Microsoft 365

FY25 Modern Work Partner Overview

Microsoft Confidential

Modern Work

GPS Solution Area Key Areas of Focus

Accelerate M365 Copilot Sales and Adoption – Copilot on every device

Scale in SMC to drive partner-led sales and deployment

Expand partner sales of Phone through Telcos and SIs

Capture the Virtualization opportunity for Microsoft with Windows 365 and AVD

Solution Play Summary and Investments

	Solution Play	Business objective	Hero product	Priority
1	Drive Business Transformation with Copilot	Drive Copilot revenue focused on productivity and business transformation.	**Primary: Copilot for M365** Secondary: Role-based Copilots, Copilot Studio, Viva Workplace Analytics and Feedback Bundle Teams Rooms, Teams Phone, AI PC	ENT, SMCC, SMB – Mainstream (all markets)
2	Secure Productivity	Drive Microsoft 365 E3 and B-SKU revenue.	**Primary: M365 E3, Business Standard/Premium** Secondary: Copilot for Microsoft 365	ENT – Mainstream (Balance/Scale only) SMCC – Mainstream (all markets) SMB – Mainstream (all Markets)
3	Converged Communications	Drive Teams Phone, Premium, and Rooms revenue to create an AI-charged workplace in Teams.	**Primary: Teams Phone, Teams Rooms, Teams Premium (including Places and Mesh)** Copilot for Microsoft 365	ENT – Mainstream (all markets) SMCC – Future Growth (all markets)
4	Cloud Endpoints	Accelerate Windows 365 revenue and Azure Consumed Revenue, driven by Azure Virtual Desktop.	**Primary: W365 + AVD** Secondary: Intune Suite	ENT – Mainstream (all markets)
5	Frontline Workers	Drive digital transformation of FLWs and secure the socket.	**Primary: M365 F1/F3** Secondary: M365 F5 add-on	ENT – Mainstream (all markets)
6	Employee Experience	Capitalize on the High-Performance Organization story to drive Viva sales.	**Primary: Viva Suite** Secondary: Employee Communications and Communities; Workplace Analytics and Feedback	ENT – Future Growth (all markets)

Partner priorities to drive MW revenue and usage

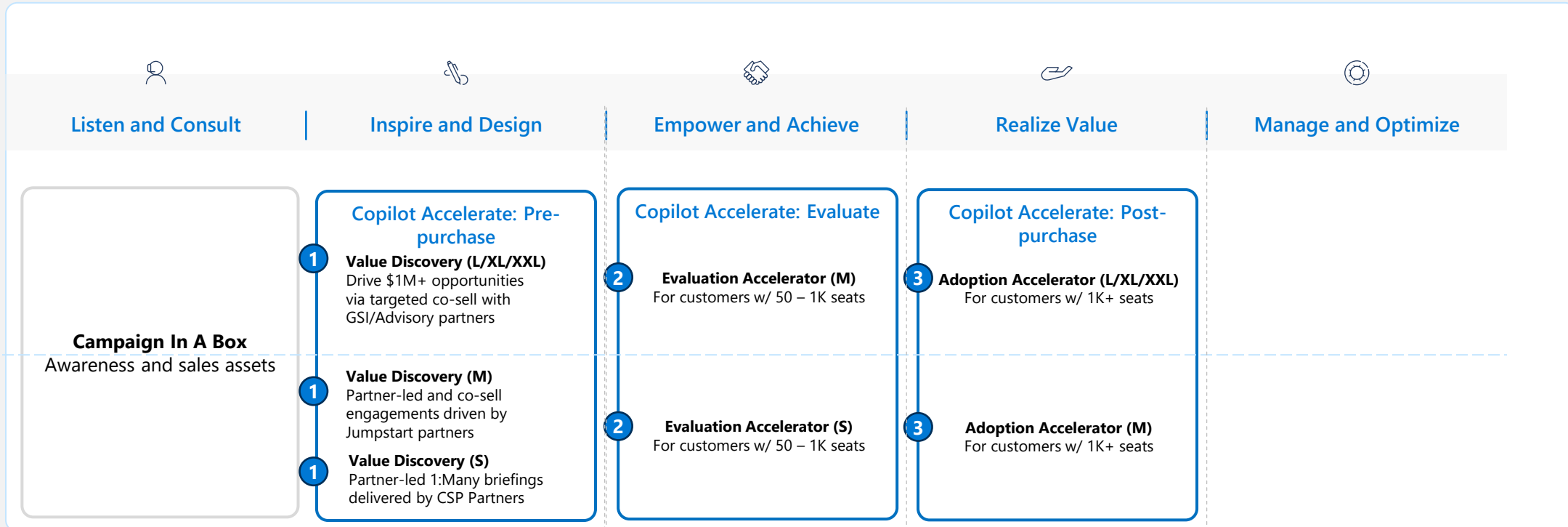| FY25 Plays	Focus Areas
Drive business transformation with Copilot *Ent | SMC-C | SMB*	▪ Scale services partner capacity and execution with focus on landing new functional business value and driving rapid adoption ▪ Drive CSP Copilot execution in SMC-C/SMB; strengthening land and expand motions, and partner GTM resources ▪ Scale through Disti/SureStep partners to execute Copilot attach and security upsell in SMB
Secure Productivity *Ent – Balance / Scale Markets Only* *SMC-C | SMB – All Markets*	▪ Leverage Copilot partner momentum to execute Business Premium/ME3 and ME5 upsell ▪ Enable effective partner-led execution with propensity, CiAB, pre-sale, and adoption accelerators ▪ Introduce CSP offers to win new customers/seats from Google in underpenetrated markets
Converged Communications *Ent | SMC-C – All Markets*	▪ Expand Telco and top Phone SI execution from "Go-back" enablement of Phone seats to driving new Phone/E5 sales in Ent and SMC-C ▪ Continue to drive Rooms sales and activation through partner-led execution
Cloud Endpoints *Ent - All Markets*	▪ Drive integrated W365 and AVD motion to ensure partners recommend best solution for customer scenarios ▪ Expand CSP partner-led sales execution to drive W365 revenue
Frontline Worker *Ent - All Markets*	▪ Provide BoM and guidance for customer-funded pilots to demonstrate value pre-sales and/or drive post sales deployment ▪ Identify top 2 partner per areas that can integrate tightly with Digital Sales to pursue higher volume of lower value opportunities
Employee Experience *Ent – All Markets*	▪ Attach Viva to Copilot-led engagements to drive adoption and value-realization (see Copilot play) ▪ Provide BoM and guidance for customer-funded pilots to demonstrate value pre-sales and/or drive post sales deployment

Modern Work Partner Accelerators and Investments

- Customer propensity lists shared with partners to focus their execution on target customers
- Continue to provide partners with through-partner marketing campaigns, sales assets, and adoption guides
- Packaged engagements provide best practice guidance on how to conduct workshops and pilots; Combination of funded and unfunded
- Accelerate initiatives provide funding for pre and post sales engagements and reward partners for driving wins that contribute towards revenue/usage

Solutions Play	Growth Area	Listen & Consult	Inspire & Design		Empower & Achieve	Realize Value
Drive Business Transformation with Copilot	Copilot	Campaign in a Box [C}	Copilot Accelerate Initiative [PI]			
Secure Productivity	Microsoft 365 E3	Campaign in a Box [C]	ME3 Accelerate Initiative [PI]			CSP Adoption Accelerator for ME3/ME5 [$]
Cloud Endpoints	W365 + AVD	Campaign in a Box [C]	Windows in the Cloud Assessment [$]	Intune Suite Pilot [$]		
				W365 Pilot [C]		
Converged Comms	Phone	Campaign in a Box [C]	Phone Workshop BoM [C]	Phone Pilot [$]		
			Phone Accelerate Initiative [PI]			
	Meeting Rooms		Rooms Accelerate Initiative (Meeting Room Partner Program) [PI]			
Frontline Worker	Frontline	Campaign in a Box [C]	Sales Assets [C]	FLW Pilot [C]		
Employee Experience	Viva	Campaign in a Box [C]	Sales Assets [C]	Viva Pilots [C]		

Key:

[C] Content	[$] Funded engagement or incentive	[PI] Partner Initiative – Includes funded engagements and/or incentives

Copilot Accelerate

- Consolidate partner Copilot investments into single initiative, Copilot Accelerate.
- Comprehensive portfolio of funded pre and post purchase MCI engagements that guide partner execution based on our Functional GTM approach, assets, and tools:
  - **(1)** Value Discovery: Help customers understand the value of AI reinvention; identify top functional scenarios; build a business case and implementation roadmap
  - **(2)** Evaluation Accelerator: Help customers that have purchased small quantities of Copilot seats, rapidly evaluate to accelerate time to significant purchase
  - **(3)** Adoption Accelerator: Help customers that have made significant Copilot investment (1K+ seats) implement and adopt to accelerate time to value
- Access to investment limited to Copilot Jumpstart partners: Approximately 400 partners with required capabilities nominated by field and supported by corp and area teams

Listen and Consult	Inspire and Design	Empower and Achieve	Realize Value	Manage and Optimize

Enterprise

SMC

Campaign In A Box
Awareness and sales assets

Copilot Accelerate: Pre-purchase

(1) Value Discovery (L/XL/XXL)
Drive $1M+ opportunities via targeted co-sell with GSI/Advisory partners

(1) Value Discovery (M)
Partner-led and co-sell engagements driven by Jumpstart partners

(1) Value Discovery (S)
Partner-led 1:Many briefings delivered by CSP Partners

Copilot Accelerate: Evaluate

(2) Evaluation Accelerator (M)
For customers w/ 50 – 1K seats

(2) Evaluation Accelerator (S)
For customers w/ 50 – 1K seats

Copilot Accelerate: Post-purchase

(3) Adoption Accelerator (L/XL/XXL)
For customers w/ 1K+ seats

(3) Adoption Accelerator (M)
For customers w/ 1K+ seats

Microsoft 365 Accelerate
Pre- and Post-sales Investments through Partners

Why Do More With Microsoft 365? What's in it for you?

- Acquire new customers and get them AI-ready
- Accelerate every interaction into an upsell conversation with existing customer base
- Door opener to position value-add project and managed services for greater profitability
- Unlock incentives throughout customer journey

≫ Partner Eligibility

- ➢ **Partner Agreement:** Microsoft AI Cloud Partner Program Agreement
- ➢ **Program Enrollment:** Microsoft Cloud Accelerators Programs
- ➢ **Partner Eligibility:** Participant in the invitation-only Secure Productivity Jumpstart Initiative at the Ready tier

Engagement Summary

- <u>1:1 & 1:Many Briefings:</u> Eligible partners can earn up to $2,500 in incentives for delivering 90-minute, 1:1 or 1:Many briefings (virtual or in-person), followed by a Milestone 2 incentive of up to $12k for influencing E3/E5 Net Paid Seat Add (NPSA) growth over the following 11 months post-event with their customers.
- <u>Deal Association:</u> Eligible partners can engage and influence customers 1:1 through a variety of engagement types covering ME3 value, forgoing the Milestone 1 payment, but maintaining the ability to earn the Milestone 2 incentive of up to $12K.

Customer Eligibility

- Medium-sized businesses above 300 seats with intent to purchase upgrade seats of Microsoft 365 E3 or Microsoft 365 E5
- Education and non-profit customers are not eligible

Program Resources

- Do More with ME3 Briefing Kit
- Microsoft Cloud Accelerators Portal

M365 Deployment Offer (EA deals)

- Initiated by a Microsoft Seller for net new or upsell mapped opportunity
- Minimum deal value for M365 in SMC Corporate is $20K and for Enterprise is $50K
- Voucher value is 10% of Year 1 Billed Revenue up to $75k for Enterprise customers

M365 Deployment offer

- (M3/5) deal size >$750k (Enterprise) -> ECIF
- (M3/5) deal size <$750k (Enterprise) -> up to $75k/10%
- (M3/5) deal size <$750k (Corporate) -> up to $25k/10%
- (M3/5) deal size >$750k (Corporate) -> up to $50k /10%

CSP Adoption Accelerator (MCI) (CSP deals)

- Initiated by qualified partners
- Customer needs to purchase at least 300 incremental seats in a same month
- Eligible SKUs (M365 E3 or mix of M365 E3/E5)
- Purchase on annual term CSP subscriptions (annual/annual or annual/monthly)
- Only one claim per customer tenant
- Customer can be claimed only by transacting CSP partner

CSP Adoption Accelerator (MCI)

- 300+ new seats of M3 and or-> up to $8k

Milestone #1
Pre-Sales Activity

Activity	Incentive
Briefing 1:1 or 1:Many	Up to $2,500
Deal Association Other Pre-Sales Activities	Not Applicable

Milestone #2
ME3/ME5 Purchase (EA or CSP deals)

Seats Sold	300-999	1000+
NPSA E3	$5K	$10K
NPSA E5	$6k	$12k

Pre-sales

Post-sales

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CSP Briefings
Pre-sales Investments through CSP Partners

Program Overview

- This invitation-only program allows selected partners to earn incentives for executing pre-sales events against a pre-set allocation of events provided each quarter by their local Area GTM team. This applies only for Microsoft 365 Business Premium or Copilot for Microsoft 365.
- All other partners can run briefings using downloadable content packages to qualify for up to US $2000 per briefing completed through the cooperative marketing funds program based on their available funds. Content packages available for M365 BP, Copilot, Teams Essentials, Teams Phone, MDB, and W365.
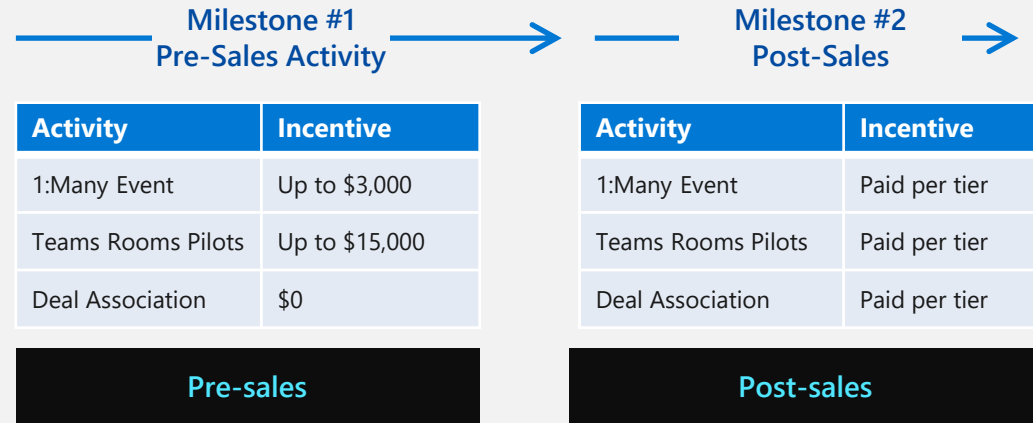
Engagement Summary

- <u>1:Many Briefings:</u> CSP partners can earn up to $2.5K in incentives for delivering 90-minute briefing to showcase the capabilities of Microsoft 365 Business Premium or Copilot in real-world small business scenarios (virtual or in-person)

Customer Eligibility*

- Must be less than 3,000 seats (SMB, inclusive of SMC-C)
- Commercial organizations, inclusive of commercial non-profit entities
- For BP Briefing - Acceptable to have Microsoft 365 Business Basic/Standard, or on-premises versions of MS software (should have no BP licenses)

Incentive
Pre-Sales Activity →

Activity	Incentive
1:Many Event for 3-19 customers	Up to $1,500
1:Many Event for 20+ customers	Up to $2,500
Deal Association	N/A

EDU and Government customers not eligible to count toward incentives engagements

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Meeting Room Partner Program (MRPP)
Pre- and Post-sales Investments through specialized Partners

Program Overview

- Invitation-only program for specialized partners with a proven track record and organizational capabilities to deploy, configure, and manage Microsoft Teams Rooms solutions.
- MRPP Participants will enjoy a range of program benefits including exclusive access to incentive for driving sales and execution of Microsoft Teams Rooms, direct access to Microsoft product experts, exclusive NDA roadmap briefings, and more. Your dedication to driving preference for Teams Rooms in the meeting room category is invaluable, and we would be delighted to support your efforts.

Engagement Summary

- **1:Many Event Briefings:** MRPPs can earn up to $3K in incentives for delivering 90-minute briefing to showcase the art of the possible of Teams Rooms (virtual or in-person)
- **Teams Rooms Pilot:** MRPPs can earn up to $15K in incentives for delivering a pilot in the customers production environment to prove the business and technical value of Teams Rooms
- **Deal Association:** MRPPs can earn up to $150 for driving growth of the next 50 Teams Rooms Pro licenses or MAD growth on the customer tenant

Customer Eligibility*

- **1:Many Event Briefings:** Teams PAU > 1K and, Teams MAU > 500, and Teams MAD <50
- **Teams Rooms Pilot:**
  - LAND: Teams PAU > 1K and, Teams Meetings MAU > 500, and Teams MAD <25
  - *Coming Soon* EXPAND: Teams Meetings MAU > 2K, and Teams Rooms Opportunity Penetration <30%
- **Deal Association:** all customer tenants eligible; exclusions apply

*SMB, EDU customers not eligible for MRPP engagements

Milestone #1 — Pre-Sales Activity

Activity	Incentive
1:Many Event	Up to $3,000
Teams Rooms Pilots	Up to $15,000
Deal Association	$0

Pre-sales

Milestone #2 — Post-Sales

Activity	Incentive
1:Many Event	Paid per tier
Teams Rooms Pilots	Paid per tier
Deal Association	Paid per tier

Post-sales

Milestone #2: rewarded for driving growth in *either* category, not both

Category	Payout	Tiers	Max
License Advisory	$150 per license	Rewarded on growth of next 50 licenses	$7.5K per tenant
Device Activations	$150 per activation	Rewarded on growth of next 50 activations (MAD)	$7.5K per tenant

Phone Accelerate (Previously Operator Enterprise)
Pre- and Post-sales Investments through specialized Partners
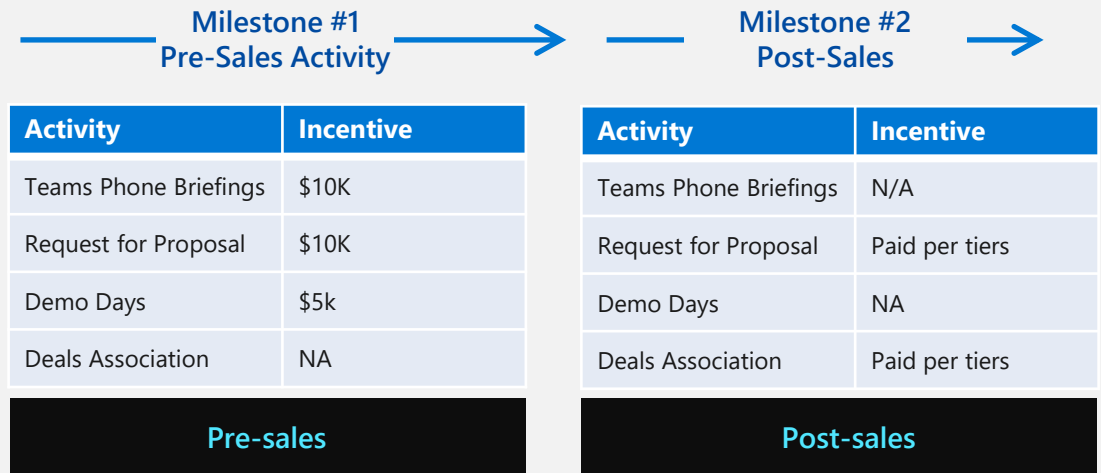
Program Overview

- Invite only program for the top global Phone specialized partners driving both Pre-Sales revenue (STU) and Post-Sales consumption (CSU)
- Partners onboarded to the program include both Telco's (Existing) and Systems integrators (New) and have been identified by the respective subsidiaries as the main strategic partners driving phone in the region.
- Partners have the opportunity to execute and be incentivized for a range of activities directly driving Teams Phone at various stages of the sales cycle including Teams Phone Briefings, Request for Proposals, Deal association and Demo Days

Engagement Summary

- Teams Phone Briefings: Partners are incentivized for running Teams Phone Briefings with customers and mapping the current environment, personas and requirements and building a plan to migrate to Teams Phone.
- Request for proposal responses: Partners are incentivized for their Pre-Sales effort responding to, submitting and winning Teams Phone RFP's
- Deal association: As part of their normal business operations partners work with and invest heavily in customers both driving and expanding Teams Phone and are incentivized for landing either revenue or sales whichever is greater
- Demo Days: 1:Many customer briefings showcasing Teams Phone, Teams Rooms and partner managed and professional services capabilities and incubating pipeline

Customer Eligibility

- Teams Phone Briefings: 500 + Paid Available Units (PAU) for Microsoft Teams.
- Request for proposal responses: 500 + Paid Available Units (PAU) for Microsoft Teams.
- Deal association: 500 + Paid Available Units (PAU) for Microsoft Teams.
- Demo Days: Customers must have 500 + Paid Available Units (PAU)/ Minimum of 5 Qualified Customers in attendance.

Milestone #1 Pre-Sales Activity → **Milestone #2 Post-Sales** →

Activity	Incentive
Teams Phone Briefings	$10K
Request for Proposal	$10K
Demo Days	$5k
Deals Association	NA

Pre-sales

Activity	Incentive
Teams Phone Briefings	N/A
Request for Proposal	Paid per tiers
Demo Days	NA
Deals Association	Paid per tiers

Post-sales

Milestone #2

Seats Tiers	Base payout	OC/TPM Accelerator	Max
1k – 5K	$15K	+$7.5K	$30K
5K – 10K	$30K	+$15K	$60K
10K+	$60K	+$30K	$120K

FY25 Microsoft Commercial Incentives (MCI) Overview

FY25 Modern Work – Incentive Details

Market A, B, and C Countries

Engagement claim amounts will be calculated in USD, based on the country associated with the Partner Location ID listed in the claim, or until program cap is reached.

Market A countries are Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Iceland, Ireland, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, and United States

Market B countries are Bahrain, Barbados, Brazil, Cayman Islands, Chile, China, Colombia, Cyprus, Czechia, Estonia, Greece, Hong Kong, Indonesia, Israel, Jamaica, Korea, Kuwait, Latvia, Lithuania, Malaysia, Malta, Mexico, N. Macedonia, Oman, Philippines, Poland, Puerto Rico, Qatar, Saudi Arabia, Senegal, Singapore, Slovakia, Slovenia, South Africa, Taiwan, Thailand, U.A.E. and Uruguay.

Market C will include all other countries/regions eligible for Microsoft Commerce Incentives.

Incentive Rate Card

Claim Type	Engagement Name	Market A	Market B	Market C
Partner-initiated	Copilot Value Discovery	$7,500	$5,000	$3,500
Partner-initiated	Copilot Value Discovery (Role-based)	$7,500	$5,000	$3,500
Partner-initiated	Copilot Studio Value Discovery	$5,000	$3,500	$2,500
Partner-initiated	Copilot Evaluation Accelerator – Small	$15,000	$11,500	$7,500
Partner-initiated	Copilot Evaluation Accelerator – Medium	$25,000	$20,000	$15,000
Partner-initiated	Copilot Evaluation Accelerator (Role-based)	$25,000	$20,000	$15,000
Partner-initiated	Copilot Adoption Accelerator – XLarge	$75,000	$55,000	$37,500
Partner-initiated	Copilot Adoption Accelerator – Large	$50,000	$37,500	$25,000
Partner-initiated	CSP Adoption Accelerator for ME3/ME5	$8,000	$6,500	$5,500
Partner-initiated	Windows in the Cloud Assessment – Large	$20,000	$15,000	$10,000
Partner-initiated	Windows in the Cloud Assessment - Small	$10,000	$7,500	$5,000
Microsoft-initiated	Microsoft Intune Suite Pilot	$20,000	$15,000	$10,000
Partner-initiated	Teams Phone Pilot	$20,000	$15,000	$10,000

* ***Tax and Withholding***: *Incentive payments for MCI Partner Activities include payment amount as specified in the claim details and do not include additional VAT or GST except in China, Korea and India*

FY25 Modern Work Incentive Details – Managed GSI / Advisory Partners Only

May only be shared with eligible Managed GSI / Advisory Partners

Market A, B, and C Countries

Engagement claim amounts will be calculated in USD, based on the country associated with the Partner Location ID listed in the claim, or until program cap is reached.

Market A countries are Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Iceland, Ireland, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, and United States

Market B countries are Bahrain, Barbados, Brazil, Cayman Islands, Chile, China, Colombia, Cyprus, Czechia, Estonia, Greece, Hong Kong, Indonesia, Israel, Jamaica, Korea, Kuwait, Latvia, Lithuania, Malaysia, Malta, Mexico, N. Macedonia, Oman, Philippines, Poland, Puerto Rico, Qatar, Saudi Arabia, Senegal, Singapore, Slovakia, Slovenia, South Africa, Taiwan, Thailand, U.A.E. and Uruguay.

Market C will include all other countries/regions eligible for Microsoft Commerce Incentives.

Incentive Rate Card

Claim Type	Engagement Name	Market A	Market B	Market C
Microsoft-initiated	Copilot Value Discovery – Large	$30,000	$22,500	$15,000
Microsoft-initiated	Copilot Value Discovery – XLarge	$50,000	$37,500	$25,000
Microsoft-initiated	Copilot Value Discovery – XXLarge	$75,000	$55,000	$37,500
Microsoft-initiated	Copilot Adoption Accelerator – XXLarge	$100,000	$75,000	$50,000

* **Tax and Withholding**: *Incentive payments for MCI Partner Activities include payment amount as specified in the claim details and do not include additional VAT or GST except in China, Korea and India*

FY25 Modern Work Incentive Details – Select MRPP Partners

May only be shared with eligible MRPP Partners

Market A, B, and C Countries

Engagement claim amounts will be calculated in USD, based on the country associated with the Partner Location ID listed in the claim, or until program cap is reached.

Market A countries are Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Iceland, Ireland, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, and United States

Market B countries are Bahrain, Barbados, Brazil, Cayman Islands, Chile, China, Colombia, Cyprus, Czechia, Estonia, Greece, Hong Kong, Indonesia, Israel, Jamaica, Korea, Kuwait, Latvia, Lithuania, Malaysia, Malta, Mexico, N. Macedonia, Oman, Philippines, Poland, Puerto Rico, Qatar, Saudi Arabia, Senegal, Singapore, Slovakia, Slovenia, South Africa, Taiwan, Thailand, U.A.E. and Uruguay.

Market C will include all other countries/regions eligible for Microsoft Commerce Incentives.

Incentive Rate Card

Claim Type	Engagement Name	Market A	Market B	Market C
Partner-initiated	Teams Rooms Adoption Accelerator	$10,000	$7,500	$5,000

* ***Tax and Withholding****: Incentive payments for MCI Partner Activities include payment amount as specified in the claim details and do not include additional VAT or GST except in China, Korea and India*

FY25 Microsoft Commercial Incentives (MCI) Details

Incentive Guide Slides

Modern Work – Copilot Adoption Accelerator - XXLarge

Private

Engagement Summary

The Copilot Adoption Accelerator (XXLarge) engagement is designed to assist customers with deploying and driving adoption of Microsoft Copilot. The engagement is modular. You can deliver services related to the eligible deployment and adoption activities to meet your customer's needs and be paid up to the approved value of the engagement. The funding provided by Microsoft is intended to be a co-investment to help customers achieve success with Microsoft Copilot and is not expected to cover the cost of all deployment and adoption work required. This engagement is designed for customers that have purchased 3,000 or more Microsoft Copilot licenses and have 10,000 or more Microsoft 365 users. It supports implementations of Copilot for Microsoft 365, Copilot for Sales/Service/Finance, and Copilot Studio.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Partner is managed by Microsoft as a Global Systems Integrator or Advisory Partner

Measure and Reward

Activity Payment: Market A = $100,000, Market B = $75,000, and Market C = $50,000 *(Refer to below slide ''FY25 Modern Work Details' for details)*

Customer Qualification

- 3,000+ Microsoft Copilot licenses; AND
- 10,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users; AND
- Customer has not previously received a Copilot Adoption Accelerator engagement
- Customer has not previously received a Deployment voucher for Copilot for Microsoft 365

Activity Requirements

User enablement:
- Identify business stakeholders, adoption champions, and user cohorts
- Validate scenarios to be prioritized for initial deployment
- Establish success measures and implement Copilot Dashboard and end user surveys to enable ongoing measurement
- Deploy training, champion programs, and engagement community
- Activate users on prioritized scenarios to drive adoption; Build momentum with success stories and knowledge sharing

Technical enablement:
- Prepare Microsoft 365 environment for deployment based on steps defined in the Setup Guide
- Ensure appropriate data security controls are in place based on outcomes of Optimization Assessment
- Assign all Microsoft Copilot licenses to users
- Establish service management plan
- [Optional] Build Copilot extensions or custom Copilots to address customer specific scenarios and processes

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< | Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

Modern Work – Copilot Adoption Accelerator - XLarge

Engagement Summary
The Copilot Adoption Accelerator (XLarge) engagement is designed to assist customers with deploying and driving adoption of Microsoft Copilot. The engagement is modular. You can deliver services related to the eligible deployment and adoption activities to meet your customer's needs and be paid up to the approved value of the engagement. The funding provided by Microsoft is intended to be a co-investment to help customers achieve success with Microsoft Copilot and is not expected to cover the cost of all deployment and adoption work required. This engagement is designed for customers that have purchased 3,000 or more Microsoft Copilot licenses and have 6,000 or more Microsoft 365 users. It supports implementations of Copilot for Microsoft 365, Copilot for Sales/Service/Finance, and Copilot Studio.

Engagement Term
July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $75,000, Market B = $55,000, and Market C = $37,500 *(Refer to below slide ''FY25 Modern Work Details' for details)*

Customer Qualification

- 3,000+ Microsoft Copilot licenses; AND
- 6,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users; AND
- Customer has not previously received a Copilot Adoption Accelerator engagement
- Customer has not previously received a Deployment voucher for Copilot for Microsoft 365

Activity Requirements

User enablement:
- Identify business stakeholders, adoption champions, and user cohorts
- Validate scenarios to be prioritized for initial deployment
- Establish success measures and implement Copilot Dashboard and end user surveys to enable ongoing measurement
- Deploy training, champion programs, and engagement community
- Activate users on prioritized scenarios to drive adoption; Build momentum with success stories and knowledge sharing

Technical enablement:
- Prepare Microsoft 365 environment for deployment based on steps defined in the Setup Guide
- Ensure appropriate data security controls are in place based on outcomes of Optimization Assessment
- Assign all Microsoft Copilot licenses to users
- Establish service management plan
- [Optional] Build Copilot extensions or custom Copilots to address customer specific scenarios and processes

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

Modern Work – Copilot Adoption Accelerator - Large

Engagement Summary

The Copilot Adoption Accelerator (Large) engagement is designed to assist customers with deploying and driving adoption of Microsoft Copilot. The engagement is modular. You can deliver services related to the eligible deployment and adoption activities to meet your customer's needs and be paid up to the approved value of the engagement. The funding provided by Microsoft is intended to be a co-investment to help customers achieve success with Microsoft Copilot and is not expected to cover the cost of all deployment and adoption work required. This engagement is designed for customers that have purchased 1,000 or more Microsoft Copilot licenses and have 3,000 or more Microsoft 365 users. It supports implementations of Copilot for Microsoft 365, Copilot for Sales/Service/Finance, and Copilot Studio.

Engagment Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $50,000, Market B = $37,500, and Market C = $25,000 *(Refer to below slide ''FY25 Modern Work Details' for details)*

Customer Qualification

- 1,000+ Microsoft Copilot licenses; AND
- 3,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users; AND
- Customer has not previously received a Copilot Adoption Accelerator engagement
- Customer has not previously received a Deployment voucher for Copilot for Microsoft 365

Activity Requirements

User enablement:
- Identify business stakeholders, adoption champions, and user cohorts
- Validate scenarios to be prioritized for initial deployment
- Establish success measures and implement Copilot Dashboard and end user surveys to enable ongoing measurement
- Deploy training, champion programs, and engagement community
- Activate users on prioritized scenarios to drive adoption; Build momentum with success stories and knowledge sharing

Technical enablement:
- Prepare Microsoft 365 environment for deployment based on steps defined in the Setup Guide
- Ensure appropriate data security controls are in place based on outcomes of Optimization Assessment
- Assign all Microsoft Copilot licenses to users
- Establish service management plan
- [Optional] Build Copilot extensions or custom Copilots to address customer specific scenarios and processes

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

Modern Work – Copilot Evaluation Accelerator - Medium

Engagement Summary

The Copilot Evaluation Accelerator (Medium) engagement is designed to assist customers with rapidly evaluating Microsoft Copilot. The engagement focuses on proven scenarios to enable customers to see and understand the value quickly, so they have the confidence to invest in buying and adopting Microsoft Copilot. This engagement is designed for customers that have 1,000 or more Microsoft 365 users and supports evaluation of Copilot for Microsoft 365 and/or Copilot for Sales/Service/Finance. Partners should position this investment to eligible customers during the sales process to help accelerate the purchase decision.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $25,000, Market B = $20,000, and Market C = $15,000 *(Refer to below slide ''FY25 Modern Work Details' for details)*

Customer Qualification

- 50 - 1,000 Microsoft Copilot licenses; AND
- 1,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users

Activity Requirements

Partners must deliver eligible services equal to or greater than the value of the funding for the engagement and must include completion of the following activities:

- Identify business stakeholders, adoption champions, and user cohorts
- Validate scenarios to be evaluated
- Build a champions community then engage and train them on the prioritized scenarios
- Enable users to evaluate prioritized scenarios
- Conduct IT enablement sessions: Copilot Dashboard overview, Copilot Studio and Extensibility
- Build or validate the business case based on feedback provided by champions and users
- Deliver IT and executive completion reports

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources >

Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

Modern Work – Copilot Evaluation Accelerator - Small

Engagement Summary

The Copilot Evaluation Accelerator (Small) engagement is designed to assist customers with rapidly evaluating Microsoft Copilot. The engagement focuses on proven scenarios to enable customers to see and understand the value quickly, so they have the confidence to invest in buying and adopting Microsoft Copilot. This engagement is designed for customers that have 300 or more Microsoft 365 users and supports evaluation of Copilot for Microsoft 365 and/or Copilot for Sales/Service/Finance. Partners should position this investment to eligible customers during the sales process to help accelerate the purchase decision.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $15,000, Market B = $11,500, and Market C = $7,500 *(Refer to below slide ''FY25 Modern Work Details' for details)*

Customer Qualification

- 50 - 1,000 Microsoft Copilot licenses; AND
- 300 - 999 Office 365 E3/E5 and/or Microsoft 365 E3/E5 users

Activity Requirements

Partners must deliver eligible services equal to or greater than the value of the funding for the engagement and must include completion of the following activities:
- Identify business stakeholders, adoption champions, and user cohorts
- Validate scenarios to be evaluated
- Build a champions community then engage and train them on the prioritized scenarios
- Enable users to evaluate prioritized scenarios
- Conduct IT enablement sessions: Copilot Dashboard overview, Copilot Studio and Extensibility
- Build or validate the business case based on feedback provided by champions and users
- Deliver IT and executive completion reports

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< | Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

Modern Work – Copilot Evaluation Accelerator (Role-based)

Engagement Summary

The Copilot Evaluation Accelerator (Role-Based) engagement is designed to assist customers with rapidly evaluating Microsoft Copilot. The engagement focuses on proven scenarios to enable customers to see and understand the value quickly, so they have the confidence to invest in buying and adopting Microsoft Copilot. This engagement is designed for customers that have 1,000 or more Microsoft 365 users, have already received a Copilot Adoption Accelerator or Copilot Evaluation Accelerator engagement, and are now looking to evaluate Copilot for Sales, Service, and/or Finance. Partners should position this investment to eligible customers during the sales process to help accelerate the purchase decision.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $25,000, Market B = $20,000, and Market C = $15,000 *(Refer to below slide ''FY25 Modern Work Details' for details)*

Customer Qualification

- 50 - 1,000 licenses of Copilot for Sales/Service/Finance; AND
- 1,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users; AND
- Customer has received the Copilot Adoption Accelerator L/XL/XXL or the Copilot Adoption/Evaluation Accelerator Medium

Activity Requirements

Partners must deliver eligible services equal to or greater than the value of the funding for the engagement and must include completion of the following activities:
- Identify business stakeholders, adoption champions, and user cohorts
- Validate scenarios to be evaluated
- Build a champions community then engage and train them on the prioritized scenarios
- Enable users to evaluate prioritized scenarios
- Conduct IT enablement sessions: Copilot Dashboard overview, Copilot Studio and Extensibility
- Build or validate the business case based on feedback provided by champions and users
- Deliver IT and executive completion reports

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

‹

Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources

›

Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

Modern Work – Copilot Value Discovery - XXLarge

Private

Engagement Summary

The Copilot Value Discovery (XXLarge) engagement is designed to assess customers' needs, develop a strategic roadmap for AI transformation powered by Microsoft Copilot, and build the business case for change in terms of increased revenue, reduced costs, and employee wellbeing. Through this engagement, you will complete data or survey analysis, conduct persona analysis, identify and prioritize high value scenarios, build a business case, and develop a plan with recommendations outlining the steps your customer should take to transform their business with Microsoft Copilot. This engagement is designed for customers that have 6,000 or more Microsoft 365 users and covers Copilot for Microsoft 365, Copilot for Sales/Service/Finance, Copilot Studio, and Microsoft Viva.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Partner is managed by Microsoft as a Global Systems Integrator or Advisory Partner

Measure and Reward

Activity Payment: Market A = $75,000, Market B = $55,000, and Market C = $37,500 *(Refer to below slide '[FY25 Modern Work Details]' for details)*

Customer Qualification

Customers with qualified Microsoft Copilot opportunities prioritized by local Microsoft sales teams meeting the following criteria:
- Microsoft Copilot Opportunity worth $2M+; AND
- Has 6,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users, AND
- 50% or greater Azure Active Directory Plan 1 Monthly Active Usage (MAU), AND
- 50% or greater Exchange Online Monthly Active Usage (MAU), AND
- 30% or greater SharePoint Online Monthly Active Usage (MAU), and
- 50% or greater Teams Monthly Active Usage (MAU); AND
- 50% or greater Microsoft 365 Apps Monthly Active Usage (MAU)

  Customers who have received the "Copilot for Microsoft 365 Workshop", a funded Modern Work Advisory Assessment, or another version of this Copilot Value Discovery engagement are not eligible

Activity Requirements

- Complete an assessment to measure technical readiness and determine steps needed to prepare your customer for their AI transformation with Microsoft Copilot.
- Conduct listening sessions leveraging a data-driven approach with the customer's C-Suite and Senior IT and Business Decision Makers (BDMs) to surface trends, priorities, challenges, and objectives supporting their AI Transformation strategy
- Deliver Art of the Possible sessions for customers to envision how they can build an AI-Powered Organization, powered by Microsoft Copilot, including persona-driven "Day in the Life of" scenarios.
- Prioritize your customer's high-value scenarios and use cases for adoption
- Build the business case for implementing Microsoft Copilot in terms of increased revenue, reduced costs, and improved employee wellbeing.
- Define an Adoption and Change Management Plan, preferably leveraging Microsoft Viva for adoption, skilling and measurement
- Outline next steps and actions to help your customer become ready for and to implement their high-value scenarios with Microsoft Copilot.

Partner role in MCI	Earning Type
Build Intent – Partner Activities	Fee

< | Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

Modern Work – Copilot Value Discovery - XLarge

Private

Engagement Summary

The Copilot Value Discovery (XLarge) engagement is designed to assess customers' needs, develop a strategic roadmap for AI transformation powered by Microsoft Copilot, and build the business case for change in terms of increased revenue, reduced costs, and employee wellbeing. Through this engagement, you will complete data or survey analysis, conduct persona analysis, identify and prioritize high value scenarios, build a business case, and develop a plan with recommendations outlining the steps your customer should take to transform their business with Microsoft Copilot. This engagement is designed for customers that have 6,000 or more Microsoft 365 users and covers Copilot for Microsoft 365, Copilot for Sales/Service/Finance, Copilot Studio, and Microsoft Viva.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Partner is managed by Microsoft as a Global Systems Integrator or Advisory Partner

Measure and Reward

Activity Payment: Market A = $50,000, Market B = $37,500, and Market C = $25,000 *(Refer to below slide '*FY25 Modern Work Details*' for details)*

Customer Qualification

Customers with qualified Microsoft Copilot opportunities prioritized by local Microsoft sales teams meeting the following criteria:
- Microsoft Copilot Opportunity worth $1.5M - $1.99M; AND
- Has 6,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users, AND
- 50% or greater Azure Active Directory Plan 1 Monthly Active Usage (MAU), AND
- 50% or greater Exchange Online Monthly Active Usage (MAU), AND
- 30% or greater SharePoint Online Monthly Active Usage (MAU), and
- 50% or greater Teams Monthly Active Usage (MAU); AND
- 50% or greater Microsoft 365 Apps Monthly Active Usage (MAU)

Customers who have received the "Copilot for Microsoft 365 Workshop", a funded Modern Work Advisory Assessment, or another version of this Copilot Value Discovery engagement are not eligible

Activity Requirements

- Complete an assessment to measure technical readiness and determine steps needed to prepare your customer for their AI transformation with Microsoft Copilot.
- Conduct listening sessions leveraging a data-driven approach with the customer's C-Suite and Senior IT and Business Decision Makers (BDMs) to surface trends, priorities, challenges, and objectives supporting their AI Transformation strategy
- Deliver Art of the Possible sessions for customers to envision how they can build an AI-Powered Organization, powered by Microsoft Copilot, including persona-driven "Day in the Life of" scenarios.
- Prioritize your customer's high-value scenarios and use cases for adoption
- Build the business case for implementing Microsoft Copilot in terms of increased revenue, reduced costs, and improved employee wellbeing.
- Define an Adoption and Change Management Plan, preferably leveraging Microsoft Viva for adoption, skilling and measurement
- Outline next steps and actions to help your customer become ready for and to implement their high-value scenarios with Microsoft Copilot.

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

<	Introduction	Modern Work Incentives	Security Incentives	Azure Incentives	Business Applications Incentives	Engagement List	Terms and Conditions	Support and Resources	>

Modern Work Activities	Cloud Solution Provider – Indirect Reseller	Cloud Solution Provider – Direct Bill	Usage – Microsoft 365

Modern Work – Copilot Value Discovery - Large

Private

Engagement Summary

The Copilot Value Discovery (Large) engagement is designed to assess customers' needs, develop a strategic roadmap for AI transformation powered by Microsoft Copilot, and build the business case for change in terms of increased revenue, reduced costs, and employee wellbeing. Through this engagement, you will complete data or survey analysis, conduct persona analysis, identify and prioritize high value scenarios, build a business case, and develop a plan with recommendations outlining the steps your customer should take to transform their business with Microsoft Copilot. This engagement is designed for customers that have 6,000 or more Microsoft 365 users and covers Copilot for Microsoft 365, Copilot for Sales/Service/Finance, Copilot Studio, and Microsoft Viva.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Partner is managed by Microsoft as a Global Systems Integrator or Advisory Partner

Measure and Reward

Activity Payment: Market A = $30,000, Market B = $22,500, and Market C = $15,000 *(Refer to below slide 'FY25 Modern Work Details' for details)*

Customer Qualification

Customers with qualified Microsoft Copilot opportunities prioritized by local Microsoft sales teams meeting the following criteria:
- Microsoft Copilot Opportunity worth $1M - $1.49M; AND
- Has 6,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users, AND
- 50% or greater Azure Active Directory Plan 1 Monthly Active Usage (MAU), AND
- 50% or greater Exchange Online Monthly Active Usage (MAU), AND
- 30% or greater SharePoint Online Monthly Active Usage (MAU), and
- 50% or greater Teams Monthly Active Usage (MAU); AND
- 50% or greater Microsoft 365 Apps Monthly Active Usage (MAU)

Customers who have received the "Copilot for Microsoft 365 Workshop", a funded Modern Work Advisory Assessment, or another version of this Copilot Value Discovery engagement are not eligible

Activity Requirements

- Complete an assessment to measure technical readiness and determine steps needed to prepare your customer for their AI transformation with Microsoft Copilot.
- Conduct listening sessions leveraging a data-driven approach with the customer's C-Suite and Senior IT and Business Decision Makers (BDMs) to surface trends, priorities, challenges, and objectives supporting their AI Transformation strategy
- Deliver Art of the Possible sessions for customers to envision how they can build an AI-Powered Organization, powered by Microsoft Copilot, including persona-driven "Day in the Life of" scenarios.
- Prioritize your customer's high-value scenarios and use cases for adoption
- Build the business case for implementing Microsoft Copilot in terms of increased revenue, reduced costs, and improved employee wellbeing.
- Define an Adoption and Change Management Plan, preferably leveraging Microsoft Viva for adoption, skilling and measurement
- Outline next steps and actions to help your customer become ready for and to implement their high-value scenarios with Microsoft Copilot.

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

| < | Introduction | Modern Work Incentives | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | > |

| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

Modern Work – Copilot Value Discovery

Engagement Summary

This Copilot Value Discovery engagement will facilitate business value conversations by function, providing a blueprint and a way to determine the positive impact to the business in terms of increased revenue, reduced costs and improved employee wellbeing. Through this customer engagement you will frame the value of AI, identify high value AI-transformation scenarios, build a business case, and develop a roadmap outlining the steps your customer needs to take to implement these scenarios with Microsoft Copilot. This engagement is designed for customers that have between 300 and 6,000 Microsoft 365 users and covers Copilot for Microsoft 365, Copilot for Sales/Service/Finance, Copilot Studio, Microsoft Viva.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $7,500, Market B = $5,000, and Market C = $3,500 *(Refer to below slide '*FY25 Modern Work Details*' for details)*

Customer Qualification

- Has 300 - 5999 Office 365 E3/E5 and/or Microsoft 365 E3/E5 users, AND
- 50% or greater Azure Active Directory Plan 1 Monthly Active Usage (MAU), AND
- 50% or greater Exchange Online Monthly Active Usage (MAU), AND
- 50% or greater SharePoint Online Monthly Active Usage (MAU), AND
- 50% or greater Teams Monthly Active Usage (MAU), AND
- 50% or greater Microsoft 365 Apps Monthly Active Devices (MAD)

Customers who have received the "Copilot for Microsoft 365 Workshop" are not eligible for this engagement

Activity Requirements

- Complete an Optimization Assessment to measure technical readiness and determine steps needed to prepare your customer for their AI transformation with Microsoft Copilot.
- Conduct an Art of the Possible session to demonstrate the product capabilities of Microsoft Copilot.
- Identify the customer's high value use cases that can benefit from Microsoft Copilot.
- Build the business case for implementing Microsoft Copilot in terms of increased revenue, reduced costs, and improved employee wellbeing.
- Develop a roadmap to address gaps found in the optimization assessment and implement the high value use cases.

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

Modern Work – Copilot Value Discovery (Role-based)

Engagement Summary

This Copilot Value Discovery (Role-Based) engagement will facilitate business value conversations related to a customer's sales, customer service, and/or finance functions. It provides a blueprint and a way to determine the positive impact to their business in terms of increased revenue, reduced costs and improved employee wellbeing. Through this customer engagement, you will frame the value of AI, identify high value AI-transformation scenarios, build a business case, and develop a roadmap outlining the steps your customer needs to take to implement these scenarios with Copilot for Sales, Copilot for Service, Copilot for Finance, and/or Copilot Studio. This engagement is designed for customers that have 1,000 or more Microsoft 365 users, have already received a Copilot Value Discovery engagement, have purchased Copilot for Microsoft 365, and are now looking to expand or upgrade to one or more of the role-based Copilots.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $7,500, Market B = $5,000, and Market C = $3,500 *(Refer to below slide 'FY25 Modern Work Details' for details)*

Customer Qualification

- Has 1,000+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 users, AND
- Has 100+ Copilot for Microsoft 365 users; AND
- 50% or greater Azure Active Directory Plan 1 Monthly Active Usage (MAU), AND
- 50% or greater Exchange Online Monthly Active Usage (MAU), AND
- 50% or greater SharePoint Online Monthly Active Usage (MAU), AND
- 50% or greater Teams Monthly Active Usage (MAU), AND
- 50% or greater Microsoft 365 Apps Monthly Active Devices (MAD)

This engagement is intended for customers who received a version of this Copilot Value Discovery engagement focused on Copilot for Microsoft 365

Activity Requirements

- Complete an Optimization Assessment to measure technical readiness and determine steps needed to prepare your customer for their AI transformation with Microsoft Copilot.
- Conduct an Art of the Possible session to demonstrate the product capabilities of Microsoft Copilot.
- Identify the customer's high value use cases that can benefit from Microsoft Copilot.
- Build the business case for implementing Microsoft Copilot in terms of increased revenue, reduced costs, and improved employee wellbeing.
- Develop a roadmap to address gaps found in the optimization assessment and implement the high value use cases.

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< | Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

Modern Work – Copilot Studio Value Discovery

Engagement Summary

Microsoft Copilot Studio unlocks value for organizations to customize Microsoft Copilot for Microsoft 365 or build their own copilot experiences. The Copilot Studio Value Discovery is a partner-led engagement run as one-day workshop designed to develop priority scenarios and the associated value opportunity enabled through Copilot Studio. Facilitators will introduce Copilot Studio, showcase scenarios related to customer's business needs and define the potential KPIs and success metrics of the solution. The workshop's objective is establishing priority scenarios and developing the plan to deploy the solution.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Partner must meet the following requirements:
- Partners with the Low Code Application Development Specialization OR
- Partners with the Intelligent Automation Specialization OR
- Active participant of invite-only Copilot Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $5,000, Market B = $3,500, and Market C = $2,500 *(Refer to below slide '*FY25 Modern Work Details*' for details)*

Customer Qualification

- 1K+ Office 365 E3/E5 and/or Microsoft 365 E3/E5 365 users OR
- 2K+ Frontline Worker F1/F3/F5 users

AND

- Microsoft Opportunity Requirements:
  - $20K+ Copilot Studio Oppty OR
  - $250K+ USD Copilot for M365 Oppty OR
  - $250K+ USD FLW Oppty

Activity Requirements

- Complete an assessment to verify the customer's current Low Code, Copilot and AI readiness
- Conduct an envisioning session to introduce Microsoft Copilot Studio, explore scenarios and use cases aligned to customer's business and showcase and demonstrate capabilities
- Identify the personas and high value use cases that can benefit from Microsoft Copilot Studio
- Build a plan to address gaps found in the readiness assessment and implement the high value use cases

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

<	Introduction	Modern Work Incentives	Security Incentives	Azure Incentives	Business Applications Incentives	Engagement List	Terms and Conditions	Support and Resources	>

Modern Work Activities	Cloud Solution Provider – Indirect Reseller	Cloud Solution Provider – Direct Bill	Usage – Microsoft 365

Modern Work – Microsoft Intune Suite Pilot

Engagement Summary

The evolving technology landscape and a workforce that performs their duties both in and out of the office results in challenging endpoint security, management, and costs. Microsoft Intune's integrated endpoint management experience and Intune Suite's advanced endpoint and security solutions enable easier management with powerful data and device protection, all at a lower total cost of ownership by consolidating your endpoint management and security vendors and optimizing performance across devices. The Microsoft Intune Suite Pilot empowers current Intune customers to pilot advanced endpoint management solutions and capabilities in their production environment providing simplicity, security and satisfaction to help keep their workforce productive.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Cloud Virtualization Jumpstart Initiative in 'Ready' tier

Measure and Reward

Activity Payment: Market A =$20,000 and Market B = $15,000, Market C = $10,000 *(Refer to below slide '[FY25 Modern Work Details]' for details)*

Customer Qualification

Customers with qualified Intune Suite opportunities prioritized by local Microsoft sales teams meeting the following criteria:

- Customers with >= 2,500 Intune PAU, and
- Customers with >= 40% Intune usage
- Recommend for customers currently managing Windows devices with Intune

Activity Requirements

- Present how the Intune Suite's advanced solutions enable your customer to reduce their total cost of ownership by eliminating the need for multiple point solutions and expensive integration projects.
- Understand a customer's endpoint management and security challenges, goals and objectives.
- Present the Intune Suite advanced solutions and make design decisions for the pilot based on customer needs.
- Pilot selected Intune Suite solutions in the customer's production environment, focusing on simplified IT management, enhanced security and exceptional user experiences for a selected group of users.

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< | Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

Modern Work – Teams Phone Pilot

Engagement Summary

Teams Phone is a cloud-based phone system with advanced features including call transfer, multi-level auto attendants and call queues. The Microsoft Teams Phone Pilot is an engagement that enables customers to pilot their top calling use cases and scenarios for Teams Phone with PSTN connectivity. The expected outcome is a curated plan to purchase and adopt Microsoft Teams Phone.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of the invite-only Microsoft Operator Enterprise or Phone Accelerate Partner Initiatives

Measure and Reward

Activity Payment: Market A = $20,000 , Market B = $15,000, Market C = $10,000 *(Refer to slide titled '*FY25 Modern Work Details*' for details)*

Customer Qualification

Customers with qualified Microsoft Phone opportunities prioritized by local Microsoft sales teams meeting the following criteria:

- Customer must have > 2,000 Teams PAU

Activity Requirements

- Define use cases and scenario to pilot with Teams Phone.
- Complete preparation checklist and remediation tasks
- Teams Phone configuration including validation in customer production tenant
- Configure at least one PSTN connectivity option for Teams Phone (Microsoft Calling Plans, Operator Connect, Teams Phone Mobile and/or Direct Routing)
- Enable at least 25 users for Teams Phone with phone number assigned
- Configure at least two Auto Attendant and Call Queue with phone number assigned.
- Provide user adoption & administrator readiness
- Offer support based on customer feedback
- Validation of pilot with next steps and findings

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

<

Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

Modern Work – CSP Adoption Accelerator for ME3/ME5

Engagement Summary

The CSP Adoption Accelerator for Microsoft 365 E3/E5 is a pre-purchase packaged engagement that has been designed to partially offset costs partners incur when delivering services to deploy and drive adoption of at least 300 new Microsoft 365 E3 licenses purchased through CSP on an annual term subscription. The engagement is modular, and partners can deliver services related to the eligible deployment and adoption activities based on the customer's needs and be paid up to the approved value of the engagement.

The funding provided by Microsoft is intended to be a co-investment to help customers achieve success with Microsoft 365 and is not expected to cover the cost of all deployment and adoption work required. Partners should leverage this co-investment early on with eligible customers to help accelerate the sales process.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
CSP Direct Bill partner **OR** Indirect Reseller
AND
Partner needs to be the transacting CSP
AND
Active participant of invite-only Secure Productivity Jumpstart Initiative in 'Ready' tier **OR** Microsoft FastTrack Ready Partner

Measure and Reward

Activity Payment: Market A = $8,000 , Market B = $6,500, Market C = $5,500 *(Refer to below slide '*FY25 Modern Work Details*' for details)*

Customer Qualification

Customer purchase between July 1, 2024, through June 30, 2025, meeting the following criteria:

- Eligible offer: M365 E3 FUSL, M365 E3 FUSL EEA (Microsoft 365 E3), M365 E5 FUSL, M365 E5 FUSL EEA (Microsoft 365 E5
- Customer purchased minimum of 300 incremental seats in total across the eligible SKUs (M365 E3 and/or M365 E5) on annual term CSP subscriptions (annual/annual or annual/monthly)
- New purchase needs to happen in a same month
- Only one CSP Adoption Accelerator for Microsoft 365 ME3/ME5 claim allowed per customer tenant.
- Only the transacting CSP partner can claim the Accelerator

Activity Requirements

Partners must deliver services to complete the following required and optional activities, unless the activity is already complete.

Required activities include:

- Scope of work definition, including business requirement mapping, customer data migration assessment and organize kickoff meeting
- Add 300 users to Entra ID, assign M365 E3 license and implement Identity and Access Management to secure user identities and address overprivileged users and associated risks
- Enroll end user computing devices to Intune, implement Intune device management Build and execute an adoption plan and deliver end user training to customer

Optional activities include

- Configure email & app security and deploy Exchange Online, including migration of email and calendar data from on-premises email and/or email hosted with 3rd parties
- Discover and protect data, determine and implement controls
- Deploy Microsoft Teams for at least 300 users

Purchasing motion
Breadth/CSP purchase motion

Earning Type
Fee

< 　 Introduction 　 **Modern Work Incentives** 　 Security Incentives 　 Azure Incentives 　 Business Applications Incentives 　 Engagement List 　 Terms and Conditions 　 Support and Resources 　 >

Modern Work Activities 　 Cloud Solution Provider – Indirect Reseller 　 Cloud Solution Provider – Direct Bill 　 Usage – Microsoft 365

Modern Work – Windows in the Cloud Assessment - Large

Engagement Summary

The Windows in the Cloud Assessment program supports the creation of business cases and deployment roadmaps for customers interested in migrating endpoints to the cloud with Windows 365 and/or Azure Virtual Desktop. Over the course of multiple weeks, partners will educate customer business and technical stakeholders on the value of Windows 365 and Azure Virtual Desktop, evaluate the customer's existing infrastructure and readiness for cloud endpoint solutions with proposed remediations, survey and interview users across the organization to understand use cases, and present a comprehensive plan to support the adoption of Windows 365 and/or Azure Virtual Desktop.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Cloud Virtualization Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $20,000, Market B = $15,000, Market C = $10,000 *(Refer to below slide '*FY25 Modern Work Details*' for details)*

Customer Qualification

Customers with qualified Windows 365 and/or Azure Virtual Desktop opportunities prioritized by local Microsoft sales teams meeting the following criteria:

- >= 3,000 Microsoft 365 E3/E5 licenses,

OR

- >= 3,000 EM+S licenses, AND

- >= 3,000 Windows 11 Enterprise E3/E5 licenses

Activity Requirements

- Survey and interview top customer stakeholders
- Provide user persona recommendations for Windows 365 and Azure Virtual Desktop
- Conduct a cost-benefit analysis exercise
- Perform a risk assessment, identifying constraints and dependencies
- Complete a business case for Windows in the Cloud migration

Purchasing motion
Breadth/CSP, Enterprise and self-service purchasing motions

Earning Type
Fee

Modern Work – Windows in the Cloud Assessment - Small

Engagement Summary

The Windows in the Cloud Assessment program supports the creation of business cases and deployment roadmaps for customers interested in migrating endpoints to the cloud with Windows 365 and/or Azure Virtual Desktop. Over the course of multiple weeks, partners will educate customer business and technical stakeholders on the value of Windows 365 and Azure Virtual Desktop, evaluate the customer's existing infrastructure and readiness for cloud endpoint solutions with proposed remediations, survey and interview users across the organization to understand use cases, and present a comprehensive plan to support the adoption of Windows 365 and/or Azure Virtual Desktop.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Active participant of invite-only Cloud Virtualization Jumpstart Initiative in 'Ready' tier.

Measure and Reward

Activity Payment: Market A = $10,000, Market B = $7,500, Market C = $5,000 *(Refer to below slide '*[FY25 Modern Work Details](#)*' for details)*

Customer Qualification

Customers with qualified Windows 365 and/or Azure Virtual Desktop opportunities prioritized by local Microsoft sales teams meeting the following criteria:

- 500 - 2,999 Microsoft 365 E3/E5 licenses

OR

- 500 – 2,999 EM+S licenses, AND
- 500 – 2,999 Windows 11 Enterprise E3/E5 licenses

Activity Requirements

- Survey and interview top customer stakeholders
- Provide user persona recommendations for Windows 365 and Azure Virtual Desktop
- Conduct a cost-benefit analysis exercise
- Perform a risk assessment, identifying constraints and dependencies
- Complete a business case for Windows in the Cloud migration

Purchasing motion
Breadth/CSP, Enterprise and self-service purchasing motions

Earning Type
Fee

Modern Work – Teams Rooms Adoption Accelerator

Private

Engagement Summary

The Teams Rooms Adoption Accelerator engagement is designed to help organizations rapidly deploy and drive adoption of 25+ newly purchased Microsoft Teams Rooms licenses. The engagement is modular, and partners can deliver services related to any of the eligible deployment and adoption activities based on the customer's needs and be paid up to the approved value of the engagement. The funding provided by Microsoft is intended to be a co-investment to help customers achieve success with Teams Rooms and is not expected to cover the cost of all deployment and adoption work required. While execution is a post-purchase activity, partners should position this investment to eligible customers during the sales process to help accelerate the purchase decision.

Engagement Term

July 1, 2024 – June 30, 2025, or until program cap is reached

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
Select active participants in the invite-only Meeting Room Partner Initiative

Measure and Reward

Activity Payment: Market A = $10,000, Market B = $7,500, and Market C = $5,000 *(Refer to below slide '*FY25 Modern Work Details*' for details)*

Customer Qualification

- Customer must have purchased 25+ Teams Rooms Pro licenses, on or after July 1, 2024
- Public Sector customer eligibility is limited to public Microsoft 365 clouds

Activity Requirements

Partners must deliver eligible services equal to or greater than the value of the funding for the engagement. Eligible services include:

- Conduct assessment/analysis of the customer's environment for Teams Rooms
- Create a set of standards with use case requirements for each type of space.
- Deploy, test and enable certified Teams Rooms devices with Teams Rooms Pro
- Setting up Teams Rooms Pro Management
- Build and execute a deployment and adoption plan
- Deliver extended training, adoption, maintenance and operations support guidance

Partner role in MCI
Build Intent – Partner Activities

Earning Type
Fee

< Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | **>**

Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

Modern Work – CSP Microsoft 365 E3 Adoption Accelerator

Engagement Summary

The CSP Microsoft 365 E3 Adoption Accelerator is a post-purchase packaged engagement that has been designed to partners partially offset costs they incur when delivering services to deploy and drive adoption of at least 300 new Microsoft 365 E3 licenses purchased through CSP. The engagement is modular, and partners can deliver services related to the eligible deployment and adoption activities based on the customer's needs and be paid up to the approved value of the engagement.

The funding provided by Microsoft is intended to be a co-investment to help customers achieve success with Microsoft 365 and is not expected to cover the cost of all deployment and adoption work required. Lastly, while execution is a post-purchase activity, partners should leverage this co-investment early on with eligible customers to help accelerate the sales process.

Engagement Term

March 1, 2024 – July 31, 2024

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
CSP Direct Bill partner **OR** Indirect Reseller **AND**

Participant in the invite-only Secure Productivity Jumpstart Initiative **OR** Microsoft FastTrack Ready Partner

Measure and Reward

Activity Payment: Market A = $7,800 , Market B = $6,300, Market C = $5,300 *(Refer to slide titled 'FY24 Modern Work Details' for details)*

Customer Qualification

Customer purchase between February 1, 2024, through June 30, 2024, meeting the following criteria:

- Eligible offer: M365 E3 FUSL, M365 E3 FUSL EEA (Microsoft 365 E3), M365 E5 FUSL, M365 E5 FUSL EEA (Microsoft 365 E5)
- Customer purchased minimum of 300 incremental seats in total across the eligible SKUs (M365 E3 and M365 E5) on annual term CSP subscriptions (annual/annual or annual/monthly)
- Only one CSP Microsoft 365 E3 Adoption Accelerator claim allowed per customer tenant.

Activity Requirements

Partners must deliver services to complete the following required and optional activities, unless the activity is already complete.

Required activities include:
- Scope of work definition, including business requirement mapping, customer data migration assessment and organize kickoff meeting
- Add 300 users to Entra ID, assign M365 E3 license and implement Identity and Access Management to secure user identities and address overprivileged users and associated risks
- Enroll end user computing devices to Intune, implement Intune device management Build and execute an adoption plan and deliver end user training to customer

Optional activities include
- Configure email & app security and deploy Exchange Online, including migration of email and calendar data from on-premises email and/or email hosted with 3rd parties
- Discover and protect data, determine and implement controls
- Deploy Microsoft Teams for at least 300 users

Purchasing motion
Breadth/CSP, Enterprise and self-service purchasing motions

Earning Type
Fee

< | Introduction | **Modern Work Incentives** | Security Incentives | Azure Incentives | Business Applications Incentives | Engagement List | Terms and Conditions | Support and Resources | >

| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

Modern Work – CSP Microsoft 365 E5 Adoption Accelerator

Engagement Summary

The CSP Microsoft 365 E5 Adoption Accelerator is a post-purchase packaged engagement that has been designed to partners partially offset costs they incur when delivering services to deploy and drive adoption of at least 300 new Microsoft 365 E5 licenses purchased through CSP. The engagement is modular, and partners can deliver services related to the eligible deployment and adoption activities based on the customer's needs and be paid up to the approved value of the engagement.

The funding provided by Microsoft is intended to be a co-investment to help customers achieve success with Microsoft 365 and is not expected to cover the cost of all deployment and adoption work required. Lastly, while execution is a post-purchase activity, partners should leverage this co-investment early on with eligible customers to help accelerate the sales process.

Engagement Term

March 1, 2024 – July 31, 2024

Partner Eligibility

Partner Agreement
Microsoft AI Cloud Partner Program Agreement

Program Enrollment
Microsoft Commerce Incentives

Partner Qualification
CSP Direct Bill partner **OR** Indirect Reseller **AND**

Participant in the invite-only Secure Productivity Jumpstart Initiative **OR** Microsoft FastTrack Ready Partner

Measure and Reward

Activity Payment: Market A = $12,750 , Market B = $9,750, Market C = $8,750 *(Refer to slide titled '_FY24 Modern Work Details_' for details)*

Customer Qualification

Customer purchase between February 1, 2024, through June 30, 2024, meeting the following criteria:

- Eligible offer: M365 E5 FUSL, M365 E5 FUSL EEA (Microsoft 365 E5)
- Customer purchased a minimum of 300-seats on an annual term CSP subscription (annual/annual or annual/monthly)
- Only one CSP Microsoft 365 E5 Adoption Accelerator claim allowed per customer tenant.

Activity Requirements

Partners must deliver services to complete the following required and optional activities, unless the activity is already complete.

Required activities include:

- Scope of work definition, including business requirement mapping, customer data migration assessment and organize kickoff meeting
- Add 300 users to Entra ID, assign M365 E5 license and implement Identity and Access Management to secure user identities and address overprivileged users and associated risks
- Enroll end user computing devices to Intune, implement Intune device management and Defender for Endpoint for 300 users
- Build and execute an adoption plan and deliver end user training to customer

Optional activities include

- Configure email & app security and deploy Exchange Online, including migration of email and calendar data from on-premises email and/or email hosted with 3rd parties
- Discover and protect data, determine and implement controls
- Deploy Microsoft Teams for at least 300 users

Purchasing motion
Breadth/CSP, Enterprise and self-service purchasing motions

Earning Type
Fee

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Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

Modern Work Engagements Controls

Maximum active workshops per customer

Partner IDs will be limited to a maximum of 9 active workshops per customer at one time*. Active workshops are those where a customer has been claimed until the claim POE has been approved. If a customer has reached this threshold, one or more of the active claims will need to be canceled, approved, rejected, or expired to allow partner to create additional claims for that customer. *Additional geographical restrictions may apply to certain workshops. See workshop details.

Subcontracting

Partners may not subcontract any workshop activity(ies) to any third party(ies). Microsoft will not pay incentives to any partners [and/or partner affiliates] for activities completed by third party(ies) (such third party(ies) including but not limited to subcontractors or vendors). All claimed activity(ies) must be executed directly by the claiming eligible partner in order to qualify for approval and payment.

Microsoft will conduct regular audits to monitor the number of active workshops per Partner ID. Microsoft may, in its sole discretion, terminate partners for falsely creating workshops to claim earnings, or for engaging in activities that do not align with the incentive intent.

Bona fide customer validation

Bona fide Customer Validation - Eligible customers must have a customer email address that is distinct from the partner's domain or tenant and is aligned to the Customer domain or tenant.

Modern Work Engagements Controls cont.

Fair market value

Partners may only claim customers where the claiming Partners Location equates to the same Market Rate as the claimed customer's TPID or Tenant ID. Partners may find the Market Rate mapping in Modern Work Incentive Details slide below. Partners claiming customers from higher rate Market Rate locations may be paused or removed from Microsoft Commercial Incentives.

Examples of a compliant claims:

- Claiming Partner Location ID is Market A and customer TPID or Tenant ID is in Market A
- Claiming Partner Location ID is Market B or C and customer TPID or Tenant ID is in Market A
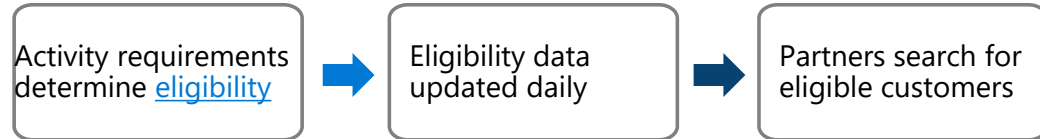
Example of a non-compliant claim:

- Claiming Partner Location ID is Market A and customer TPID or Tenant ID is in Market B or C

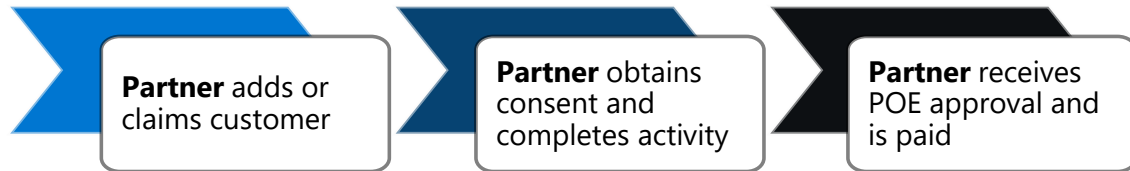# FY25 Modern Work – MCI Engagement Models

Modern Work - MCI Engagement Model Overview

Partner-Initiated Model

Determine Eligibility

Activity requirements determine eligibility	→	Eligibility data updated daily	→	Partners search for eligible customers

Partners nominates customer (same in either model)

Partner adds or claims customer → **Partner** obtains consent and completes activity → **Partner** receives POE approval and is paid
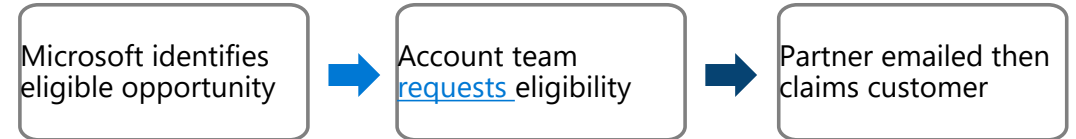
Key differentiation

- Broad partner & customer eligibility, partner leads the opportunity
- Partners responsible for end-to-end customer engagement
- Co-Selling is desired, but not required

Which MCI engagements are Partner-Initiated?

Copilot
- Adoption (XL,L)
- Evaluation (M-S)
- Value Discovery
- Value Discovery (Role-Based)

M365
- Adoption Accelerator

Phone
- Phone pilot

Endpoints
- Cloud assessment (L-S)

Teams Rooms
- Adoption

Microsoft-Initiated Model

Determine Eligibility

Microsoft identifies eligible opportunity	→	Account team requests eligibility	→	Partner emailed then claims customer

Partners nominates customer (same in either model)

Partner adds or claims customer → **Partner** obtains consent and completes activity → **Partner** receives POE approval and is paid

Key differentiation

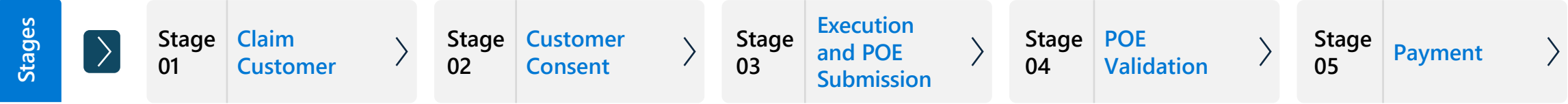- Limited partner and customer eligibility, Microsoft leads opportunity
- Microsoft account team request eligibility and obtains approval
- Partner notified of co-sell opportunity, then creates MCI claim

Which MCI engagements are Microsoft-Initiated?

Copilot
- Adoption (XXL)
- Value Discovery (XXL-L)

M365
- NA

Phone
- NA

Endpoints
- Intune Suite Pilot

Teams Rooms
- NA

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Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365

MCI Build Intent Incentive – Partner-Initiated Claims process

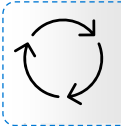| Stages > | Stage 01 | Claim Customer > | Stage 02 | Customer Consent > | Stage 03 | Execution and POE Submission > | Stage 04 | POE Validation > | Stage 05 | Payment > |

Activity	**Customer eligibility is predetermined by MCI, Partners can search for a range of eligible customers for specified engagements.** **Partner** creates MCI claim for eligible customers. Partner selects/adds new customer and eligible engagement, clicks "Add Customer"	**Partner** requests customer consent for engagement. **Customer** consents to engagement. Claims without customer consent automatically expire.	**Partner** completes engagement per specified requirements, submits POE for approval. Claims without POE approval automatically expire.	**Microsoft** approves or declines submitted POE. **Partner** may append or update POE based on MCI Operations Team guidance. Claims without approved POE automatically expire.	**Microsoft** processes payment for claims with approved POE.
		Timeline			
		30 days max from from MCI claim date	90 days max from customer consent date	30 days max from claim submission date	45 days max from claim approval month end

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| Modern Work Activities | Cloud Solution Provider – Indirect Reseller | Cloud Solution Provider – Direct Bill | Usage – Microsoft 365 |

MCI Build Intent Incentive – Microsoft-Initiated Claims process

Stages					
Stage 00 Microsoft Customer Identification	**Stage 01** Claim Customer	**Stage 02** Customer Consent	**Stage 03** Execution & POE Submission	**Stage 04** POE Validation	**Stage 05** Payment

Activity

Customer eligibility is determined by Microsoft. Partners are only able to engage with customers specified upon notification email from Microsoft. **Microsoft** initiates customer opportunity, secures customer intent and submits partner contact details as part of request. **Partner** receives email from Microsoft with customer details, partner takes next steps to create MCI claim.	**Microsoft** updates MCI eligibility to reflect customer eligibility for specified engagement. **Partner** creates MCI claim for specified customer using partner and customer details in the provided email.	**Partner** requests customer consent for engagement. **Customer** consents to engagement. Claims without customer consent automatically expire.	**Partner** completes engagement per specified requirements, submits POE for approval. Claims without POE approval automatically expire.	**Microsoft** approves or declines submitted POE. **Partner** may append or update POE based on MCI Operations Team guidance. Claims without approved POE automatically expire.	**Microsoft** processes payment for claims with approved POE.

Timeline					
		30 days max from MCI claim date	**90 days max from customer consent date**	**30 days max from claim submission date**	**45 days max from claim approval month end**

MCI Automated Referral Creation

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| Glossary | Azure Resources for Common Support Scenarios | Useful Links |

>

Automated Referral Management | Overview

Select MCI claims now automatically generate inbound Partner Center Referrals. This feature notifies Microsoft account teams of new qualified deals with integrated insights for simplified co-selling and improved Partner experience

MCI Claims
Microsoft automatically creates a standard Partner Center referral when specified conditions are met

Benefits
✓ Ensure notification process alerts Microsoft account teams partner engagements
✓ Enable MCI Engagement configuration to support co-sell configurations defaults
✓ Validate Partner Center Deal IDs provided by partners

Partner Center
Manages referral status and supports co-sell notifications across organizations

Benefits
✓ Microsoft and partners are better connected regarding account opportunities
✓ Update referral to co-sell after customer consent,
✓ Update referral to won or lost based on POE completion status to indicate when activity is completed.
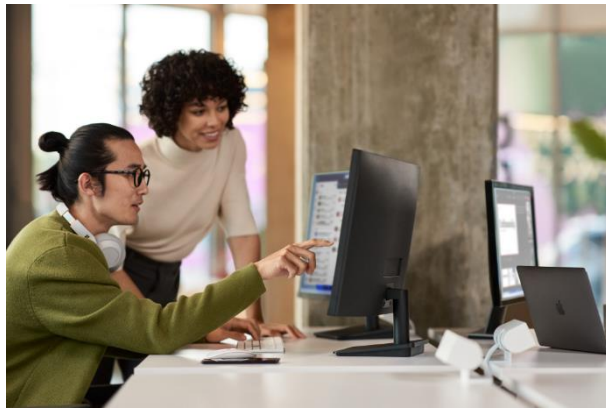
Microsoft CRM
Account team notified of partner led activities and can support customer outcomes / opportunities.

Benefits
✓ Align Microsoft sales teams with customer outcomes / opportunities
✓ Automate ability for Microsoft sellers to jointly engage and align with partners
✓ Associate MCI engagement impact and track to sales pipeline progression

<	Introduction	Modern Work Incentives	Security Incentives	Azure Incentives	Business Applications Incentives	Engagement List	Terms and Conditions	Support and Resources	>

Glossary	Azure Resources for Common Support Scenarios	Useful Links

Automated Referral Management | Process Flow and Engagement Thresholds

Three Touches to Tighter Collaboration

1. Partner creates claim in MCI

2. MCI creates Partner Center referral when conditions are met

3. Microsoft / Partner engage in joint opportunity

Automated Referral Management Process Flow

Select engagements enabled for automated referral management

Customer consent request triggers referral creation process where deal size, and customer segment requirements are met

Referral upgraded co-sell when customer consents to engagement

Referral status automatically updates to "Won" or "Lost" based on POE completion status.

* Partners may manually update or manage referral details throughout the typical referral lifecycle.

Automated Referral Engagement Thresholds

Solution Area	Engagement Name	Deal Size	Customer Segment
Azure	Azure Innovate Partner-Led: Azure AI Platform Deployment - XS,S,M,L	>$10,000	Majors & SMC Corporate Customer
	Azure Migrate & Modernize Partner-led: Infrastructure and Database Migration - XS,S,M,L,XL,XXL		
	Azure Migrate & Modernize Partner-led: Infrastructure and Database Migration with Microsoft Defender for Cloud - XS,S,M,L		
	Azure Migrate & Modernize Partner-led: Migrating to Azure VMware Solution - XS,S,M,L		
	Azure Migrate & Modernize Partner-led: Virtual Desktop Infrastructure - XS,S,M,L		
	Azure Migrate & Modernize Partner-led: SAP Migration - XS,S,M,L		
	Azure Migrate & Modernize Partner-led: Migration to SAP RISE in Azure - XS,S,M,L		
	Azure Innovate Partner-Led: Build & Modernize AI Apps Deployment - XS,S,M,L		
	Azure Innovate Partner-led: Analytics Deployment - XS,S,M,L		
	Azure Innovate Partner-led: Accelerate Developer Productivity Deployment - XS,S,M,L		
Modern Work & Security	Intune Suite Pilot	All	Medium to Large Commercial Customers
	Windows in the Cloud Assessment		
	Teams Phone Pilot		
	Microsoft Sentinel Migrate and Modernize		

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| Glossary | Azure Resources for Common Support Scenarios | Useful Links |

Automated Referral Management | Referral Creation Process Detailed

Engagement Stages	Activity	MCI Partner Activities	Microsoft CRM
Stage 01 — Claim Customer	**Partner** identifies customer opportunity, creates MCI claim for partner activity.		
Stage 02 — Customer Consent	**Partner** requests customer consent through MCI Partner Activities portal Customer provides consent to proceed. Adds Deal Size when requesting customer consent	Microsoft creates referral where conditions meet engagement configuration. Microsoft updates referral as Co-Sell after customer consent has been received.	Microsoft Account team actions "Co-Sell Referrals" in Microsoft CRM, by Accepting and/or Appending Referral to a MSX Opportunity
Stage 03 — Execute & Submit POE	**Partner** completes engagement per requirements Partner submits POE		
Stage 04 — POE Validation	**Microsoft** approves or declines POE Partner disputes or fixes POE errors	Upon POE approval MCI updates PC referral status to "won" and upon claim expiration without POE approval status is updated to "Lost".	
Stage 05 — Payment	**Microsoft** processes payment for approved claims **Partner** receives payment for processed approved claim.		

Microsoft 365