor the engagement and can help with pilot customers. | Stakeholder sponsorship and alignment on outcomes to address technical build, sales delivery and marketing awareness. |
| Commit Investments | Collaborate with PDM and architect to ensure partner commitment on technical resources, other investments to develop the engagement. | Availability of technical resources and/or investment funds to build the Practice/Solution/IP and make it Co-Sell Ready. |
| Develop Plan | Develop the TEP along with intermediate milestones and obtain stakeholder sign-off. | Agreement on major milestones and timelines for the completion of the develop phase and Co-Sell readiness. |
| Execution and tracking | Lead the execution of engagement in line with TEP along with periodic tracking | Engagement progress through build-with phase with accomplishment of interim milestones. |

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Roles and Responsibilities for TEP

Roles and responsibilities in each stage:

| Stage | PTS | PDM | PTM | CSA | Partner |
|------------------------|-----|-----|-----|-----|---------|
| Ideation | R,A | C,A | I | I | R,A |
| Qualification | R,A | A | I | C | A |
| Stakeholder Alignment | R,A | C | I | C | R |
| Commit Investments | R,A | C,A | I | C | R,A |
| Develop Plan | R,A | C | I | C,A | C |
| Execution and tracking | R,A | I | C | R,A | R,A |

R Responsible

A Accountable

C Consulted

I Informed

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TDP vs TEP – When to create what?

Technical Development Plan (TDP)

Timing: TDP is created at the beginning of planning cycle, which is typically at the beginning of MS fiscal year.

What a TDP contains: All-Up partner tech strategy in line with PBP with an approach to realize the goals/objectives.

Who will create a TDP: PTS in collaboration with PDM, consult Architect as required.

Partner stakeholders: CxO, Cloud Leader, Sales Leader, Practice Lead, HR/Training Leader.

Technical Engagement Plan (TEP)

Timing: TEP is created any time one/multiple engagements are started which can be anytime during a fiscal year.

What a TEP contains: Engagement(s) specific strategy and milestones to make the solution Co-Sell/Marketplace ready.

Who will create a TEP: PTS/Architect in collaboration with Architect and PDM.

Partner Stakeholders: Practice Leader, CoE Leader, Architect Lead, Industry/Market Leader.

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TDP/TEP Forms and Executive Summary Report

TDP and TEP Intake Forms are located in GPS CRM at the Partner Account level. The TDP is found at the Account Summary tab then click on one of the Partner Business Plans. The TDP tab sits inside the PBP. The TEP is found inside the Engagements tab of a Partner Account. Examples of each are on the next slides

The **Executive Summary Report** is available in GPS CRM to extract a PPT deck of all Partner Planning elements for use with partners, internal teams and executive overviews. The report is found at the Partner Account level under the Reporting Tab

Executive Summary Includes:

- Partner Business Plan (PBP)
- Technical Development Plan (TDP)
- Technical Engagement Plan (TEP)
- Technical Services Activities (TS/TT)

Click on "Regenerate and Download"

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Technical Development Plan – CRM Intake Form

Partner Name (Business Unit)

Partner Type, Regional or Global, Region/Country

| Technical Execution Strategy – Summary of the technical execution strategy aligned to Business Opportunities in the business plan | | | | |
|---|--|--|---|--|
| Solution Area | Technical Priorities (800 char) | Description of Technical Goals (2,000 char) | Execution Strategy (2,000 char) | Training & Competency Priorities (500 char) |
| Identify Sol Area | Identify the Sales Play and Tech Capability scenario needed within the Solution Area | Describe what the partner wants to accomplish technically for one or more practice, solution or applications mapped to Business Opportunities in the business plan | Summarize what both the partner and Microsoft tech team will do to drive this goal (investments, support, services) | Describe the skills, training, certs and comp goals partner agrees to for each Solution Area |
| | | | | |
| | | | | |
| | | | | |

| Advanced Workloads | Select if a focus area | Advanced Specializations – Identify any being worked on or completed by marking as In Progress, Complete, N/A | | |
|--|-----------------------------|---|--|--|
| Advanced Specialization | In Progress, Complete or NA | Expected Attainment Date | | |
| Artificial Intelligence (AI) | | | | |
| Azure Kubernetes Service (AKS) | | | | |
| Teams | | | | |
| OSS DB (Cosmos DB, MySQL, Postgre SQL, Maria DB) | | | | |
| Azure Active Directory (AAD) | | | | |
| PowerApps | | | | |
| Customer Insights | | | | |

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Technical Development Plan – CRM Intake Form continued

Partner Name (Business Unit)

Partner Type, Regional or Global, Region/Country

| Technical Stakeholders – Identifies key technical stakeholders for this plan | | | |
|--|--|--|---|
| Partner Contact Name | Role & Responsibility | Engagement Description | Microsoft Owner |
| List key technical stakeholder partner contact names | Identify the contact's role and primary responsibility | Describe how the contact will be involved and the interaction necessary for plan execution | Anyone in Microsoft AD responsible for relationship |
| | | | |
| | | | |
| | | | |
| | | | |

Additional Programs – List any additional key programs the partner is involved in or targeted for this plan

List any additional key programs the partner is involved in or planned to target with this plan

Notes – Use to attach supporting documents to the plan

TDP Completion Attestation

After review with partner and buy-in to the plan, complete the TDP attestation in CRM to indicate planning is complete

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Executive Summary export to PPT Example

Technical Development Plan

Partner Name (Business Unit) – Technical Development Plan

Management Level, Partner Type, Country

| Technical Execution Strategy | | | |
|------------------------------|--|---|---|
| Solution Area | Technology Priorities | Description of Technical Goals (mapped to PDP Business Opportunities) | Execution Strategy |
| Azure | Identify the technical scenario and capability needed within the Solution Area e.g.) Data & AI Azure Analytics | Describe what the partner wants to accomplish technically for one or more practice, solution or applications mapped to Business Opportunities in the business plan | Summarize what both the partner and Microsoft tech team will do to drive this goal (investments, support, services) |
| Azure | e.g.) App Modernization/ Refactoring with Containers, Serverless, Functions and other PaaS solutions | e.g.) Grow the Azure Migration Practice. Build an SAP on Azure CoE to support a new migration and managed service offer. Build an App Modernization CoE to support a new customer offer | e.g.) Provide partner readiness around migration assessment and execution tools Provide in-depth training, architectural design sessions, build with assistance, and other services to support building SAP on Azure and App Modernization CoEs Provide tech team validation of solutions as they progress toward Launch and Co-Sell Prioritized status |
| Business Applications | e.g.) Power Platform emphasizing citizen developer and RPA scenarios | e.g.) Build a Process Modernization consultative service focused on Power Apps. Build a Process Automation consultative service focused on Power Automate | e.g.) Provide in-depth training, including hosting App-in-a-Day events, build-with assistance, and other services to support building a Power Apps practice Provide in-depth training, architectural design sessions, build with assistance, and other services to support building a Power Automate practice |

| Technical Stakeholders | | | | |
|--|-----------------------|--|------------------------|--|
| Name | Role & Responsibility | Microsoft Owner | Engagement Description | |
| List the key technical stakeholder partner contact names | | Identify the contact's role and primary responsibility | Anyone in Microsoft AD | Describe how the contact will be involved and the interaction necessary for plan execution |
| Ravi C | | Director of Cloud Services | PTS | Identify and drive architecture and delivery resources to be trained and lead solution build |
| Marisol H | | Director of Data Services | PTS | Identify and drive architecture and delivery resources to be trained and lead solution build |
| Jamie B | | Director of Sales | PTS | Identify and drive sales resources to be trained and drive new opportunities |

| Active Partner Engagements | | | | | | | |
|----------------------------|---|-----------------|--------------------------------------|----------------------------|------------|---------------------------|----------|
| Engagement Name | Description | E to S Relation | Industry | Customer Segment | CAD | Metric Name: EEV FY Total | Status |
| Intelligent Edge Solutions | BSA Compliance and risk mitigation. Fraud Detection and Money Laundering | Share | Defense Cloud/Defense & Intelligence | Corporate, Enterprise, SMB | 2022-03-01 | 10,000 Microsoft Teams AU | On-Track |
| Cybersecurity Practice | As one of the largest cybersecurity providers, Booz Allen employs continuous cyber innovation, sophisticated tradecraft, and t... | Share | Smart Borders/Defense & Intelligence | Enterprise | 2022-03-01 | \$600K/Year ACR | On-Track |
| | Open Engagements listed in OCRM will appear here | | | | | | |

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Technical Development Plan cont...

Partner Name (Business Unit) – Technical Development Plan

Management Level, Partner Type, Country

| Capability & Industry | | | Advanced Specialization | Status | Competency | Status | MCPs | |
|--------------------------------|------------------------------------|--------|---|-------------|--|-------------------------------------|-----------------|--|
| PTI Score | Partner Transformation Index Score | | Name all that are in progress or incomplete from a drop-down list. E.g.) Windows Server and SQL Server Migration to Azure | In Progress | Cloud Customer Relationship Management | Silver – Active | 2 | |
| Industries | Government, Education | | | | Cloud Platform | Gold – Active | 8 | |
| CSP | CSP Indirect | | Additional Programs | | | Cloud Productivity | Gold – Active | |
| Advanced Workloads | | | Name all that are complete from a drop-down list E.g.) Data Warehouse Migration to Azure | | | Enterprise Mobility Management | In Progress | |
| EPP Targets | | Status | Name all that apply and provide a supporting statement as applicable E.g.) Fasttrack for Azure, AI Inner Circle, Azure Expert for MSP, Modern Workplace Expert. Include any BG or Local sponsored programs | | | Small and Midmarket Cloud Solutions | Silver – Active | |
| Synapse | No | | | | | | 1 | |
| IoT | Yes | | | | | | | |
| H | No | | | | | | | |
| Power Apps | Yes | | | | | | | |
| Azure Kubernetes Service (AKS) | Yes | | | | | | | |
| Azure Active Directory (AAD) | No | | | | | | | |
| Unify Customer Data | Yes | | | | | | | |

Partner Enablement Goals

| Solution Area | Training and Competency Priorities |
|-----------------------|---|
| Azure | Apps & Infra: Add 2 more certs to Gold Cloud Platform Competency, train 40 on existing Infra solution. AZ900 for all Azure related roles across support, marketing, pre-seals. Azure Administrator Associate additionally for Support. Azure Solutions Architecture Expert for presales/deployment roles |
| Azure | Data & AI: Get Gold Data & Analytics Competency with focus to train half tech team in Q1. Azure Expert status for H2. Agreed to 10 individuals completing DP-200, 10 individuals completing DP-201 |
| Business Applications | Focus training on Power Platform. Partner agreed to 10 individuals completing PL-900, 5 individuals completing MB-600 |
| Modern Workplace | Add 5 more certs to Gold Cloud Productivity competency and 5 to Communications comp. Train the other half of tech team. M365 Teams Administrator Associate for support roles for Teams. M365 Developer Associate for team developing Teams offering. M365 Fundamentals for all Teams related roles across support, marketing, presales etc. M365 Enterprise Administrator Expert for support and deployment teams |

FY22

Technical Engagement Plan

Partner Account Name(Region) – Technical Engagement Plan

Management Level, Specialization, Country

| Engagement/Practice Strategy | | | | | | | | | | | | | |
|---|--|-----------------------|------------|-----------------------|------------|-------------------|------------|-----------------|------------|----------------------------|------------|---------------|------------|
| Solution Engagements Associated to this plan | | | | | | | | | | | | | |
| Solution Area and associated tech tags | | | | | | | | | | | | | |
| Title | FY22 Engagement Strategy for X specific solution | | | | | | | | | | | | |
| Fiscal Year | FY22 | | | | | | | | | | | | |
| Solution Area | Modern Work | | | | | | | | | | | | |
| Business Outcome | Describe the partner's desired outcome and expected impact. Such as 1) launch date, 2) customer targeting (size, industry, # customers), 3) partner revenue targets, 4) partner services to be delivered. | | | | | | | | | | | | |
| Technologies Used and Supported | List Microsoft technologies used that will drive revenue for Microsoft when the solution is sold. List any other Microsoft technologies the partner will consume in order to deliver the solution Example: Azure DevOps, CI/CD, Integration Services, GitHub | | | | | | | | | | | | |
| Technical Strategy | What is the plan to get partner's technical team onboard and proficient on the solution? How will the solution be built? Is a competitive platform being displaced? Is this an add-on to something in market? What Technical Services need to be delivered for the partner to be successful? What partner role types and how many are included in this plan? What is the strategy to bring them along? Architects, Engineers, Pre-Sales team members | | | | | | | | | | | | |
| Additional Partnerships | Describe any P2P necessary for partner success to connect the right services to app dev to customers. P2P for solution enablement or end-to-end solution offering. This is not a description of the partners relationship with Microsoft. Example: Ingram Micro will develop a package for their VARs to re-sell this solution. Or, Solution requires partnership with hardware manufacturers Plantronics for headsets, Audiocodes and Seinhauser. Or, Need to develop a P2P channel for selling the new application build. | | | | | | | | | | | | |
| Competitive Platforms Supported | Is there a competitive platform to be aware of that ties into this solution or that partner needs to migrate from or also support that effect success of this engagement Example: AWS, ISV's, Google | | | | | | | | | | | | |
| Microsoft Programs Supported | List programs to be leveraged such as BG sponsored programs, Ignite sponsorship, Engineering Program, Investment program, new CSP program, etc. Example: FastTrack for Azure, Azure Inner Circle, CoE, new CSP Direct | | | | | | | | | | | | |
| Solution/Practice Timeline Goals <table border="1"> <tr> <td>Gold Cloud Competency</td><td>2022-02-28</td></tr> <tr> <td>Technical Proficiency</td><td>2022-02-28</td></tr> <tr> <td>Sales Proficiency</td><td>2022-03-30</td></tr> <tr> <td>GTM Launch Date</td><td>2022-04-15</td></tr> <tr> <td>3 first Sales Deals closed</td><td>2022-06-01</td></tr> <tr> <td>Co-Sell Ready</td><td>2022-07-01</td></tr> </table> | | Gold Cloud Competency | 2022-02-28 | Technical Proficiency | 2022-02-28 | Sales Proficiency | 2022-03-30 | GTM Launch Date | 2022-04-15 | 3 first Sales Deals closed | 2022-06-01 | Co-Sell Ready | 2022-07-01 |
| Gold Cloud Competency | 2022-02-28 | | | | | | | | | | | | |
| Technical Proficiency | 2022-02-28 | | | | | | | | | | | | |
| Sales Proficiency | 2022-03-30 | | | | | | | | | | | | |
| GTM Launch Date | 2022-04-15 | | | | | | | | | | | | |
| 3 first Sales Deals closed | 2022-06-01 | | | | | | | | | | | | |
| Co-Sell Ready | 2022-07-01 | | | | | | | | | | | | |
| Success Metrics How will you and the partner measure success? List revenue or revenue growth expected with a date, average deal size, expected pipeline, and key metrics such as O365 Active Usage, Azure Consumption, Azure Revenue, etc. used to measure success. Example: Initial 3 wins by 6/2022 with average deal size of \$50K Azure ACR plus \$150K in partner services. 12-month pipeline expected to be 50 customers of same size with YOY growth of 50% | | | | | | | | | | | | | |
| Risks/Blockers/Dependencies and Mitigation Is there anything that possibly stands in the way of success or meeting timeframes and goals? How will you mitigate these blockers? Example: Missing exec sponsorship to build a profitable business through services, will leverage Practice Lead relationship to get to CTO | | | | | | | | | | | | | |
| Other Notes Any additional pertinent information for the solution build | | | | | | | | | | | | | |

FY22

Tech Services and Tech Tasks – Executive Summary export to PPT

Technical Services

Partner Name (Business Unit) – Engagement Technical Services

Management Level: Local Managed, Specialization: Services, Country: United States

| Engagement Technical Services | | | | | | | | | | |
|---|--------------------------------|--|---|----------------------------------|--|------------|------------|-------------------|----------|-----------|
| Secure Workplace Productivity | | | | | | | | | | |
| SOL-4284-FUJ: Adoption & Change Management, Compliance, Security, Teamwork, Unified Endpoint Management | | | | | | | | | | |
| Technical Service | Technical Service Title | Business Outcome | Description | Tech Task | Tech Task Description | Start | End | Resource Required | Owner | Status |
| Assessment – Solution Capability | Discussion on Team opportunity | Commitment to build new Teams solution | Discuss partner opportunity, ROI model and what niche they could fill in market | Capability Assessment | Use consultative approach to discuss partner opportunity and gain buy in to build new solution | 2019-08-01 | 2019-09-01 | PTS | PTS Name | Completed |
| Build and Assist | Intelligent Edge scenarios... | Provide RFI demonstration build... | Intelligent Edge scenarios with Open Shift for... | OpenShift on Azure Stack | Coordinate resources for unique configuration wit... | 2019-08-14 | 2019-09-15 | CSA | CSA Name | Open |
| Technical Skills Enablement | VMWare on Azure enablement | Create an offering on VMWare on... | Huge VMWare presence and they want t... | AVS Strategy discussion | AVS Strategy discussion with lead architects | 2020-02-12 | 2020-02-28 | CSA | CSA Name | Completed |
| Technical Briefing | Azure Sentinel Briefing | Help partner think through a Se... | Azure Sentinel Briefing | Technical overview on Sentinel | Technical overview with demo on Sentinel and best practices for development | 2020-02-10 | 2020-02-28 | CSA | CSA Name | Completed |
| Technical Skills Enablement | VMWare on Azure enablement | Create an offering on VMWare on... | Huge VMWare presence and they want t... | AVS Technical Skills Enablement | Technical Skills training for AVS | 2019-11-12 | 2019-11-12 | CSA | CSA Name | Completed |
| Technical Briefing | Azure Sentinel Briefing | Help partner think through a Se... | Azure Sentinel Briefing | Strategy - Business stakeholders | Strategy discussion with Business and Technical stakeholders | 2019-11-12 | 2019-11-12 | CSA | CSA Name | Completed |
| Technical Skills Enablement | VMWare on Azure enablement | Create an offering on VMWare on... | CSA with VMWare compete knowledge needed for skills training | AVS training | Tech training | 2019-12-16 | 2019-12-16 | CSA | CSA Name | Completed |
| | | | | WVD training | Tech training to accompany WVD session | 2019-12-16 | 2019-12-16 | CSA | CSA Name | Completed |
| | | | | Teams training | Teams skills building session connected to WVD session | 2020-2-01 | 2020-3-01 | CSA | CSA Name | Open |

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GPS Technical Engagement Framework

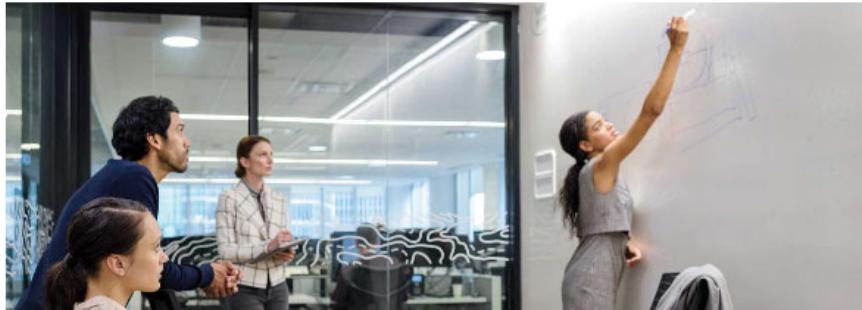
WW GPS Technical Team
FY22 Update

Tools Integration and Resources

Includes:

- Web landing page
- GPS CRM
- Training and Support Resources

WW GPS Technical Engagement Framework



Worldwide GPS Technical Engagement Framework

Designed to assist GPS Build-with teams in developing partners with resources and guidance. Includes a Technical Services Catalog with activity descriptions, roles and responsibilities, Solution Area assets and CRM integration to support partner lifecycle stages.

Overview and Reference

Watch the short video first on how to get started using the framework and associated resources. The Overview deck outlines a consistent framework of technical services and tech planning to guide partner development. It includes a consolidated view of Technical Services Catalog activities mapped to business outcomes. Then the Technical Services Catalog word document details how to deliver each service activity with scope, inputs and outputs to guide each delivery.

[Overview Deck](#) [Technical Service Catalog](#) [Getting Started Video](#)

CRM Integration and GPS Insights

GPS CRM drives orchestration of technical activities and shows impact on partner development. Request resources, track technical activities and effort required, drive insights on partner development.

[CRM Integration Deck](#)

GPS Insights provides a dashboard view on the impact technical teams have with insights by partner type, activity type, solution area, stage, and resources required. The report is accessible [here](#).

[GPS Insights](#)

Roles and Responsibilities

All GPS Build-with team members are responsible for driving partner development toward measurable business outcomes. Each role plays an integral part in a partner's life-cycle. Leverage the Overview deck and Reference document for RACI charts by activity to understand role responsibility. Here's a quick snapshot.

[Snapshot Deck](#)

Additional Resources

Solution Area Assets are available in Azure DevOps/GitHub GPS Tech Team Service Catalog [here](#) as a work in progress.

Additional Resources contain Technical Planning Journey, Example Scenarios for Tech Services, Templates and Examples for TDP and TEP data gathering, and guidance material to assist with partner solution and practice development.

[Additional Resources](#)

Internal landing page

<https://aka.ms/gpstechhub>

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GPS CRM Technical Services Integration

Goal: Orchestrate GPS Technical Team engagement and show impact on Partner Development

Capabilities

1. Technical Planning

Technical Development Plan, Technical Enablement Plan

2. Technical Resource Management

Partner Engagement, Partner Account, Breadth Evangelism

3. Technical Service Activity Tracking

Identify major milestone activities used to drive partner development

4. Technical Task Management

Identify multiple tech resources for engagement activities

5. Insights on Partner Development effort

Activities by Solution Area and Partner Type

Time and Resources required to perform certain activities by Partner Type

6. Role clarity and orchestration

| Tech Service Title | Technical Service | Delivery Method | Tech Service Number |
|---------------------------------|----------------------------------|-----------------|---------------------|
| Solution Capability Analysis | Assessment - Solution Capability | Virtual | CAS-134208-L1M1NB |
| AI Overview | Envisioning Briefing | In Person | CAS-134209-Y2/W3 |
| Deep dive on ML | Technical Briefing | In Person | CAS-134210-H2V1P9 |
| Architectural design discussion | Architectural Design Session | In Person | CAS-134211-C8MBY1 |

| Tech Task Name | Proposed Start | Proposed End | Priority Scenario | Tech Service Request |
|------------------------------------|----------------|--------------|------------------------------|---------------------------------|
| IoT Tech Briefing | 11/20/2019 | 11/20/2019 | IoT (deprecated) | Technical Briefing on Azure IoT |
| Delivery for IoT Tech Briefing | 11/11/2019 | 11/12/2019 | IoT | IoT Technical Briefing |
| AI tech briefing | 11/11/2019 | 11/11/2019 | Artificial Intelligence (AI) | AI Tech Briefing |
| Tech Briefing for IoT | 12/5/2019 | 12/6/2019 | Advanced Networking | Tech Briefing on IoT |
| AI Envisioning Briefing on Futures | 2/17/2020 | 2/24/2020 | Artificial Intelligence (AI) | Test for UCI UAT |

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GPS CRM Technical Services Integration

Technical Service Activities are created three ways

- 1) **Partner Account** related activities without a Solution tied to the activity
- 2) **Partner Engagement** activities tied to building a Solution
- 3) **Campaign** (evangelism) 1: Many Partner event activities where there is more than one partner being delivered to

Step 1: Create a Technical Service request in one of the three areas to identify the Tech Service Catalog activity to be delivered to the partner

Step 2: Create at least one Tech Task under that Technical Service to indicate who is responsible to deliver the service. Assign the Tech Task to that person. If more than one person is engaged to deliver the service, then create another Tech Task to identify the additional person(s).



Partner Account

Technical Services
Tech Tasks



Partner Engagement

Technical Services
Tech Tasks



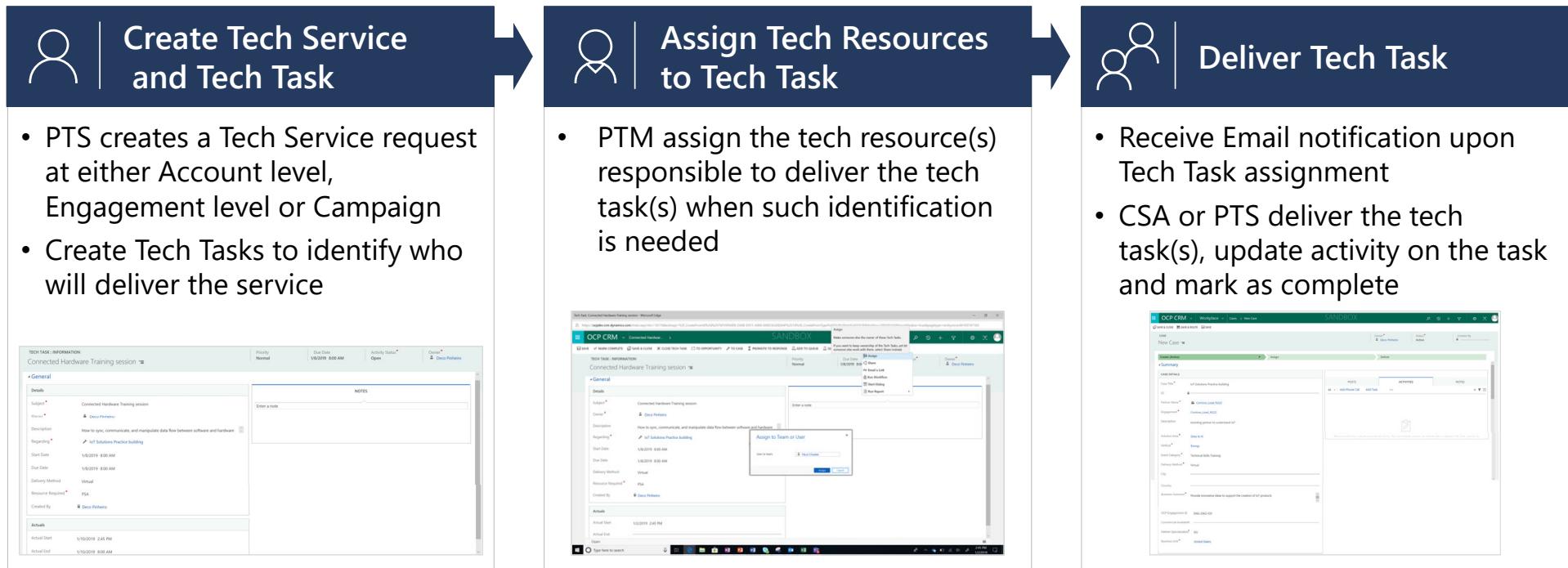
Campaign Evangelism

Technical Services
Tech Tasks

FY22

GPS CRM Technical Services Integration Workflow

👤 = PTS, 📲 = PTM, 🚀 = CSA



- In Recruit motion where there are no PTS roles the PDM-R is expected to create the Tech Service request to engage the CSA resource pool
- In WCB Partner Architect Team the Partner Aligned CSA is expected to create Tech Services and Tech Tasks

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Tools Training and Support Resources

| Description | Link |
|--|--|
| FY22 Partner Business & Technical Planning | aka.ms/PBP (here) Overview videos: GPS CRM , Drive Partner Technical motion |
| WW GPS Tools Training FY22 Partner Business and Technical Planning (TDP, TEP) | Office Hours how-to Training Recording and Deck Technical Planning PTS Journey in PBP video Executive Summary Mapping to CRM data here |
| WW GPS Training & Readiness Page User guide, FAQ, recorded training, videos on creating Tech Services and Tech Tasks | OCP CRM Technical Services Integration Feb 19, 2019 OCP CRM Technical Services Integration |
| WW GPS Tools Team Training SharePoint | aka.ms/MyGPSTools |
| GPS Tools & Insights Champs community Be a tool champ and learn what new in GPS CRM and GPS Insights | Join the GPS Tools & Insights Champs community here Connect with the GPS community on Teams here |
| GPS Support System issues and troubleshooting support | Email gpshelp@microsoft.com Submit a Ticket GPS Internal Support and review FAQs here |

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FY22



GPS Technical Engagement Framework

WW GPS Technical Team
FY22 Update

Insights Reporting

GPS Insights – Tech Team Reporting

Goal: Provide insights on GPS Tech Team services and impact on Partner Development

Data pulled from GPS CRM Technical Services and Tech Tasks

Key Views

- Portfolio View
- Engagement Detail
- Technical Service Detail
- Tech Task Location
- Hygiene
- Pipeline
- EPP
- Tech Development Plan

How to Access

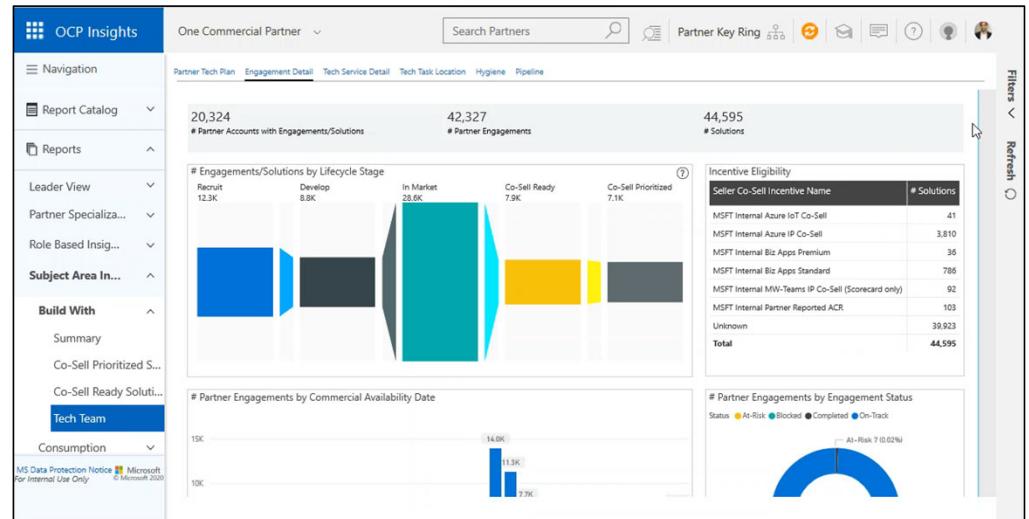
[OCP Insights | Tech Team Plan](#)

Tools Training and Readiness [here](#) with short how-to training videos

FY22

Engagement Detail

Engagement Detail provides tech service information on associated Solution Engagements across Partners by an assigned user to the account



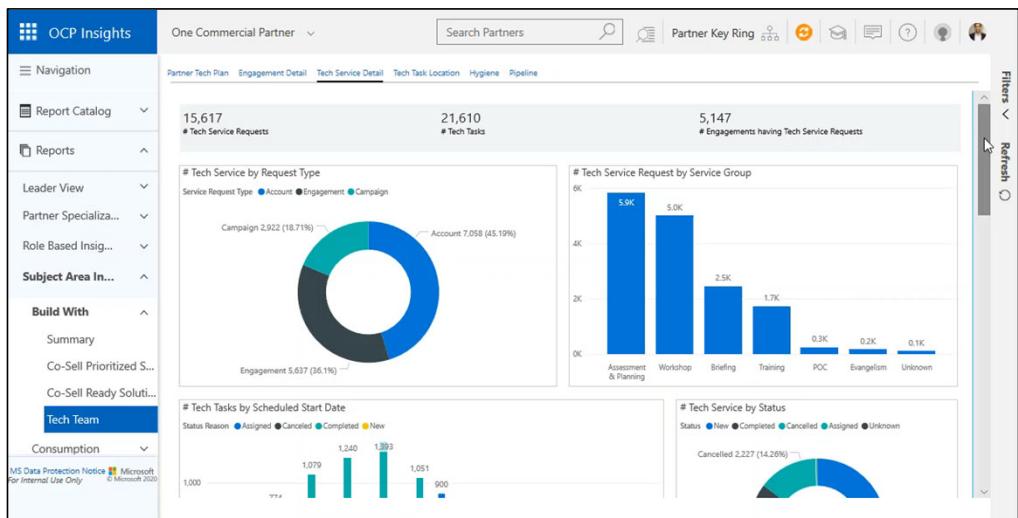
*Hover over video to play

Tech Service Detail

Tech Service Detail provides information on the Technical Services and Tech Tasks in CRM to support an Engagement or Partner Account

This page provides insight on the following

- # of Tech Service request Type
- # of Tech Service request by Service Group
- # of Tech Tasks by Scheduled Start Date
- # of Tech Service by Status
- # of Tech Tasks Broken down by Solution Area
- Tech Service request Detail
- Tech Task Detail

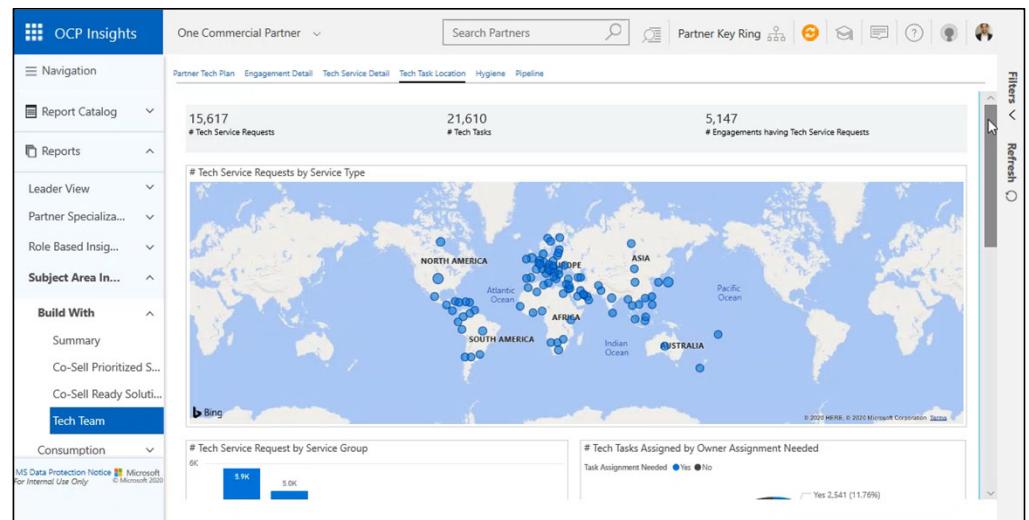


*Hover over video to play

Tech Task Location

Tech Task Location provides insight on where services will be delivered, and which services have or have not yet been assigned to an individual

This view also provides a visual of services broken down by solution in terms of the Tech Services and Tech Tasks taxonomy they are supporting



*Hover over video to play

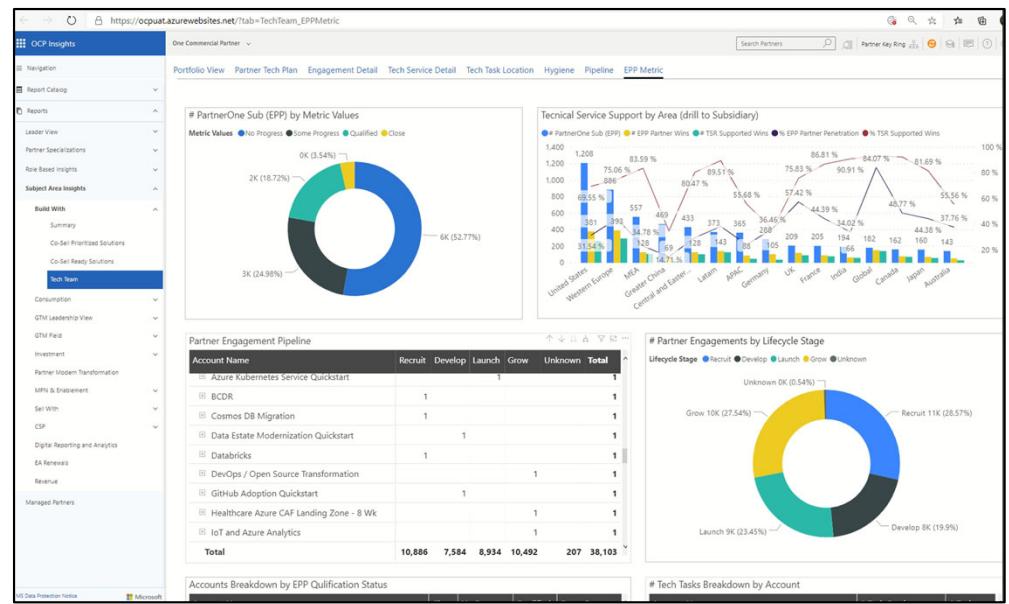
Update Coming FY22 Q1 due to EPP Workload Transition

EPP Metric

The EPP Metrics provides information on the Tech Tasks Breakdown by Account and their association to each EPP Advanced Workload.

This page provides insight on the following:

- # EPP engagement by account
- # of Tech Services Requests
- # of Tech Tasks
- Account Team Contact Details
- Tech Services Details
- EPP Partner Penetration associated to TSR



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Hygiene

The Hygiene tab provides a perspective on metrics that highlight Tech Services and Tech Tasks which need to be addressed and cleaned up

The Engagement/Solution Grid outlines issues with Solution Area Taxonomy which are not specified for Technical Services

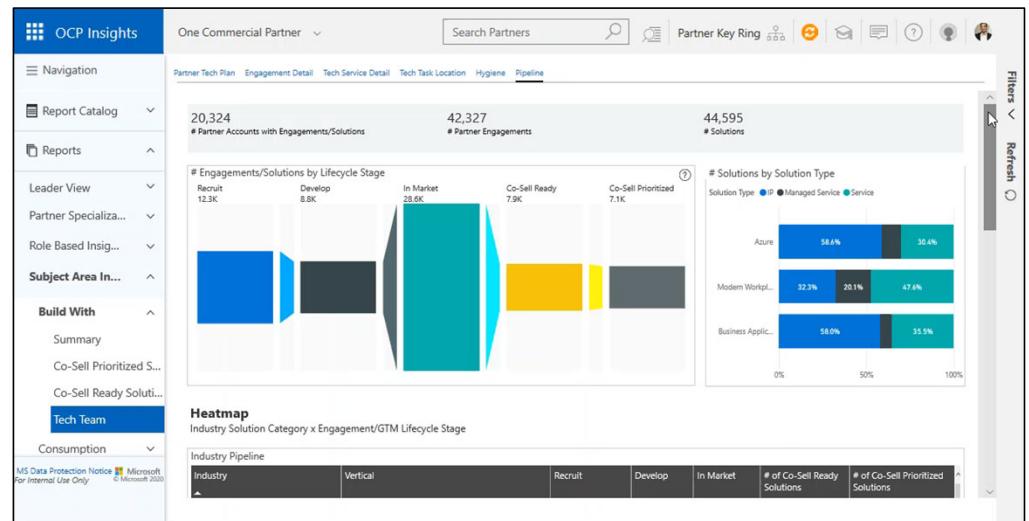
The screenshot shows the Microsoft OCP Insights application. The left sidebar has a 'Navigation' section with 'Report Catalog' (selected), 'Leader View', 'Partner Specializa...', 'Role Based Insi...', and 'Subject Area In...'. Under 'Build With', it lists 'Summary', 'Co-Sell Prioritized S...', 'Co-Sell Ready Soluti...', 'Tech Team' (selected), and 'Consumption'. A note at the bottom says 'MS Data Protection Notice Microsoft For Internal Use Only'. The main area has tabs for 'Partner Tech Plan', 'Engagement Detail', 'Tech Service Detail', 'Tech Task Location', 'Hygiene' (selected), and 'Pipeline'. A search bar and various icons are at the top right. A 'Hygiene Issue: Using Deprecated Solution Areas' alert box is open, stating: 'Solutions must use the current Fiscal Year Solution Area Taxonomy (available at <http://aka.ms/fy20taxonomy>). WW attempts to update Solution Areas/Scenarios as part of the Fiscal Year rollover, but some building blocks are left as "deprecated" and will not show up properly in search results. Click the Engagement URL and update the Solution Area and Building Blocks taxonomy with current values. If the engagement/solution does not fit into the current taxonomy (such as an on-premises solution), the engagement and solution should be disabled in OCP CRM. If the solution is an Industry solution, please select only one solution area (the one that closest aligns to the core technology used by the solution).'. Below this, there are two counts: '7,930 # Solutions' and '8,280 # Partner Engagements'. A grid titled 'Engagement/Solution Detail' lists several entries with columns for CRM Account Name, PartnerOne Name, Partner Specialization, Primary Role, Primary Contact, Solution Type, Life Cycle Stage, MAX Solution GTM Readiness, Solution Source, Solution/Engagement Name, and Engagement URL. The first entry is 'VISION INFORMACIJSKI SUSTAVI d.o.o.'.

*Hover over video to play

Pipeline

Pipeline tab provides insight in terms of volume for Engagements and Solutions by geography

End users leverage this tab to focus on and measure opportunities for Tech Services



*Hover over video to play

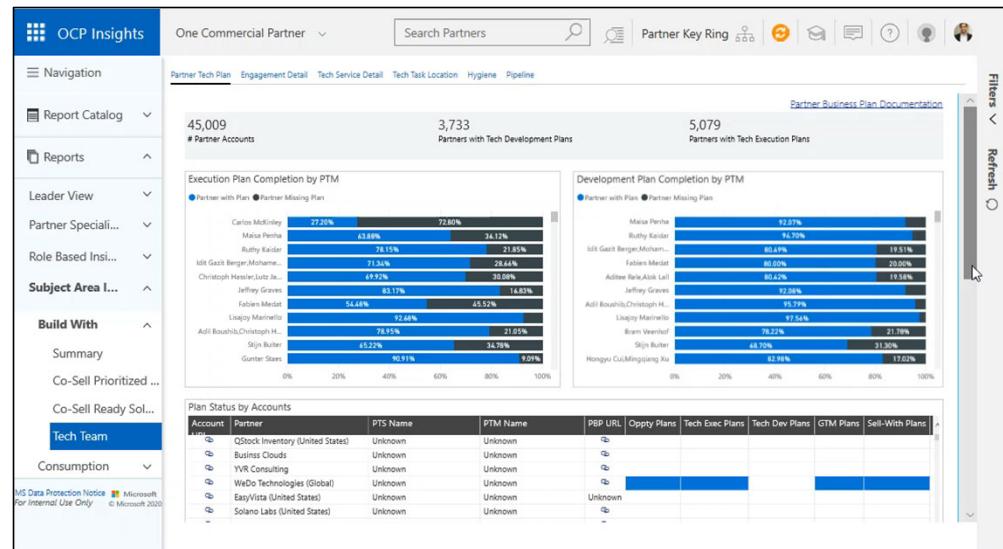
Partner Tech Plan

The Partner Tech Plan tab aims to give visibility and accountability to gaps which need to be filled for Technical Development planning

Plan Status by Accounts provide specific info on which Account have such as plan in the current fiscal year

Execution Plan (AKA "Elevator Pitch" Summary) provides a high-level of the partner summary from a Tech community perspective for the current fiscal

Tech Development Plan Detail provides additional Technical Service details

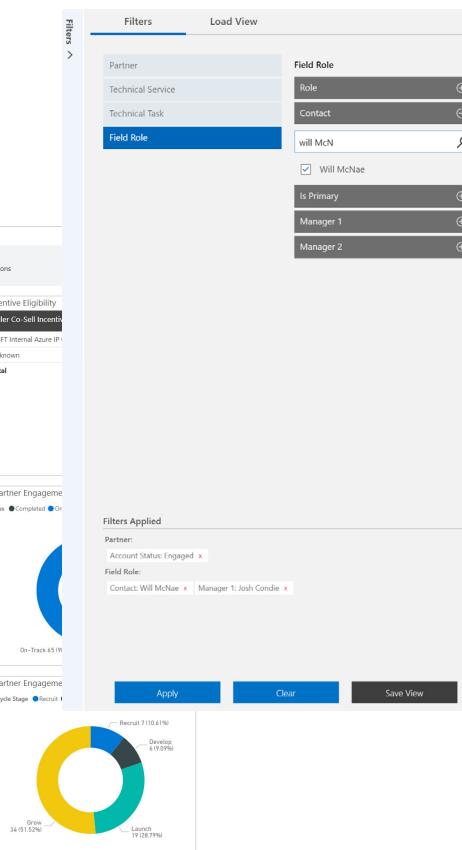
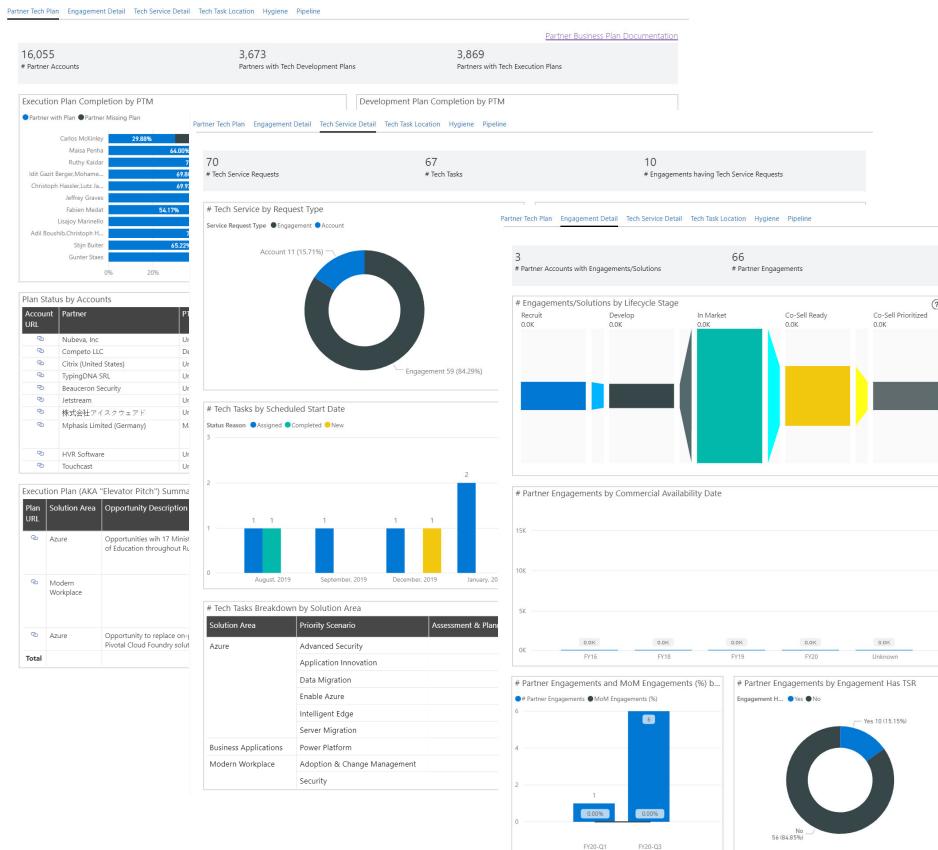


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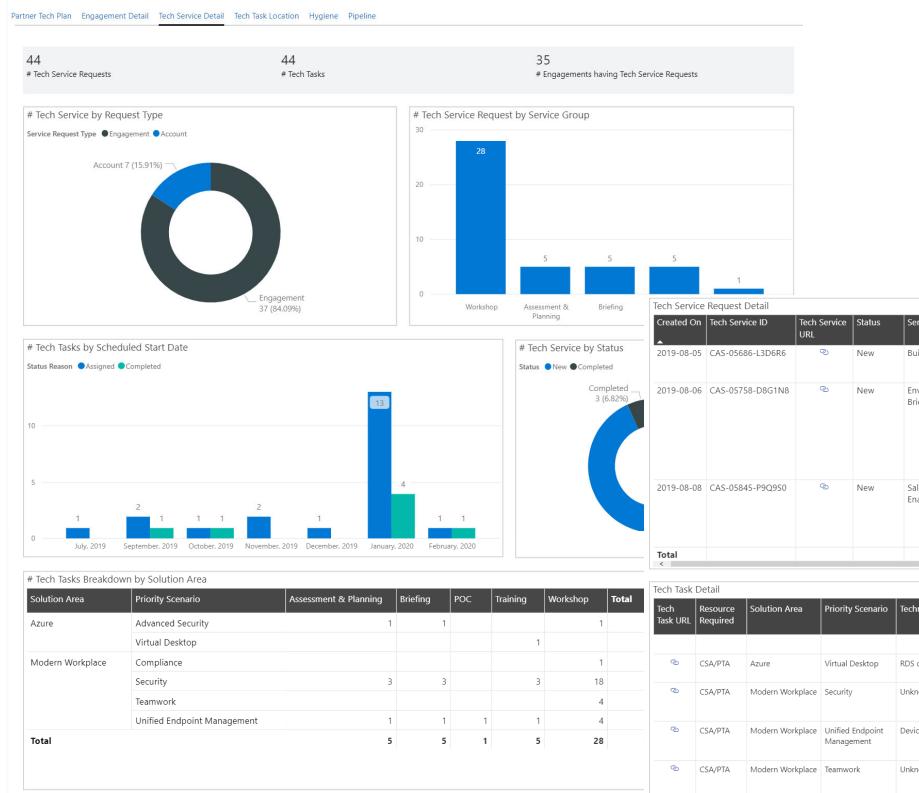
GPS Insights Tech Team Reporting Scenarios

PTM/PTS Perspective – Partner Portfolio Aligned



- Set Field Role->M1 Filter for PTM or Contact to PTS
- This is the starting point for PTM and PTS Resources
- Enables quick identification of the Tech Services and Tech Task for associated accounts as well as navigate over to see the Engagement/Solution Detail related to associated partners
- Leverage Hygiene view to identify problem areas
- From Engagement Detail, utilize the **Engagement -> Has Technical Service Request** filter to differentiate those Engagements supported or not supported with Technical Services

CSA Perspective – Architect



Start by setting **Technical Task/Task Owner** Filter to the CSA

This is the starting point for CSA resources

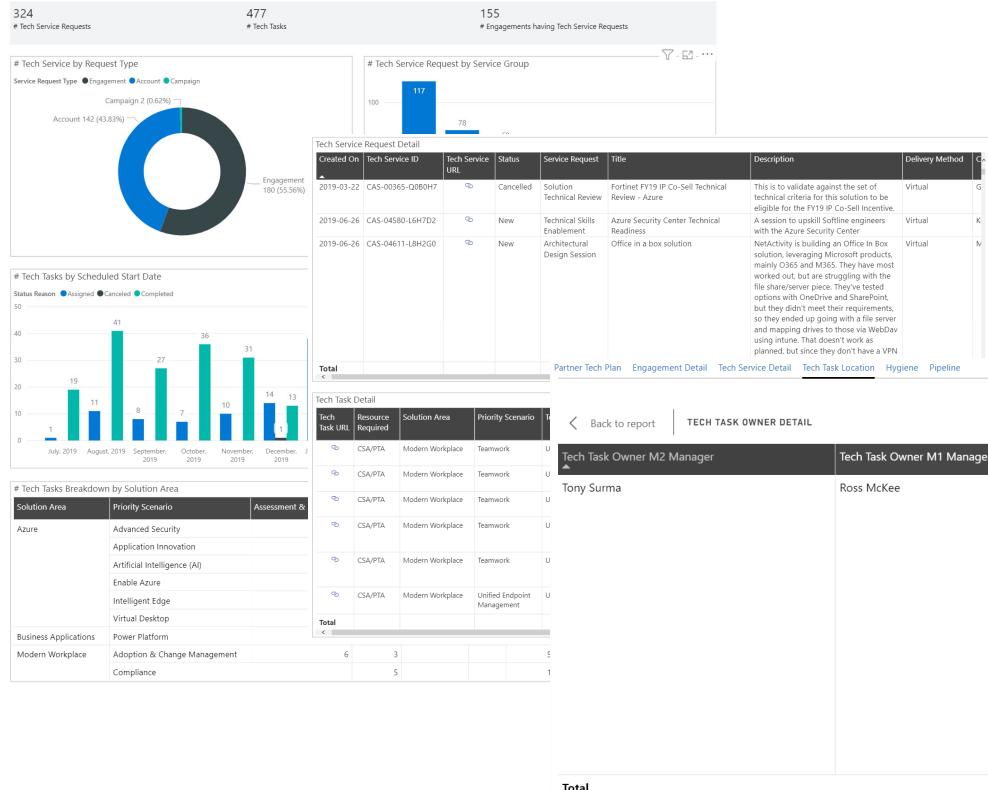
Enables quick summary of:

- Type of Requests
- Types of Services
- Completed/Open by Start Date
- Task Breakdown by Solution Area
- Technical Service and Tech Task Details with links back to CRM

Select items in the visualizations to utilize cross filtering of the page content

CSA Manager

Partner Tech Plan Engagement Detail Tech Service Detail Tech Task Location Hygiene Pipeline



The 'Filters' pane shows the following selected filters:

- Technical Task:** Task Owner - M1 Manager [Tech Task Owner]
- Field Role:** Ross m
- Other Filters:** M2 Manager [Tech Task Owner], Solution Area, Priority Scenario, Technical Scenario, Created On Fiscal Year, Created On Fiscal Quarter, Created On Fiscal Month, Created On Date, Scheduled Start Date Fiscal Year, Scheduled Start Date Fiscal Quarter, Scheduled Start Date Fiscal Month, Scheduled Start Date.

The 'Filters Applied' section shows:

- Partner: Account Status: Engaged
- Technical Task: M1 Manager [Tech Task Owner]: Ross McKee

The 'Tech Task Detail' table lists tasks assigned to Ross McKee and Tony Surma.

Start by setting **Technical Task/M1 Manager** Filter to the CSA

This is the starting point for a Manager of CSA resources

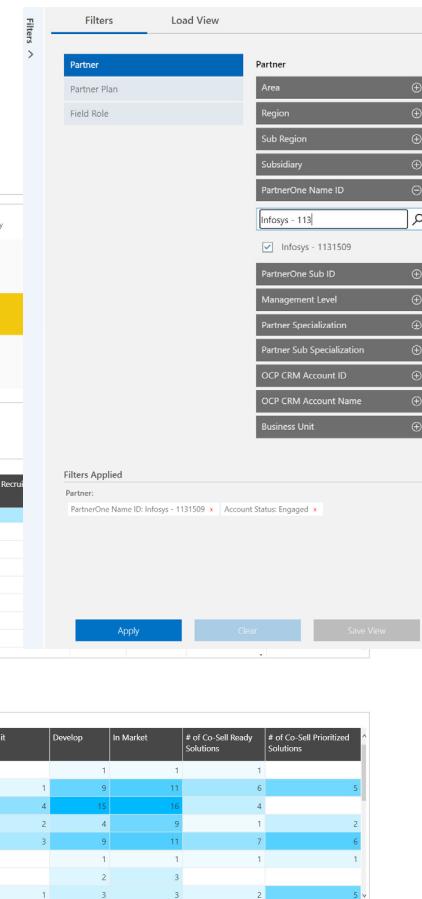
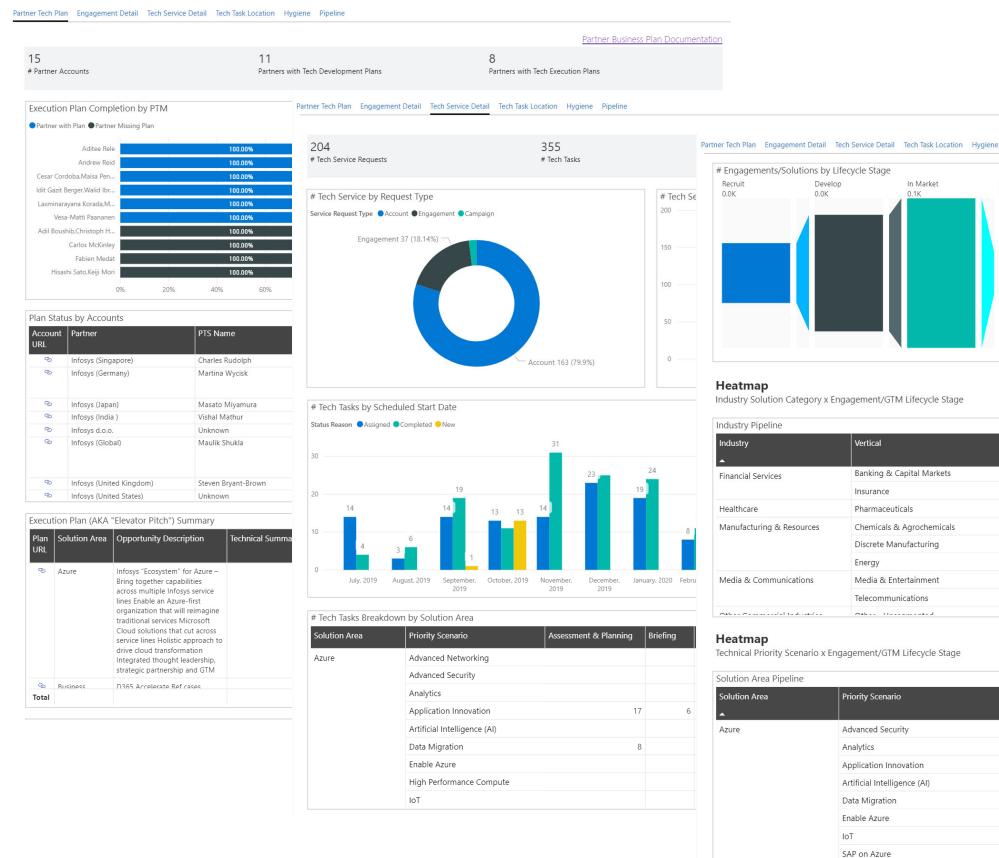
Enables quick summary of:

- Type of Requests
- Types of Services
- Completed/Open by Start Date
- Task Breakdown by Solution Area
- Service Request and Tech Task Details with links back to CRM

Select items in the visualizations to utilize cross filtering of the page content

Utilize the Tech Task Location tab to see the breakdown across Tasks by CSA

Account Views



- Search and filter to a specific Partner by PartnerOne Name or PartnerOneSub Name to isolate the context to that partner
 - Traverse the tabs to review the Plans, Technical Services, Engagements and Solutions for the selected Partner

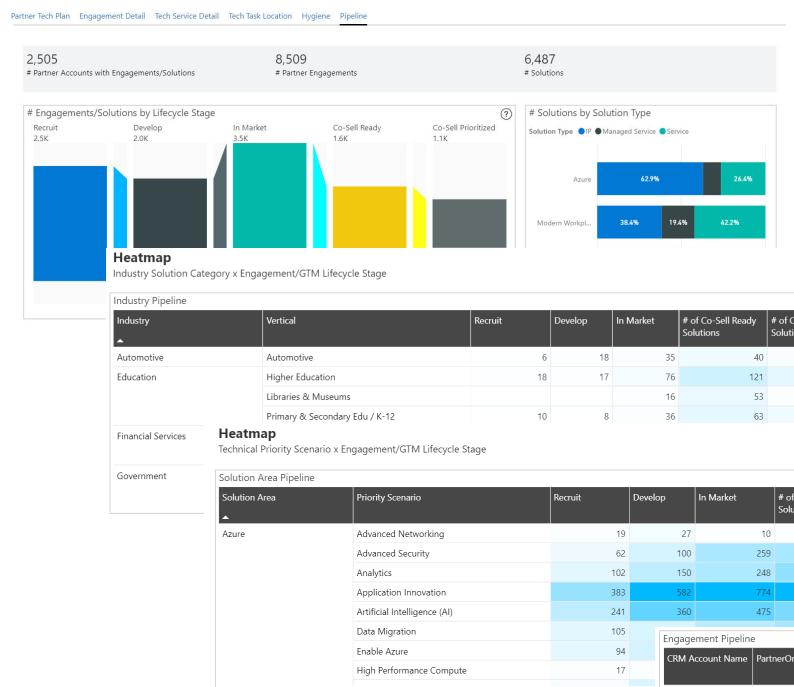
Area Perspective

The dashboard provides a comprehensive view of technical service requests and tasks across various locations. It includes:

- Map:** Shows the distribution of tech service requests and tasks across the United States and Canada.
- Table:** Details the number of tech service requests and tasks by country, state, and city.
- Bar Chart:** Breaks down tech service requests by service group.
- Table:** Lists tech service request details including created date, service ID, URL, account, and OCP CRM.
- Table:** Lists tech task owner details including name and manager.

- Utilize the Tech Task Location to focus on where the set of Technical Service/Tech Task are being delivered
- Hygiene will become apparent as well from this view
- Details are located on the page with links back to CRM to enable updates to source information
- Easily navigate to the other tabs like Pipeline view to review Area level Heatmaps of Engagements and Solutions by Industry and Solution Area taxonomy

Pipeline – Industry & Solution Area Capacity



Filters Load View

Partner Area

- Greater China
- India
- Japan
- Latam
- MEA
- UK
- United States
- Western Europe

Region Sub Region Subsidiary PartnerOne Name ID PartnerOne Sub ID Management Level Other Considerations

Filters Applied

Partner: Area: United States x Account Status: Engaged x

Apply Clear Save View

| CRM Account Name | PartnerOne Name | Partner Specialization | Primary Role | Primary Contact | PTS Name | Solution Type | Engagement ID | Life Cycle Stage | MAX Solution GTM Readiness | Incentive Name |
|------------------------------------|---------------------|------------------------|--------------|----------------------|----------|---------------|---------------|------------------|----------------------------|------------------------------------|
| Rocketbox | Rocketbox | ISV | SM | Rajeskar Thiagarajan | Unknown | IP | Co-Sell Ready | Unknown | Unknown | C |
| Krypc Technologies Private Limited | Krypc Technologies | ISV | SM | Susan Smith | Unknown | IP | ENG-54577-RFA | Grow | Co-Sell Ready | MSFT Internal Azure IP Co-Sell |
| DefinedCrowd | DefinedCrowd | ISV | SM | Susan Smith | Unknown | IP | ENG-54140-HNP | Launch | Co-Sell Prioritized | MSFT Internal Azure IP Co-Sell |
| DefinedCrowd | DefinedCrowd | ISV | SM | Susan Smith | Unknown | IP | ENG-54140-HNP | Launch | Co-Sell Prioritized | MSFT Internal Partner Reported ACR |
| Dun & Bradstreet (United States) | Dun and Bradstreet | ISV | PDM-R | Abigail Gunning | Unknown | | ENG-66743-P2H | Develop | Unknown | C |
| Defacto Global (ISV) | defacto Global, Inc | ISV | PDM-R | Abigail Gunning | Unknown | | ENG-54820-DAQ | Launch | In Market | C |
| Dun & Bradstreet | Dun and Bradstreet | ISV | PDM-R | Abigail Gunning | Unknown | | ENG-54004-JAH | Pilot | Unknown | C |

- Set Partner Area Filter to desired Partner Geography
- Utilize the Pipeline framework to quantify and identify Engagement and Solution gaps
- Adjust filters to look at portfolio specific partners or review specifics relative to Solution Area taxonomy

Hygiene

Partner Tech Plan Engagement Detail Tech Service Detail Tech Task Location Hygiene Pipeline

Deprecated Solutions No Solution Area Availability Date In The Past Solution Is Co-Sell Ready Stage > 1 Year Stage > 6 Months No AppSource URL

Hygiene Issue: Using Deprecated Solution Areas

Solutions must use the current Fiscal Year Solution Area Taxonomy (available at <http://aka.ms/fy20taxonomy>). WW attempts to update Solution Areas/Scenarios as part of the Fiscal Year rollover, but some building blocks are left as "deprecated" and will not show up properly in search results. Click the Engagement URL and update the Solution Area and Building Blocks taxonomy with current values. If the engagement/solution does not fit into the current taxonomy (such as an on-premises solution), the engagement and solution should be updated by the solution owner.

Hygiene Issue: No Solution Area

Solutions must use the current Fiscal Year Solution Area Taxonomy (available at <http://aka.ms/fy20taxonomy>). Solutions that have no Solution Areas tagged will not show up properly in search results. Click the Engagement URL and update the Solution Area and Building Blocks taxonomy with current values. If the engagement/solution does not fit into the current taxonomy, select only or

Hygiene Issue: Engagement in Recruit/Develop with Availability Date in the Past

The Commercial Availability Date for a solution should be the most current estimate of when the solution will launch, to help with reviews of upcoming solutions. If the solution is still in Recruit/Develop and the Commercial Availability Date has passed, it must be updated with a new estimate of the solution's market availability. Click on the "Engagement URL" link to make the

Hygiene Issue: Engagements still in Recruit/Develop while solution is Co-Sell Ready

Solutions only become Co-Sell Ready/Prioritized after they have passed through the required steps in Recruit/Develop. Engagements should not remain in these statuses after the solution has launched to market. Please click on the Engagement URL and advance the solution to the Launch phase (completing any mandatory tasks when doing so)

- Utilize the Hygiene views to identify gaps in content regarding Engagements and Solutions. Utilize the Filters to reduce the scope from Geography to Portfolios to a specific Partner
- Details are on each of the tabs with how these items are getting flagged along with links to related tools to facilitate updates