**OEM Cooperative Marketing Fund**

# CO-OP PARTNER GUIDEBOOK

## FY09

**SYSTEM BUILDERS**

# OEM Cooperative Marketing Fund: Partner Guidebook for System Builders

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# OEM Cooperative Marketing Fund: Overview

## Overview

The OEM Cooperative Marketing Fund (Co-op) for System Builders provides reimbursements to participating System Builders to help market and promote fully assembled systems with preinstalled Microsoft products.  Co-op reimburses eligible costs associated with related marketing and readiness activities to support:

• Demand Generation - Advertising with broad reach.
• Market Development - Marketing and business development activities designed for a specific audience.
• Partner Readiness - Training, readiness and personnel development to improve Microsoft technology expertise.

## Co-op Core Requirements

Co-op Core Requirements must be met for a Demand Generation or Market Development activity to be considered for Co-op reimbursement.  More information can be found on page 4.

1. Prominently displayed Co-op tagline.
2. Prominently displayed Company name and/or brand and contact information.
3. Minimum 30% Microsoft content that markets and promotes a fully assembled system with preinstalled genuine Microsoft software.

## Co-op Periods

Co-op periods operate on a 6 month fiscal half calendar as follows:

  FY H1:  1 Jul - 31 Dec
  FY H2:  1 Jan - 30 Jun

System Builder must meet eligibility and purchase requirements for each Co-op period and eligible System Builder must re-enroll at the start of each Co-op period.
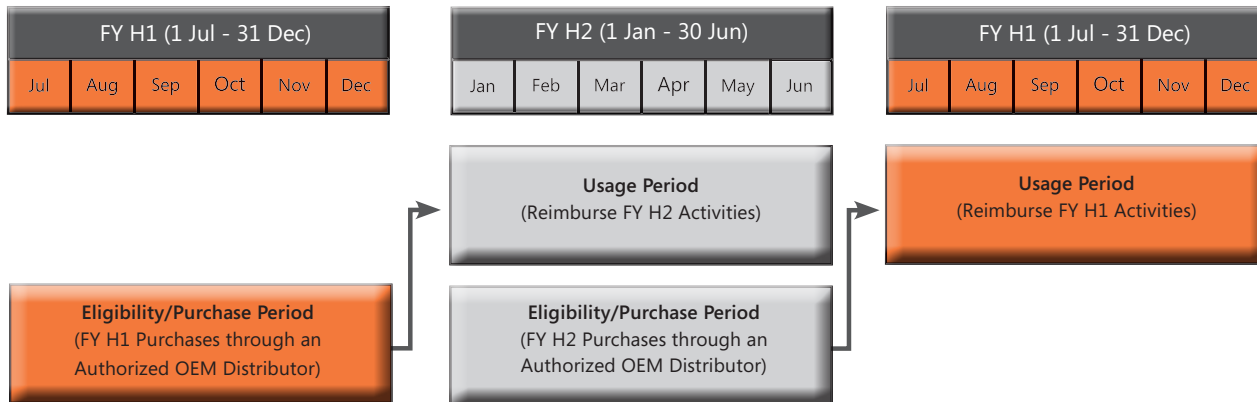


There are eligibility/purchase periods and usage periods. System Builders meeting the eligibility and purchase requirements in the eligibility/purchase period will be eligible to use the accrued funds in the usage period. The deadline for meeting the purchase requirements is 30 Jun for FY H1, and by 31 Dec for FY H2 to be eligible for Co-op.

# OEM Cooperative Marketing Fund: Overview

## Co-op Eligibility Requirements for System Builders

To participate in Co-op, a System Builder must meet minimum qualified purchases and have Active status in the Microsoft Partner Program[3] by 30 Jun for FY H1 or by 31 Dec for FY H2. The minimum purchase requirement must be met in at least one product family for eligibility. The deadline for meeting the technical certification requirement is the end of the first quarter in the fiscal half (either 31 Mar or 30 Sep). For example, a System Builder must have Active status in the Microsoft Partner Program by 30 Jun for FY H1 or by 31 Dec for FY H2 and have met the technical requirement by 30 Sep for FY H1 or by 31 Mar for FY H2 to be considered for Co-op.

## Accruing Funds

Eligible System Builders accrue funds in U.S. dollars based on the number of qualifying partner licenses for each product family where the minimum purchase requirement is met. Qualifying purchases must be through a Microsoft Authorized OEM Distributor[1] in the 6 month Co-op eligibility/purchase period. Eligible partners may use their accrued funds during the following 6 month Co-op usage period for Demand Generation, Market Development and Partner Readiness activities.

[1] For a list of Microsoft Authorized OEM distributors, visit: http://www.microsoft.com/oem/authdist/default.mspx.

## Enrollment

Eligible System Builders who chose to participate need to enroll in Co-op at the start of each Co-op period through the Co-op Web tool. The Co-op Web tool is provided to assist in managing Co-op resources. See for instructions to set up your online Co-op account.

| System Builder Co-op Eligibility Requirements | | | |
|---|---|---|---|
| **Product Family** | **Market** | **6-Month Purchase Requirement (units)[2]** | **Eligibility Requirements** |
| **Windows Client** | A | 1,000 | Active status member in the Microsoft Partner Program[2] as of 30 JUN for the FY H1 Co-op period, and 31 DEC for the FY H2 Co-op period. |
| | B | 500 | |
| | C | 300 | Meet ONE of the following technical requirements as reported in the Partner Membership Center (PMC) as of 30 SEP for the FY H1 Co-op period, and 31 MAR for the FY H2 Co-op period. |
| **Microsoft Office** | A | 700 | • Have Active or Qualified status in the OEM Hardware Solutions competency, or |
| | B | 400 | • Have a PC or server that has passed the "Designed for Windows" logo program testing through the Windows Hardware Quality Labs (WHQL) in the last 24 months, or |
| | C | 100 | |
| **Windows Server** | A | 100 | • Have Microsoft Certified Professional (MCP) status by employing or contracting with an individual who has passed the Pre-installation Assessment Exam 74-134, or any one of the following MCP Exams: 70-272, 70-282, 70-290, 70-620, 70-621, 70-623, 70-624, 70-655. |
| | B | 70 | |
| | C | 30 | Ineligible if participating as a Sub-Distributor in the OEM Cooperative Marketing Fund (Co-op) for Sub-Distributors. |

[2] Net purchases of eligible System Builder licenses through Microsoft Authorized OEM Distributors during the accrual period as reported in MS-Sales as of 14 Jan for the FY H1 period and 14 July for the H2 period.
[3] Local requirements may vary.

| Markets By Country | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **Market A** | **Market B** | | | | | | | | **Market C** |
| United States[4] Japan Canada | Australia Austria Belgium Brazil Bulgaria China Cyprus | Czech Republic Denmark Estonia Finland France Germany | Greece Hong Kong Hungary Iceland India Ireland Israel | Italy Korea Latvia Liechtenstein Lithuania Luxembourg Malaysia | Malta Mexico Monaco Netherlands New Zealand Norway Poland | Portugal Romania Russia Singapore Slovakia Slovenia South Africa | Spain Sweden Switzerland Taiwan United Kingdom | | All others |

[4] Not currently participating in Co-op.

**Overview**

**Co-op Marketing Category Overview**

| Category | Reimbursement Rate* | Category Description | Eligible Activity Examples | Activity Timing |
|---|---|---|---|---|
| **Demand Generation** | 100% | Traditional advertising with broad reach that furthers the marketing and promotion of genuine Microsoft software. Results and audience size are measurable. | Print, broadcast, Web/online, outdoor, direct mail, and e-mail. | Conduct activity within the Co-op usage period. Submit fully documented claim after conducting the activity and before the claim deadline. |
| **Market Development** | 100% | Marketing activities designed for a specific customer audience that support the sale of genuine Microsoft based systems. | Tradeshows, events, seminars, telemarketing, sponsorships, customer offers, internal incentives, Web/online or e-commerce, promotional retail displays. | Get Market Development plan concept approval, conduct activity within the Co-op usage period. Submit fully documented claim after conducting the activity and before the claim deadline. |
| **Partner Readiness** | 100% | Expenses related to Microsoft training, technical certification, and program fees that promote the development of Microsoft technology expertise. | MSPP registration fees, WHQL fees, partner exam fees, Microsoft conference registration fees, Microsoft training tuition fees, Microsoft certification exam fees. | Conduct activity within the Co-op usage period. Submit fully documented claims after conducting the activity and before the claim deadline. |

* Reimbursement Rate: Percentage of activity cost reimbursed for approved claims, up to amount of available funding.

**Advertising Standards**

All Demand Generation and Market Development activities must adhere to:
- All international, national, regional, corporate and local guidelines, laws and rules, and privacy policies
- Standards of good taste and must not be sexually oriented or otherwise offensive or inappropriate

**Ineligible Activities and Expenses**

Co-op funds may not be used to reimburse:
- Costs associated with the manufacture or distribution of customer systems, including costs related to bills of materials and costs of goods
- Infrastructure, overhead, depreciable asset expenses (e.g., vehicles, capital equipment, etc.), or real property
- VAT taxes, government fees, excises, tariffs or any other taxes related to the implementation of Co-op Marketing Activities
- Costs associated with advertising on a Web site owned or operated by Company or Company Subsidiary(ies)
- Company's requirement to match or otherwise contribute to any marketing funds provided under a Microsoft joint marketing agreement or any other marketing program offered by Microsoft or any of its affiliated companies (i.e., Company may not use any Co-op funds to satisfy any marketing funds contribution requirement by Microsoft or its affiliates)
- Multiple claims for a single activity expense
- Travel expenses, including meals, flights, mileage and any other travel costs
- Microsoft software, cash or service rebates of any kind on systems sold

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# Co-op Core Requirements

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## Co-op Core Requirements

**Co-op core requirements must be met for an activity to be eligible for Co-op reimbursement.**

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

### 1. Prominently Displayed Co-op Tagline

The Co-op tagline must be present in all Demand Generation and Market Development activities to be considered for Co-op reimbursement. Prominent display of the tagline (page 5) demonstrates commitment preinstalling genuine Microsoft software.

**Co-op taglines approved for System Builders.**

1. [We/Company name] preinstall genuine [Microsoft® software/specific product].
   Example:  [Company name] preinstalls genuine Microsoft® software.
2. Built with genuine [Microsoft® software/specific product].
   Example:  Built with genuine Windows Vista® Home Premium.
3. [We/Company name] recommend genuine [Microsoft® software/specific product].
   Example:  [Company name] recommends genuine Windows Vista® Business.

### 2. Prominently Displayed Company Name and/or Brand and Contact Information

Prominently display company name and/or brand and contact information in the activity. Contact information must include at least one of the following
- Your company address
- Your company Web site URL

### 3. Minimum 30% Microsoft Content in Support of the Sale of a Fully Assembled System with Preinstalled Genuine Microsoft Software

The activity should include:
- A minimum of 30% of the content in Demand Generation and Market Development activities must directly support the sale of a fully assembled system preinstalled with genuine Microsoft software. Preinstalled Microsoft product in the system specifications, where specifications are listed.
- An associated partner software graphic, campaign element, or other eligible logo on the page. See (page 5).

# Microsoft Content Guidelines: Tagline, Logo and Graphics Usage

**Tagline Prominence**

- **Clear Space**. Keep a border of clear space around the Co-op tagline. The required border of clear space must be a minimum of the height of the letters.

- **Placement**. The Co-op tagline must be prominently displayed in the activity. Typically, this is within the upper one-third of a print activity, or is otherwise easily identifiable.

- **Background**. The Co-op tagline must appear on a background that adequately contrasts with the tagline text to make the tagline clearly legible.

- **Translation**. The Co-op tagline may be translated, but the wording must not be changed.

- **Font**. Fonts must be consistent with the core advertisement and text size. Do not mix typefaces or weights. All words must be the same size and color. Do not use all caps, small caps, or italics.

**Using Microsoft Templates**

Microsoft has created a number of easy-to-use marketing campaign templates for partners. Add the Co-op tagline and customize these templates for partner specific messages and brands.

To access OEM Marketing campaign templates, visit and log in: https://www.oem.microsoft.com.

Ensure that the template includes the Co-op tagline and Company/brand name and contact information for Co-op eligibility.

**Logo and Graphics Usage**

Approved graphical elements may be used in Demand Generation and Market Development activities.

Any use of logos must comply with logo usage eligibility. You may not use logos for which you have not met requirements.

Participation in Co-op must not be construed as endorsement or approval of content by Microsoft, including but not limited to any brand, company name, product technology, or product performance claims.

Use of approved logos or graphics must follow guidelines. Inappropriate use of logos or unapproved graphics may result in claim denial.

Regional logos require approval for use with Co-op.

**For trademark guidelines, visit:**
http://www.microsoft.com/trademarks

**To view all available partner software graphics and to obtain graphic downloads, visit and log in:**
https://www.oem.microsoft.com

**Partner Software Graphics**

Microsoft has introduced a series of partner software graphics that may be used to create customized marketing materials. Partner Software Graphics for OEM partners (a few examples are shown below) help:
- Represent Microsoft software preinstalled on systems sold to customers.
- Enhance advertising, Web sites, online banners, and other marketing materials.
- Support hardware partners' marketing efforts to drive sales of specific preinstalled product SKUs.
- Assure customers that their systems are preinstalled with genuine Microsoft software.

Partner Software Graphics do not compete with existing logo programs or pose a risk to Microsoft brand equity. The graphics are for use ONLY in partner-branded materials so they clearly show they originate from you and not in Microsoft branded materials provided to you by Microsoft.

**Examples**



Microsoft® Windows Vista® Ultimate

Microsoft® Windows Vista® Business

Microsoft® Windows Vista® Home

Microsoft® Office Ultimate 2007

Windows® Small Business Server 2003 R2 Standard Edition

Windows® Small Business Server 2003 R2 Premium Edition

**Logo and Graphics Usage**

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## Microsoft Certified or Gold Certified Partner

Microsoft Certified or Gold Certified Partners may elect to use the appropriate logo in Co-op activities according to these logo usage guidelines.

**Translation**. The logo image must be retained in English.

**Clear Space**. A minimum amount of clear space must be left between the logo and other objects. The border must equal the height of the word Microsoft in the logo.

**Minimum Size**. Logos must be readable and maintain the integrity of the element. The minimum acceptable size for the logo is 1 inch (2.54 cm).

**Color Palette**. The logo may appear in two colors: in black or reversed out to white. Use appropriately to your audience and budget. Do not alter or change the color.

**Orientation**. The logo must never be displayed on its side.

**Lockup**. The logo must never be taken apart or recombined in any way to create new artwork. No part may be changed or resized in any way.

**Competency Usage**. If you have achieved any Microsoft Competency—you may use the competency logo lockup according to the usage guidelines.

**Note**:  Use of the Certified or Gold Certified Partner logo or Designed for Windows logo by partners not qualified for their use will result in claim denial.

## Examples

Clear space
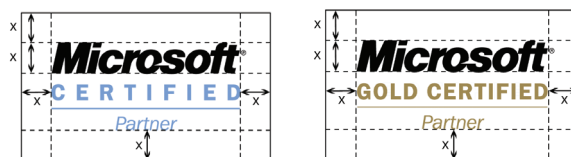


Minimum size



Minimum size 1 inch wide          Minimum size 1 inch wide



**For Logo Builder Tool to create and download your logo, visit:**
https://www.wwmsb.com

## Windows Screen

You may use the Windows screen display graphic on monitors for your activity.



## Designed for Windows Logo

The "Designed for Windows" logo may be used only in conjunction with the system that has passed WHQL testing.

**Usage**. Use the "Designed for Windows" logo in conjunction with a Windows based system. Never crop the logo. Do not change the logo colors, flip the logo, change its perspective, or outline it. The logo cannot be translated or changed in orientation.

**Clear Space**. A minimum amount of clear space must be between the logo and other objects. The clear space around the logo must be equal to the height of the lowercase letters in "Windows". The logo must not be contained within a box, circle, or other shape.

**Minimum Size**. Logos must be readable and maintain the integrity of the element. The minimum acceptable size for the logo is .5 inches, or 32 pixels.

**Color Palette**. The full-color version must be used whenever possible.

**Lockup**. The logo must never be taken apart or recombined in any way to create new artwork. No part may be changed or resized in any way.

## Examples

Clear Space          Sizing



Minimum size .5"

**For more information, visit:**
http://www.microsoft.com/whdc

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## Claim Requirements

After enrollment, partners may submit claims after conducting qualifying activities within the Co-op usage period. The Claim Submission Form and proof of performance documentation must be received by the Co-op claim validation team by the claim deadline.

The estimated claim reimbursement may be adjusted based on the amount of Co-op funds available.

### Demand Generation Claims

Co-op reimburses expenses for both **Media Placement** (page a) and **Marketing Services** (page a). They can be claimed at the same time for activity that has taken place within the Co-op usage period with proper documentation.

### Market Development Claims

Market Development activity claims may only be submitted after the plan has concept approval by a Microsoft account manager (page 15). Approval of a Market Development plan does not guarantee reimbursement of claims as activities need to meet the Co-op guidelines.

Market Development planned activities conducted in the Co-op usage period may be submitted up to the amount of the approved Market Development plan.

### Partner Readiness Claims

Partner Readiness claims may be submitted for any qualifying readiness activity conducted within the Co-op usage period.

## Proof of Performance

All claims require proof of performance be submitted for validation to assess program compliance.

Proof of performance must be accompanied by the Claim Submission Form. Incomplete or missing documentation may cause delays in processing.

Proof of performance documentation may be uploaded directly to the Co-op Web tool (combined file size limit of 15MB) sent by e-mail, post, or fax. For a list of accepted file types please see page a.

The costs associated with sending and submitting proof of performance are not reimbursable through Co-op.

**Note:** Claims submitted after the funds for that period have been fully utilized will not be reimbursed.

Monthly notifications are sent reminding of open claims requiring a Claim Submission Form and proof of performance. **Please allow 6-10 weeks from the claim approval date for reimbursement.**

### ☑ Co-op Claim Submission Process

1. Review Co-op Guidebook for activity requirements and guidelines.
2. (Recommended) Submit your activity for preapproval by e-mail.
3. Conduct the activity.
4. Collect required proof of performance documentation for the type of activity conducted.
5. Log on to the Co-op Web tool http://www.microsoftcoop.com. Page 8 has more information on the Co-op Web tool.
6. Enter claim information into the Claim Submission Form and submit.
7. Upload, e-mail, fax or post proof of performance documents* before the Co-op deadline. When submitting proof of performance by e-mail, fax, or post, include the claim number, organization name and Co-op ID in the subject line or cover page.

| Claim Timing and Deadlines | FY H1 Period (Jul – Dec) | FY H2 Period (Jan – Jun) |
|---|---|---|
| Activity completed by: | 31 Dec | 30 Jun |
| Claim and proof of performance submission deadline: | 15 Feb | 15 Aug |

\* Microsoft reserves the right to request original proof of performance documents. You must maintain all original documents for a period of 12 months from the activity date.

## Co-op Web Tool

The Co-op Web tool is provided to assist in managing Co-op resources and may be used to:
- Enroll to participate in Co-op
- View account summary information
- Submit Market Development plans for concept approval by a Microsoft account manager
- Submit reimbursement claims and proof of performance documentation
- Review claim and payment status
- Access Co-op resources
- Open and view support inquiries

## Primary contacts

- Have access to the organization's account profile and banking information.
- Must be listed in the organization's MSPP Profile at https://partners.microsoft.com/partnerprogram/Welcome.aspx.
- Open a support ticket or e-mail customerservice@microsoftcoop.com requesting the primary contact set up in your Co-op account.

## Account Users

- Do not have access to the organization's account profile and banking information.
- To add account users, enter name and e-mail address into the add account user section of the manage profile page.

For issues regarding account user setup or primary contacts, open a support ticket or e-mail customerservice@microsoftcoop.com.

## Enrollment

1. Enrollment must be done by a primary contact
2. Log on the Co-op Web tool using:
   - The registered e-mail address
   - Co-op access ID
   - First time users must select the "retrieve or reset password" option to obtain a temporary password
   - The temporary password will be e-mailed to the registered primary contact e-mail address
   - After logging in using the temporary password, the user will be directed to change the password
3. Read and accept the OEM Cooperative Marketing Fund (Co-op) Agreement, review the Co-op Guidebook, and take the training.

## Account Information Page

After enrolling, the user is directed to the account information page. Review the account information to verify contact information and complete banking information to facilitate payment.

1. Review organization and contact information:
   - Company Name
   - Company Address
   - Primary Contact
2. Verify payment and banking information (page 10).
3. User information: Designate who may access fund information.

## Home Page

The home page provides quick access to the following types of information:

❶ **Accrued Funds**. Shows total accrued funds for the current usage period.
❷ **Available Funds**. Funds available for Demand Generation, Market Development, and partner readiness claims in the current usage period.
❸ **Committed Funds**. Total funds committed to claims that have been submitted.
❹ **Reimbursed To Date**. Indicates payments made to date.
❺ **Reports**. There are several reports available on the status of claims and fund usage.
❻ **Partner Resources**. Has links to the Guidebook, Agreement, localized taglines as well as Procedure Guides and Partner Examples. Additional links and resources also available.
❼ **Support Inquiries**. If you have questions regarding your Co-op account, please open a support case through the Co-op Web tool or send an e-mail including your organization name and Co-op ID to customerservice@microsoftcoop.com.

**Example Partner Home Page**
(Actual view may vary)



**Co-op Web Tool**

## Banking Information

During the enrollment process partner primary contacts are required to submit bank account information. This information must be complete and accurate in order to disburse funds for approved claims in a timely manner.

Payments are disbursed based on the payment method (electronic funds transfer: ACH or MWIRE) and currency specified (or USD as appropriate). Transaction fees will be paid by Microsoft. However, you will be responsible for any additional fees charged by your financial institution.

The number one cause of delayed Co-op payments is incorrect, inaccurate or incomplete banking details.

Please verify your banking information with your financial institution to ensure prompt payment.

### Payment Information Screen

1. Contact Name
2. Contact Name (International Banking Version)
3. Contact Phone Number
4. Company Name/Bank Account Name
5. Company Name/Bank Account Name (International Banking Version)
6. Company Address Line 1
7. Company City, State/Province, Postal Code
8. Company City, State/Province, Postal Code (International Banking version)
9. Full Bank Name
10. Branch Name
11. Bank Address

**Example** (Actual view may vary)



**Banking Information**

Due to international banking standards the fields below for bank detail must use characters from the following chart. If any character not included in this chart is used in your payment information, your claim payment may be delayed.

Chart of valid characters

**Payment Information**

| # | Field | Value |
|---|-------|-------|
| 1 | Company Name/Bank Account Name | John Smith |
| 2 | Contact Name International Banking version | |
| 3 | Contact Phone Number | 012 345 6789 |
| 4 | Company Name/Bank Account Name | Our Company's Bank Account Name |
| 5 | Company Name/Bank Account Name (International Banking Version) | |
| 6 | Company Address Line 1 | 123 Everywhere Lane |
| | Company Address Line 1 (International Banking Version) | |
| | Company Address Line 2 | Suite 1000 |
| 7 | Company City, State/Province, Postal Code | Our Town, Our State |
| 8 | Company City, State/Province, Postal Code (International Banking Version) | |
| | Company Country | |
| 9 | Full Bank Name | Bank of the World |
| 10 | Branch Name | |
| 11 | Bank Address Line 1 | 1234 Bank St |
| | Bank Address Line 2 | |

Company names and addresses containing non-standard ASCII characters must have the information entered in standard ASCII characters per the table at the top of the payment information page. "International Banking Version" fields are provided on the form for this information. International banking standards require transaction information be transmitted in standard ASCII.

**Payment Processing**

Payments for approved claims are processed twice a month. **Payments are typically disbursed 6 to 10 weeks from the date of claim approval**. Multiple approved claims in the same disbursement period, will be consolidated into one payment.

**Currency Exchange Rates**

For claims where payment is requested in local currency, enter both the local currency expense amount and USD-converted amount during the claims submission process on the Co-op Web tool using the currency exchange calculator link. Due to fluctuation in currency exchange, the actual reimbursement amount you receive may vary.

Claims will be processed for claim amount on the date of claim submission. Currency fluctuation between the claim submission date and claim verification date is possible when complete proof of performance is not submitted at the time of claim entry. Adjustment to the claim amount will be made if the fluctuation is greater than 5%.

You will be notified by e-mail if the reimbursement amount of your claim is adjusted due to currency exchange rate fluctuation.

**Requirements for Europe, Middle East, and Africa (EMEA)**

Co-op partners requiring to submit Value Added Tax (VAT) invoices will receive a consolidated quarterly request via e-mail.

In order to maintain compliance, participating partners must submit quarterly VAT invoices. Failure to submit valid VAT invoices may result in payment delays.

**Payment Processing**

## Overview

Demand Generation activities have a broad reach and a defined audience size. They are usually associated with traditional advertising methods such as print, broadcast, and Web.

## Eligible Activities

- Print, multi-page print advertisements, and catalogs (page 13)
- Direct mail and e-mail (page 13)
- Outdoor advertising (page 13)
- Web/Online advertising (page 14)
- Broadcast advertising (page 14)

## Activity Guidelines

These guidelines apply to all Demand Generation activities. Specific requirements for each activity are available in the following pages.
- Activities may be submitted for optional preapproval before conducting the activity.
- Activities may include components and messaging from complementary vendors.
- Activities must adhere to all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

## Demand Generation - Preapproval (Recommended)

Preapproval of Demand Generation is optional, but recommended to ensure compliance with Co-op core requirements and guidelines. Activities may be submitted for preapproval by e-mail to preapproval@microsoftcoop.com a minimum of 3 days before the activity is scheduled to begin. The Co-op preapproval team will review the activity and preapprove or request changes/corrections to achieve compliance within 3 calendar days.

Approved activities will be assigned a preapproval code which must be provided along with proof of performance at the time of claim submission. The activities must be conducted exactly as approved. Any deviation, with the exception of dates and pricing, from the approved activities will result in the activities being re-assessed. Activities that run unchanged (with the exception of dates and pricing) multiple times may use the same preapproval number.

### ☑ Co-op Claim Submission Process

1. Review Co-op Guidebook for activity requirements and guidelines.
2. (Recommended) Submit your activity for preapproval by e-mail.
3. Conduct the activity.
4. Collect required proof of performance documentation for the type of activity conducted.
5. Log on to the Co-op Web tool http://www.microsoftcoop.com. Page 8 has more information on the Co-op Web tool.
6. Enter claim information into the Claim Submission Form and submit.
7. Upload, e-mail, fax or post proof of performance documents* before the Co-op deadline. When submitting proof of performance by e-mail, fax, or post, include the claim number, organization name and Co-op ID in the subject line or cover page.

| Claim Timing and Deadlines | FY H1 Period (Jul – Dec) | FY H2 Period (Jan – Jun) |
|---|---|---|
| Activity completed by: | 31 Dec | 30 Jun |
| Claim and proof of performance submission deadline: | 15 Feb | 15 Aug |

\* Microsoft reserves the right to request original proof of performance documents. You must maintain all original documents for a period of 12 months from the activity date.

**Demand Generation**

**Co-op Core Requirements (page 4)**

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Demand Generation guidelines and information regarding optional preapproval is available on page 11.

| Reimbursement Rate up to 100% of Actual Costs | | |
|---|---|---|
| **Activity Type** | **Additional Eligibility Requirements** | **Required Proof of Performance Documentation*** |
| Print, Multi-Page Print Advertisements, Brochures and Catalogs | Page 13 | • Tear sheet from the printed publication<br>• Invoice(s) |
| Direct Mail and E-mail | Page 13 | • Mailed piece including postmarked shipping envelope from provider<br>• Invoice(s) |
| Outdoor Advertising | Page 13 | • Final piece in electronic form<br>• Photographs showing detail and overall view of the live billboard placement<br>• Invoice(s) |
| Web/Online Advertising | Page 14 | • Electronic file of the Web banner and link to the landing page<br>• Click-through report from third-party<br>• Invoice(s) |
| Broadcast Advertising | Page 14 | • Spot as aired (tape provided as proof of purchase from station)<br>• Invoice(s)<br>• Scripts |

* Claim forms and proof of performance must be received by the validation team no later than the Co-op deadline stated on the claim form.

# Activity Requirements: Print, Direct Mail, E-mail, and Outdoor Advertising

## Co-op Core Requirements (page 4)

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Demand Generation guidelines and information regarding optional preapproval is available on page 11.

### Print Advertising Requirements

- Appear in publications with an established circulation rate.

**Additional Multi-Page Print Advertisement and Catalog Requirements**

- Catalogs delivered to an established list of new or existing customers.
- Reimbursement will be based on percentage of activity that meets the minimum 30% Microsoft content in support of sales of fully assembled systems with preinstalled Microsoft software.

#### ☑ Required Proof of Performance

- ☐ Tear sheet(s) from the printed publication demonstrating compliance with core-requirements.
- ☐ Invoice(s) from third-party vendor.

### Direct Mail and E-mail Requirements

- Executed through a third-party fulfillment house or e-mail distributor.
- Delivered to an established list of new or existing customers.

#### ☑ Required Proof of Performance

- ☐ Mailed or e-mailed piece.
- ☐ Postmarked shipping envelope from provider (direct mail).
- ☐ Be sure to add your organization's e-mail address to the distribution list and provide as proof of performance.
- ☐ Invoice(s) from third-party vendor.

### Outdoor Advertising Requirements

- Appear in an outdoor advertising space that has an established and measured advertising rate.
- Appear in outdoor advertising that is directed toward end users.

#### ☑ Required Proof of Performance

- ☐ Final piece in electronic form.
- ☐ Photographs showing detail and overall view of the live billboard placement.
- ☐ Invoice(s) from third-party vendor.

**Co-op Core Requirements (page 4)**

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Demand Generation guidelines and information regarding optional preapproval is available on page 11.

**Demand Generation**

### Web/Online Advertising Requirements

- Appear on a Web site that has an established advertising rate.
- Placed on a third-party site of which not more than 10% is partner owned.
- Placed on a site with content adhering to high standards of good taste.

☑ **Required Proof of Performance**

- ☐ Electronic file of the Web marketing piece or activity with link to the landing page
  For example:
  - Banner
  - Web advertisement
  - Search engine placement

- ☐ Click-through report from third-party
- ☐ Invoice(s) from third-party vendor

### Television Requirements

- Co-op tagline is prominently displayed on the television advertisement for a minimum of 3 seconds.
- The voice-over script mentions that the systems include genuine Microsoft software.
- Co-op tagline in voice-over is delivered in normal tone and voice which lasts a minimum of 3 seconds and is free of sound effects or loud music and is clearly understandable.
- Air on networks that are legally recognized or regulated by the appropriate authority in the broadcast country or origin.

☑ **Required Proof of Performance**

- ☐ Spot as aired (tape provided as proof of purchase from station)
- ☐ Invoice(s) from third-party vendor
- ☐ Script spot as aired

### Radio Advertising Requirements

- Voice-over includes the Co-op tagline delivered in normal tone and voice which lasts a minimum of 3 seconds, and is free of sound effects or loud music and is clearly understandable.
- Air on radio stations that are legally recognized by the appropriate authority in the broadcast country or origin.

☑ **Required Proof of Performance**

- ☐ Spot as aired (tape provided as proof of purchase from station)
- ☐ Invoice(s) from third-party vendor
- ☐ Script spot as aired

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## Overview

Market Development activities include customer events, business-to-business development trade shows, sponsorships, and offers and incentives that support the sale of fully assembled systems preinstalled with genuine Microsoft software. Typically, these marketing and advertising activities are designed for a specific customer audience.

### Market Development Plans - Required Approval

**All Market Development plans are required to have concept approval by a Microsoft account manager before activities may begin.**

Market Development plans must be submitted via the Co-op Web tool before the planned activities are scheduled to begin to allow time for review.

Once the plan has been submitted, a Microsoft account manager will review and render a decision on the plan concept. Notification of the decision will be sent via e-mail.

After the plan has concept approval, the Market Development activities associated with the plan may be conducted. Approval of a Market Development plan does not guarantee reimbursement of claims as activities need to meet the Co-op core requirements and guidelines.

Submitting a Market Development plan does not commit Co-op funds. Claims submitted against plan activities commit funds.

### Plan Cancellation

Cancellation of a Market Development activity may be requested by submitting a support case if the activity is an approved plan activity that has not been claimed.

### Market Development Activities - Preapproval (Recommended)

Once the Market Development plan has concept approval, it is recommended that activities (e.g. banners, printed materials, displays) be submitted for preapproval by e-mail to preapproval@microsoftcoop.com prior to conducting the activity to ensure compliance with the Co-op guidelines. The Co-op preapproval team will review the activities and respond within 3 calendar days.

Preapproved activities will be assigned a preapproval code which must be provided along with proof of performance at the time of claim submission. The activities must be conducted exactly as approved. Any deviation from the approved activities will result in the activities being re-assessed.

### Eligible Activities

- Trade shows, events and seminars (page 18)
- Telemarketing (page 19)
- Sponsorships (page 20)
- Customer Offers (page 21)
- Incentives (SPIFFS) (page 21)
- Online or e-commerce (page 22)
- Promotional retail display materials (page 23)

### Activity Guidelines

These guidelines apply to all Market Development activities. See the page for each activity for specific requirements.
- Customer focused or targeted activity.
- Activities may include components and messaging from other complementary vendors.
- Activities must adhere to all international, national, regional, corporate, and local guidelines, laws and rules, standards of good taste, and privacy policies.

### ☑ Market Development Plan Submission Process

1. Log on to the Co-op Web tool http://www.microsoftcoop.com. Page 8 has more information on the Co-op Web tool.
2. Enter Market Development plan activity expense details and submit the plan.
   - Submit plan before planned activity date to allow time for review.
   - The plan is reviewed by the account manager.
   - Notification will be sent by e-mail when the plan is approved, rejected, or pending further review.
3. Once the plan is approved the associated Market Development activities may beconducted.

Recommended: Submit plan activities (e.g. banners, printed materials, displays) for preapproval directly to: preapproval@microsoftcoop.com.

**Market Development**

# Market Development Claims

## Market Development Considerations

Consider the following when planning activities and submitting claims for Market Development activities:

1. Follow the marketing guidelines in this guidebook in order to be eligible for reimbursement (page 4).
2. Market Development activities must have a well-defined strategy and provide a compelling marketing Return On Investment (ROI) as discussed and agreed upon by the customer and their account manager. This can be accomplished by helping to ensure a targeted customer message, placing content in media that is targeted to partner specific market segments, having a compelling call-to-action, and providing a way for customers to interact or respond.
3. The information provided when submitting a claim must meet the required deadlines and be accurate.
4. Approval of Market Development plans is based on the plan concept. Plan approval does not guarantee claim approval. Claims must meet the Co-op guidelines including the required proof of performance to be approved.



| MD Plan | ·········· | Activity |
|---|---|---|

Account/marketing manager concept approval

Activity

Co-op claim validation team approval

Activity

## Claim Timing Requirements

Market Development activity claims may only be submitted after the Market Development plan has concept approval by a Microsoft account manager, and after the planned activity has been completed. The Claim Submission Form and proof of performance documentation must be received by the Co-op claim validation team no later than the claim submission deadline.

Claim amounts are limited to the approved Market Development plan activity cost and by the available funds at the time the claim is submitted. Claims submitted after the funds for that period have been fully utilized will not be approved.

**Note**: Use of the Certified or Gold Certified Partner logo or Designed for Windows logo by partners not qualified for their use will result in claim denial.

## ☑ Claim Submission Process

1. Receive Market Development plan concept approval by e-mail.
2. Review the Co-op guidelines for your activity.
3. (Recommended) Submit your Market Development activity for preapproval by e-mail.
4. Conduct the Market Development planned activities.
5. Collect proof of performance documentation for the type of activity conducted.
6. Submit claim using the Co-op Web tool http://www.microsoftcoop.com. Page 8 has more information on the Co-op Web tool.
7. Upload, e-mail, fax or post proof of performance documents* before the Co-op deadline. When submitting proof of performance by e-mail, fax, or post, include the claim number in the subject line or cover page.

| Claim Timing and Deadlines | FY H1 Period (Jul – Dec) | FY H2 Period (Jan – Jun) |
|---|---|---|
| Activity completed by: | 31 Dec | 30 Jun |
| Claim and proof of performance submission deadline: | 15 Feb | 15 Aug |

\* Microsoft reserves the right to request original proof of performance documents. You must maintain all original documents for a period of 12 months from the activity date.

**Co-op Core Requirements (page 4)**

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Market Development guidelines and information regarding optional preapproval is available on page 15.

| **Reimbursement Rate up to 100% of Actual Costs** | | | |
|---|---|---|---|
| **Activity Type** | **Additional Eligibility Requirements** | **Reimbursable Expenses** | **Required Proof of Performance Documentation\*** |
| Tradeshows, Events, and Seminars | Page 18 | • Facility fees<br>• Event equipment rental<br>• Catering (excluding alcohol)<br>• Printed promotional materials<br>• Signage and display fees, including development, shipping and setup<br>• Agency fees<br>• Registration fees for booth display space and attendance | • Dated event photograph(s) and/or hard copies of printed materials<br>• Event agenda<br>• Presentation deck showing a minimum 30% Microsoft content<br>• Invoice(s) |
| Telemarketing | Page 19 | • Call center charges | • Copy of script<br>• Summary of results<br>• Number of calls<br>• Successful contacts<br>• Invoice(s) |
| Sponsorships | Page 20 | • Sponsorship fees<br>• Printed materials<br>• Signage and displays<br>• Agency fees | • Dated event tear sheet(s) or photograph(s) and/or hard copies of printed materials<br>• Invoice(s) and/or printed materials supporting the offer |
| Offers and Incentives | Page 21 | • Incentives, offers and giveaways<br>• Printed materials<br>• Agency fees<br>• Incentives (SPIFFS) | • Sample giveaway item(s), tear sheet(s), dated event photograph(s), and/or hard copies of printed materials<br>• Invoice(s)<br>• Contest rules and summary of results based on contest metrics |
| Web/Online Marketing and E-commerce | Page 22 | • Agency fees<br>• Programming and development fees directly related to Co-op eligible content | • Screen shots and URL<br>• Invoice(s) |
| Promotional Retail Display | Page 23 | • Agency fees<br>• Printed materials<br>• In-store retail display<br>• Permanent signage | • Photograph(s)<br>• Invoice(s) |

\* Claim and proof of performance must be received by the validation team no later than the Co-op deadline stated on the claim form.

## Activity Requirements: Tradeshows, Events, and Seminars

### Co-op Core Requirements (page 4)

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Market Development guidelines and information regarding optional preapproval is available on page 15.

**Tradeshow and Event Guidelines**

- Include a prominently displayed Co-op tagline on the booth, banner, table-top signage, display, or event promotional mailing or e-mail message.
- Booth and materials must not mislead the audience that the booth is "sponsored by" or "provided by" Microsoft.

**Eligible Activities**

Tradeshow and event expenses include:
- Booth signage
- Table-top signage and handouts:
  - Large table-top sign
  - Product sheets
  - Sales sheets
  - Promotional materials
  - Event binders
  - Attendee materials
- Demonstration: Use an interactive display to communicate with customers
- Promotional mailings
- Giveaways

**Allowable Expenses**

Third-party expenses associated with:
- Facility fees
- Event equipment rental
- Catering (excluding alcohol)
- Printed promotional materials
- Signage and display fees, including development, shipping, and setup
- Agency fees
- Registration fees for booth

**Best Practices**

- Provide giveaways to attract attendees, increase participation, and collect customer information.
- Customize your tradeshow or event strategy based on the unique needs of your business.

**Please refer to the Tradeshow and Events Procedure Guide for more information.**

☑ **Required Proof of Performance**

Demonstrate the Co-op core requirements have been met by submitting all that apply:
- ☐ Dated event photographs and/or copies of printed materials
- ☐ Event agenda and/or presentation deck showing a minimum of 30% Microsoft content
- ☐ Invoice(s) from third-party vendor including:
  - Items contracted for delivery
  - Date delivered
  - Amount

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## Co-op Core Requirements (page 4)

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Market Development guidelines and information regarding optional preapproval is available on page 15.

Telemarketing can be an effective tool to prospect for leads and communicate directly with customers. Use accrued Co-op funds to develop and launch telemarketing campaigns.

**Telemarketing Guidelines**

- Co-op tagline must be included in the script.
- Use the appropriate trademarked names for software in the script.
- Indicate that the phone message is sponsored by your company and not Microsoft.

**Allowable Expenses**

Third-party expenses associated with:
- Call center charges

**Best Practices**

- Focus on communicating the most important message and driving a response.
- Appeal to customers by meeting a specific need.
- Have a strong call-to-action and response mechanism.
- Make sure the customer list is targeted, focused, and cleaned prior to conducting the telemarketing campaign.
- Test multiple lists and offers to see which has the greatest impact.
- Telemarketing can be used to make sales calls, build a sales pipeline, or communicate with existing customers.

### ☑ Required Proof of Performance

Demonstrate the Co-op core requirements have been met by submitting all that apply:
- ☐ Copy of script
- ☐ Summary of results
  - Number of calls made
  - Successful contacts
- ☐ Invoice(s) from the third-party call center vendor including:
  - Items contracted for delivery
  - Date delivered
  - Amount

**Market Development**

# Activity Requirements: Sponsorships

## Co-op Core Requirements (page 4)

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Market Development guidelines and information regarding optional preapproval is available on page 15.

Sponsorships can provide access to customers and can be an effective tool to communicate brand messaging. Use sponsorships to make connections with customers—and receive reimbursement for a portion of expenses for activities that meet Co-op requirements.

Sponsorships are primarily designed to build relationships and brands, not drive sales. They can be an effective communication tool, but are hard to quantify and tie to sales.

**Sponsorship Guidelines**

- Include a prominently displayed Co-op tagline in sponsorship materials.
- All print materials meet branding and logo usage guidelines (page 5).
- Must have a target customer audience.

**Eligible Activities**

Sponsorship activities include:
- Signage
- Digital signage
- Giveaways

**Allowable Expenses**

Third party expenses associated with:
- Sponsorship fees
- Printed materials
- Signage and displays
- Agency fees
- Giveaways

**Best Practices**

- Provide ways for prospects and customers to respond.
- Include strong messaging.

### ☑ Required Proof of Performance

Demonstrate the Co-op core requirements have been met by submitting all that apply:
- ☐ Dated event photographs, tear sheets and/or copies of printed materials
- ☐ The third-party invoices including:
  - Sponsorship
    - Terms of the sponsorship
    - Dates of sponsored activity
    - Invoice date
    - Invoice amount
  - Signage vendor
  - Printing Vendor
    - Number of copies
    - Date produced
    - Shipping/handling amount

# Activity Requirements: Offers and Incentives

## Co-op Core Requirements (page 4)

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Market Development guidelines and information regarding optional preapproval is available on page 15.

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Customer Offers are directed to end users and create excitement and generate sales opportunities.

### Customer Offer Guidelines

- Offers for customers only
- Do not include Microsoft software
- Not be used to provide cash or service rebates of any kind on systems sold

### Eligible Activities

Customer offer activities include:
- Giveaway items
- Printed materials supporting the offer

### Allowable Expenses

Third-party expenses associated with:
- Giveaway items
- Signage and displays
- Printed materials
- Agency fees

### Best Practices

- Have a strong offer that is readily accessible, legible, and focused on the needs of the targeted customer.
- Offers that have a deadline encourage immediate action.

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**Please refer to the Customer Offer Procedure Guide for more information**

### ☑ Required Proof of Performance

Demonstrate the Co-op core requirements have been met by submitting all that apply:
- ☐ Copies of printed materials or tear sheets
- ☐ Dated event photograph(s)
- ☐ Photograph(s) of giveaway item
- ☐ Invoice from third-party incentive or give away vendor
- ☐ Invoice from the third-party printing vendor including:
  - Number of copies
  - Date produced
  - Shipping/handling amount

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### Incentives (SPIFFS) Guidelines

Incentives (SPIFFS) are prizes awarded to employees (e.g. sales staff) for achieving specific goals. SPIFFS are most effective when clear goals and time lines are set and the incentive is relevant to the goals. Incentives must:
- Not include Microsoft software.
- Not be used to provide cash.
- Limited to the lesser of 25% of total funds accrued or $20,000.

**Please refer to the Incentives (SPIFFS) Procedure Guide for more information.**

### ☑ Required Proof of Performance

Demonstrate the Co-op core requirements have been met by submitting all that apply:
- ☐ Contest rules and summary of results based on contest metrics
- ☐ Invoice from third-party incentive or give away vendor
- ☐ Invoice from the third-party printing vendor including:
  - Number of copies
  - Date produced
  - Shipping/handling amount

# Activity Requirements: Web/Online Marketing or E-commerce

## Co-op Core Requirements (page 4)

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Market Development guidelines and information regarding optional preapproval is available on page 15.

Use Market Development funds to promote solutions or set up online storefronts to drive genuine Windows based system purchases.

**Web/Online Marketing or E-commerce Guidelines**

- Include a prominently displayed Co-op tagline.
- Developed by a third-party vendor not affiliated with your company.
- Result in an online experience that promotes the sale of fully assembled systems with preinstalled Microsoft software.

**Allowable Expenses**

Third-party expenses associated with:
- Programming and development fees directly related to Co-op eligible activities.
- Agency fees.

**Best Practices**

- Web page placement: Placing the Co-op tagline on the home page and key product pages helps create value by showing additional benefits of products.
- Links: Link to the Microsoft home and product pages.
- Banner advertisements: Place banners on key pages, including the home page, that link to product pages. This allows better measurement of results and expands the communication opportunity.
- Configuration drop-down menus: Create up-sell or cross-sell opportunities by configuring drop-down menus with Microsoft products.

### ☑ Required Proof of Performance

Demonstrate the Co-op core requirements have been met by submitting all that apply:
- ☐ Screen shots and URL.
- ☐ Invoice from third-party programming/ development vendor including:
  - Items contracted for delivery
  - Date delivered
  - Amount

**Market Development**

# Activity Requirements: Promotional Retail Display

## Co-op Core Requirements (page 4)

1. **Prominently displayed Co-op tagline.**
2. **Prominently displayed Company name and/or brand and contact information.**
3. **Minimum 30% Microsoft content in support of the sale of a fully assembled system with preinstalled genuine Microsoft software.**

Additional Market Development guidelines and information regarding optional preapproval is available on page 15.

For a retail storefront, using Market Development funds can be an ideal opportunity to promote commitment to preinstalling genuine Microsoft software.

### Promotional Retail Display Guidelines

- Stocked with product at all times (if applicable)
- Located in a high-traffic area

### Eligible Activities

Promotional retail display activities include:
- **In-store display**: Create in-store retail displays that promote the installation of genuine Microsoft software such as:
  - End caps
  - Window clings
- **In-store materials**: Print in-store materials that promote genuine Windows at the point-of-sale such as:
  - Shelf talkers
  - Sales materials
  - Tear sheets
  - Free-standing point-of-purchase displays
- **Permanent signage**: Install permanent signage on the storefront for ongoing value and communicating the partner's commitment to Microsoft for the long-term.

### Allowable Expenses

Third party expenses associated with:
- In-store retail display
- Permanent signage
- Printed materials
- Agency fees

### Best Practices

- Consider the size and layout of the retail storefront in determining point-of-sale materials.

### ☑ Required Proof of Performance

Demonstrate the Co-op core requirements have been met by submitting all that apply:
- ☐ Dated photographs
- ☐ Invoice from third-party vendor including:
  - Promotional display vendor
    - Amount paid
    - Services rendered
    - Date of purchase
- ☐ Invoice from the third-party printing vendor Including:
  - Printing vendor
  - Number of copies
  - Date produced
  - Shipping/handling amount

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## Overview

Partner Readiness reimbursement opportunities include specific expenses related to product training, technical certification, and Microsoft event registration that promote the development of Microsoft software preinstallation expertise.

Partner Readiness is necessary to stay competitive. Co-op helps offset readiness costs, including the costs associated with training and certification.

### Eligible Activities

Partner readiness reimbursement helps offset expenses including:

- Microsoft Partner Program registration fees (page 25).
- Microsoft training tuition fees such as:
  - Microsoft official curriculum through www.microsoft.com/learning (page 25).
  - Other Microsoft related training (such as Windows Vista readiness costs).
- Partner exam fees (page 25).
  - Recommended certification exams
  - Other Microsoft certification exams
- Windows Hardware Quality Lab (WHQL) fees.
- Microsoft conference registration fees (page 25).
  - Worldwide Partner Conference
  - Tech•Ed
  - Other as determined by the Microsoft account manager

The following expenses are not covered:

- Travel expenses, including meals, flights, mileage, and any other travel costs
- Materials other than predefined course materials
- Testing environments and other technology

### Claim Timing Requirements

Partner readiness claims may be submitted for any qualifying readiness activity that has taken place within the Co-op usage period.

The Claim Submission Form and proof of performance documentation must be received by the Co-op claim validation team no later than the deadline indicated on the Claim Submission Form.

Claims may only be submitted against available funds in the usage period. Claims submitted after the funds for that period have been fully utilized will not be approved.

### ☑ Proof of Performance Required

- ☐ Invoice with course code and dates included.

### ☑ Claim Submission Process

1. Review the Co-op guidelines for your activity (preapproval is not required).
2. Conduct the Partner Readiness activity.
3. Collect required proof of performance documentation.
4. Submit claim using the Co-op Web tool http://www.microsoftcoop.com. Page 8 has more information on the Co-op Web tool.
5. Upload, e-mail, fax or post proof of performance documents* before the Co-op deadline. When submitting proof of performance by e-mail, fax, or post include the claim number in the subject line or cover page.

| Claim Timing and Deadlines | FY H1 Period (Jul – Dec) | FY H2 Period (Jan – Jun) |
|---|---|---|
| Activity completed by: | 31 Dec | 30 Jun |
| Claim and proof of performance submission deadline: | 15 Feb | 15 Aug |

\* Microsoft reserves the right to request original proof of performance documents. You must maintain all original documents for a period of 12 months from the activity date.

**Partner Readiness**

# Partner Readiness Guidelines

This is a partial list of qualifying expenses. For a complete listing please visit http://microsoft.com/learning.

| Specific Guidelines for Partner Readiness Activities | Reimbursement Rate up to 100% of Actual Costs |
|---|---|
| **Readiness and Training Activities** | **Reimbursable Expenses** |
| Microsoft Partner Program registration fees | • Annual enrollment fee |
| Windows Hardware Quality Lab fees (WHQL) | • VeriSign fee up to US$600<br>• WHQL submission fee up to US$250 |
| Partner exam fees | • Required classes and exams for certifications and competencies<br>• Recommended certification exams<br>• Other Microsoft certification exams |
| Microsoft conference registration fees (Worldwide Partner Conference, Tech•Ed, other) | • Registration |
| Microsoft training tuition fees | • Microsoft Official Curriculum through http://www.microsoft.com/learning |

## Exams

| List of Recommended Exams | |
|---|---|
| Exam 70-620 | Configuring Microsoft Windows Vista Client |
| Exam 70-624 | Deploying and Maintaining Windows Vista Client and 2007 Microsoft Office System Desktops |
| Exam 70-655 | New for FY09: Preinstalling Microsoft Technologies (Vista, 2007 Office) |
| Exam 70-272 | Maintaining and Troubleshooting Applications on a Microsoft Windows XP Platform for Desktop Support Technicians |
| Exam 70-282 | Planning, Deploying, and Managing a Network Solution for the Small and Medium-Sized Business |
| Exam 70-290 | Managing and Maintaining a Microsoft Windows Server 2003 Environment |
| Exam 74-134 | Preinstalling Microsoft Products and Technologies |

## Microsoft Windows Hardware Qualifying Labs

| WHQL Qualifying Expenses | | |
|---|---|---|
| **Reimbursable Expense** | **Description** | **Reimbursable** |
| VeriSign Code Signing ID. | Use up to US$600 to obtain a VeriSign Code Signing Digital ID for submitting your product to the Microsoft Windows Logo Program and to the Windows Catalog. Be sure to select the Microsoft Authenticode® digital ID product. | Up to US$600 |
| Microsoft fee. | After your product has passed the HCT tests, use Co-op funds to send your log file package to Windows Quality Online Services, WinQual. This enables you to qualify systems for the "Designed for Windows" logo program. | Up to US$250 |

For more information, visit: http://oem.microsoft.com/whqlresources.

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# Glossary

**Accrued funds**: The total amount of Co-op Fund dollars that is calculated based on eligible license purchases during the fiscal half-year eligibility/purchase period.

**Available funds**: Funds that can be used for claiming and reimbursement in the fiscal half-year usage period following the eligibility/purchase period.

**Committed funds.** The total funds set aside for submitted claims. Indicates when a claim has been validated by the Co-op claim validation team and is in the process of funds disbursement.

**Co-op Marketing Fund**: A Microsoft marketing program designed to help qualified partners grow their businesses. The fund provides reimbursement for approved Demand Generation, Marketing Development, and Partner Readiness activities. Partner funds accrue based upon qualifying Windows partner license purchases. These funds become available in the subsequent fiscal half-year usage period.

**Co-op period**: 6 month periods running from January 1 through June 30, and July 1 through December 31.

**Demand Generation**: A marketing activity in which performance and the size of the audience can be verified. Examples include print, broadcast and Web advertising, and direct mail or e-mail. Partners can be reimbursed for the cost of qualifying Demand Generation activities.

**Market Development**: Marketing activities for which performance and the size of the audience cannot be verified, such as customer events, sponsorships, trade shows, point-of-purchase sales materials, telemarketing, offers and incentives that support the sale of genuine Windows-based systems.

**Marketing services costs**: Costs associated with the creation or design of the marketing piece by a third-party.

**Media placement costs**: Costs associated with purchasing measured media space from a third-party.

**Microsoft account manager**: Microsoft field personnel who are assigned to individual Microsoft partners to monitor marketing and other business development activities.

**Microsoft Authorized Distributor**: A distributor who has entered into a Microsoft OEM Distributor Agreement to licence OEM partner software licenses and hardware. Eligible partners accrue Co-op funds for qualifying Windows partner licenses purchased only through a Microsoft Authorized Distributor.

**Partner readiness**: Training, exams and conference fees associated with the achievement and maintenance of specific Microsoft Competencies.

**Proof of performance**: To be eligible for reimbursement, proof of performance documentation must be submitted by the established deadline. Proof of performance is critical to the reimbursement process. Accepted file types are:
- Image: .jpg, .gif, .bmp, .tif
- Audio/video: .avi, .wav, .mp3, .mpeg
- Document: .doc, .txt, .pdf, .xls, .htm
- Compressed file: .rar, .zip
- CDs
- DVDs
- Cassette
- VHS

**System**: A fully assembled computer system consisting of at least a central processing unit, a motherboard, hard drive, a power supply, and a case.

**Third-party vendors**: Businesses or service providers that are not affiliated with Microsoft or the partner company enrolled in the Co-op Fund.

**Value-added tax (VAT) requirements**: Certain geographies are required to submit VAT documentation to Microsoft. Co-op partners required to submit VAT invoices will receive a consolidated quarterly request via e-mail.

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# Resources

For more information, visit:

**General Information**:
http://www.microsoft.com/oem

**Co-op Web tool**:
http://www.microsoftcoop.com

**Microsoft Partner Center (OPC) Web Site**:
http://oem.microsoft.com

**Microsoft Learning Web site**:
http://www.microsoft.com/learning

For additional materials, logos, and Microsoft guidelines, visit:

**Microsoft Partner Software Graphics and Campaign Materials**:
http://oem.microsoft.com

**Partner Logo Builder**:
https://www.wwmsb.com

**Designed for Windows Logo Program**:
http://www.microsoft.com/whdc/winlogo

**General Microsoft Trademark Guidelines**:
http://www.microsoft.com/trademarks

**Customer service and support**:
e-mail: customerservice@microsoftcoop.com
fax: (001) (319) 294 8013
toll free: (001) (866) 619 3233

**For Co-op Web tool access issues only**:
phone: (001) (319) 294 8036
toll free: (001) (866) 619 3415

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