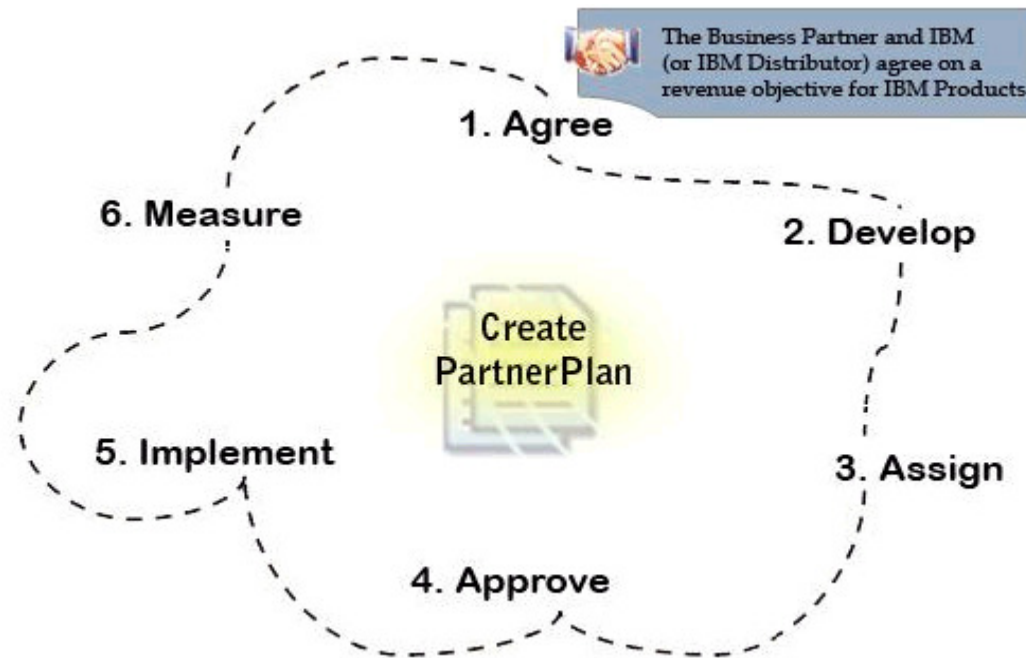


# PartnerPlan 2010

## User Education



Anne Henderson  
PartnerPlan Project Manager

# Agenda

## Section A (Charts 3 – 12):

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

## Section B (Charts 13 – 58):

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

## Section C (Charts 59 - 68):

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

## Section D (Charts 69 – 76):

- Reports/Helpdesk/Education

## Section E (Charts 77 - 87):

- Distributor Growth Fund/Marketing Investment Fund charts

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

# PartnerPlan

## Section A:

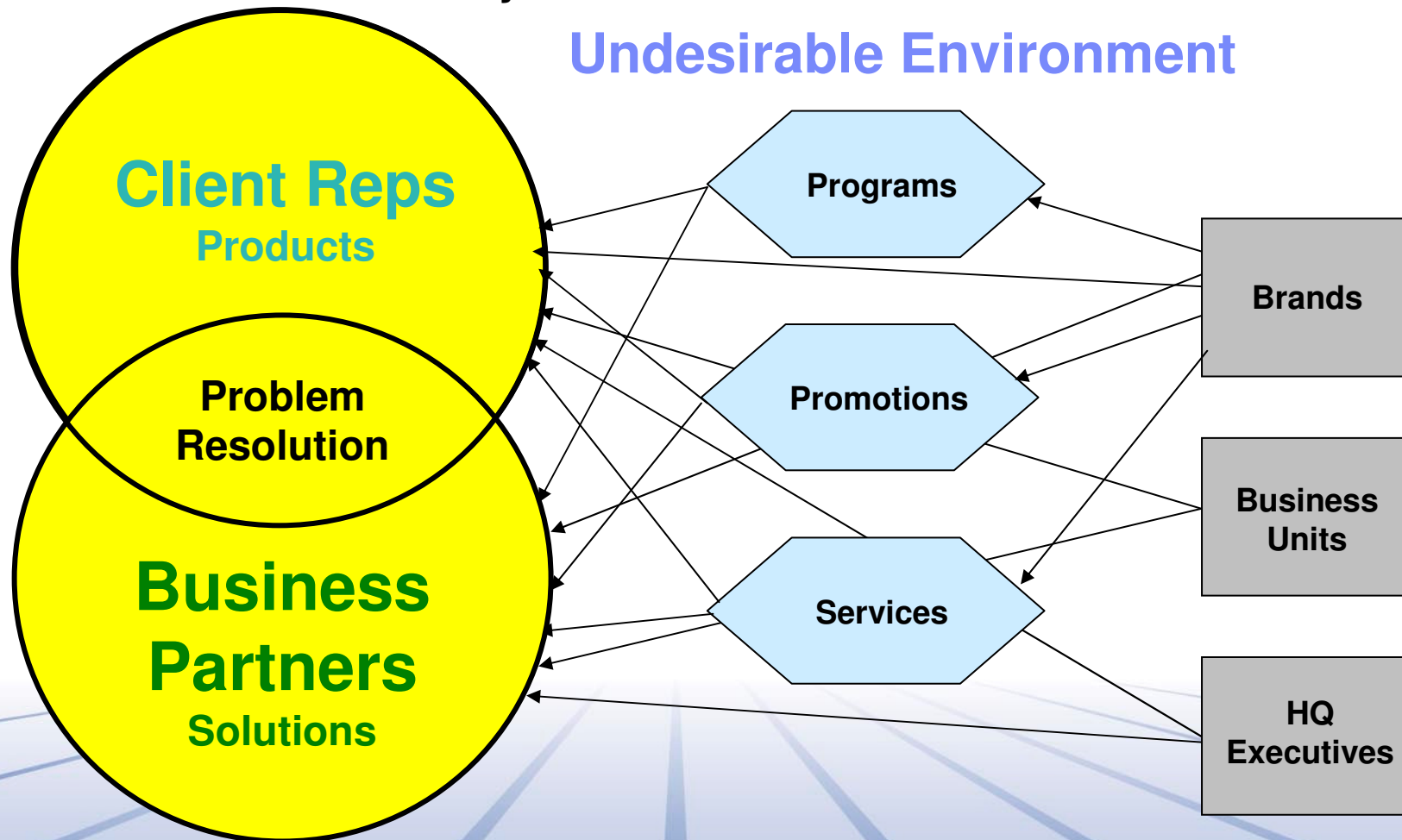
- **What does PartnerPlan do? Who uses it?**
- **Access Requirements**
- **How to reach PartnerPlan**

## What is PartnerPlan? Who uses it?

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

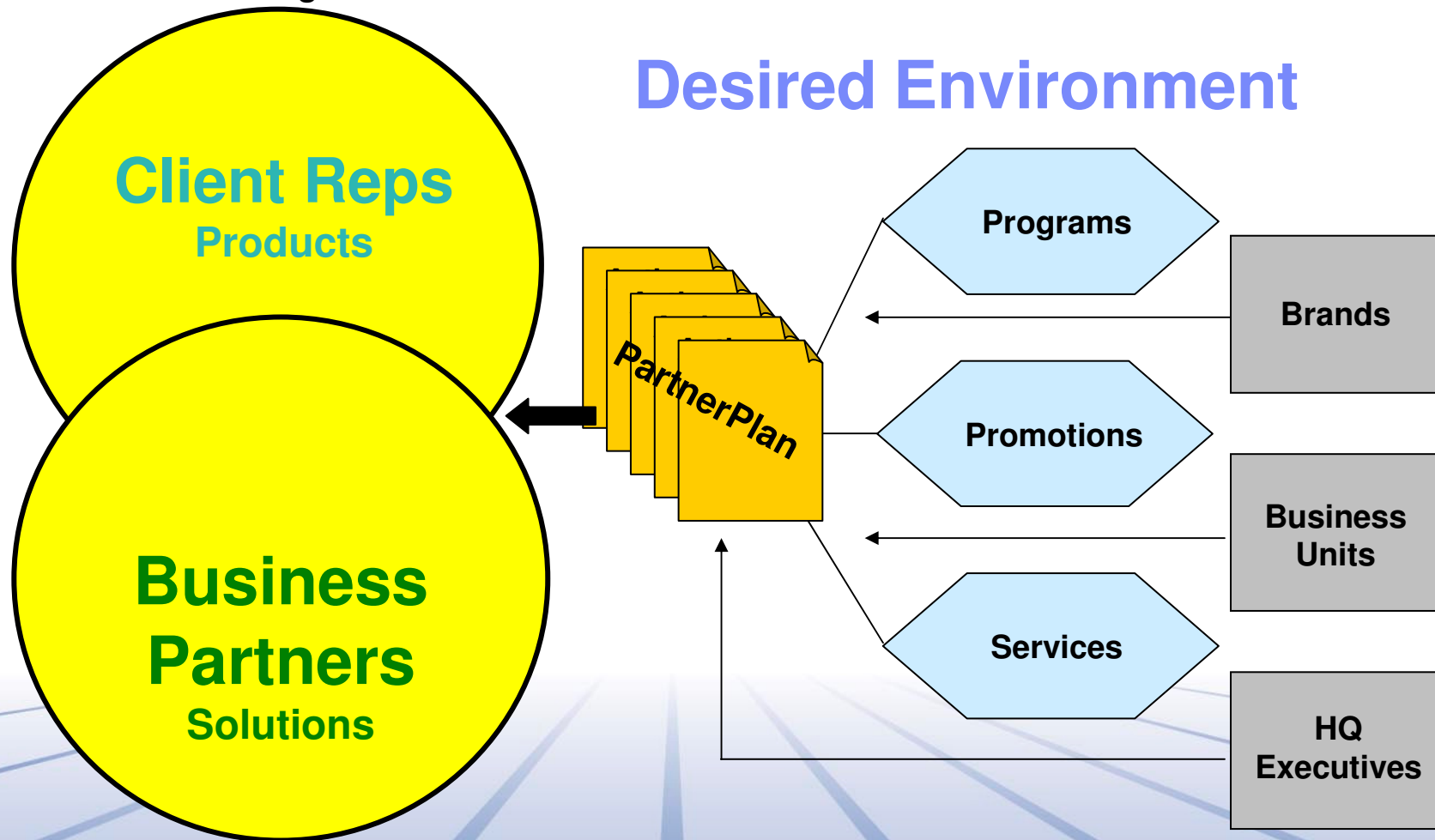
Many Business Partners have multiple contacts with IBM. An efficient method for sharing information among teams, both at IBM and at the Business Partner saves everyone time and effort.

## Undesirable Environment



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

## Desired Environment



# PartnerPlan Access

**PartnerPlan is reached at this URL: [www.ibm.com/partnerworld/partnerplan](http://www.ibm.com/partnerworld/partnerplan)**

## **Access Requirements:**

- a) Users require an IBM id to access PartnerPlan. If you don't have an IBM id, you can apply for one by clicking on the Register Now link, circled in the chart.**
  - b) All users must register in the PartnerPlan Registration Database and select their Privacy settings once only. Your Privacy setting must be updated annually. The system will ask you to reselect your settings when the original request has expired.**
- **If you attempt to log in and see a message that your id cannot be validated, you need to register by clicking on the Register now link.**
    - > **You will be presented with IBM id registration form.**
    - > **If you have an IBM id but have not registered in the PartnerPlan Registration DB, you will be presented with a request for your first name, last name and email address.****IBMers will be required to enter their Notes mail in the format of John Smith/UK/IBM.**
  - **Your Privacy settings are valid for one year. If they have expired, you will be presented with the Privacy settings screen. Simply select the correct option and click submit. More on the Privacy settings on the next chart.**

United States [change]

Home | Products | Services & industry solutions | Support & downloads | My IBM

## Sign in

Please enter your IBM ID and Password in the sign in area below. If you are not currently registered with our site please [register now](#).

**IBM ID:**

**Password:**

## PartnerPlan Access

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

### Create Your PartnerPlan Profile

You need to complete your personal profile.

If you are a Business Partner, you will have immediate access to PartnerPlan after completing your profile. To be identified as a Business Partner, you must be registered as an employee of a Business Partner. Your firm's Authorized Profile Administrator (APA) will do this for you.

If you do not know who the APA is for your company, contact the PartnerWorld Contact Services team at [Partner World Help](#)

To confirm that you are registered, click [here](#) and validate your membership.

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

**First Name\*:**

**Last Name\*:**

**Notes Name\*:**

**Email\*:**

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

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

Click on the top button, for most users.

**Choices for Privacy:**

- Include me in all searches ←
- Do not include me in any searches
- Allow only certain partners to search me



## PartnerPlan Access - IBM

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

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

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

### PartnerPlan Privacy Settings

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

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

 Submit

#### Choices for Privacy:

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

#### Search for a Business Partner:

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

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

 Add  
 Remove

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

 Next

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

## PartnerPlan Access

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

---

### PartnerPlan Registration Process

---

Your information cannot be validated.

If you are a Business Partner, you must be registered as an employee of a Business Partner to access PartnerPlan. Your firm's Authorized Profile Administrator (APA) will do this for you.

If you do not know who the APA is for your company, contact the PartnerWorld Contact Services team at [Partner World Help](#)

To confirm you are registered, click [here](#) and validate your membership.

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

---

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

## PartnerPlan User Prerequisites

- **PartnerPlan users must use Internet Explorer, V6 or above or Firefox with the IE tab option selected.**

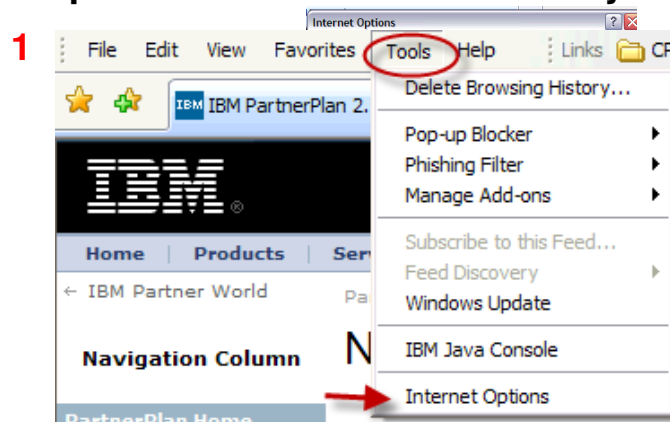
<https://addons.mozilla.org/en-US/firefox/addon/1419>

- **Other browsers will allow you view information in PartnerPlan. If you perform any edits, such as creating an activity or approving an activity, you must use IE or Firefox with the IE tab option. Any other browser can result in failure to see information in the Plan. For example, dropdown selections may not be visible.**
- **You MUST ensure that the Pop-up Blocker is not checked. The Pop-up Blocker is found under Tools/Internet Options/Privacy.**
- **If the Business Partner is located in a country that does not use US or Canadian currency, you MUST go to the Tools/Internet Options/Language Settings and modify them. The next chart shows you how.**
- **Lastly, clear your Internet History regularly. Having a very large history can affect performance and create errors. The option to clear your history is also found on the Tools menu, under Internet Options/General.**

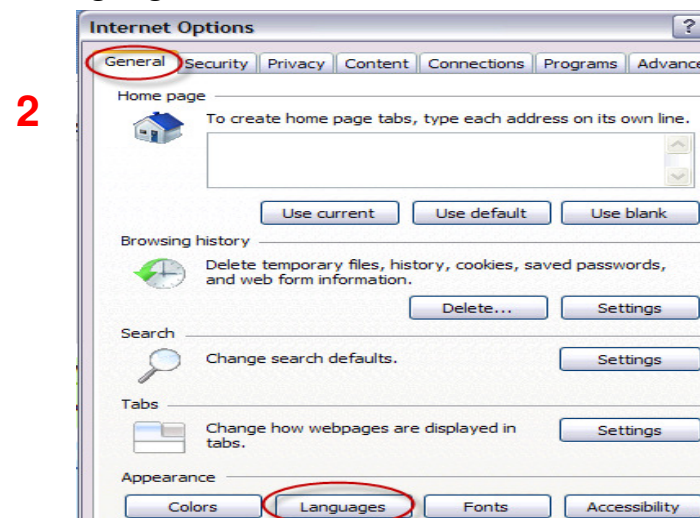
## PartnerPlan User Prerequisites – Currency Settings

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

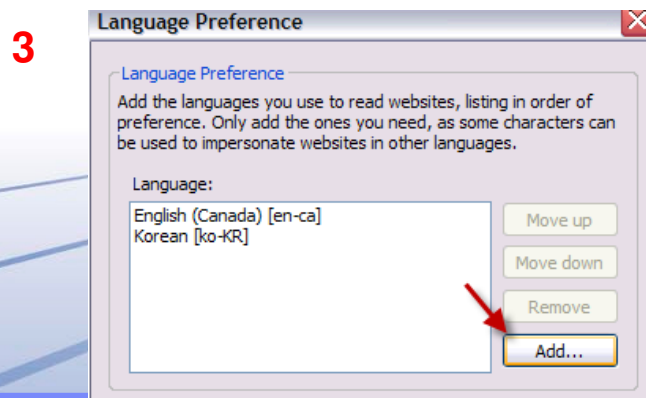
**Step 1: Go to the Tools menu on your browser and select Internet Options.**



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



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



## PartnerPlan

### Section B:

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

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

IBM Partner World

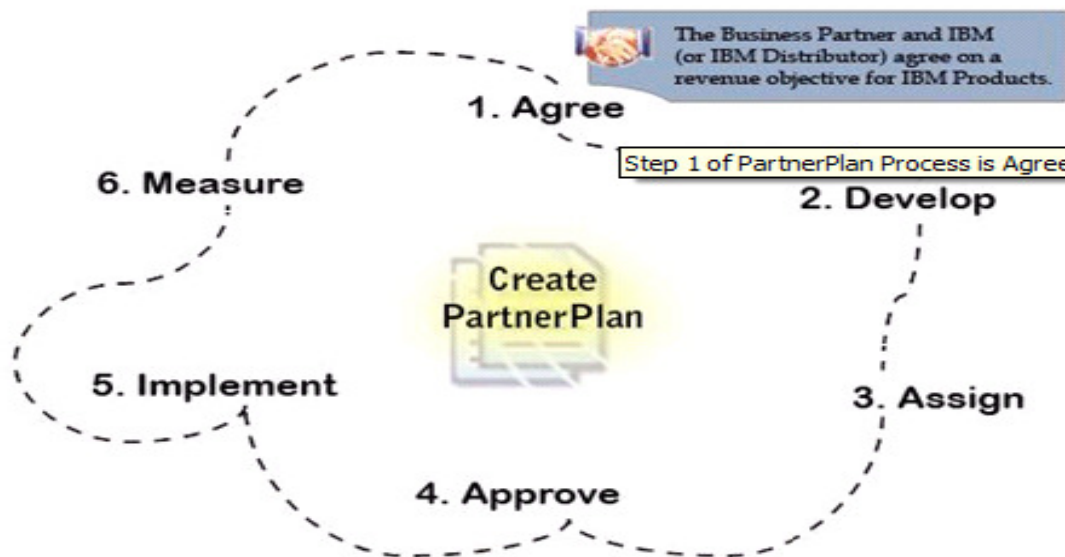
**Navigation Column**

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

## PartnerPlan 2010

*A relationship process for use with IBM Business Partners*

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



IBM Confidential

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

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

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

The screenshot shows the 'PartnerPlan 2010' interface. On the left is a 'Navigation Column' with a red circle around its title and a red box around the 'Change Privacy Settings' link. The main content area features a circular process diagram with six steps: 1. Agree, 2. Develop, 3. Assign, 4. Approve, 5. Implement, and 6. Measure. A central icon labeled 'Create PartnerPlan' is highlighted. A callout box for '1. Agree' states: 'The Business Partner and IBM (or IBM Distributor) agree on a revenue objective for IBM Products.' Another callout box says 'Step 1 of PartnerPlan Process is Agree'. Below the diagram, a text box reads: 'PartnerPlans are always created from the Business Partner's point of view. The IBM PartnerPlan tool is designed to keep the team focused, foster collaboration, and ensure results. It works!' The IBM Confidential logo is visible at the bottom left of the interface.

## To find an existing PartnerPlan:

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

← IBM Partner World

**Create/Copy/Find PartnerPlan**

**Navigation Column**

- PartnerPlan Home
- Education/Aids/Tools
- View PartnerPlans
- Create/Copy/Find Missing PartnerPlan**

**I want to**

- Create a new PartnerPlan
- Copy my plan and use it for 2010
- Find my missing plan

Choose the Find my missing plan link.

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

← IBM Partner World

**Find PartnerPlan**

**Navigation Column**

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

- Enter all or part of the Business Partner name. Enter the name matching the contact name in the PartnerWorld Profiling System.
- You can also search by Country Enterprise ID (CEID). The CEID can be obtained from the PartnerWorld Contact Services (PWCS) helpdesk.
- PWCS contact information is provided [here](#).
- There are only links to Plans that you have access to. Click on the Plan name to be taken to the Plan.

Click on the 'here' link for help.

Search for Business Partner

Aurora

OR

Search for Country Enterprise ID

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

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



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

1) Click on the Copy my plan link.

**Create/Copy/Find PartnerPlan**

I want to

- [Create a new PartnerPlan](#)
- [Copy my plan and use it for 2010](#)
- [Find my missing plan](#)

Choose the Copy feature

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

← IBM Partner World

**Navigation Column**

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

### Copy PartnerPlan

- Enter all or part of the Business Partner name. Enter the PartnerWorld Profiling System.
- You can also search by Country Enterprise ID (CEID) PartnerWorld Contact Services (PWCS) Helpdesk.
- PWCS contact information is provided [here](#)

Search for Business Partner

**OR**

Search for Country Enterprise ID

To copy a prior year plan for current year use:

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

**NOTE:** Only the Plan Owner or Plan Owner’s Manager can copy the plan.

If you are the new owner, contact the Plan Owner using the link. Ask the current owner to make you the plan owner by replacing his name and IBM id with your name and IBM id on the Access tab.

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

### Copy PartnerPlan

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

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

Search for Business Partner



**OR**

Search for Country Enterprise ID



Plan Name	Country	Enterprise ID	Status	Contact Plan Owner	
<a href="#">A Top Plan</a>	United States of America	18z7gey8	ACTIVE	<a href="#">Email Owner</a>	<a href="#">Copy</a>



To copy a prior year Plan for the current year:

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

← IBM Partner World

**View Plans**

Navigation Column

- PartnerPlan Home
- Education/Aids/Tools
- View PartnerPlans
- Create/Copy/Find Missing PartnerPlan
- Help
- Manager's Page

A B C D E F G H I J K L

Quick Search: enter the first few c

Find It!

Double click plan name to open

- ▶ [A Better Car](#)
- [A Better Car - 2010](#)

**NOTE:**

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

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

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

## To archive a PartnerPlan:

1) Click on the link to the old plan.

Navigation Column

PartnerPlan Home

Education/Aids/Tools

**View PartnerPlans**

Create/Copy/Find Missing PartnerPlan

Help

Manager's Page

A B C D E F G H I J K L M N O

Quick Search: enter the first few characters

[Find It!](#)

Double click plan name to open. Click

[A Better Car](#)

[A Better Car - 2010](#)

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

← IBM Partner World

**PartnerPlan for A Better Car**  
Last Updated on Nov-13-09

[Edit](#)
[Delete Plan](#)
[Close](#)
[Email](#)
[Print](#)
[Executive Review](#)

[Name & Address](#)
[Revenue](#)
[Activities](#)
[Skills](#)
[Approvals](#)
[Access](#)

**PartnerPlan Basic Information**

Plan Time Frame		Business Partner Firm Name and Address	
<u>Start Date</u> (mm/dd/yyyy)	Jan-1-09	<u>Firm Name</u>	A Better Car
<u>End Date</u> (mm/dd/yyyy)	Dec-31-09	<u>Address</u>	110 Great Lakes Blvd.
		<u>City</u>	Belgrade
		<u>State / Zip</u>	/10070
		<u>Country</u>	Serbia
		<u>HomePage URL</u>	www.atech.com
		<u>Country Enterprise ID</u>	2r8w0pgu

IBM Organizational Units		BP's Relationships	
<u>Business Unit</u>	IBM Software	<u>Primary</u>	Implementer
<u>Business Unit (Secondary)</u>		<u>Additional</u>	IBM SW Reseller
<u>Region</u>	Central & Eastern Europe	<u>Additional</u>	VAD (Value Add Distribut

Plan Tools

→ Archive Plan

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

## Creating a New Plan:

- 1) Open the Create/Copy/Find Missing PartnerPlan view.
- 2) Click on Create a new PartnerPlan.

### Create/Copy/Find PartnerPlan

I want to

- Create a new PartnerPlan
- Copy my plan and use it for 2010
- Find my missing plan

Choose the Create a new PartnerPlan option

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

Home | Products | Services & solutions | Support & downloads | My account

← IBM Partner World

### Create PartnerPlan

**Navigation Column**

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

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

Search for Business Partner

OR

Search for Country Enterprise ID

You can search by either Company name or Country Enterprise id (CEID). The CEID is a more precise search and can be obtained by contacting the PWCS team at the link above.

## Creating a New Plan:

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

### Create PartnerPlan

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

Search for Business Partner


OR

Search for Country Enterprise ID

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

Plan Name	Country	Enterprise ID	Status	Contact Plan Owner
Acme Test Plan	United States of America	10aiIDTY	ACTIVE	<a href="#">Email Owner</a>



## Creating a New Plan:

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

The screenshot displays the 'Create PartnerPlan' page in the IBM PartnerWorld system. On the left is a navigation column with links such as 'PartnerPlan Home', 'Education/Aids/Tools', and 'View PartnerPlans'. The main content area has a heading 'Create PartnerPlan' and a list of instructions: 'Enter all or part of the Business Partner name...', 'You can also search by Country Enterprise ID (CEID)...', and 'PWCS contact information is provided here'. Below the instructions are search fields for 'Business Partner' (containing 'Aurora') and 'Country'. A 'Go' button is next to the first field. A red arrow points from the 'Cancel' button in the error dialog to the 'Cancel' button in the search form. At the bottom, there is an 'IBM Confidential' notice and links for 'About IBM', 'Privacy', and 'Contact'.

Navigation Column

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

IBM Confidential

About IBM | Privacy | Contact

### Create PartnerPlan

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

The Business Partner you are searching for is not in the active Database. Click cancel to begin the process of searching the PartnerWorld Profiling System.

Search for Business Partner

Aurora Go

Search for Country

Windows Internet Explorer

No Match was found.

To search again, click on OK and use more or less of the name you entered originally.

To create a new plan, click Cancel (which cancels the search of PartnerPlan). The system will automatically take you to the PartnerWorld Profiling database where you can search for your Business Partner. Once you find your Business Partner, a new plan will be created.

OK Cancel

## Creating a New Plan:

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

← IBM Partner World

### Navigation Column

PartnerPlan Home

Education/Aids/Tools

View PartnerPlans

Create/Copy/Find  
Missing PartnerPlan

Help

Manager's Page

### Create PartnerPlan

#### Search for Business Partner:

#### OR Search for Country Enterprise ID:

- Highlight the Business Partner name and click Continue. Clicking Continue will create a new PartnerPlan.
- If you do not see your Business Partner listed, you can either try another search or contact the [PartnerWorld Contact Services helpdesk](#)



## Creating a New Plan:

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

← IBM Partner World

### Create PartnerPlan

**Navigation Column**


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

**Search for Business Partner:**

aurora  Canada

**OR Search for Country Enterprise ID:**

- Highlight the Business Partner name and click Continue. Clicking create a new PartnerPlan.
- If you do not see your Business Partner listed, you can either try search or contact the [PartnerWorld Contact Services helpdesk](#)



Aurora Test Company  
Aurora Test Company Too  
AuroraM

**IBM Confidential**

<b>Name:</b>	Aurora Test Company
<b>Address:</b>	136 Wellington St East
<b>City:</b>	Packham
<b>State/Province:</b>	ON
<b>Zip/Postal Code:</b>	L4G 5J5
<b>Country Code:</b>	Canada
<b>BP URL:</b>	
<b>Country Enterprise ID:</b>	25zc1pn
<b>PW Level:</b>	Member

## Creating a New Plan:

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

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

The screenshot shows the IBM Partner World interface. The main page is titled "New Partner Plan" and includes a sidebar with navigation options like "PartnerPlan Home", "Education/Aids/Tools", and "Create PartnerPlan". The main content area has a "PartnerPlan Basic Info" section with fields for "Name", "Revenue", and "Plan Time Frame" (Start Date and End Date). A dialog box titled "Partner Plan 12.0 -- Web Page Dialog" is overlaid on the page, asking the user to identify their relationship to IBM. The dialog box contains the following text: "Please identify yourself using one of the four following choices:" followed by three radio button options: "An employee of an IBM Distributor", "An IBM employee", and "An IBM Business Partner". A blue arrow points to the "An IBM Business Partner" option. Below the dialog box, there are two sections: "IBM Organizational Units" and "BP's Relationships". The "IBM Organizational Units" section has a "Business Unit\*" dropdown menu. The "BP's Relationships" section has a "Primary\*" dropdown menu and two "Additional" dropdown menus. A red text annotation on the right side of the dialog box reads: "Identify your relationship to IBM by clicking on the appropriate button."

# Creating a New Plan

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

## PartnerPlan for Aurora Test Company

Last Updated on Dec-23-09

- Edit
- Delete Plan
- Close
- Email
- Print
- Executive Review

- Name & Address**
- Revenue
- Activities
- Skills
- Approvals
- Access

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

### PartnerPlan Basic Information

Plan Time Frame		Business Partner Firm Name and Address	
<u>Start Date</u> (mm/dd/yyyy)	Jan-1-10	<u>Firm Name</u>	Aurora Test Company
<u>End Date</u> (mm/dd/yyyy)	Dec-31-10	<u>Address</u>	136 Wellington St. East
		<u>City</u>	Packham
		<u>State / Zip</u>	/E0E JK2
		<u>Country</u>	United Kingdom
		<u>HomePage URL</u>	www.aurorait.com
		<u>Country Enterprise ID</u>	25zc1pm

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

# Creating a New Plan:

## The First Tab > Name & Address

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

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

IBM Organizational Units		BP's Relationships												
*Business Unit	Which IBM Unit is your relationship with?	*Primary	Which type of contract does the Business Partner have?											
Business Unit		Additional	-----											
(Secondary)		*Distributor	-----											
Region	If you are a Distributor or have a relationship with a Distributor, Select the Distributor name from the list. If the Distributor name is not in the list, Select Other.	Select												
Geography														
SubRegion														
* Rep Name (e.g John Doe)		Rep Phone-external	PartnerWorld Level											
Julia Child			Member											
* Main Business Partner Contact	Responsibility	Phone	Second Phone	Email										
Sam Jones	VP, Marketing	877-158-1877												
<p><b>Show Other Contacts</b>   The Other Contacts section is a reference section only. You can add an unlimited number of contacts from IBM or the Business Partner. Adding someone here does NOT give access to the Plan. Access is provided on the Access tab only.</p> <p> <input type="button" value="Add"/> <input type="button" value="Modify"/> <input type="button" value="Remove"/> </p> <p>Use the table below to store the names of people who can help with the development or implementation of this plan</p> <table border="1"> <thead> <tr> <th>Other Contact Names</th> <th>Responsibility</th> <th>Phone</th> <th>Second Phone</th> <th>Email</th> </tr> </thead> <tbody> <tr> <td>Emilio Sabatini</td> <td>IBM Program Manager</td> <td>416-888-7676</td> <td>---</td> <td>esabatini@Aurora.com</td> </tr> </tbody> </table>					Other Contact Names	Responsibility	Phone	Second Phone	Email	Emilio Sabatini	IBM Program Manager	416-888-7676	---	esabatini@Aurora.com
Other Contact Names	Responsibility	Phone	Second Phone	Email										
Emilio Sabatini	IBM Program Manager	416-888-7676	---	esabatini@Aurora.com										

# Creating a New Plan:

## The First Tab > Name & Address

### Business Partner 's Core Business

[↑ Back to top](#)

What does this BP sell, what are their main markets, and what are their key business issues?

Focus Brand Review

Add three or four lines to summarize the Business Partner's products or services and business issues.

Select

This year's Revenue Objective

Field level help

Last year's Revenue Objective

Percent In General Business

Business Partner's Revenue Objective  
IBM Revenue Objective



Add the Business Partner's Overall Revenue Objective



Add IBM's portion of the overall objective.



### Comments

Free text area to add additional comments.

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

### Attachments

## Creating a New Plan (IBM Software only):

### The Second Tab > Revenue



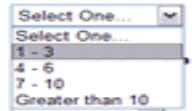
If you have selected IBM Software as the Business Unit on the Name and Address tab, there are 10 mandatory questions on the Revenue tab, Step 3. Prior to creating the PartnerPlan, obtain the answers to these questions. These are not mandatory for non-Software partners.

→ Step 1. Enter Business Partner Solutions  
 → Step 2. Enter IBM Products  
 → Step 3. Enter Software Marketing Responses (Mandatory for all IBM Software plans)  
 → Step 4. (Optional ) Create/Use Action Plans



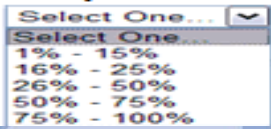
**1) How many IBM Software Brands do you currently sell? Please select all that apply.**

Information Management  
 Lotus  
 Rational  
 Tivoli  
 Websphere

**2) How many Sales Reps do you have selling IBM Software and/or IBM Solutions?**

Select One...   

**3) What percentage of time does your sales force dedicate to selling IBM Software and/or IBM Solutions?**

Select One...   

## Creating a New Plan (IBM Software only):

The Second Tab > 

### Mandatory Software Questions continued:

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

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

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

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

1

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

2

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

Select One...

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

Select One...

e. OEM:

Select One...

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

Select One...

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

Select One...

## Creating a New Plan (IBM Software only):

The Second Tab > **Revenue**

### Mandatory Software Questions continued:

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

Yes  No

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

Select One...  

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

Yes  No

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

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



## Creating a New Plan (IBM Software only):

The Second Tab > **Revenue**

### Mandatory Software Questions continued:

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

a. Certifications:

Select One... ▼



Select One... ▼

b. Marketing:

Select One... ▼



Select One...

Under \$10K

\$10K - \$50K

\$50K - \$100K

Over \$100K

c. Headcount:

Select One... ▼



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

Select One... ▼



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

Yes  No

# Creating a New Plan Access

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

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

Save Delete Plan Close Email Print Executive Review Set/Get

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

**PartnerPlan Ownership**

* PartnerPlan Owner	* PartnerPlan Owner's WI Id	* Owner's Email Address
Anne Henderson/Atlanta/Cont/IE IBM Employee <a href="#">Change Owner Affiliation</a>	IBMUniqueIdentifier=2700002GSH <a href="#">Select</a>	ahend@us.ibm.com
* Owner's Manager	* Owner's Manager's WI Id	* Owner's Manager Email Address
johnnysu/taiwan/ibm	IBMUniqueIdentifier=2700002VTK <a href="#">Select</a>	johnnys@tw.ibm.com

# Creating a New Plan

Revenue Tab: **Revenue**

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

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

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

Name & Address	Revenue	Activities	Skills	Approvals
<p>→ <b>Step 1. Enter Business Partner Solutions</b></p> <p>→ Step 2. Enter IBM Products</p> <p>→ Step 3. Enter Software Marketing Responses (Mandatory for)</p> <p>→ Step 4. (Optional) Create/Use Action Plans</p>				
BP Solutions & Services	→ Calc	This Year's Objective		
A		80,000		
Comments:				
B		35,000		
Comments:				
C		150,000		
Comments:				
		0		
Comments:				

## Creating a New Plan

### Revenue Tab: **Revenue**

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

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

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

- **Step 1. Enter Business Partner Solutions**
- **Step 2. Enter IBM Products**
- **Step 3. Enter Software Marketing Responses (Mandatory for a**
- **Step 4. (Optional) Create/Use Action Plans**

**BP Solutions & Services** | **Calc** | **This Year's Objective**

A | 500000

Comments:

# Creating a New Plan

Revenue Tab: **Revenue**

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

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

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

[Save](#) [Delete Plan](#) [Close](#) [Email](#) [Print](#) [Executive R](#)

[Name & Address](#) **Revenue** [Activities](#) [Skills](#) [Approvals](#) [Access](#)

[Step 1. Enter Business Partner Solutions](#)  
**[Step 2. Enter IBM Products](#)**  
[Step 3. Enter Software Marketing Responses \(Mandatory for all IBM Software\)](#)  
[Step 4. \(Optional\) Create/Use Action Plans](#)

IBM Products		This Year's Objective	Prior Year Revenue
Lotus Portal	<a href="#">Select</a>	150,000	0
Comments:	<input type="text"/>		
WebSphere Enterprise Trans Solutions (z)	<a href="#">Select</a>	88,000	0
Comments:	<input type="text"/>		
System z	<a href="#">Select</a>	110,000	0
Comments:	<input type="text"/>		
System x	<a href="#">Select</a>	85,000	0

## Creating a New Plan

Revenue Tab: **Revenue**

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

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

- Step 1. Enter Business Partner Solutions
- Step 2. Enter IBM Products
- Step 3. Enter Software Marketing Responses (Mandatory for all IBM Software plans)**
- Step 4. (Optional) Create/Use Action Plans

**1) How many IBM Software Brands do you currently sell? Please select all that apply.**

IM

Lotus

Rational

Tivoli

Websphere

**2) How many Sales Reps do you have selling IBM Software and/or IBM Solutions?**

4 - 6

## Creating a New Plan

Revenue Tab: **Revenue**

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

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

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

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

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

# Creating a New Plan

Revenue Tab **Revenue**

## Step 4 – Action Plans

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

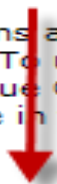
**The DGF and MIF action plans will only appear on Distributor plans.**

+ - Edit ✕ Delete Plan ← Close ✉ Email 🔍 Print 🔍 Executive Review

Name & Address Revenue Activities Skills Approvals Access

- ➔ Step 1. Enter Business Partner Solutions
- ➔ Step 2. Enter IBM Products
- ➔ Step 3. Enter Software Marketing Responses (Mandatory for all IBM Software
- ➔ Step 4. (Optional ) Create/Use Action Plans

Action Plans are designed to group a set of Activities around a Business Partner Solution or grouping. To use Action plans, click the Create Action Plan button and create a set of Activities, the Revenue Objective for this Solution, etc. To open an existing Action plan, merely click plan name in the panel to the left.



➔ Create Action Plan ➔ Create MIF Action Plan ➔ Delete ➔ Refresh

	Description
<input type="checkbox"/>	<a href="#">Plan 2 Marketing Investment Fund for Distributors</a>
<input type="checkbox"/>	<a href="#">Plan 3 test for action plan</a>



# Creating a New Plan

Revenue Tab

Revenue

## Step 4 – Action Plans

### Action Plan 1Q Activities

→ Save
✕ Delete
← Close
✉ Email

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

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

Solution Name	Description of Business Solution	Target Market

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

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

/ibm

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

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

# Creating a New Plan: Activity

Revenue

or

Activities

**PartnerPlan:**  
**Action Plans:**

**Activity ID:** 002574BB004DA6048725742E002B4581

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

**Co-funded Marketing Application**

**Activity has been sent to CMT**

**UCID:** NECE6030708

**Status:** Claim Paid

**Date Submitted:** 07/18/2008

[Access the Co-funded Marketing Tool](#)

- Set a Reminder for this Activity
- Attach Connector

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

**Time Frame**

Start Date  
(mm/dd/yyyy)  
End Date  
(mm/dd/yyyy)

**Funding Program**

# Creating a New Plan: Activity

Revenue

or

Activities

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

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

→ Save ← Close × Delete ✉ Email → Create New Activity → Submit

↻ Show Revenue in USD

**PartnerPlan:** Aurora Test Company  
**Action Plans:** [Select Action Plan](#)

**Activity ID:** 852575A600589FE8002575C3004D240B

[Great Ideas!](#)  
[Set a Reminder for this Activity](#)  
[Sales Support](#)

**Time Frame**

\* Start Date (mm/dd/yyyy) 01/07/2010 [Date](#)

\* End Date (mm/dd/yyyy)

\* Activity Name

**Location of Activity**

[help]

**Callout 1:** You can send automated reminders to yourself or other teammates using this feature.

**Callout 2:** Click on "Date" and select the dates of the activity from the calendar.

**Callout 3:** Click on "Select" and choose the funding program may fund part or all of the activity. Select "other" if the costs are covered by the Business Partner or the Distributor.

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

# Creating a New Plan: Activity (continued)

Revenue

or

Activities

Complete all mandatory fields, identified with a red asterisk.

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

>BP Names (enter all Business Partners you have worked with on this activity if you are requesting funding from SWG Plug N Play or SWG VAD MDF).

>The Catering, Entertainment, Transportation fields allow you to enter estimated catering /entertainment and/or transportation costs. Provide the name of the vendor and other detail describing the costs in the Expense Detail field. This information will flow through to the CoMarketing Tool if the program is linked.

The other fields are described in the following two charts.

The Activity Name field requires a short description of the activity

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

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

<p><b>* Activity Name</b></p> <p>Trade show in Belgrade</p>		<p><b>Location of Activity</b></p> <p></p>	
<p><b>BP Names</b></p> <p>Business Partner A Business Partner B</p>		<p><b>Activity</b></p> <p></p>	
<p><b>Amount Requested from Program</b></p> <p>0</p>	<p><b>* Spending Category</b></p> <p></p>	<p><b>Catering</b> 0</p> <p><b>Entertainment</b> 0</p> <p><b>Transportation</b> 0</p> <p><b>Expense detail</b></p>	<p>Dollar USA</p>
<p>0 [help] Select</p> <p>Enter the Amount in US Currency</p>			

# Creating a New Plan: Activity (continued)

Revenue

or

Activities

**Complete all mandatory fields, identified with a red asterisk.**

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

**Amount Requested from Program** i

5000 [help]

**Enter the Amount in Local Currency.**

**Category**

---

**\* Person Responsible** [help]    **Activity Status** [help]    **Segment** [help]

Open

---

**Industry**

- Aerospace and Defense
- Automotive
- Banking
- Chemical and Petroleum

**Activity Type** i

Select

---

**Territory Marketing Manager**

- Identify TMM if involved
- Amy S Lawrence/Lansing/IBM
- Anne Hay/Markham/IBM
- Deb Williamson/Dalla

**Additional Software Questions**

Software Value Incentive

Value Advantage Plus

Enter a number without punctuation; the system will add the punctuation when you save the Activity.

The Amount Requested from Program is the amount that you are asking IBM to pay against the cost of this activity.

Two new fields for IBM Software partners appear below.

# Creating a New Plan: Activity (continued)

Revenue

or

Activities

**IBM Brand(s)** ⓘ

Select Solution... ▼

Planned Rev  ⓘ

Actual Rev

Select Solution... ▼

Planned Rev  ⓘ

Actual Rev

Select Solution... ▼

Planned Rev  ⓘ

Actual Rev

---

Activity Cost ⓘ		Total Win Revenue ⓘ	Leads	Expense Revenue (E/R) ⓘ
Planned	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	0.0% → Calc
Actual	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	0.0%

---

Invitees/End-User Touches/Participants	Responses	Validated Lead Revenue ⓘ
Planned <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Actual <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

---

Date Claim Submitted:  Date Claim Paid:  Claim Amount: ⓘ

---

Approver	Approval Status	Date Submitted	Funding Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

Approver Comments

---

GPP Validated Leads ⓘ	GPP Validated Lead Revenue ⓘ	GPP Validated Win Revenue ⓘ
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

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

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

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

# Submitting a New Activity – All Types

Revenue

or

Activities

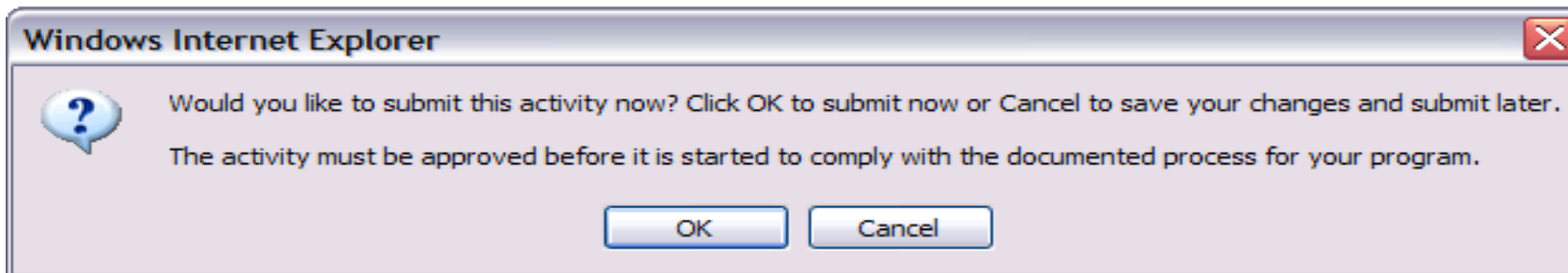
Activity -- Trade Show 3 in Belgrade

PartnerPlan:  
Action Plans:

Activity ID: 48656D5F5F99CB210025751B00175D87

- Great Ideas!
- Set a Reminder for this Activity
- Attach Connector

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



Activity Name	Trade Show 3 in Belgrade
Location of Activity	
Exchange Rate of Activity	1.0000000

# Submitting a New Activity – All Types

Revenue

or

Activities

## Activity -- Trade Show 3 in Belgrade

- Edit
- Close
- Delete
- Email
- Create New Activity

- A request for review has been created.



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

**PartnerPlan:**  
**Action Plans:**  
**Activity ID:** 48656D5F5F99CB210025751B00175D87

- Set a Reminder for this Activity
- Attach Connector
- Sales Support

Time Frame

Funding Program



# Submitting Activities from the Activities Tab

## Activities

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

- Create New Activity
- Copy One or More Activities
- Paste One or More Activities
- **Submit One or More Activities**
- Import Activities
- Delete Activities
- Refresh View
- Export to Excel
- 📄 IBM Sales Support
- Monthly Progress Meeting
- 📄 Link to Account Planning
- 📄 Link to BP Connections

Search for Activity by Name, Activity ID, or CMT UCID

	Funding Program	Activity Type	Activity	Person Responsible	Estimated Cost	Estimated Cost USD	Program Funding	Program Funding USD	Ac Co
<input checked="" type="checkbox"/>	SWG VAD MDF	Demand Generation	<a href="#">Impact comes to you for FSS markets</a>	Tom Smith	0	0.00	0	0.00	0
<input checked="" type="checkbox"/>	SWG VAD MDF	Demand Generation	<a href="#">WAS Workshop in association with Macro 4 and IBM</a>	Tom Smith	0	0.00	0	0.00	0

# Changing the Claim Amount or Brand

Review This: →

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

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

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

## Activity

+- Edit
← Close
✕ Delete
✉ Email
→ Create New Activity
⊕ Update Fields

**PartnerPlan:**  
**Action Plans:**  
**Activity ID:** 2C399C0F3E92876A852573C9006FCD06

A dropdown menu is shown below the 'Update Fields' button. The menu items are:
 

- Change Claim Amount
- Change Brand
- Set
- Attach Connector
- Sales Support

 Red arrows point to the 'Change Claim Amount' and 'Change Brand' options.

# Activities Tab: Copy Feature

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

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

	Funding Program	Activity Type	Activity	Person Responsible	Estimated Cost	Estimated Cost USD	Program Funding	Program Funding USD	Ac Co
<input checked="" type="checkbox"/>	SWG VAD MDF	Demand Generation	<a href="#">Impact comes to you for FSS markets</a>	Tom Smith	0	0.00	0	0.00	0
<input type="checkbox"/>	SWG VAD MDF	Demand Generation	<b>COPY</b> <a href="#">Impact comes to you for FSS markets</a>	Tom Smith	0	0.00	0	0.00	0

# Creating a New Activity

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

The screenshot shows the 'New Activity' form in the IBM PartnerWorld interface. The form includes fields for 'PartnerPlan', 'Action Plans' (currently showing '1Q Activities'), 'Activity ID', 'Time Frame' (with 'Start Date' and 'End Date' fields), 'Activity Name', 'Amount Requested from Program', and 'Program I.D.'. A 'Select Action Plan' button is highlighted with a red arrow. An overlaid dialog box titled 'PartnerPlan 12.0 -- Web Page Dialog' contains a list of activity options: '1Q Activities', '2Q Activities', '3Q Activities', '4Q Activities', and 'Distributor Growth Fund'. The dialog also has 'OK' and 'Cancel' buttons. A red text box above the dialog explains: 'After you create an activity, you can click on Select Action Plan for a list of existing Action Plans. You can highlight one or more Action plans. The activity will appear on all of the Action Plans selected.'

# Skills Tab Skills

**Brands selected on the Revenue step, Step 2 will flow through to the Skills tab. An agent runs overnight (North American time) to update the Skills tab with the certifications in the PartnerWorld Contact Services database.**

**A future tool update will capture hardware certs at the enterprise level.**

Name & Address
Revenue
Activities
Skills
Approvals
Access

Education Vouchers 0

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

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

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

## Approvals Tab: Approvals

Three types of approvals are typically required in PartnerPlan.

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

+ Edit   X Delete Plan   ← Close   ✉ Email   🔍 Print   🔍 Executive

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

Business Partner | IBM/Distributor | IBM SWG Mgmt Approval | Program

Your approval signifies that you have reviewed the plan and..

- Agree with the revenue objectives in the plan
- Will commit to the resources assigned to work on the plan's activities
- Agree to the funding required as stated in the plan
- Agree to the time frames for completion of the plan
- Agree that, in your business judgement, this plan will achieve your revenue

Business Partner Executive ->  
 Approval Status ->  
 Date Approved ->

## Access Tab:

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

Name & Address	Revenue	Activities	Skills	Approvals	Access
<b>PartnerPlan Ownership</b>					
* PartnerPlan Owner		* PartnerPlan Owner's WI Id		* Owner's Email Address	
Anne Henderson		IBMUniqueIdentifier=2700002GS		ahend@us.ibm.com	
IBM Business Partner		Select			
Change Owner Affiliation					
* Owner's Manager		* Owner's Manager's WI Id		* Owner's Manager Email Address	
Scott/AUSTIN/US/IBM		UniqueIdentifier=0100002E0V		srk@us.ibm.com	
		Select			



The SWG Manager fields are not mandatory. They are used only on plans created by non-software personnel where the software representatives are added as as teammembers.

SWG Manager	SWG Manager's WI Id	SWG Manager Email Address
Anne Henderson	IBMUniqueIdentifier=2700002GS	ahend@us.ibm.com
	Select	

## Access Tab: Access

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

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

**PartnerPlan Ownership**

* PartnerPlan Owner	* PartnerPlan Owner's WI Id	* Owner's Email Address
Scott/AUSTIN/US/IBM IBM Distributor Employee <a href="#">Change Owner Affiliation</a>	IBMUniqueIdentifier*0100002E0W <a href="#">Select</a>	srk@indellient.com
* Owner's Manager	* Owner's Manager's WI Id	* Owner's Manager Email Address
Anne Henderson/Atlanta/Contr/IE	IBMUniqueIdentifier=2700002GSP <a href="#">Select</a>	Henderson@test.com
Owner's Manager Override	Owner's Manager Override WI Id	Owner's Manager Override's Email Address
	<a href="#">Select</a>	

**Reason for Override**

**Team Member Access**

You provide access to PartnerPlan in the table below. PartnerPlans are Business Partner Confidential. The PartnerPlan Owner determines who has access to the plan. Teammembers cannot add other team members. Add team members by entering their Web Identity id (example: IBMUniqueIdentifier=999999ZZZZ;cn=people/c=US/l=world) in the Team member field. If your team member does not have or does not know his or her Web Identity id, please refer them to their local PartnerWorld Contact Services Helpdesk. Contact information is found in the Help view on the left, blue navigation column.

Enter the names of others who should have access to this plan.

- Click Add button to add team members
- Click Modify button to update a team member
- Click Remove button to remove a team member

[Add](#) [Modify](#) [Remove](#)

Team Members	Email Address	Business Unit	Edit Rights	Create Pages
--------------	---------------	---------------	-------------	--------------



# Giving Access To Plan

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

Add    Modify    Remove

Team Members	Email Address	Business Unit	Edit Right
<div style="border: 1px solid gray; padding: 5px;"> <p><b>IBM PartnerPlan 12.0 -- Webpage Dialog</b></p> <p><b>IBM</b></p> <p>To see this PartnerPlan, Team Members must be added with the Web Identity (WI id). To find their WI id, use the Select link. <u>The Select link will allow you to search the WI id database by name.</u> If you cannot find the name you are looking for, notify the Team Member that he must contact the PartnerWorld Contact Services helpdesk for assistance.</p> <p>* <b>Team Member Web Identity id</b> <input type="text"/> <input type="button" value="Select"/></p> <p>* <b>Team Member Email</b> <input type="text"/></p> <p>* <b>Business Unit</b> <input type="text" value="-&gt;Select Business Unit&lt;-"/></p> <p>* <b>Access Rights</b>  <input type="radio"/> Read and Edit   <input type="radio"/> Read Only</p> <p>* <b>Create Action Plans</b>  <input type="radio"/> Yes   <input type="radio"/> No</p> <p>* <b>Action Plan Access Rights</b>  <input type="radio"/> Read and edit ALL Action Plans  <input type="radio"/> Read and edit SELECTED Action Plans  <input type="radio"/> Read only ALL Action Plans  <input type="radio"/> Read only SELECTED Action Plans</p> <p><input type="button" value="OK"/>   <input type="button" value="Cancel"/></p> </div>			

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

## Getting yourself added to an existing PartnerPlan

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

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

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

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

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

#### Find PartnerPlan

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

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

Search for Business Partner

OR

Search for Country Enterprise ID

Plan Name	Country	Enterprise ID	Status	Contact Plan Owner
<a href="#">ACME Inc.</a>	Argentina	10ailjyy	ACTIVE	<a href="#">Email Owner</a>
<a href="#">Acme</a>	Brazil	10ailk22	SOFT DELETED	<a href="#">Email Owner</a>



## Section C

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

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

← IBM Partner World

**Navigation Column**

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

**Plan Tools**

- Archive Plan
- Email Plan Owner
- Request Overall Plan Approval
- Request SWG Manager Approval
- Request Business Partner Approval

## PartnerPlan for Aurora Test Company

Last Updated on Dec-23-09

+ Edit
✕ Delete Plan
← Close
✉ Email
🔍 Print
🔍 Executive

Name & Address
Revenue
Activities
Skills
Approvals
Access

Business Partner
**IBM/Distributor**
IBM SWG Mgmt Approval
Program

Your approval signifies that you have reviewed the plan and agree that...

- The plan shows an understanding of the BP's Business.

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

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

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

You must use these links to create the audit trail.

IBM Products.  
signed.  
worked in the past.  
es.  
ve.

Executive → Enrique Sanchez/mexico/IBM

Approval Status -> **Unapproved**

Date Approved ->

Date Submitted ->

**Comments**

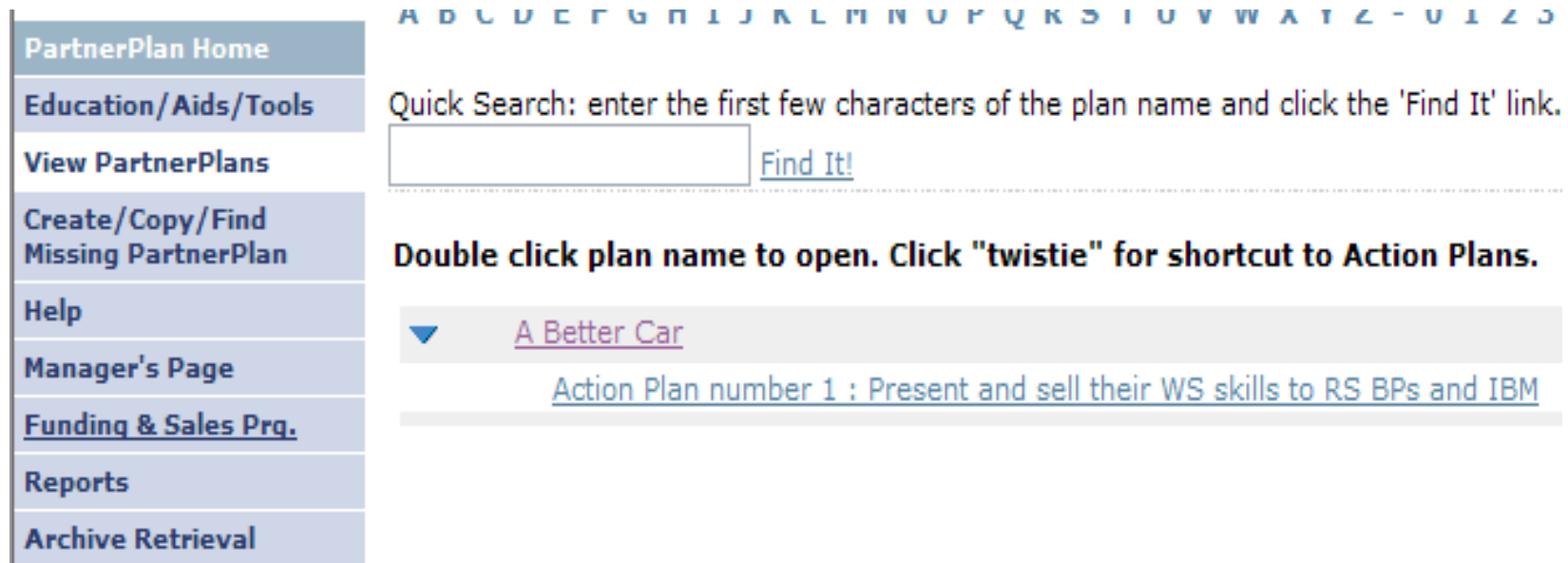
**Attachments**

## Faster Access to DGF or other Activities on Action Plans

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

The Action plan becomes visible.

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



The screenshot shows the PartnerPlan interface. On the left is a navigation menu with the following items: PartnerPlan Home, Education/Aids/Tools, View PartnerPlans, Create/Copy/Find Missing PartnerPlan, Help, Manager's Page, Funding & Sales Prq., Reports, and Archive Retrieval. The main content area features an alphabetical index (A-Z) and a search bar with the text "Quick Search: enter the first few characters of the plan name and click the 'Find It' link." Below the search bar is a "Find It!" button. A list of plans is displayed, with the first one being "A Better Car". A small downward-pointing triangle (the "twistie") is located to the left of the plan name. Below the plan name, the text "Action Plan number 1 : Present and sell their WS skills to RS BPs and IBM" is visible.

# Copying activities on the DGF/MIF Action Plan

## Action Plan Distributor Growth Fund - 1Q

A minimum of 15% of the planned annual Distributor Growth Fund should be allocated to "Market to Business Partners" for marketing activities directed at resellers participating across any customer set. Distributors with less than \$80,000 in annual Growth Funding are excluded from this guideline.

Revenue Objective for this Section

0

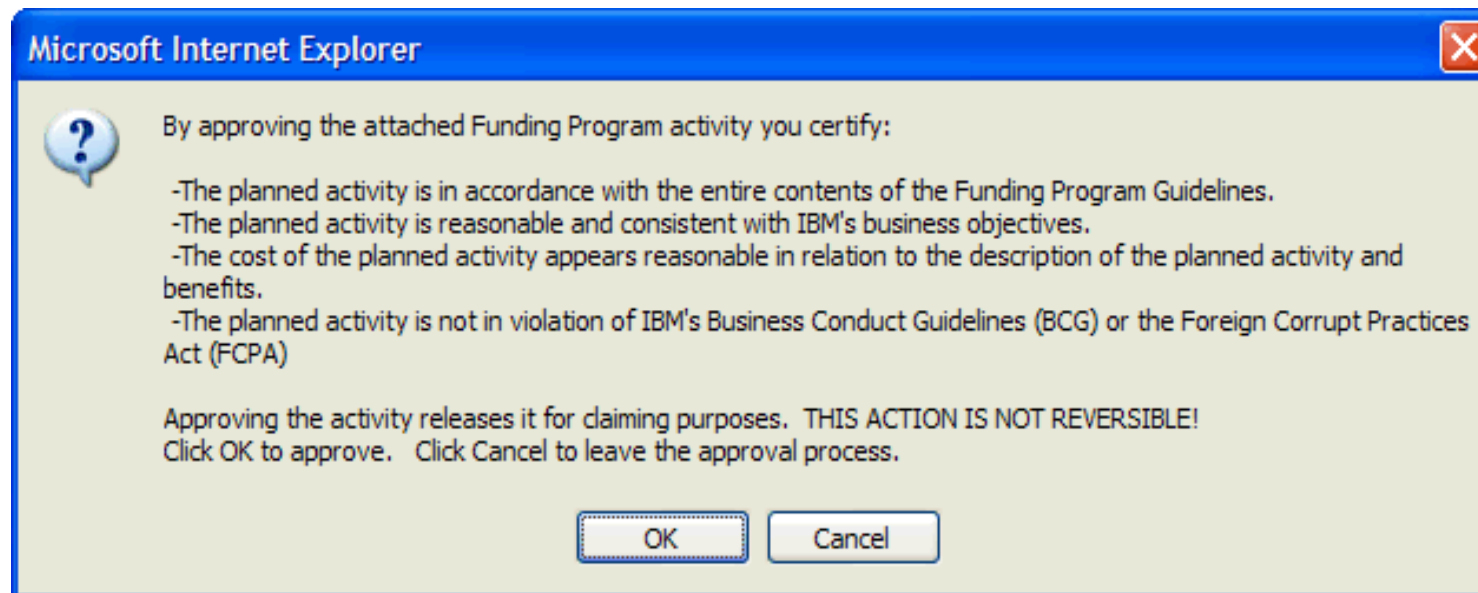
- Create New Activity
- Copy One or More Activities
- Paste One or More Activities

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

	Funding Program	Activity Type	Responsible	Es Co
<input checked="" type="checkbox"/>	Distributor Growth Fund	Channel Development - ValueNet	IBMuniqueIdentifier=2700002GSK/cn=people/c=CA/l=world	5,

# Funding Program Approver Certification

Clicking OK on this message approves the activity.



# Activity Approvals

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

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

Business Partner | IBM/Distributor | **Program**

[Approve All](#) << If you are an activity approver, you can use this link to approve all of the activities requiring your approval. To bypass approval for a subset of the activities you can use the check boxes below to select the activities that you DO NOT want to approve.

[Approve By Quarter](#) << If you are an activity approver, you can use this link to approve activities requiring your approval by your choice of quarters. To bypass approval for a subset of the activities you can use the check boxes below to select the activities that you DO NOT want to approve.

NOTE: Your approval indicates you have reviewed the plan and found it compliant with the regulations governing your program. You are releasing the funds to the Business Partner. Your approval also confirms that planned actions do not violate any Business Conduct Guidelines or the IBM Partner Code of Conduct.

	Program Name	Approver	Approved	Funding Status
<input type="checkbox"/>	<a href="#">Distributor Growth Fund</a>	Arnold Flowers/Toronto/IBM	Pending Review	Awaiting approval.
<input type="checkbox"/>	<a href="#">Distributor Growth Fund</a>	Arnold Flowers/Toronto/IBM	Pending Review	Awaiting approval.
<input type="checkbox"/>	<a href="#">Distributor Growth Fund</a>	Arnold Flowers/Toronto/IBM	Pending Review	Awaiting approval.



## Approving a New Plan

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

>>>Note the guidelines listed for Approval.

→ Save × Delete Plan ← Close ✉ Email 🔍 Print 🔍 Executive Review

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

Business Partner **IBM/Distributor** Program

Your approval signifies that you have reviewed the plan and agree that...

- The plan shows an understanding of the BP's Business.
- There an agreed upon revenue objective for BP and IBM Products.
- The activities have people, budget and due dates assigned.
- The activites seem right for this plan and have they worked in the past.
- There enough skills in place to achive the objectives.
- There a plan to increase skills if necessary.
- There enough funds available to achieve the objective.
- This plan has an acceptable return on investment.
- The time frame realistic.
- It is strategic.

Review before approving ->  Checklist

IBM/Distributor Executive -> dick Stern/San Diego/IBM

Approve ->

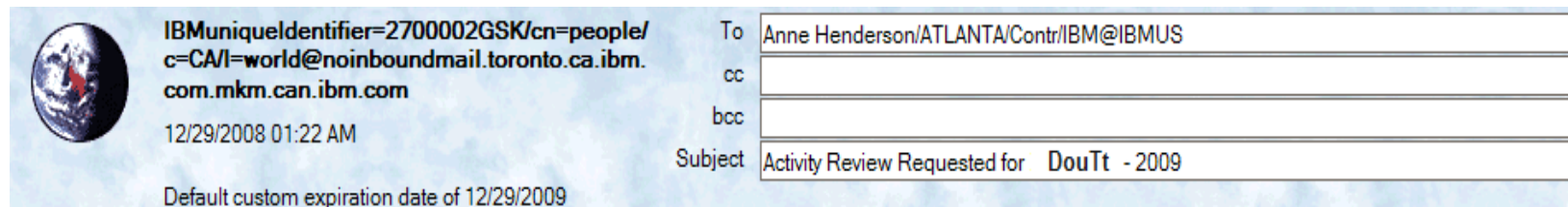
Approval Status ->

Date Approved ->

Guidelines you should review before approving the Plan.

## Sample Email To an Approver

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



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

Click this link to go to this activity ==>

<http://www-sso.toronto.ca.ibm.com/partnerworld/partnerplan/partplanmaint.nsf/0/0DE93CEA20FE4E820025752E0022CD1D>

# Executive Review

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



➔ Save
✕ Delete Plan
⬅ Close
✉ Email
🔍 Print
🔍 Executive Review
⊕ Set/Met

Name & Address
Revenue
Activities
Skills
Approvals
Access

Business Partner | IBM/Distributor | **Program**

➔ Approve All
 << If you are an activity approver, you can use this link to approve all of the



## What have you learned?

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

## Section D

### ➤ **Reports, Helpdesk and Webinars**

# Reports In PartnerPlan

← IBM Partner World

## Navigation Column

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

## Reports

Here are some useful standard reports. Your PartnerPlan Advocate can advise you on how to create customized versions of these reports or enter a requirement for additional reports. To find out more, contact your Business Unit's PartnerPlan Advocate or use HELP.

Subscription Reports
➔ <a href="#">Subscribe to a report</a>
➔ <a href="#">My Reports</a>
➔ <a href="#">My Report Criteria</a>

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



On Demand Reports
📄 <a href="#">Brand Report (spreadsheet)</a>
➔ <a href="#">Funding Programs Report</a>
➔ <a href="#">Approved Plans by PartnerWorld Level</a>
➔ <a href="#">Approved with no Activities</a>
➔ <a href="#">PartnerPlan Locator</a>
📄 <a href="#">SetMet Report (spreadsheet)</a>

# Reports

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

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

**Note:** Reports are created in the Eastern Time Zone.

← IBM Partner World

## Report Subscriptions

→ Save
← Close

Subscriber:	Email Address:	Access Level:
Anne Henderson/USM000012		[ReaderAll]

Subscription Type:

Standard
  Custom

**Custom Report Creation:**

These reports are created on the server on a scheduled basis. You will get a notification with a link to the reports after they have been created. The reports are in XML format and can be easily opened with Microsoft Excel, as well as many other spreadsheet or database applications.

**Directions:** Select as many choices as you wish from the fields below to produce a report containing only the information of interest to you. Hold down the shift key and right click to select more than one option from the dropdown. You can also leave all fields blank if you want a report containing everything in the database for these fields.

Example, To select all Distributors in the Americas, selling iSeries, choose **Geography** = Americas and **BP Type** = Distributors and **Brand** = iSeries.

---

Report Name:	Anne Henderson's Custom Report
Report Frequency:	Date(s) to run report:
<input checked="" type="radio"/> Monthly <input type="radio"/> Weekly	<input type="checkbox"/> 01 <input type="checkbox"/> 06 <input type="checkbox"/> 11 <input type="checkbox"/> 16 <input type="checkbox"/> 21 <input type="checkbox"/> 26 <input type="checkbox"/> 31 <input type="checkbox"/> 02 <input type="checkbox"/> 07 <input type="checkbox"/> 12 <input type="checkbox"/> 17 <input type="checkbox"/> 22 <input type="checkbox"/> 27 <input type="checkbox"/> EOM <input type="checkbox"/> 03 <input type="checkbox"/> 08 <input type="checkbox"/> 13 <input type="checkbox"/> 18 <input type="checkbox"/> 23 <input type="checkbox"/> 28 <input type="checkbox"/> 04 <input type="checkbox"/> 09 <input type="checkbox"/> 14 <input type="checkbox"/> 19 <input type="checkbox"/> 24 <input type="checkbox"/> 29 <input type="checkbox"/> 05 <input type="checkbox"/> 10 <input type="checkbox"/> 15 <input type="checkbox"/> 20 <input type="checkbox"/> 25 <input type="checkbox"/> 30

# Reports

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

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

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

Home
Create/Copy/Find Missing PartnerPlan
Help
Manager's Page
Funding & Sales Prg.
Reports
Archive Retrieval
Change Privacy Settings

Logged in as:  
ahend@us.ibm.com

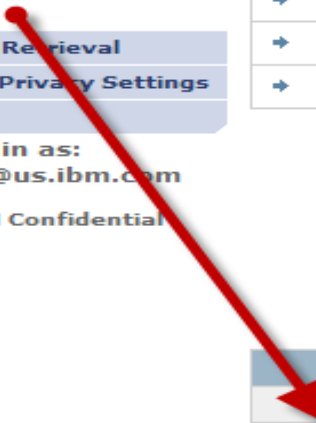
IBM Confidential

- On Demand Reports are views, with the exception of the Brand Report. The Brand report produces an Excel spreadsheet on your system while you wait.
- If you need help or have a problem with the Reports, contact your local help desk and ask for PartnerPlan support. Contact information is [here](#).

Subscription Reports
➔ <a href="#">Subscribe to a report</a>
➔ <a href="#">My Reports</a>
➔ <a href="#">My Report Criteria</a>

On Demand Reports
<a href="#">Brand Report (spreadsheet)</a>
<a href="#">DGF 2008 Cross Brand Report (spreadsheet)</a>
➔ <a href="#">Approved Plans by PartnerWorld Level</a>
➔ <a href="#">Approved with no Activities</a>
➔ <a href="#">PartnerPlan Locator</a>
<a href="#">SetMet Report (spreadsheet)</a>
<a href="#">Meeting Log Report (spreadsheet)</a>
<a href="#">The IBM Software PartnerPlan Report (.CSV)</a>

Report Tools	
Name	Function
<a href="#">PartnerPlan Report Loader</a>	Please use the link on the left to access the tool and user guide <ul style="list-style-type: none"> <li>• Ensures the columns appear in the sequence requested</li> <li>• Sets the column headers to a standard format</li> <li>• NOTE: This tool is NOT required for On Demand Reports</li> </ul>





# Getting Help

Click on the Telephone Numbers link to find local support.  
Ask for PartnerPlan Support

← IBM Partner World

**Navigation Column**

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

Logged in as: ahend@us.ibm.com

IBM Confidential

**Help**

For assistance with PartnerPlan, call or email PartnerWorld Contact Services at the numbers/addresses below .

Did you get an answer to your question? Let us know if help is working for you. ->

PartnerWorld Contact Services Helpdesks	
<b>Asia Pacific</b>	<a href="#">Telephone Numbers</a>
<b>Northeast Europe / Southwest Europe (Europe, Middle East, Africa)</b>	
44-1256-344500 or <a href="mailto:emeapw@uk.ibm.com">emeapw@uk.ibm.com</a>	<a href="#">Telephone Numbers</a>
<b>Latin America</b>	
<b>Brazil:</b> <a href="mailto:pwcsbr@br.ibm.com">pwcsbr@br.ibm.com</a>	0800.7007.4837
<b>For Argentina, Bolivia, Chile, Columbia, Equador, Mexico, Paraguay, Peru, Venezuela.</b>	Email only: <a href="mailto:pplcm@us.ibm.com">pplcm@us.ibm.com</a>
<b>United States - Canada</b>	
800-426-9990 or <a href="mailto:pwcs@us.ibm.com">pwcs@us.ibm.com</a>	
<b>All Others</b>	
1-770-863-2048 or <a href="mailto:pwcs@us.ibm.com">pwcs@us.ibm.com</a>	

**Answer to Your Questions**

Expand all Sections Collapse all Sections

- PartnerRewards Helpdesk
- Support
- Get Started
- Get Access
- Help on individual fields/export data/other
- Fix Problems
- Funding Programs, Premier Level & Approval Process
- Partner Plan on the Web for BPs
- PartnerPlan Release Information
- All Bulletins

To look up e-mail addresses of IBM employees, using a name search, go to this site: <http://www.ibm.com/contact/employees/be/en/>

To look up general telephone numbers and e-mail addresses to contact IBM, open this site and select your country:

## PartnerPlan Education Schedule - 2010

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

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

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

If you require training at a different time or day, arrange this with Anne Henderson at [ahend@us.ibm.com](mailto:ahend@us.ibm.com).

Home | Products | Services & solutions | Support & downloads | My account

← IBM Partner World

### Education/Support

This page contains information and education that can greatly increase your PartnerPlan Workshop.

**Use the Videos in the Education column to quickly become a "PartnerPlan" expert. Planning Aids will help you to create better plans and the tool more productive.**

Education	Planning Aids
<ul style="list-style-type: none"><li>→ <a href="#">How to use PartnerPlan: Step by Step Instructions</a></li><li>→ <a href="#">"Ask the Expert" Web Conference Schedule</a></li><li>→ <a href="#">DGF Slide Presentation</a></li></ul>	<ul style="list-style-type: none"><li>→ <a href="#">PartnerPlan Presentation</a></li><li>→ <a href="#">Account Planning</a></li><li>→ <a href="#">PartnerPlan in PDF format</a></li><li>→ <a href="#">Sample plans</a></li></ul>

## PartnerPlan Education Schedule - 2010

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

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

**Call in Number for ALL sessions (Webconference information listed below)**

Toll-free dial-in (North America): 1-877-421-0528

Tie Lie (North and South America): 421-0528

International Toll Dial-in: 1-770-615-1258

IP Telephony: 24210528

Participant passcode: 278812

**Webconference:**

**IBM employees and IBM contractors must use the following URL:**

<https://wedc.lotus.com/meeting/join/?schedid=5081951>

**Non-IBM employees/contractors must use:**

Go to <http://www.lotuslive.com/join?schedid=5081951>

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

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

# The Help Process

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

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

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

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

**Thank you for your attention during this presentation.**

**If you have recommendations which might either improve the presentation or the database, please forward directly to me, Anne Henderson, at [ahend@us.ibm.com](mailto:ahend@us.ibm.com).**

## Section E

### ➤ **Distributor Growth Fund/Marketing Investment Fund for Distributors Guidance**

## Creating a DGF Action Plan

Revenue Tab **Revenue**

### Step 4 – Action Plans

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

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

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

+ Edit   X Delete Plan   ← Close   ✉ Email   🔍 Print   🔍 Executive Review

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

- Step 1. Enter Business Partner Solutions
- Step 2. Enter IBM Products
- Step 3. Enter Software Marketing Responses (Mandatory for all IBM Software plans)
- Step 4. (Optional ) Create/Use Action Plans

Action Plans are designed to group a set of Activities around a Business Partner Solution or other logical grouping. To use Action plans, click the Create Action Plan button and create a set of Activities to achieve the Revenue Objective for this Solution, etc. To open an existing Action plan, merely click on the Action plan name in the panel to the left.

Use the MIF or DGF Action Plan if you use either of these programs.

→ Create Action Plan   → Create MIF Action Plan   → Delete   → Refresh

Description
<input type="checkbox"/> Plan 2 Marketing Investment Fund for Distributors

# Creating a New DGF/MIF Action Plan

Revenue

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

## New Action Plan

→ Save ← Close

Click on the tab which best identifies the overall purpose of your activity. If you are using the ValueNet tab, add the Partner and Solution Name.

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

### Growth Funds Guidelines: - Global Guidance

A minimum of 15% of the planned annual Distributor Growth Fund should be allocated to "Market to Business Partners" for marketing activities directed at resellers participating across any customer set. Distributors with less than \$80,000 in annual Growth Funding are excluded from this guideline.

Revenue Objective for this Section

0

Section Target Market

Identify ISV / RSI Partner. Provide Solution Name(s).

Add the ISV name here

Click on the Create New Activity link to begin your DGF activity.

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

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

# Creating a New Activity – Distributor Growth Fund

Revenue

**PartnerPlan:** Aurora Test Systems

**Action Plans:** Distributor Growth Fund - 2009

**Activity ID:** 7F0C66250B6D65398525767200678C17

## Time Frame

\* Start Date  
(mm/dd/yyyy)

01/13/2010

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

\* End Date  
(mm/dd/yyyy)

01/15/2010

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

## \* Activity Name

## Exchange Rate of Activity



## Creating a New Activity – Distributor Growth Fund

### Revenue

<p><b>Amount Requested from Program</b> ⓘ</p> <p>* 5,000 [help] <a href="#">Select</a></p> <p><b>Enter the Amount in Local Currency.</b></p>	<p><b>Program I.D.</b> ⓘ</p> <p><a href="#">Select</a></p>	<p><b>* Spending Category</b></p> <p>05 - Marketing Seminars <a href="#">Select</a></p>
<p><b>* Person Responsible</b></p> <p>John Smith [help]</p>	<p><b>Activity Status</b></p> <p>Open ▼ [help]</p>	<p><b>Changing the Activity Status to Cancelled will stop the activity from flowing to CMT.</b></p>
<p><b>* General Business Company Size</b></p> <p>100 - 999 = Mid-Market ▼</p>	<p><b>* Market Programs</b></p> <p>End User Demand Generation - Mid Market Framework ▼</p>	
<p><b>Industry</b></p> <ul style="list-style-type: none"> <li>Aerospace and Defense</li> <li>Automotive</li> <li>Banking</li> <li>Chemical and Petroleum</li> </ul>	<p><b>Activity Type</b> ⓘ</p> <p>* Marketing <a href="#">Select</a></p>	<p><b>You need to complete only the fields with an asterisk.</b></p>

# Creating a New Activity – DGF

## Revenue

**IBM Brand(s)** ⓘ

**GTS and SWG display only in Japan and AP at this time.**

Select one or more options below. To select more than one option, hold down the shift key and highlight your choices.

% of Power Systems  
 % of Storage Systems  
 % of System X

GTS  
 STG  
 SWG

Planned Rev  ⓘ

Actual Rev

Select Associated Software or Services if Applicable ▼

Planned Rev  ⓘ

Actual Rev

Select Associated Software or Services if Applicable ▼

Planned Rev  ⓘ

Actual Rev

**Only the fields with a red asterisk are mandatory.**

Activity Cost ⓘ		Total Win Revenue ⓘ	Leads	Expense Revenue (E/R) ⓘ
Planned *	<input type="text" value="0"/>	* <input type="text" value="0"/>	<input type="text" value="0"/>	0.0% → Calc
Actual	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	0.0%

Invitees/End-user Touches		Responses	Validated Lead Revenue ⓘ
Planned	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Actual	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

# Creating a New Activity – Distributor Growth Fund

## Revenue

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

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

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

Approver Comments

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

Comments

**Free text area for additional information about this activity.**

**Add presentations or other documents to share with your teammates.**

Attachments

[\[help\]](#)

# Submitting Activities from the DGF Action Tab

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

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

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

Revenue Objective for this Section  
0

Section Target Market

Description of Section Solution

- Create New Activity
- Copy One or More Activities
- Paste One or More Activities

- Submit One or More Activities
- ↓ Import Activities
- Delete Activities
- Refresh View

- Export to Excel
- ☐ IBM Sales Support
- ☐ Link to Account Planning

	Funding Program	Activity Type	Activity	Person Responsible	Estimated Cost	Estimated Cost USD	Program Funding	Program Funding USD
<input checked="" type="checkbox"/>	Distributor Growth Fund	Marketing	Trade Show in Vienna	John Jones	2,000	2,000.00	2,000	2,000.00
<input checked="" type="checkbox"/>	Distributor Growth Fund	section1	Trade Show in Vienna, 2Q	John Jones	5,000	5,000.00	5,000	5,000.00

## Summary of DGF/MIF Activities:

### Action Plan Q1 DGF

**+ - Edit** **X Delete**

No activities can be added to the Summary tab. You must select one of the other tabs.

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

Action Plan No.	Action Plan Name	Revenue Objective for this Action Plan
2	Q1 DGF	0

Solution Name	Description of Business Solution	<b>i</b> Target Market

Capture all activities on this Action plan and export them to Excel.

**➔ Export to Excel** **➔ Refresh View**

# Changing the Claim Amount or Brand

Review This: →

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

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

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

## Activity

+- Edit
← Close
✕ Delete
✉ Email
→ Create New Activity
⊕ Update Fields

**PartnerPlan:**  
**Action Plans:**  
**Activity ID:** 2C399C0F3E92876A852573C9006FCD06

- Change Claim Amount
- Change Brand
- Attach Connector
- Sales Support

# Thank you!

**Thank you for joining me for the PartnerPlan education session.**

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