

Guide to Using WorkSpan Web App for Co-selling with Hyperscalers

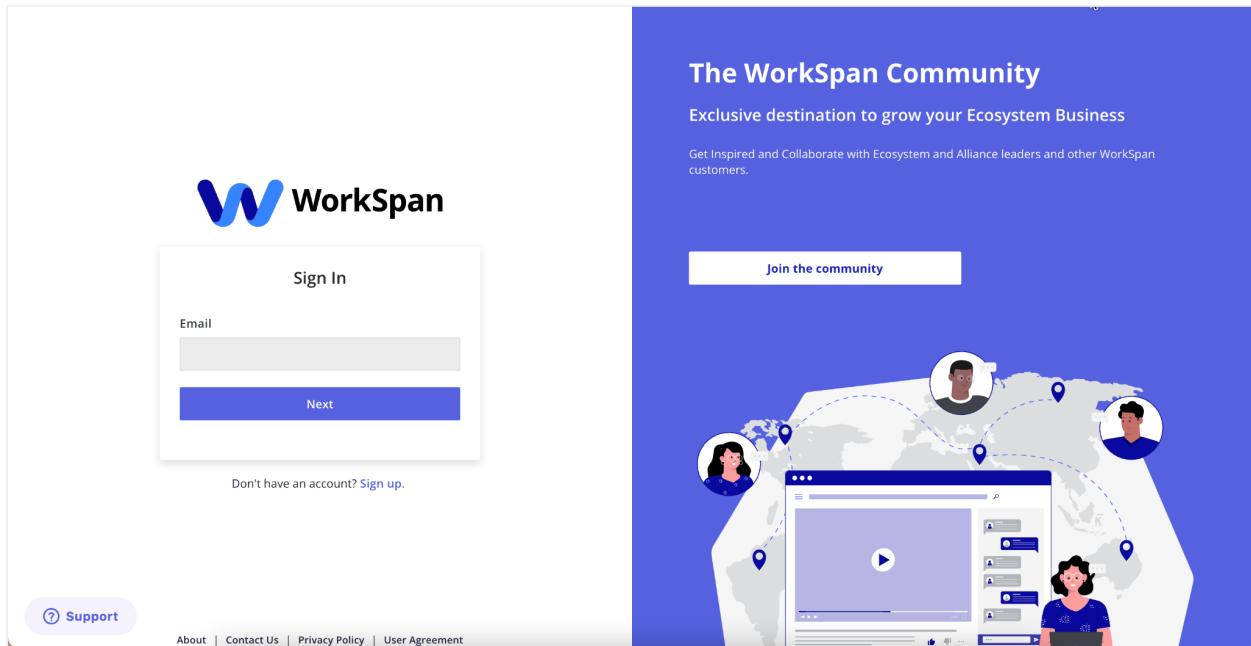


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1. Instructions for accessing WorkSpan

Step 1: Go to app.workspan.com & enter your email to “Sign In” to your WorkSpan account.



2. Invite users, manage user roles/permissions

- a. [Refer to this article](#) to invite users to WorkSpan.
- b. [Learn more](#) about user roles/permissions.

3. Bulk upload CSV/Excel files to create opportunity referrals in WS Web App

- a. Inbound integration - It allows data to transfer from external applications into WorkSpan seamlessly. To know more, [click here](#).

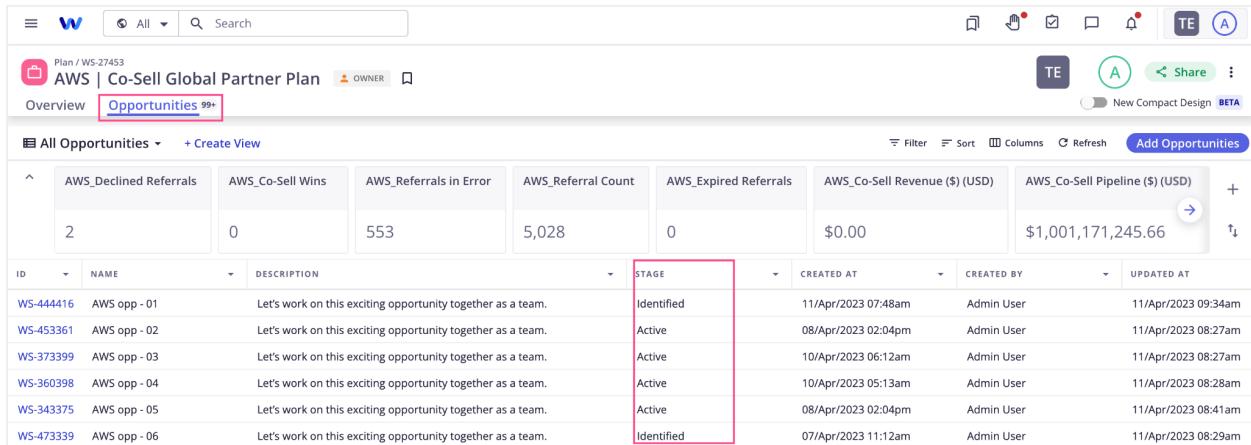
- b. Bulk Upload - It allows bulk upload of data (e.g., Opportunities) using xlsx, json and csv files directly from the table view. To know more, [click here.](#)

4. View Opportunity referral list

Opportunity referral list can be used to check status and other key info (e.g., sales stage).

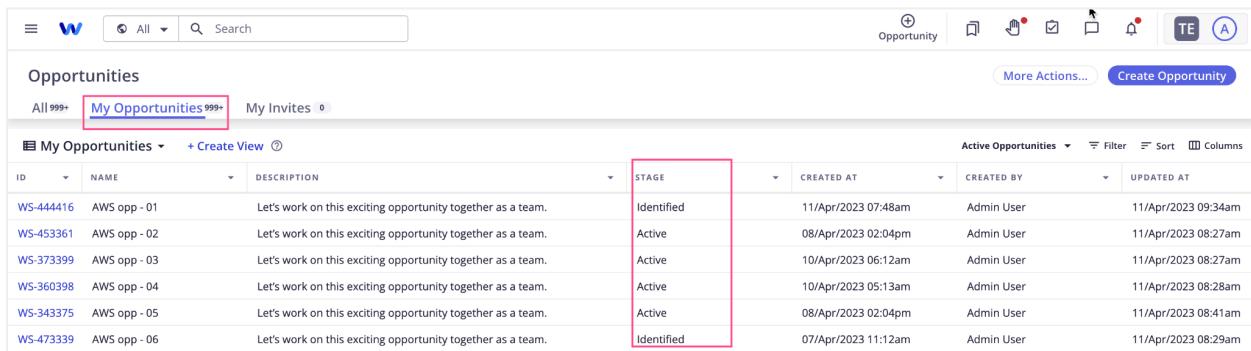
You can view this list in two ways:

- a. From a parent object (e.g., Partner Plan) where the Opportunities (child object) are linked



All Opportunities							+ Create View	Filter	Sort	Columns	Refresh	Add Opportunities
AWS_Declined Referrals	AWS_Co-Sell Wins	AWS_Referrals in Error	AWS_Referral Count	AWS_Expired Referrals	AWS_Co-Sell Revenue (\$ (USD)	AWS_Co-Sell Pipeline (\$ (USD)						
2	0	553	5,028	0	\$0.00	\$1,001,171,245.66						
ID	Name	Description	Stage	Created At	Created By	Updated At						
WS-44416	AWS opp - 01	Let's work on this exciting opportunity together as a team.	Identified	11/Apr/2023 07:48am	Admin User	11/Apr/2023 09:34am						
WS-453361	AWS opp - 02	Let's work on this exciting opportunity together as a team.	Active	08/Apr/2023 02:04pm	Admin User	11/Apr/2023 08:27am						
WS-373399	AWS opp - 03	Let's work on this exciting opportunity together as a team.	Active	10/Apr/2023 06:12am	Admin User	11/Apr/2023 08:27am						
WS-360398	AWS opp - 04	Let's work on this exciting opportunity together as a team.	Active	10/Apr/2023 05:13am	Admin User	11/Apr/2023 08:28am						
WS-343375	AWS opp - 05	Let's work on this exciting opportunity together as a team.	Active	08/Apr/2023 02:04pm	Admin User	11/Apr/2023 08:41am						
WS-473339	AWS opp - 06	Let's work on this exciting opportunity together as a team.	Identified	07/Apr/2023 11:12am	Admin User	11/Apr/2023 08:29am						

- b. From the Opportunity table view



My Opportunities							+ Create View	Opportunity	More Actions...	Create Opportunity
All 999+	My Opportunities 999+	My Invites								
ID	Name	Description	Stage	Created At	Created By	Updated At				
WS-44416	AWS opp - 01	Let's work on this exciting opportunity together as a team.	Identified	11/Apr/2023 07:48am	Admin User	11/Apr/2023 09:34am				
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WS-473339	AWS opp - 06	Let's work on this exciting opportunity together as a team.	Identified	07/Apr/2023 11:12am	Admin User	11/Apr/2023 08:29am				

5. Collaboration after referral is accepted by partner

Once a referral has been accepted by the partner, you can start collaborating on the referral by sending to and receiving updates from the partner against the referral.

- a. Sending future updates from CRM to AWS
 - i. Manually using file upload
 - ii. Automation using [CRM inbound integration](#)
 - iii. Manually by directly updating in WS UI
- b. Receiving future updates from AWS
 - i. View updates in WS
 - ii. Export updates to CRM using file based export (report download)

6. Next steps after partner rejects a referral

Rejection of a referral by partner usually leads to an end of state where no further submission can be done. Hence, it is recommended to create a new referral, update key information as per the guidelines by the partner and submit it.

A disqualified referred opportunity means that the partner has deemed that the opportunity submission did not meet the criteria to be shared with their sales team. This can be because of any of the following reasons:

- **Forecast Conflict:** The opportunity is forecasted by Co-Sell partner already, and a significant Partner need has not been identified.
- **Duplicate:** The Partner's involvement has already been captured in an internal opportunity, and the new submission will be disqualified in order to avoid duplicate opportunities.
- **Incomplete:** The opportunity submission was first flagged as incomplete and the Co-Sell Partner was given five business days for providing additional information but didn't provide the requested details within the timeline.

- **Invalid:** The opportunity could be considered invalid for the following reasons:
 - It was deemed a lead or sales activity rather than a qualified opportunity.
 - It is an internal workload where your Co-Sell Partner and customer are the same entity.
 - It is a PAST WON opportunity.

In the case of AWS, please note that the APN opportunity Submission tool is for **current and active opportunities only** and does not support past won deals. We encourage you to submit your opportunities on this platform as you uncover them and not at the end of the quarter or end of the year.

The WorkSpan platform is designed to increase alignment and facilitate introductions between WorkSpan Partners and the co-sellers for joint collaboration and engagements with our mutual customers.

For example, AWS rejects the referral if you fail to provide additional information within the timeline (usually five business days) and resubmit the referral.

7. Managing referrals that were placed into “Action Required” status by AWS

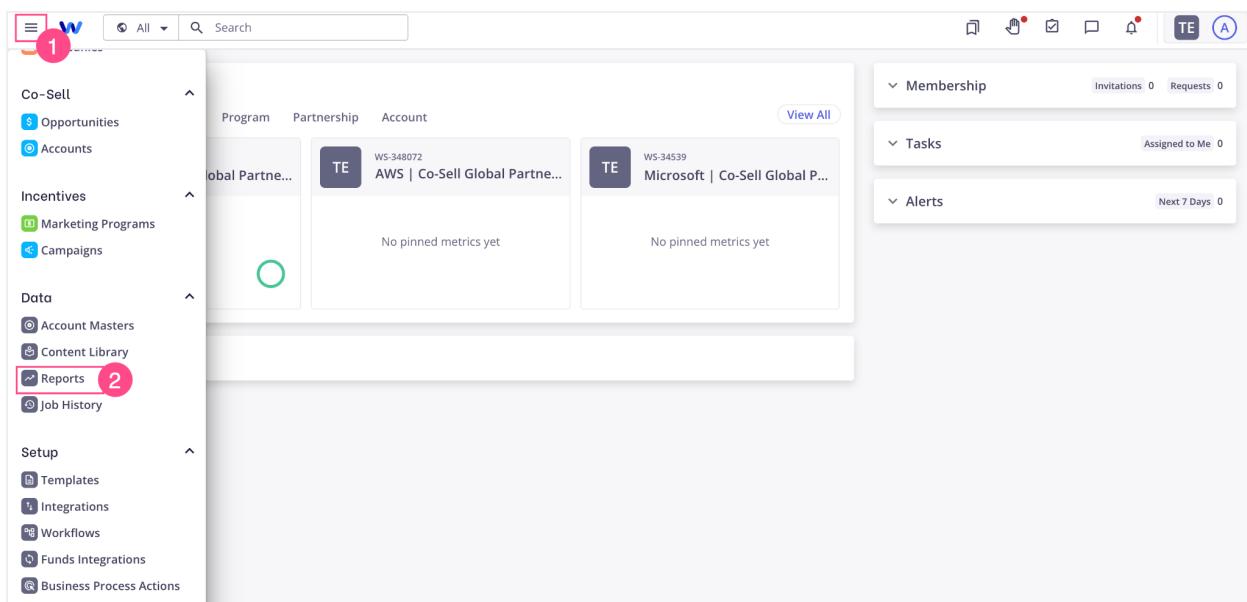
You will receive an email from AWS stating the reason why the opportunity referral was placed in the “Action Required” status. You need to follow the steps as mentioned below to resubmit the referral request to AWS.

Step 1: Go to the respective Opportunity overview page and you will see the “Action Required” button on the UI. Click on the button.

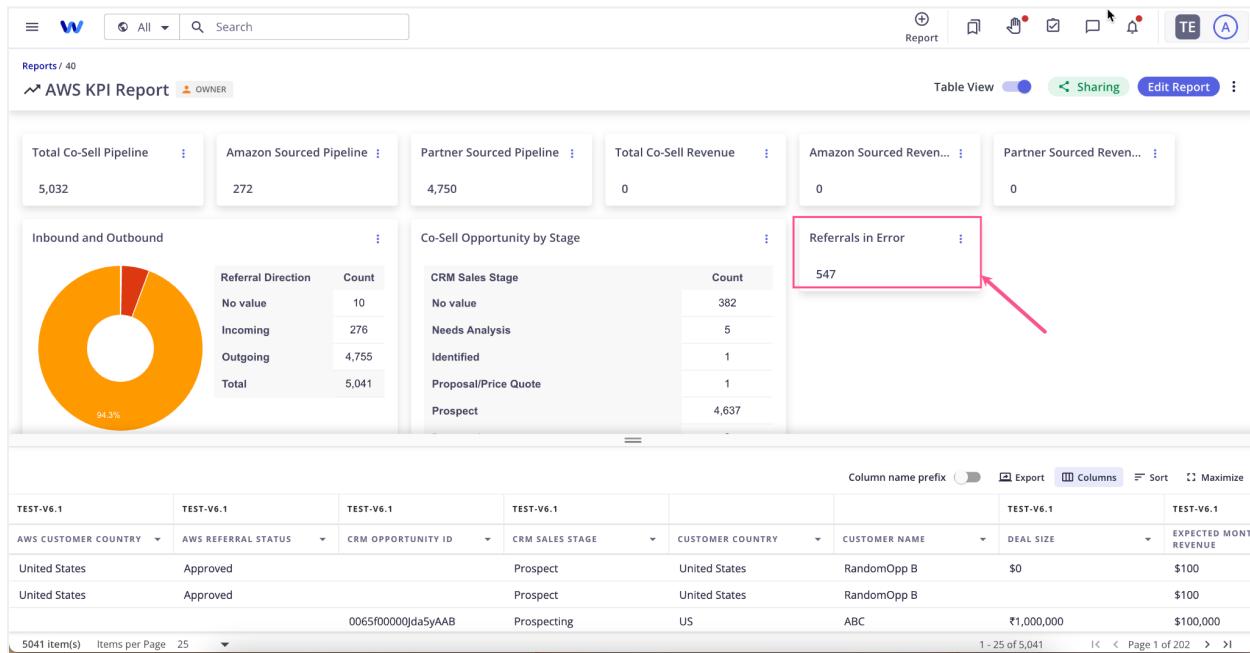
Step 2: The popup screen will appear. You need to update all the required fields, like description (add more info here if already added), etc. and then click the “Resubmit/Save” button.

8. View and manage errors via error reports (error codes, troubleshooting, etc.)

Step 1: Click on the hamburger menu and go to “Reports”.



Step 2: Click on a Report, for e.g., “AWS KPI Report”. You will be redirected as follows:



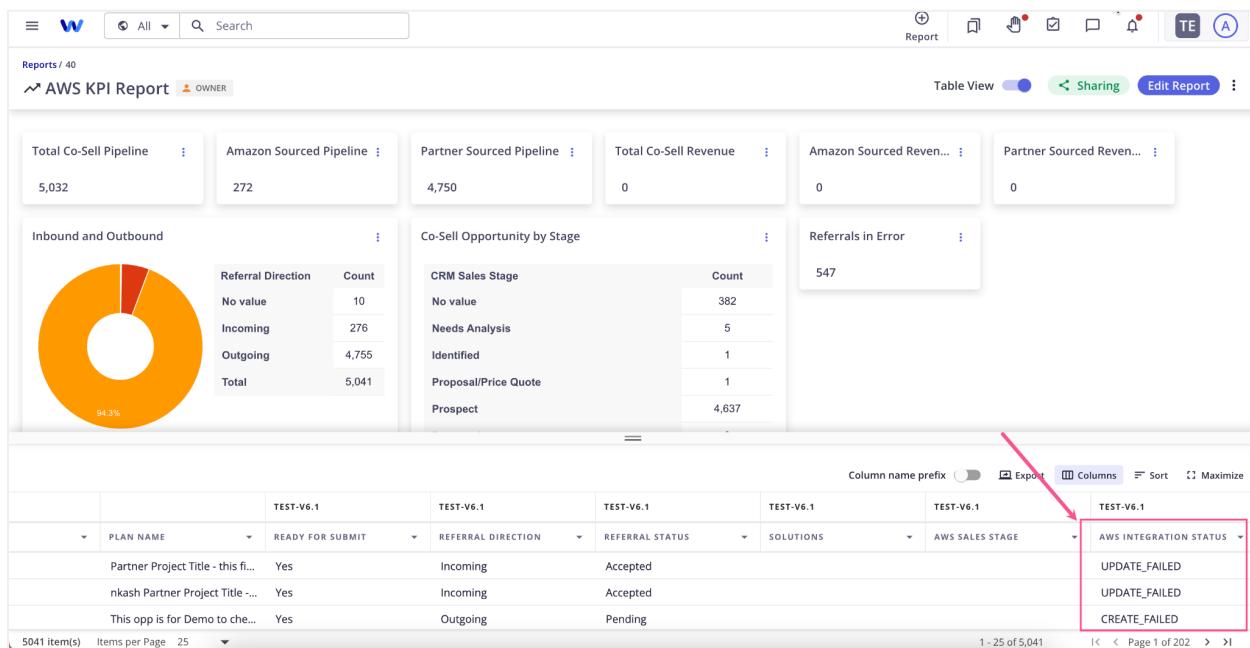
The screenshot shows a dashboard titled "AWS KPI Report". At the top, there are six summary cards: Total Co-Sell Pipeline (5,032), Amazon Sourced Pipeline (272), Partner Sourced Pipeline (4,750), Total Co-Sell Revenue (0), Amazon Sourced Revenue (0), and Partner Sourced Revenue (0). Below these is a donut chart for Inbound and Outbound direction. To the right is a table titled "Co-Sell Opportunity by Stage" with columns for CRM Sales Stage and Count. A specific row, "Referrals in Error", is highlighted with a red box and a red arrow pointing to it. The count for this row is 547.

CRM Sales Stage	Count
No value	382
Needs Analysis	5
Identified	1
Proposal/Price Quote	1
Prospect	4,637
Referrals in Error	547

Below the dashboard is a table view section with a red box highlighting the "TEST-V6.1" header. The table has columns for TEST-V6.1, AWS CUSTOMER COUNTRY, AWS REFERRAL STATUS, CRM OPPORTUNITY ID, CRM SALES STAGE, CUSTOMER COUNTRY, CUSTOMER NAME, DEAL SIZE, and EXPECTED MONTH REVENUE. The data shows two rows of prospects from the United States with various status codes.

In the above image, you can see the “Referrals in Error” count.

Step 3: Double-click on the “Referrals in Error” card to see the list of referrals below in the table view. [Read this article](#) to know more about the various error codes and corresponding actions to be taken.



The screenshot shows the same dashboard and table view as the previous one. The red box now highlights the "AWS INTEGRATION STATUS" column in the table view. The table data includes columns for PLAN NAME, READY FOR SUBMIT, REFERRAL DIRECTION, REFERRAL STATUS, SOLUTIONS, AWS SALES STAGE, and AWS INTEGRATION STATUS. The last three rows show entries with "UPDATE_FAILED" and "CREATE_FAILED" in the AWS INTEGRATION STATUS column.

PLAN NAME	READY FOR SUBMIT	REFERRAL DIRECTION	REFERRAL STATUS	SOLUTIONS	AWS SALES STAGE	AWS INTEGRATION STATUS
Partner Project Title - this fi...	Yes	Incoming	Accepted			UPDATE_FAILED
nkash Partner Project Title - ~..	Yes	Incoming	Accepted			UPDATE_FAILED
This opp is for Demo to che...	Yes	Outgoing	Pending			CREATE_FAILED

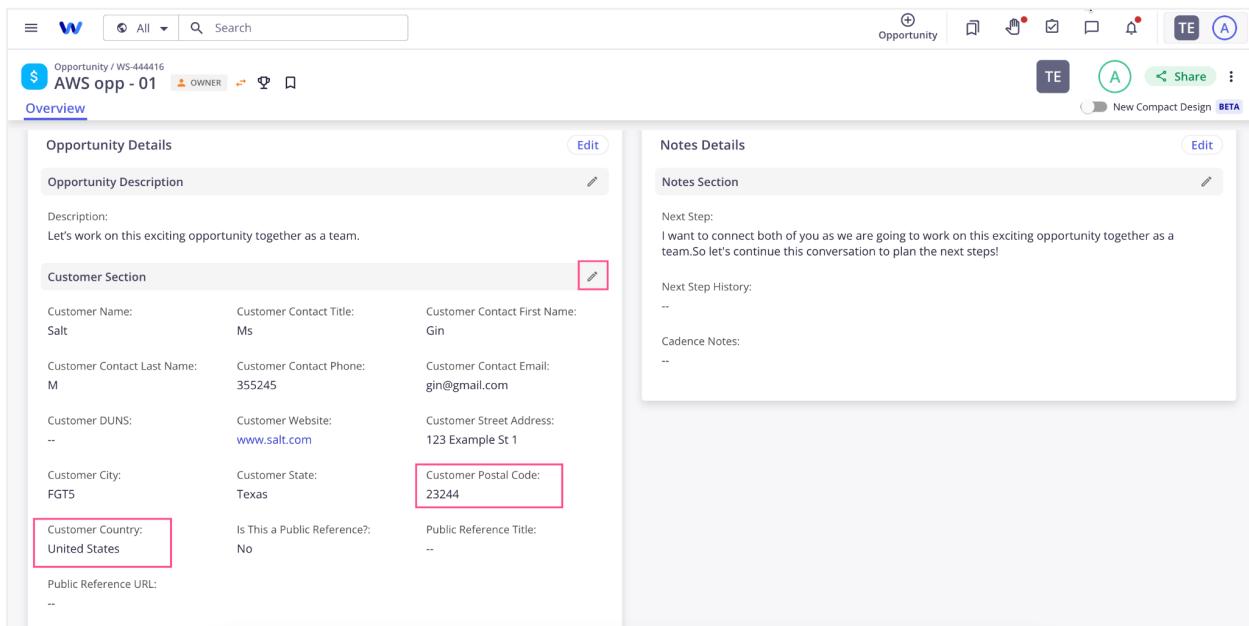
You can see “AWS Integration Status” as “UPDATE_FAILED” or “CREATE_FAILED”.

- UPDATE_FAILED - It shows the referral has values that do not match AWS standard values and needs to be updated accordingly.
- CREATE_FAILED - It shows the referral creation has failed due to value mismatch or no proper information per AWS guidelines.

To resubmit the referral, follow the steps as given below:

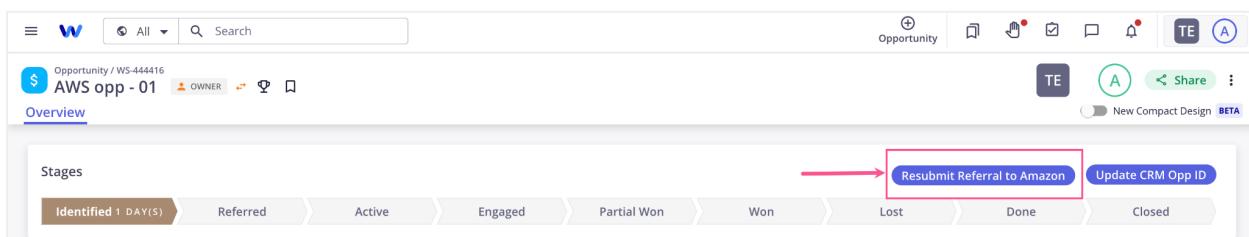
Step 1: Go to the respective Opportunity overview page.

For example, in the below screenshot, for the Customer Country “United States”, the postal code format is invalid for the United States. United States postal code must be in ‘99999’ OR ‘99999-9999’ format. Click on the pencil icon to “Edit” the fields and then “Save.”



The screenshot shows the WorkSpan Opportunity Overview page for an opportunity named "AWS opp - 01". The "Customer Section" contains fields for Customer Name (Salt), Customer Contact Title (Ms), Customer Contact First Name (Gin), Customer Contact Last Name (M), Customer Contact Phone (355245), Customer Contact Email (gin@gmail.com), Customer DUNS (--), Customer Website (www.salt.com), Customer Street Address (123 Example St 1), Customer City (FGT5), Customer State (Texas), Customer Postal Code (23244), Is This a Public Reference? (No), and Public Reference Title (--). The "Customer Country" field is highlighted with a red box. The "Notes Details" section contains a Notes Section with the note: "I want to connect both of you as we are going to work on this exciting opportunity together as a team. So let's continue this conversation to plan the next steps!" and a Next Step History with two entries: "--" and "Cadence Notes: --".

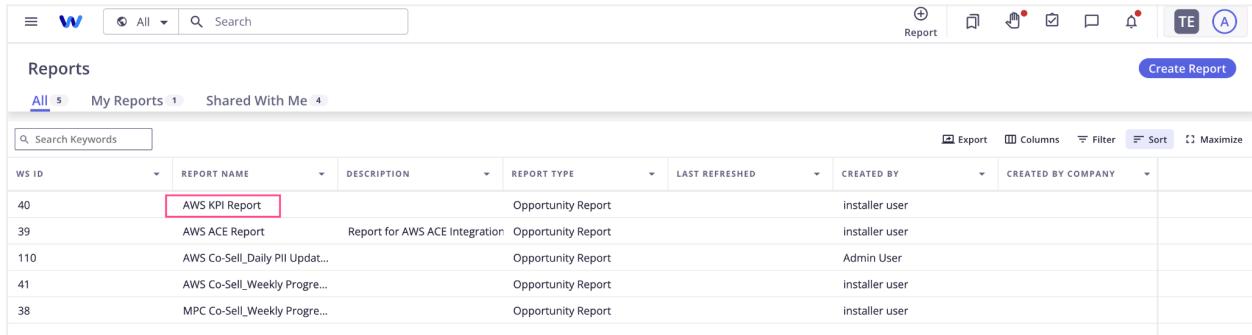
Step 2: Now click on the “Resubmit Referral to Amazon” button once you are done with the changes.



The screenshot shows the WorkSpan Opportunity Overview page for the same opportunity. The "Stages" section displays a pipeline with stages: Identified 1 DAY(S), Referred, Active, Engaged, Partial Won, Won, Lost, Done, and Closed. The "Submit Referral to Amazon" button is highlighted with a red box and a red arrow points to it from the previous step's description.

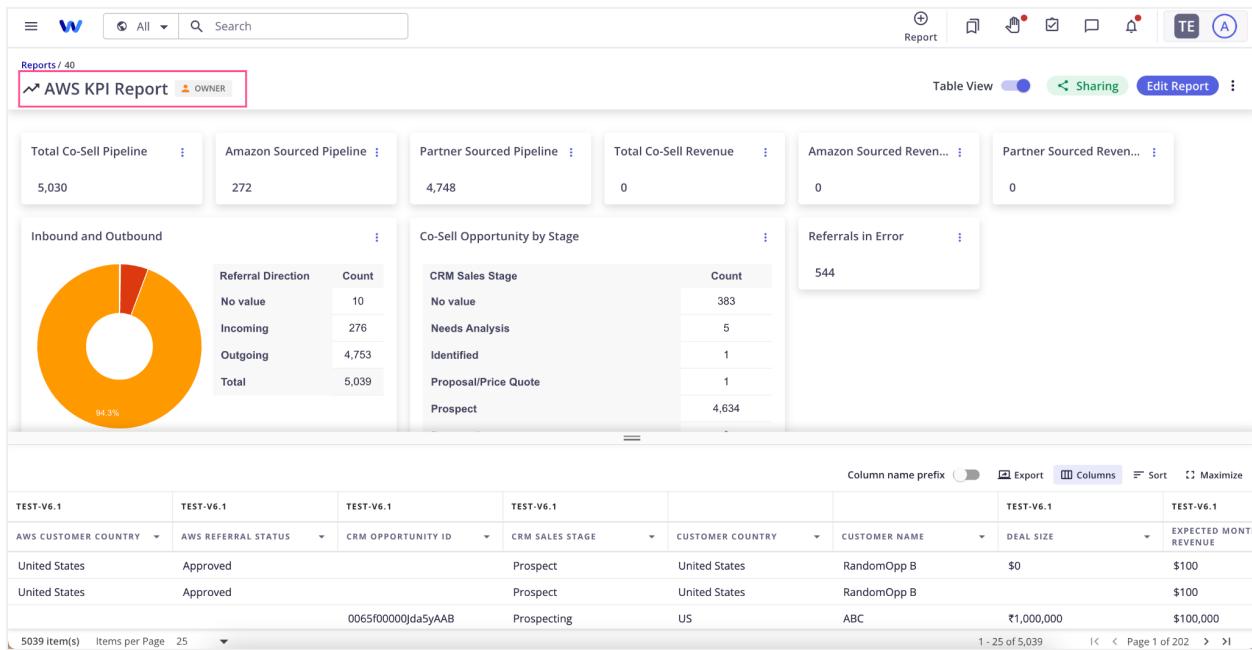
9. View Co-Sell reports and key metrics

Step 1: On the Reports page, click on a Report, for e.g., “AWS KPI Report”.



WS ID	REPORT NAME	DESCRIPTION	REPORT TYPE	LAST REFRESHED	CREATED BY	CREATED BY COMPANY
40	AWS KPI Report		Opportunity Report		installer user	
39	AWS ACE Report	Report for AWS ACE Integration	Opportunity Report		installer user	
110	AWS Co-Sell_Daily PII Updat...		Opportunity Report		Admin User	
41	AWS Co-Sell_Weekly Progre...		Opportunity Report		installer user	
38	MPC Co-Sell_Weekly Progre...		Opportunity Report		installer user	

Step 3: You will be redirected as follows:



The screenshot shows the detailed view of the 'AWS KPI Report'. At the top, there's a navigation bar with 'Reports / 40' and a search bar. Below it, a card for the 'AWS KPI Report' is shown, indicating it's owned by 'OWNER'. The report content includes:

- Pipeline Metrics:**
 - Total Co-Sell Pipeline: 5,030
 - Amazon Sourced Pipeline: 272
 - Partner Sourced Pipeline: 4,748
 - Total Co-Sell Revenue: 0
 - Amazon Sourced Revenue: 0
 - Partner Sourced Revenue: 0
- Inbound and Outbound:**
 - Referral Direction Count:

Referral Direction	Count
No value	10
Incoming	276
Outgoing	4,753
Total	5,039
- Co-Sell Opportunity by Stage:**

CRM Sales Stage	Count
No value	383
Needs Analysis	5
Identified	1
Proposal/Price Quote	1
Prospect	4,634
- Referrals in Error:**

Category	Count
544	

At the bottom, there's a table with columns: TEST-V6.1, TEST-V6.1, TEST-V6.1, TEST-V6.1, TEST-V6.1, TEST-V6.1, TEST-V6.1, TEST-V6.1, TEST-V6.1, TEST-V6.1. The table rows show data for 'Customer Country', 'Referral Status', 'Opportunity ID', 'Sales Stage', 'Customer Name', 'Deal Size', and 'Expected Month Revenue'. The last row shows a total of 5039 items.