



IBM Software Group

2007 Co-Marketing

for Business Partners

17th July 2007



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SPGIT Channels Sales Manager



IBM Co-Marketing Funding Model for Business Partners

- **What Are IBM Co-Marketing Fundings?**

- ▶ **Definition:** are IBM's contribution to IBM BPs (Tier 1 / Tier 2) marketing activities.
- ▶ **Objective:** help you more effectively sell IBM software and increase your business revenue.



IBM Co-Marketing Funding Model for Business Partners

- **Activities Suggested:**
 - Customer Seminars, teleseminars or webcasts.
 - Direct Mail (includes newsletters, product catalogs, direct mail packages, self-mailers).
 - Industry Trade Shows.
 - Print Advertising (includes newspapers, price guides, brochures, handouts, fax bulletins, magazines, trade journals, circulars, literature and inserts).
 - Promotional Materials.
 - Radio & TV Advertising.
 - Telemarketing.
 - Integrated (multi-tactic) campaign.



Requirements

- ▶ Be Member of PartnerWorld (any level)
- ▶ Has a (Country) Enterprise ID in PPS and is Active.
- ▶ Has a PartnerPlan or Business Plan acorded with BPSSR
- ▶ Be Enabled at IBM Lead Management System.
- ▶ Must be willing to report leads generated in the activities.
- ▶ Must promote IBM products in the activities.
- ▶ Funds not to be used to pay travel expenses, speaker spenses, etc.. Only marketing activities.



Co-Marketing Funding Models

▶ Business Partner Driven

- Co-marketing: IBM SWG 50% / BP 50%
- BP execute autonomously, claim money back and submit proof of performance and leads.

▶ Agency Assisted

- Co-marketing: IBM SWG 50% / BP 50% . Administrative process will be leaded by Agency.
- BPs execute tactic supported by an IBM selected marketing agency.



Business Partner Driven

How it works

- IBM Marketing receives detailed information of the activity
 - Type of Event, Products to be promoted, Type of Audience, etc..
 - Funds requested to IBM (USD \$)

- If approved by IBM:
 - BP receives notification and guidelines to proceed with formal request for fundings through IBM PartnerWorld 2007 Co-marketing Funds Website application.
 - Business Partner executes the activity autonomously.
 - BP pays upfront 100 % of the campaign costs and then claims 50 % back to IBM.
 - Business Partner sends Cover sheet, Director letter and proof of performance via email.
 - Business Partner submits leads online to be loaded in IBM Lead Management System.

 - The Business Partner will update the leads with the Win Revenue when the sales close (successfully or not) in IBM Lead Management System.



Business Partner Driven

How it works

- IBM Business Partners ...
 - can check at any moment the status of their co-marketing requests at Co-Marketing Funds Website Application.
 - receive notifications at every stage.





IBM Software Group

2007 Co-Marketing Fundings

Requesting Fundings through Website Application



ON DEMAND BUSINESS™

From [PartnerWorld](#), click on “Marketing” and then in “Co-funded marketing”

PartnerWorld - Business Partner support and resources - U.S. - Microsoft Internet Explorer

Address: <https://www-304.ibm.com/jct09002c/partnerworld/mem/home/us/index.jsp>

United States [change] | Terms of use

PartnerWorld Search

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

IBM PartnerWorld >

Marketing

- Marketing
- Selling
- Technical
- Training and certification
- Collaboration
- Products
- Solutions
- Services
- Industries
- IBM strategies
- Order and track products
- Events
- News and announcements
- Forms and agreements
- PartnerWorld program
- Contact PartnerWorld

- Marketing
 - Campaign components
 - Current IBM campaigns
 - Market intelligence and planning
 - Leads and opportunities
 - Co-funded marketing
 - Marketing vendors
 - IBM magazines
 - Marketing training

Partner ecosystem. IBM has...
 do business with us. Learn about the...
 ir PartnerWorld profile.

offerings New announcements add to...
 vantage Offerings designed,
 mid-market.

IBM Express Advantage Offerings...
 recently surpassed the major milestone of its 500th deployed...
 offering. And it's still growing.

| Product shortcuts | Business shortcuts | Technical shortcuts |
|---|---|---|
| <ul style="list-style-type: none"> Downloads and CDs Hardware discounts/leases Information Management Lotus Systems Sales BP Library Global Services | <ul style="list-style-type: none"> Industry networks Value Package and Options Small and Medium Business information Co-marketing opportunities LIA/BP reports iSeries and pSeries order status | <ul style="list-style-type: none"> Virtual Innovation Center Software trials and betas Techline Software support knowledgebase Technical validations Develop and port |

Welcome
iregid OrAnGe

- Update your profile
- Frequently asked questions
- Find and team with Business Partners
- Find a solution

Select a country/region
United States Go

Executive Corner
Ravi Marwaha
 IBM invests in Business Partner ecosystem

Next Step – Click on “2007 co-marketing funds (Business Partner direct funding)”

IBM Country/region [select] | Terms of use

PartnerWorld [dropdown] [input] [Search]

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

IBM PartnerWorld > Marketing > Co-funded marketing >

Co-funded marketing

- [Industry Networks discounted advertising package](#)
Discounts up to 60% for ISVs off standard advertising rates in more than 160 high-profile industry and technology publications in more than 40 countries.
- Eligible Business Partners can execute IBM solution-oriented campaigns based on allocated co-marketing funds and receive partial reimbursement from IBM.
- **2007 co-marketing funds (Business Partner direct funding) - Europe, Middle East, Africa**
Take advantage of co-funded marketing initiatives available to eligible Business Partners.
- [2007 co-marketing funds \(using Marketing vendors\) - Europe, Middle East, Africa](#)
Eligible Business Partners can execute IBM solution-oriented campaigns based on allocated co-marketing funds delivered through a variety of Marketing vendors that offer services at specially discounted rates.

IBM PartnerWorld®

Marketing

- Campaign components
- Current IBM campaigns
- Market intelligence and planning
- Leads and opportunities
- Co-funded marketing
- Marketing vendors
- IBM magazines
- Marketing training

Selling

Technical

Training and certification

Collaboration

Select a country/region

Select one [dropdown] [Go]

Membership

- Update my profile
- Update my subscriptions
- Update solution listings
- Submit a client reference/success
- Get certified
- Learn about and apply



Click on “Co-Funded marketing application” Link to Step 2

Country/region [select] | Terms of use

PartnerWorld [dropdown] [input] Search

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

IBM PartnerWorld > Marketing > Co-funded marketing >

2007 co-marketing funds - Europe, Middle East, Africa

IBM is pleased to offer co-funded marketing funds to eligible Business Partners who have contributed to the success of IBM. Please see your IBM representative or [PartnerWorld Contact Services](#) for more details on your qualification.

Web-based System!

The enhanced Web-based interface includes a pre-populated marketing application plus the ability to view the status of your applications and claims online.

We have worked diligently to make the participation process easy for you! But if you need help with your marketing application or claim, please contact [PartnerWorld Contact Services](#).

Five easy steps to complete your marketing campaign

Step 1: Begin to plan your campaign by reviewing the [marketing materials](#). We have also provided you a list of IBM approved European [marketing vendors](#), should you require them.

Step 2: Complete the [co-funded marketing application](#). When applying, you will be asked to agree to the terms and conditions.

Step 3: Once your application is approved, you will receive a

Membership

- Update my profile
- Update my subscriptions
- Update solution listings
- Submit a client reference/success
- Get certified
- Learn about and apply for awards

Collaborate

- Find an IBMer
- Find a Business Partner solution or service

IBM PartnerWorld®

- Marketing**
 - Campaign components
 - Current IBM campaigns
 - Market intelligence and planning
 - Leads and opportunities
 - Co-funded marketing
 - Marketing vendors
 - IBM magazines
 - Marketing training
- Selling**
- Technical**
- Training and certification**
- Collaboration**
- Products**
- Solutions**
- Services**
- Industries**

Log in again using PartnerWorld UserID & Password

Europe, Middle East and Africa [change] | Terms of use

PartnerWorld [dropdown] [Search]

Home | Products | Services

IBM PartnerWorld®

IBM strategies

Selling resources

Marketing resources

- Market planning and research
- Campaigns
- Co-marketing and investment funds
- Business and channel development
- Literature and logos
- Channel communications
- Marketing training
- Awards

Products, services and solutions

Technical resources and support

Training and certification

Order and track products

Events

News

Forms and agreements

PartnerWorld membership

Connect to www-03.ibm.com

/partnerworld/mem/mkt/software/cofunding

User name: Bart Simpson

Password:

Remember my password

OK Cancel

Five easy steps to complete your marketing campaign:

1. Begin to plan your campaign by reviewing the [software materials](#). We have also provided you a list of IBM approved [marketing agencies](#), should you require them.
2. Complete the [co-funded marketing application](#). When applying, you will be asked to agree to the terms and conditions.
3. Once your application is approved, you will receive a confirmation e-mail. You can now start executing your campaign.
4. The following documentation will be required prior to the payment of claims: Input your [customer opportunities](#) generated by this marketing activity. Validated opportunities may be entered before and after the 60 day claim deadline.
5. Submit your claim form for reimbursement.

Marketing materials to support Your campaign
Access [Software marketing materials](#) to find a wealth of IBM program and brand materials to support your marketing campaign.

Need Help Executing?

Work with Business Partners

- Find an IBM Business Partner
- Find a solution
- Team with other Business Partners

Welcome Page – Select your language

The screenshot shows the IBM Co-Marketing Funding website. At the top, there is a navigation bar with the IBM logo, a search bar, and links for "Country/region select" and "Terms of use". Below this is a secondary navigation bar with links for "Home", "Products", "Services & industry solutions", "Support & downloads", and "My account".

The main content area features the heading "IBM Co-Marketing Funding" and a sub-heading "Welcome to the 2007 IBM Business Partner Co-Marketing Funding Site". A red box highlights a "Select language" dropdown menu. The dropdown is open, showing a list of language options: "Select one", "Chinese (Simplified)", "Chinese (Traditional)", "English (US)", "French (France)", "German", "Italian", "Japanese", "Korean", "Portuguese (Brazil)", and "Spanish (Spain)". A "Go" button is visible next to the dropdown.

Below the dropdown, there is a "New Application" button and a link to "Status of 2006 Marketing Applications. Click on the UCID for additional information." The page also includes a sidebar with "Co-funded Marketing" and "Contact PartnerWorld" sections.

Welcome Page – Click on “New Application” to request fundings for new activities

[United States change](#) | [Terms of use](#)

Search

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

← IBM PartnerWorld®

Co-funded Marketing

- Brand solution
- Company
- Funding model
- Partner group
- Status
- Copy to clipboard

IBM strategies

Selling resources

Marketing resources

Products and technologies

Technical resources and support

Training and certification

Order and track products

Events

News

Forms and agreements

PartnerWorld membership

Contact PartnerWorld

Co-funded Marketing

Welcome to the 2007 IBM Business Partner Co-Funded Marketing Site.

From this page you will be able to do two things.

1. Create a new co-funded marketing application. Eligible Business Partners would have received notification from IBM.
2. Check on the status of applications you have already created.

If at any time you need assistance with this application please click on "Contact PartnerWorld" located at the bottom of the navigation links on the left side of the screen. We appreciate your participation and look forward to sharing in your success.

→ **New Application**

Status of Marketing Applications. Click on the UCID for additional information.

| Date | UCID ▲ | Status ▲ | Requested | Company name ▲ | Geo ▲ |
|--------|--|---------------------|-----------|----------------|--------------|
| - 2007 | 01/02/2007 APAZ0010107 (Application) | Application pending | \$500 | Test 2007 | Asia Pacific |
| + 2006 | | | | | |
| + 2005 | | | | | |



Validation Page – Enter your IBM Enterprise ID and Zip Code (security)

United States change | Terms of use

Home
Products
Services & solutions
Support & downloads
My account

← IBM PartnerWorld

Co-funded Marketing

IBM strategies

Selling resources

Marketing resources

Products and technologies

Technical resources and support

Training and certification

Order and track products

Events

News

Forms and Agreements

PartnerWorld membership

Contact PartnerWorld

IBM Partner Co-funded Marketing - Validate Eligibility

In order to grant you access to the co-funded marketing application, please enter your company's Enterprise ID and the postal code for your main office. If you do not know your Enterprise ID, please contact your IBM marketing representative.

The fields indicated with an asterisk (*) are required to complete this transaction. If you do not want to provide us with the required information, please use the "Back" button on your browser to return to the previous page, or close the window or browser session that is displaying this page.

Enterprise ID *

Headquarters Postal code *

If your location does not have postal codes "NA".

Remember me

Submit

By clicking "Submit" you agree that IBM may process your data in the manner indicated as described in the Privacy Policy below.

At present, we are unable to use your IBM iReg ID and PW to validate your application, so we require you to enter your PartnerWorld Enterprise ID and your HQ's Postal Code. The postal code must exactly match the code as it is shown on your PW BP Profile. Include any spaces, dashes or extensions.

If you require assistance, please contact
PWCS

http://www.ibm.com/partnerworld/pwhome.nsf/weblook/cpw_index.html



Funding Summary Page –

Select co-marketing funding model

[United States change](#) | [Terms of use](#)

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

← IBM PartnerWorld

Co-funded Marketing

- Brand
- Date
- Funding Model
- Partner Group
- Status
- Copy to Clipboard

IBM strategies

Selling resources

Marketing resources

Products and technologies

Technical resources and support

Training and certification

Order and track products

Events

News

Forms and Agreements

PartnerWorld membership

Contact PartnerWorld

IBM Partner Co-funded Marketing - Funding Summary

Select the radio button for one of the below Funding Models and click submit

| Yearly Funding Summary for Transaction Test - (US\$ figures) | | | | | | |
|--|---------------|--------------------------|----------------------------|---------------------|---------------------------|--|
| Funding IBM Business Unit | Funding Model | Total Allocated for 2006 | Total Pending IBM Approval | YTD Approved By IBM | Remaining Funds Available | |
| <input type="radio"/> Software Group | Registered | \$22000 | \$0 | \$111 | \$21889 | |
| <input type="radio"/> Server Technology Group | Registered | \$25000 | \$0 | \$111 | \$24889 | |
| <input type="radio"/> DB2 EMEA Agency | Registered | \$55000 | \$0 | \$672 | \$54328 | |
| <input type="radio"/> Server Technology Group | Registered | \$26500 | \$0 | \$1111 | \$25389 | |
| <input type="radio"/> VAD | VAD | \$99999 | \$2199 | \$33 | \$97767 | |

Our records indicate that you are located in Americas / Central /

The information entered above will not be shared with any other IBM programs.

By clicking Submit, you agree to the following:

- 1) IBM may process your data in the manner indicated as described in the Privacy link below.
- 2) This application may send you email notifications regarding the status of your application.



General Terms & Conditions Generales applicable locally

Read carefully this text, select the acceptance box and then click on "submit" before continuing.

The screenshot shows the IBM PartnerWorld website interface. At the top, there is a navigation bar with the IBM logo, a search box, and links for "United States change" and "Terms of use". Below this is a secondary navigation bar with links for "Home", "Products", "Services & solutions", "Support & downloads", and "My account".

The main content area is titled "← IBM PartnerWorld" and features a left-hand sidebar with various resource categories: "Co-funded Marketing", "IBM strategies", "Selling resources", "Marketing resources", "Products and technologies", "Technical resources and support", "Training and certification", "Order and track products", "Events", "News", "Forms and Agreement", "PartnerWorld membership", and "Contact PartnerWorld".

The main content area displays the following information:

- Our records indicate that you are located in: Asia Pacific \ Australia & New Zealand \ Australia**
- Terms and Conditions - Asia Pacific - Registered Co-Funding**
- Updated: 28 January 2005*
- Business Partner participation in co-funded marketing activities**
- Business Partners who have IBM contractual relationships that provide marketing funds as a component of the agreement are not eligible to receive funds under this program. (Examples may include ISVs with SII contracts and IBM Global Alliance Business Partners). If you are not sure if you qualify, please contact your IBM representative.
- Approval to conduct a Business Partner's co-funded marketing activity is contingent upon adherence to the following terms and conditions. Please read carefully.
- 2005 Terms and Conditions**
- Marketing program tactics must be formally approved by IBM prior to program execution. Approval will be provided by email and will specifically reference the application for which you have been approved to execute. Co-funded marketing tactics are defined as those tactics that aid the Business Partner in [redacted] activity.
- Reimbursement checks will be payable to the IBM Business Partner company name as listed in your Business Partner Profile and will be sent to the address listed for the "Business Contact".
- Terms and Conditions are subject to change.**
- I accept the terms and conditions outlined above
- Submit** (indicated by a red arrow)

At the bottom of the page, there is a footer with links for "About IBM", "Privacy", and "Contact".

Complete the Application Form

United States change | Terms of use

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

← IBM PartnerWorld

Co-funded Marketing

- Brand
- Date
- Funding Model
- Partner Group
- Status
- Copy to Clipboard

IBM strategies

Selling resources

Marketing resources

Products and technologies

Technical resources and support

Training and certification

Order and track products

Events

News

Forms and Agreements

PartnerWorld membership

Contact PartnerWorld

Co-funded Marketing - Application For Funds

The fields indicated with an asterisk (*) are required to complete this transaction; other fields are optional. If you do not want to provide us with the required information, please use the "Back" button on your browser to return to the previous page, or close the window or browser session that is displaying this page.

Business Partner Information - test, Enterprise ID: LATest

| | | | |
|---------|--|---|--|
| Name * | | Phone * | |
| Email * | | <input checked="" type="checkbox"/> Remember me | |

The fields indicated with (#) indicates a numbers only field - All currency values are in US\$.

Funding Request - US\$ figures

| | |
|------------------------------|--|
| Total Cost of Marketing | |
| Tactic (#) | |
| Funds Request from IBM (#) * | |

Available at time of application: \$1,000

Activity/Event Information

| | | | |
|---|---------------|--|------------|
| Start date * (mm/dd/yyyy) | | End date * (mm/dd/yyyy) | 01/31/2006 |
| Linux solution * | Select choice | | |
| Primary IBM Brand * | Select choice | | |
| Secondary IBM Brand | Select choice | | |
| Activity Type * | Select choice | Location * | |
| Estimated invitees, end user touches or calls (#) * | | Estimated responses or attendees (#) * | |
| Estimated leads (#) * | | Estimated win revenue (#) * | |
| Industry * | Select choice | | |
| VAD * | Select choice | | |
| Authorize IBM to share application detail with selected VAD | Select choice | | |
| Brief Description * | | | |

The information entered above will not be shared with any other IBM programs.

By clicking Submit, you agree to the following:

- 1) IBM may process your data in the manner indicated as described in the Privacy link below.
- 2) This application may send you email notifications regarding the status of your application.

Submit



Confirmation Screenshot

The screenshot shows a Microsoft Internet Explorer browser window. The title bar reads "IBM Business Partner Co-funded Marketing - Microsoft Internet Explorer". The address bar contains the URL: [https://fadoms1.austin.ibm.com/cofunded/cofundedmarketingtest.nsf/\\$StaticContent/AfterApplicationSubmitReturnToHome](https://fadoms1.austin.ibm.com/cofunded/cofundedmarketingtest.nsf/$StaticContent/AfterApplicationSubmitReturnToHome). The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains icons for Back, Forward, Home, Search, Favorites, Media, and other functions. Below the toolbar, there are links for "Search the Web with Lycos", "IBM Business Transformation Homepage", "IBM Internal Help Homepage", and "IBM Standard Software Install".

The main content area of the browser displays the IBM logo on the left. To the right of the logo, there is a search bar and a "Search" button. Below the search bar, there is a navigation menu with the following items: Home, Products, Services & solutions, Support & downloads, and My account. The "Co-funded Marketing" section is expanded, showing a list of links: IBM PartnerWorld, Brand, Company, Funding Model, Partner Group, Status, Copy to clipboard, IBM strategies, Selling resources, Marketing resources, Products and technologies, Technical resources and support, Training and certification, Order and track products, Events, News, Forms and Agreements, PartnerWorld membership, and Contact PartnerWorld.

The main content area of the page displays the following text:

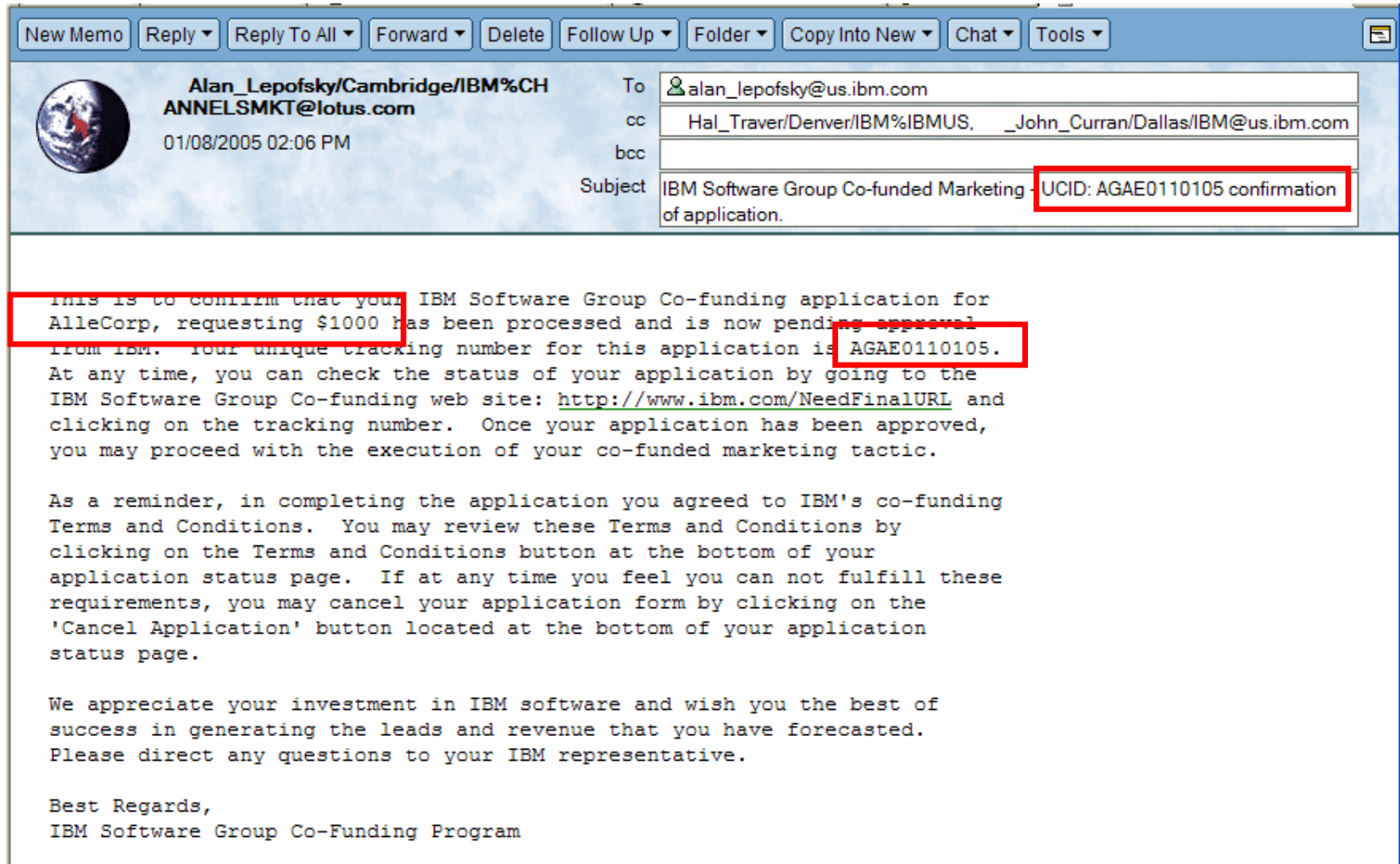
Your Application form has been submitted.

If your browser does not automatically redirect after 20 seconds, click [here](#) to go back to the Welcome screen.

At the bottom of the page, there is a footer with the following links: About IBM, Privacy, and Contact.

Confirmation email

Cc: IBM Responsible to approve the Application and Your BPSSR.



The screenshot shows an email client window with a toolbar at the top containing buttons for 'New Memo', 'Reply', 'Reply To All', 'Forward', 'Delete', 'Follow Up', 'Folder', 'Copy Into New', 'Chat', and 'Tools'. The email header shows the sender as 'Alan Lepofsky/Cambridge/IBM%CH' with the email address 'ANNELSMKT@lotus.com' and a timestamp of '01/08/2005 02:06 PM'. The recipient list includes 'alan_lepofsky@us.ibm.com', 'Hal_Traver/Denver/IBM%IBMUS', and '_John_Curran/Dallas/IBM@us.ibm.com'. The subject line is 'IBM Software Group Co-funded Marketing - UCID: AGAE0110105 confirmation of application.', with 'UCID: AGAE0110105 confirmation' highlighted in a red box.

The email body contains the following text:

This is to confirm that your IBM Software Group Co-funding application for AlleCorp, requesting \$1000 has been processed and is now pending approval from IBM. Your unique tracking number for this application is AGAE0110105. At any time, you can check the status of your application by going to the IBM Software Group Co-funding web site: <http://www.ibm.com/NeedFinalURL> and clicking on the tracking number. Once your application has been approved, you may proceed with the execution of your co-funded marketing tactic.

As a reminder, in completing the application you agreed to IBM's co-funding Terms and Conditions. You may review these Terms and Conditions by clicking on the Terms and Conditions button at the bottom of your application status page. If at any time you feel you can not fulfill these requirements, you may cancel your application form by clicking on the 'Cancel Application' button located at the bottom of your application status page.

We appreciate your investment in IBM software and wish you the best of success in generating the leads and revenue that you have forecasted. Please direct any questions to your IBM representative.

Best Regards,
IBM Software Group Co-Funding Program

Check at any moment your Marketing Applications and its Status at Welcome page.

Click on the tracking number (UCID) to see detailed information, cancel or edit your application before approval.

United States change | Terms of use

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

← IBM PartnerWorld®

Co-funded Marketing

Welcome to the 2007 IBM Business Partner Co-Funded Marketing Site.

From this page you will be able to do two things.

1. Create a new co-funded marketing application. Eligible Business Partners would have received notification from IBM.
2. Check on the status of applications you have already created.

If at any time you need assistance with this application please click on "Contact PartnerWorld" located at the bottom of the navigation links on the left side of the screen. We appreciate your participation and look forward to sharing in your success.

[→ New Application](#)

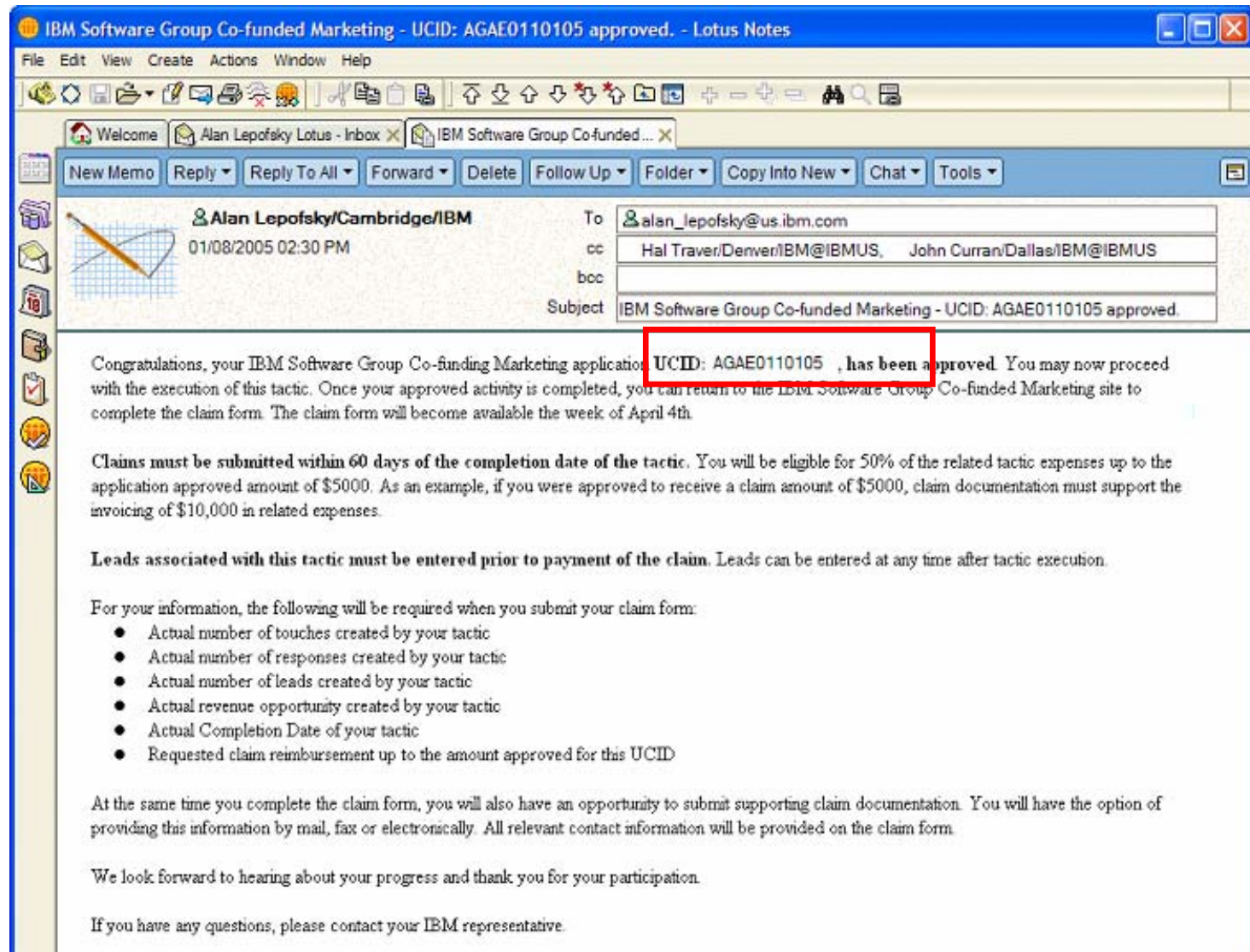
Status of Marketing Applications. Click on the UCID for additional information.

| Date | UCID ▲ | Status ▲ | Requested | Company name ▲ | Geo ▲ |
|--------|------------|---------------------------|---------------------|-----------------|--------------|
| - 2007 | 01/02/2007 | APAZ0010107 (Application) | Application pending | \$500 Test 2007 | Asia Pacific |
| + 2006 | | | | | |
| + 2005 | | | | | |

If Approved by IBM, a notification email will be sent.

This is your **authorization** to execute the activity.

Status will be updated to **“Application Approved”** on la welcome page.



IBM Software Group Co-funded Marketing - UCID: AGAE0110105 approved. - Lotus Notes

File Edit View Create Actions Window Help

Welcome Alan Lepofsky Lotus - Inbox IBM Software Group Co-funded...

New Memo Reply Reply To All Forward Delete Follow Up Folder Copy Into New Chat Tools

Alan Lepofsky/Cambridge/IBM
01/08/2005 02:30 PM

To: alan_lepofsky@us.ibm.com
cc: Hal Traver/Denver/IBM@IBMUS, John Curran/Dallas/IBM@IBMUS
bcc:
Subject: IBM Software Group Co-funded Marketing - UCID: AGAE0110105 approved.

Congratulations, your IBM Software Group Co-funding Marketing application **UCID: AGAE0110105** has been approved. You may now proceed with the execution of this tactic. Once your approved activity is completed, you can return to the IBM Software Group Co-funded Marketing site to complete the claim form. The claim form will become available the week of April 4th.

Claims must be submitted within 60 days of the completion date of the tactic. You will be eligible for 50% of the related tactic expenses up to the application approved amount of \$5000. As an example, if you were approved to receive a claim amount of \$5000, claim documentation must support the invoicing of \$10,000 in related expenses.

Leads associated with this tactic must be entered prior to payment of the claim. Leads can be entered at any time after tactic execution.

For your information, the following will be required when you submit your claim form:

- Actual number of touches created by your tactic
- Actual number of responses created by your tactic
- Actual number of leads created by your tactic
- Actual revenue opportunity created by your tactic
- Actual Completion Date of your tactic
- Requested claim reimbursement up to the amount approved for this UCID

At the same time you complete the claim form, you will also have an opportunity to submit supporting claim documentation. You will have the option of providing this information by mail, fax or electronically. All relevant contact information will be provided on the claim form.

We look forward to hearing about your progress and thank you for your participation.

If you have any questions, please contact your IBM representative.

Next Steps

- Execute marketing activity.
- After execution, claim for reimbursement – links are available inside the approved application form.
 - ▶ Send documentation required and proof of performance.
 - ▶ Submit the leads generated.

United States change | Terms of use

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

← IBM PartnerWorld

Co-funded Marketing - Application For Funds

Overall Status: New Application > Application Pending > **Application Approved** > Claim Pending > Claim Paid

UCID: APAN0030206 - Vendor Name: Motivation Asia

[Read Terms and Conditions](#) [Create Claim Form](#)
[Create Lead Form](#)

The fields indicated with an asterisk (*) are required to complete this transaction; other fields are optional. If you do not want to provide us with the required information, please use the "Back" button on your browser to return to the previous page, or close the window or browser session that is displaying this page.

Business Partner Information - Hal Demo, Enterprise ID: 18DemoIBM

| | | | |
|---------|---------------------|---------|--------------|
| Name * | Hal Traver | Phone * | 303-773-7734 |
| Email * | hjtraver@us.ibm.com | | |

Funding Request - US\$ figures

| | | |
|------------------------------|----------|--|
| Total Cost of Marketing | \$10,000 | |
| Tactic (#) * | | |
| Funds Request from IBM (#) * | \$5,000 | Available at time of application: \$25,000 |

Demo:

How to request co-marketing fundings

ftp://ftp.software.ibm.com/software/partners/emea/marketing/Comarketing_Application_Process_R.exe





IBM Software Group

2007 Co-Marketing Funding Website

Claim for Reimbursement Process – Business Partner Help Guide



ON DEMAND BUSINESS™

Steps to claim for reimbursement

This presentation shall help you complete a Claim through a 4 steps process:

- Step 1 - Fill in tactic results, claim funds requested and completed activity date.
- Step 2 - Read carefully your GEO specific requirements for claim reimbursement.
- Step 3 - Complete the GEO specific requirements using the On-line Claim Tracking Tool
- Step 4 - Submit your documentation:
 - ▶ **Supplier's invoices**
 - ▶ **Director letter**
 - ▶ **Coversheet**
- To receive reimbursement, you also need to **submit the customer opportunities**.
- To submit the opportunities, just click on **Create Lead form** from the application page.
- Once a claim is approved, Business Partners are requested to submit a final invoice to IBM.



Important notice to submit a Claim !

- Please note that the person submitting the claim must be the person who applied for funding.

=> If the person / IBM Id is different, it will not be possible to proceed.



You start from PartnerWorld – Same Location as with the Co-Marketing Application:

Marketing Resources => Co-Marketing funding => 2007 co-marketing funds (BP direct funding)

The screenshot shows the IBM PartnerWorld website interface. At the top, there is a navigation bar with the IBM logo, a location selector for 'United Kingdom', and a dropdown menu for 'PartnerWorld'. Below this is a secondary navigation bar with links for 'Home', 'Products', 'Services & solutions', 'Support & downloads', and 'My account'. The main content area features a left-hand sidebar with a list of categories: 'IBM PartnerWorld', 'Selling resources', 'Marketing resources', 'Technical resources and support', 'Training and certification', 'Products, services and solutions', 'Industries', 'IBM strategies', and 'Order and track products'. The 'Marketing resources' category is highlighted with a red box. A red arrow points from this category to a central panel titled 'Marketing resources' which lists several items: 'Campaign Components', 'Current IBM campaigns', 'Market intelligence and planning', 'Leads and opportunities', and 'Co-marketing funding'. The 'Co-marketing funding' item is also highlighted with a red box. A second red arrow points from this item to a detailed page titled 'Co-marketing funding'. This page contains several links and descriptions, with the link '2006 co-marketing funds (Business Partner direct funding) - Europe, Middle East, Africa' highlighted by a red box. The page also includes text about 'Innovation that matters' and 'SVI'.

Click on the link: [claim form](#).

Enter the IBM ID and Password and Click Ok

Five easy steps to complete your marketing campaign:

1. Begin to plan your campaign by reviewing the [software materials](#). We have also provided you a list of IBM approved [marketing agencies](#), should you require them.
2. Complete the [co-funded marketing application](#). When applying, you will be asked to agree to the [terms and conditions](#).
3. Once your application is approved, you will receive a confirmation e-mail. You can now start executing your campaign.
4. The following documentation will be required prior to the payment of claims: Input your [customer opportunities](#) generated by this marketing activity. Validated opportunities may be entered before and after the 60 day claim deadline.
5. Submit your [claim form](#) for reimbursement. You can also download this [user guide](#), which outlines how to submit your claim.



Connect to www-03.ibm.com

/partnerworld/mem/mkt/software/cofunding

User name:

Password:

Remember my password

OK Cancel

Welcome Page

Click on the UCID you wish to fill a claim against

Please note: the application must be in “Approved by IBM” status

Co-funded Marketing

Welcome to the 2006 IBM Business Partner Co-Funded Marketing Site.

From this page you will be able to do two things.

1. Create a new co-funded marketing application. Eligible Business Partners would have received notification from IBM.
2. Check on the status of applications you have already created.

If at any time you need assistance with this application please click on "Contact PartnerWorld" located at the bottom of the navigation links on the left side of the screen. We appreciate your participation and look forward to sharing in your success.

[New Application](#)

Status of 2006 Marketing Applications. Click on the UCID for additional information.

| Date | UCID ▲ | Status ▲ | Requested | Company Name ▲ | Geo ▲ |
|------------|---|-----------------|-----------|----------------|-------|
| 13/02/2006 | NEDL0090206 (Application) | Approved By IBM | \$2,000 | Demo by Hal | EMEA |

To start the claim process, click on “Create Claim Form”

The screenshot shows the IBM PartnerWorld interface. At the top, there is a navigation bar with the IBM logo, a search box, and links for 'United States change' and 'Terms of use'. Below this is a secondary navigation bar with links for 'Home', 'Products', 'Services & solutions', 'Support & downloads', and 'My account'. The main content area is titled 'Co-funded Marketing - Application For Funds'. On the left, there is a vertical menu with various categories like 'Co-funded Marketing', 'IBM strategies', 'Selling resources', etc. The main content shows the application status as 'Application Approved' in a breadcrumb trail: 'Overall Status: New Application > Application Pending > Application Approved > Claim Pending > Claim Paid'. A red arrow points to a red-bordered button labeled 'Create Claim Form' located below the 'Application Approved' status. Below the status, the page displays 'UCID: AGCE0090305 - Vendor Name: Harte Hanks' and a link to 'Read Terms and Conditions'. The 'Business Partner Information' section shows details for 'Test VAD Americas, Enterprise ID: Peggy1', including Name (Hal Traver), Phone (303-841-2208), and Email (hjtraver@us.ibm.com). The 'Funding Request - US\$ figures' section shows 'Requesting (#) * \$2,500' and 'Available at time of application: \$47,500'. The 'Activity/Event Information' section contains a table of details: Start date (03/22/2005), End date (03/31/2005), Linux solution (Yes), Software Brand (DB2), Software Brand Solution (DB2 Information Integration), Activity Type (Seminar Solutions), Location (Midwest), Estimated invitees (2000), Estimated responses or attendees (200), Estimated leads (15), Estimated revenue (\$300,000), Industry (Industrial Sector), VAD (-NA-), and Brief Description (test).

Step 1 – Fill in top portion of the form which indicates the results and completed activity date for the tactic.

[United States change](#) | [Terms of use](#)

Search

Home
Products
Services & solutions
Support & downloads
My account

← IBM PartnerWorld

- Co-funded Marketing
- IBM strategies
- Selling resources
- Marketing resources
- Products and technologies
- Technical resources and support
- Training and certification
- Order and track products
- Events
- News
- Forms and Agreements
- PartnerWorld membership
- Contact PartnerWorld

Co-funded Marketing - Claim Form

Claim Status:
New > Submitted > Pending Lead Submission > Pending IBM Approval > Approved By IBM > Submitted For Payment > Claim Paid

UCID: AGCE0090305 - **Vendor Name:** Harte Hanks - **Activity Type:** Seminar Solutions

Claim Form – 4 Step Process

Step 1 – Fill in tactic results, claim funds requested and completed activity date.

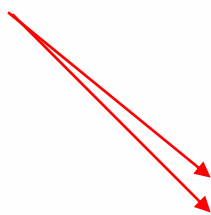
After completing step 1 you can begin the claim process by clicking on the submit button at the bottom of this form. This will move the claim to a submitted status and notify the claim processor of your intent to file a claim against this application. Step 3 must be completed before the claim can be submitted for payment.

The fields indicated with an asterisk (*) are required to complete this transaction; other fields are optional. The fields indicated with (#) indicates a numbers only field - All currency values are in US\$. If you do not want to provide us with the required information, please use the "Back" button on your browser to return to the previous page, or close the window or browser session that is displaying this page.

Business Partner Information - Test VAD Americas, Enterprise ID: Peggy1

| | | | |
|---------|---------------------|---|--------------|
| Name * | Hal Traver | Phone * | 303-841-2208 |
| Email * | hjtraver@us.ibm.com | <input checked="" type="checkbox"/> Remember me | |

| | Actual Values | Original Estimate |
|---|----------------------|-------------------|
| Invitees, end user touches or calls * (#) | <input type="text"/> | 2,000 |
| Responses or attendees * (#) | <input type="text"/> | 200 |
| Leads * (#) | <input type="text"/> | 15 |
| Revenue * (#) | <input type="text"/> | \$300,000 |
| Funds requested * (#) | <input type="text"/> | \$2,500 |
| Completed activity date (mm/dd/yyyy) | 03/31/2005 | 03/31/2005 |



To complete Step 1, click on the submit button at the bottom of the form.

Your claim is now submitted and the process to complete documentation can begin.

Miscellaneous

Please use this field to provide any other comments you would like: (Please date all comments)

Step 4 – If in any of the sections above you indicated that you would be supplying documentation via email, than please click on the link below.

[Click here to create email with required attachments](#)

 Submit

By clicking "Submit" you agree that IBM may process your data in the manner indicated as described in the Privacy link below.

Step 2 – Read this section to understand your Requirements and How To Complete Your Claim

- Claim Requirements
 - ▶ Documentation that must be submitted
 - ▶ Documentation that is subject to audit
 - ▶ Submission within 60 days of completed activity date
 - ▶ Lead Requirements
- How and where to send documentation

EMEA GED Specific Requirements for Claim Reimbursement

This form is for qualified IBM Business Partners to claim reimbursement for a completed and approved IBM Co-funded marketing activity.

The following documentation must be submitted for claim reimbursement:

- Director Letter – Sample available with Claim Tracking Tool
- Cover Letter – Sample available with Claim Tracking Tool
- Supplier Invoices

The following documentation must be maintained on site for two years.:

- All Proof of Performance documentation listed on the Claim Tracking Tool

Important: Co-Marketing Operations will notify you if Proof of Performance documentation submission is also required for claim reimbursement. Please do not forward Proof Of Performance documentation unless specifically requested to do so by Co-Marketing Operations.

After submitting your claim in step 1, you will be sent an automated e-mail that will confirm the receipt of your claim request. Claim processing may take 3-4 weeks, and involves an IBM verification of the co-funded marketing activity and the submission of all required documentation. Claims must be submitted within 60 days of the completed activity date or by December 16th, whichever is earlier to qualify for reimbursement.

The requested claim amount can equal 50% of the total cost of the activity up to the approved application amount. For example, if the activity cost \$10,000, you would be eligible to submit a claim for up to \$5,000 or the approved application amount if the approved amount is less than \$5000.

Claims can be tracked utilizing the following On-line Claim Tracking Tool. You and the claims processor, Co Marketing Operations, can use this tool to communicate claim information and track your claim status. The tool will indicate the status of documentation that must be submitted. To submit electronically, you can use the email submission feature located as step 4 at the bottom of this form. You can also fax (**please retain your fax report for proof of sending**) or mail your documentation as follows:

Send related materials via fax to:
353 1 8153587 or 353 1 8153388, Attn: Co-Marketing/SWG BP Operations

Send related materials via mail to:
Co Marketing Operations
DSW BP Incentives
Customer Fulfillment
IBM PDL
Building 6
Damastown Industrial Estate
Mulhuddart
Dublin 15
Ireland.

Once all documentation is complete, Co Marketing Operations and IBM will check to ensure leads have been submitted for this UCID prior to forwarding the claim for IBM approval. If leads have already been submitted, no further action will be required on your part.

After IBM has approved your claim, you will be notified via e-mail and Co Marketing Operations will forward your claim for payment. If you have any concerns about your claim or status, please use the following e-mail for your questions: SWG_CoMarketing@uk.ibm.com. (This e-mail is for claims only and not for co-marketing program questions.) Don't forget to use the Unique Control Number noted at the top of this form for reference with each query!

Sample - Director Letter

ON BUSINESS PARTNER'S COMPANY HEADED PAPER

For the Attention of SWG Co-Marketing
Co Marketing Operations
DSW BP Incentives
Customer Fulfillment
IBM PDL
Building 6
Damastown Industrial Estate
Mulhuddart
Dublin 15
Ireland.

Reference : Unique control claim reference (XXXXXXXXXXXX)

I hereby confirm that **(Company name)** has organised & completed the following marketing activity, as outlined in our partner plan entry **(reference)**

Activity name / line item

Activity date

I confirm that all invoices submitted (as per our completed Cover Sheet) relate to the costs incurred for the event. I understand that by signing this document I am taking responsibility for the accuracy of the above claim related information and that this is subject to audit by IBM if deemed necessary. Any misrepresentation may result in a subsequent rejection or reclaim of payments related to the claim.

Signed by

Either :

Finance Director/ Company Secretary /Operations Director



Sample - Coversheet

Proof of Performance - EMEA Claim Form Coversheet

SWG Co-Marketing Proof of Claim Coversheet

(To be completed in Business English, printed, signed, and returned by fax by an authorised Company Employee of the Business Partner named)

Action: Please complete the following form and table to provide the SWG Co-Marketing team with the correct and accurate details required in order to process the claim. Within the table please provide a summary corresponding to each individual piece of documentation submitted to support the claim.

Unique Claim Control Reference:

Business Partner Name:

| Invoice Number / Document Reference | Description of invoice/document activity related to the claim | Currency | Amount (Net) |
|-------------------------------------|---|----------|--------------|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |
| 7 | | | |
| 8 | | | |
| 9 | | | |
| 10 | | | |

Additional Comments (if appropriate):

I confirm that the above information is true and correct. I also understand that by signing this document I am taking responsibility for the accuracy of the above claim related information and that this is subject to audit by IBM if deemed necessary. Any misrepresentation may result in a subsequent rejection or reclaim of payments related to the claim.

Signature: Print Name:

Title:

Date:


FAX NUMBER: +353 1 8153587

(Please mark the fax for the attention of the SWG Co-Marketing Team)



Example of Approved Claim eMail

New Memo Reply Reply To All Forward Delete Folder Copy Into New Tools Change Document Expiration

 **Hal_Traver/Denver/IBM%CHANNELSMKT@nreading.ibm.com**
04/10/2005 03:06 PM
Please respond to Co-funded Marketing
This document expires on 07/09/2005

To: Hal Traver/Denver/IBM@IBMUS, Marge_Simpson%ChannelsMkt@nreading.ibm.com
cc: Hal_Traver/Denver/IBM%IBMUS@nreading.ibm.com, Janet_Jones/Dallas/IBM%IBMUS@nreading.ibm.com
bcc:
Subject: IBM Software Group Co-funded Marketing - Test Janet - UCID: AGCE0110405 - Claim Form Pending Lead Submission.

This email is to confirm that all required documentation for your claim, UCID number AGCE0110405, has been received and accepted. A check will now take place to ensure that leads have been submitted for this tactic prior to final approval by IBM. Once approved, you will receive another email indicating that your claim is approved and has been forwarded for payment.

Best Regards,
IBM Software Group Co-Funding Program

Final Steps

- Final claim steps – once the Documentation is Complete:
 - ▶ When all documents have a processor status of “Documentation Complete” or “Submission of Documentation Not Required” the status of the application is moved to “Pending IBM Approval”.
 - ▶ Once the claim is in a “Pending IBM Approval” status, the IBM Approver is notified and asked to approve or reject the claim.
 - ▶ After the IBM approver approves or rejects the claim, the claim status is updated on the database and an email is sent to the Business Partner confirming the status.
 - ▶ **Invoice in Process:** BPs will receive a final invoice request from the claim vendor. At this stage you are requested to [create a final invoice to IBM](#)



THANK YOU!

