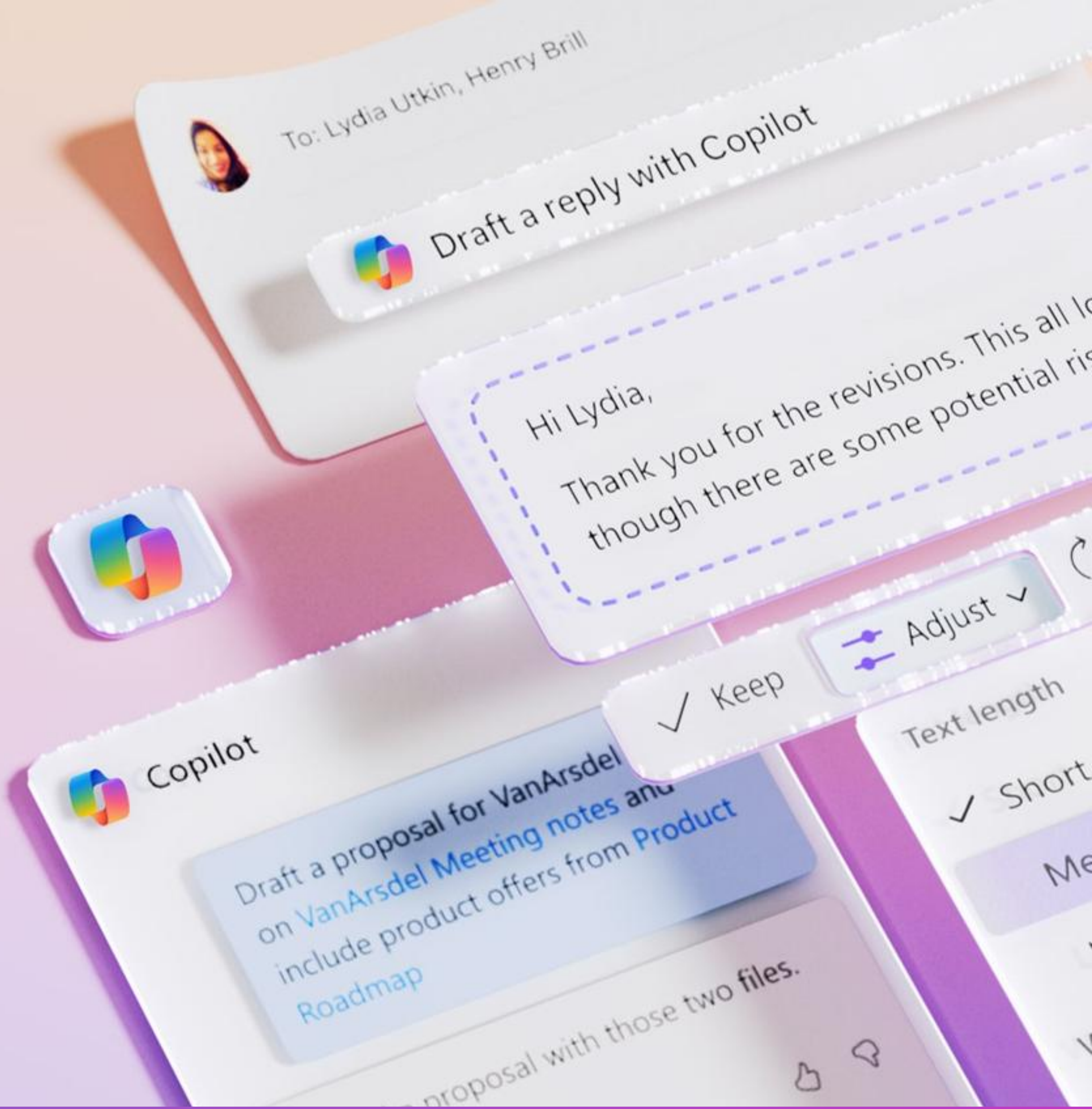
Microsoft

Partner Center Referral Sharing Walkthrough

Sharing SMB deals with Microsoft for active co-selling

EMEA SMB FY26

Why sharing referrals with Microsoft



Why should you share referrals with Microsoft

Referral sharing is a key partnership activity

- *Provide visibility into relevant opportunities to support ongoing ROB with Microsoft and financial impact*
- *Get connected with Microsoft sellers (VDS and PSS) to support deal acceleration or remove blockers*
- *Capture ROI of marketing investments (thru partner marketing), and MSFT funded engagements (like MCI Azure Accelerate or Copilot + Power Accelerate)*
- *Enable other benefits or investments like ECIF or other MSFT funded engagements for partners*

Sell with Microsoft Co-sell requirements - Partner Center | Microsoft Learn

Inbound referral delivery flow to Microsoft

1 Partner → **2 Deal Acceleration Specialist (DAS)** → **3 CLM (Customer Lifecycle Manager)** / **SAS (Solution Area Specialist)**

- Sends referral via Partner Center
- Prequalify validating VDS scope
- Qualified?
  - Convert to Stage 1 opportunity
  - Decline Referral
- Transfer ownership to appropriate CLM
- Reviews opportunity and moves to stage 2

Ensure high quality leads

Validate referral for BANT and ensure call to action is within the VDS scope

Triage Referrals

Based on Deal Value. Threshold by Geo and CSA. If over threshold, transfers ownership to PSS. If not, to VDS Team Member.

Connect with partners on scope and next steps

Route to the right seller

DAS assigns opportunity and notifies CLM/SAS of new stage 1 opportunity ready for review

- Assigns opportunity and notifies CLM/SAS of new stage 1 opportunity ready for review
- Funding/support request: Assign to PSS/PDM and notify

Update Opportunity

- Update Opportunity to only reflect cross sell/upsell deal value, as well as removing all 3PP products and solutions from Opportunity

Qualified Pipeline

Seller accountable to review all stage 1 opportunities

Engage with partner sellers and customer (partner–led), and determine if opp should be moved to stage 2 or close it

Update the DAS on the opportunity status

Understanding Microsoft roles supporting partner referrals

Microsoft VDS (Vendor Digital Sales)

DAS = **Deal Acceleration Specialist** - responsible for accelerating deal closure by managing partner engagement and pipeline activities. Engaged across TUM (top unmanaged), Scale and RCOE (EA renewals)

SAS = **Solution Area Specialist** - partner-facing technical expert, specialist in solution areas. These are engaged early in pipe and help drive upsell and cross sell.

CLM = **Customer Lifecycle Manager** - owns the customer relationship and opportunity lifecycle - work on customer outreach, manage pipeline, collaborate with DAS & SAS.

Microsoft SMB Sales

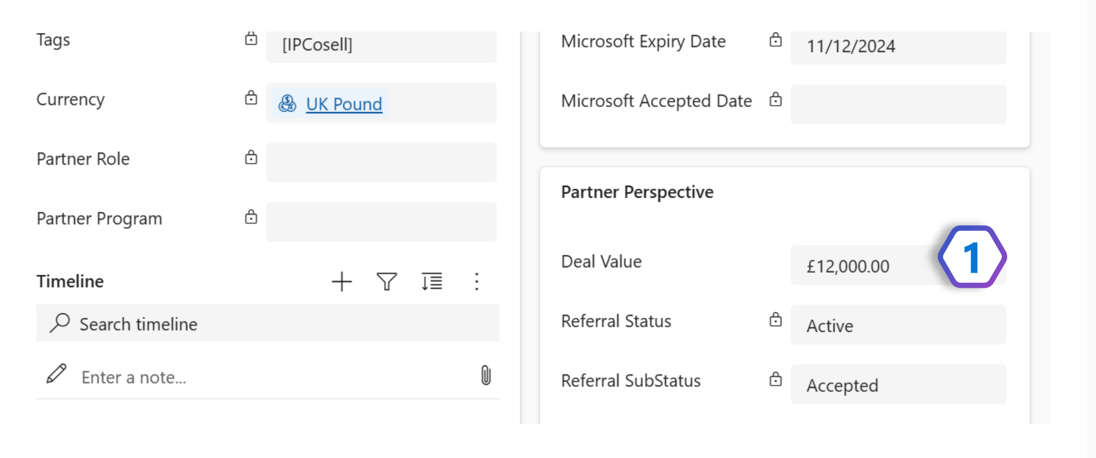
PSS = **Partner Solution Sales** – sales manager aligned to Solution Area supporting pinned partners (Direct and/or Indirect Resellers) on their top opportunities (high deal value, above threshold, or with strategic importance)

SMB Business Leader – sales specialist aligned to Solution Area supporting the largest, more complex and transformational deals and/or engagements, including compete cases and more challenging migrations

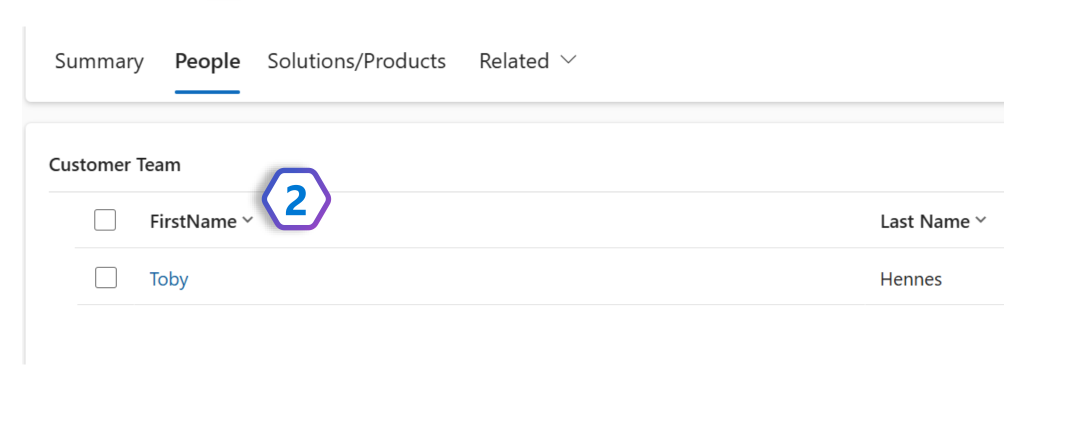
What is BANT on a referral?

For an inbound referral to be eligible for acceptance, BANT is a necessary requirement. While BANT can be detailed in the Partner Notes section, it can also be specified in the relevant fields within MSX.

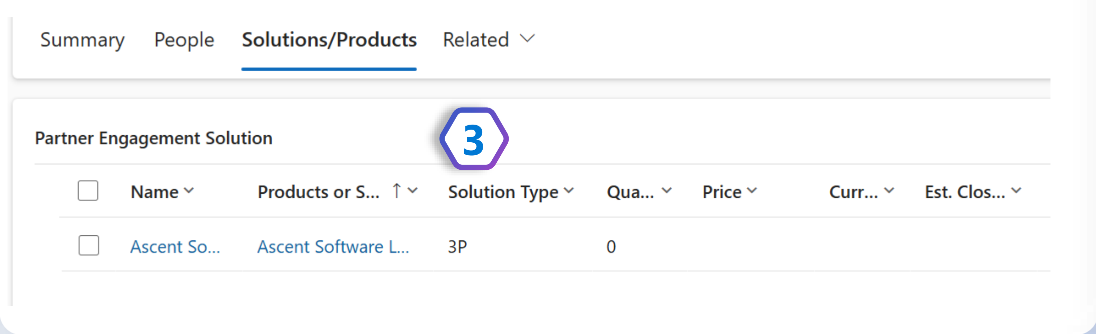
1 Budget – deal value



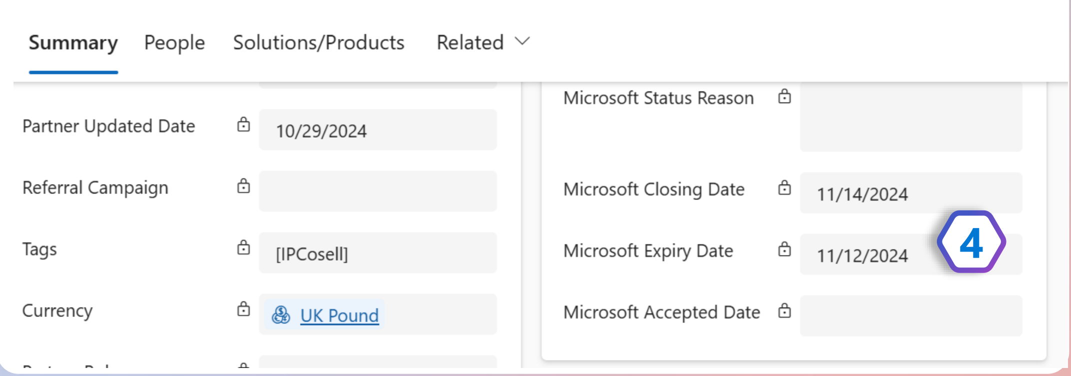
2 Authority – Customer Team



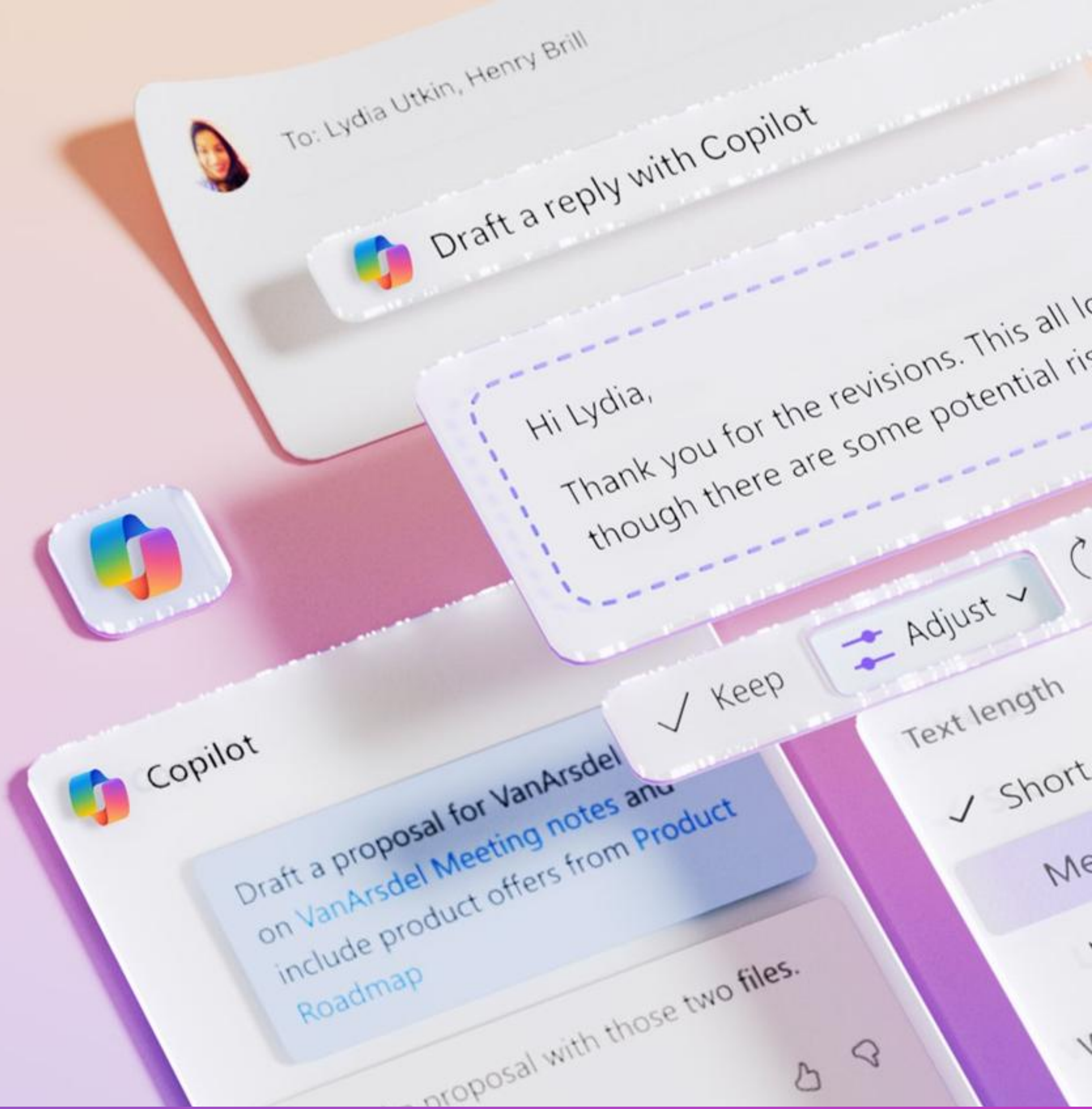
3 Need – Solutions/Products



4 Timeline – Close Date



Solution Plays



✅ New for FY26

FY26 AI Business Solutions Solution Plays

Solution Area	Segment	FY26 Growth Drivers	Solution Plays	Enterprise	Corporate	SMB
AI Workforce	Mainstream	M365 Copilot, Copilot Chat, Copilot Studio, Viva	**Copilot and Agents at Work**	✓	✓	✓
AI Workforce	Mainstream	Business Premium, ME3, Frontline Worker	**Secure AI Productivity**	✓	✓	✓
AI Workforce	Mainstream	W365, AVD, W365 Link	**Scale with Cloud and AI Endpoints**	✓		
AI Workforce	Mainstream	Teams Phone, Rooms, Premium	**Converged Comms**	✓		
AI Business Process	Mainstream	Power Apps, Power Automate, Copilot Studio	**Innovate w. Low Code AI & Agents**	✓	✓	
AI Business Process	Mainstream	D365 Sales, Copilot Studio	**Sales Transformation with AI**	✓	✅	
AI Business Process	Mainstream	D365 Service, Field Service, CCaaS, Copilot Studio	**Service Transformation with AI**	✓	✅	
AI Business Process	Mainstream	D365 Finance, Supply Chain, Copilot Studio	**ERP Transformation with AI**	✅	✓	✅
AI Business Process	Mainstream	Business Central, Copilot Studio	**Scale Business Operations with AI**			✓

FY26 Security Solution Plays

Led by Security	FY26 Growth Drivers	Solution Plays	Enterprise	Corporate	SMB
Mainstream	Microsoft 365 E5 E5 Security Sentinel Entra Microsoft Defender Suite for Business Premium	**Modern SecOps with Unified Platform**	✓	✓	✓
Mainstream	Microsoft 365 E5 E5 Compliance Purview Microsoft Purview Suite for Business Premium	**Data Security**	✓	✓	✓
Mainstream	Microsoft Defender for Cloud Purview	**Protect Cloud, AI platform and Apps**	✓	✓	

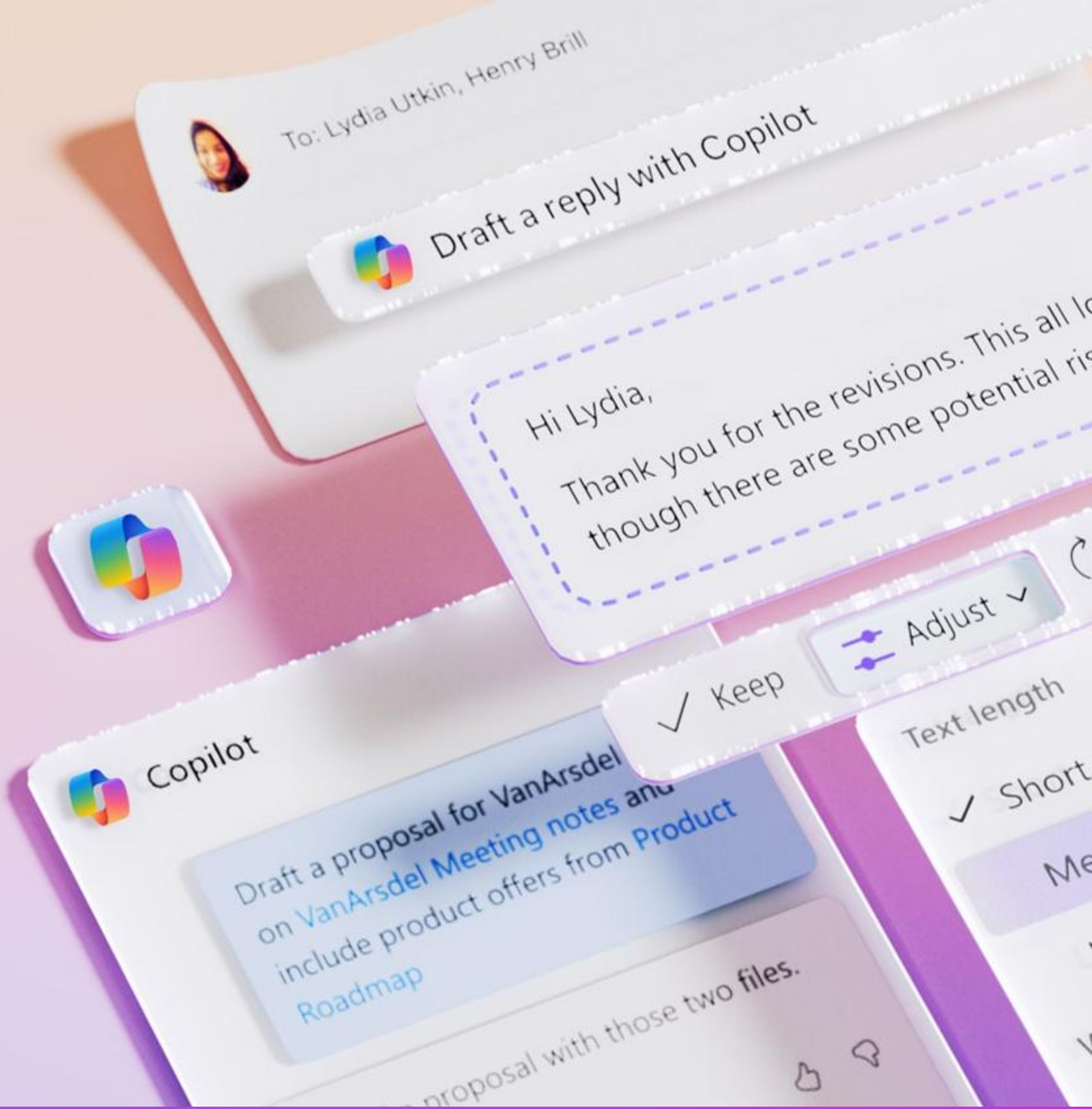
FY26 Cloud & AI Platforms Solution Plays

Led by Cloud & AI

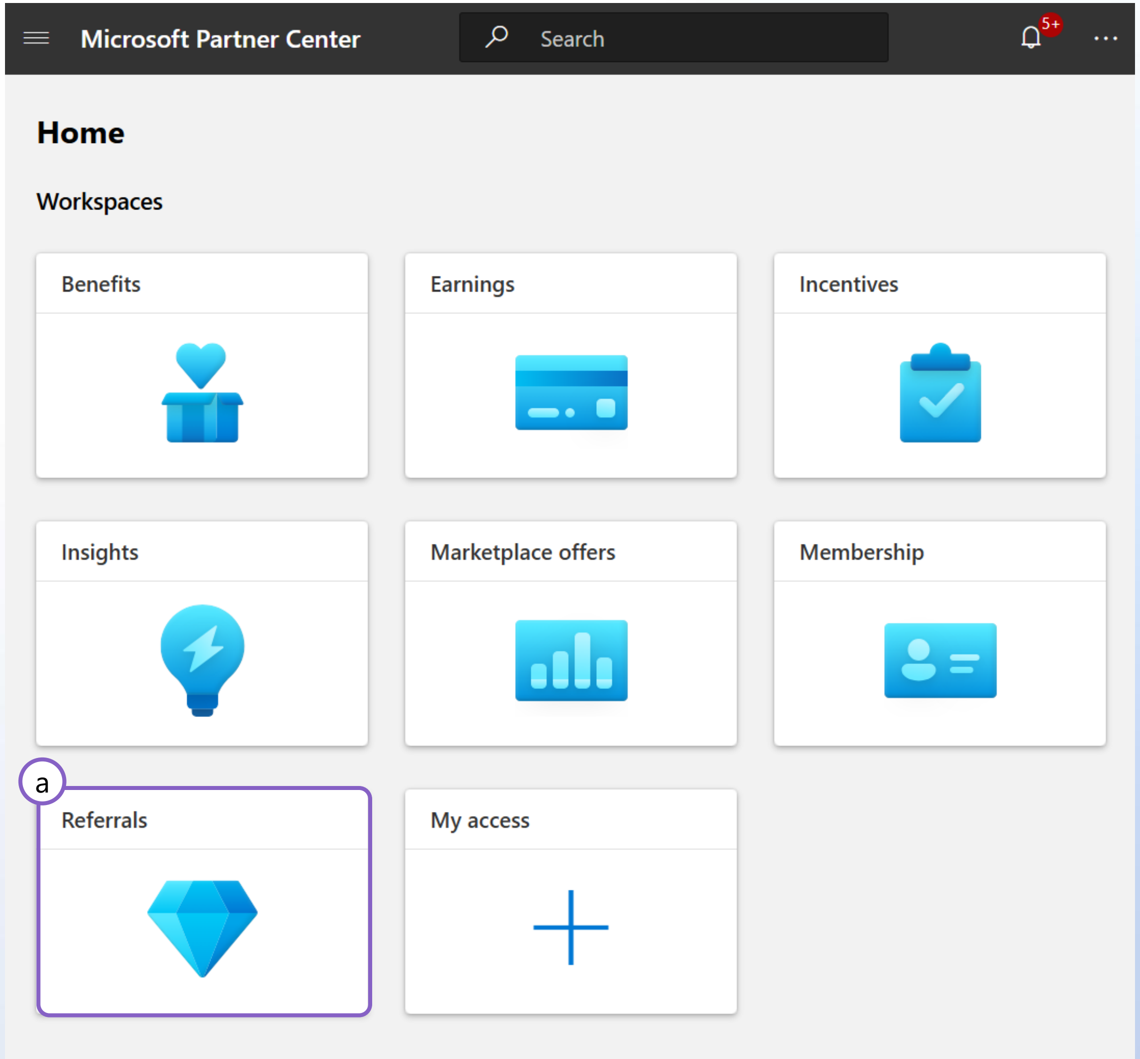
Mainstream

FY26 Growth Drivers	Solution Plays	Enterprise	Corporate	SMB
Windows Server, Azure SQL Linux, Azure PostgreSQL AVS Azure Kubernetes Service, Azure App Service Microsoft Defender for Cloud	**Migrate and modernize your estate**	✓	✓	✓
Microsoft Fabric Azure Databricks Microsoft Purview CosmosDB, Azure SQL, Azure PostgreSQL, Azure MySQL	**Unify your Data Platform**	✓	✓	✓
Azure AI Foundry, 3P GPU Azure Kubernetes Service, Azure App Service Azure API Management CosmosDB, Azure SQL, Azure PostgreSQL GitHub	**Innovate with Azure AI apps and agents**	✓	✓	✓ Primarily Software Development Companies (SDC)

Navigating the Referrals workspace

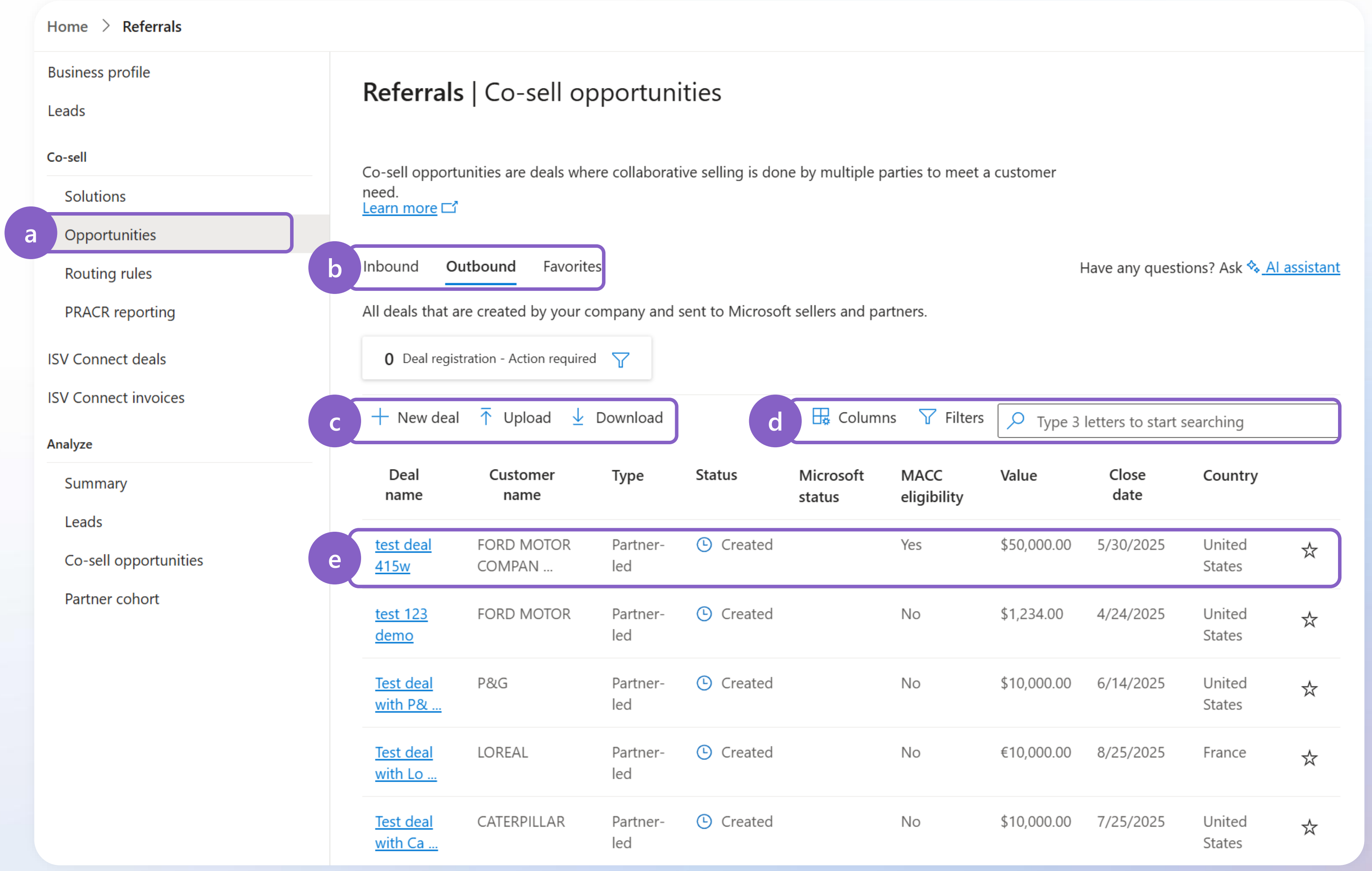


Accessing the Referrals workspace



a Navigate to the Referrals workspace in Partner Center. If you do not have access, enable the Referrals Admin role in User Management.

Referrals workspace orientation



a. Referrals are managed on the Co-sell opportunities page.

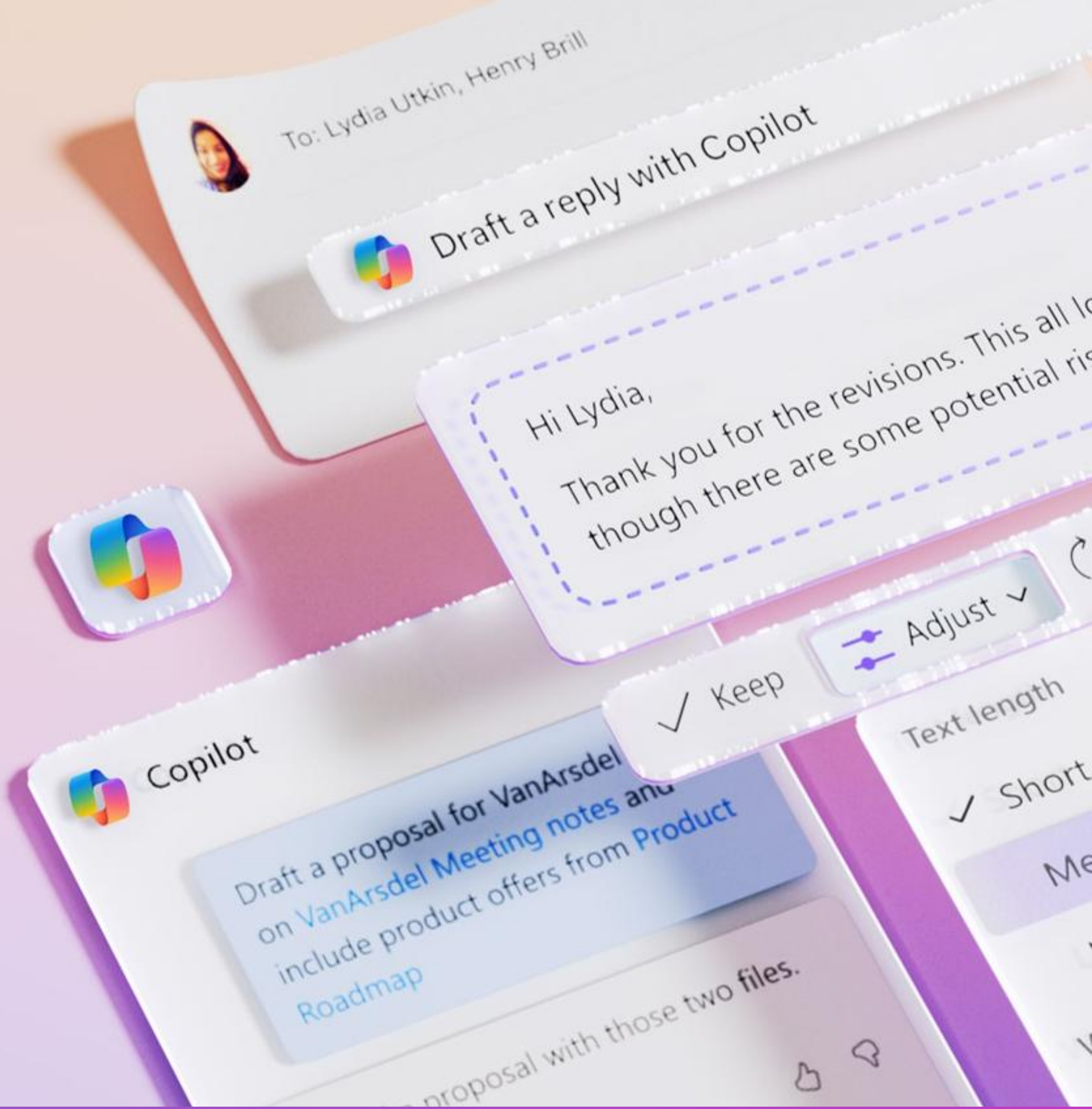
b. Referrals are organized into 3 categories:
   - **Inbound** = Referrals shared to the Partner from Microsoft.
   - **Outbound** = Referrals shared by the Partner to Microsoft.
   - **Favorites** = Private Partner view of referrals marked as Favorite with the star icon.

c. Create a **new deal** with the +New deal button. Create and manage deals in bulk with the Upload and Download buttons.

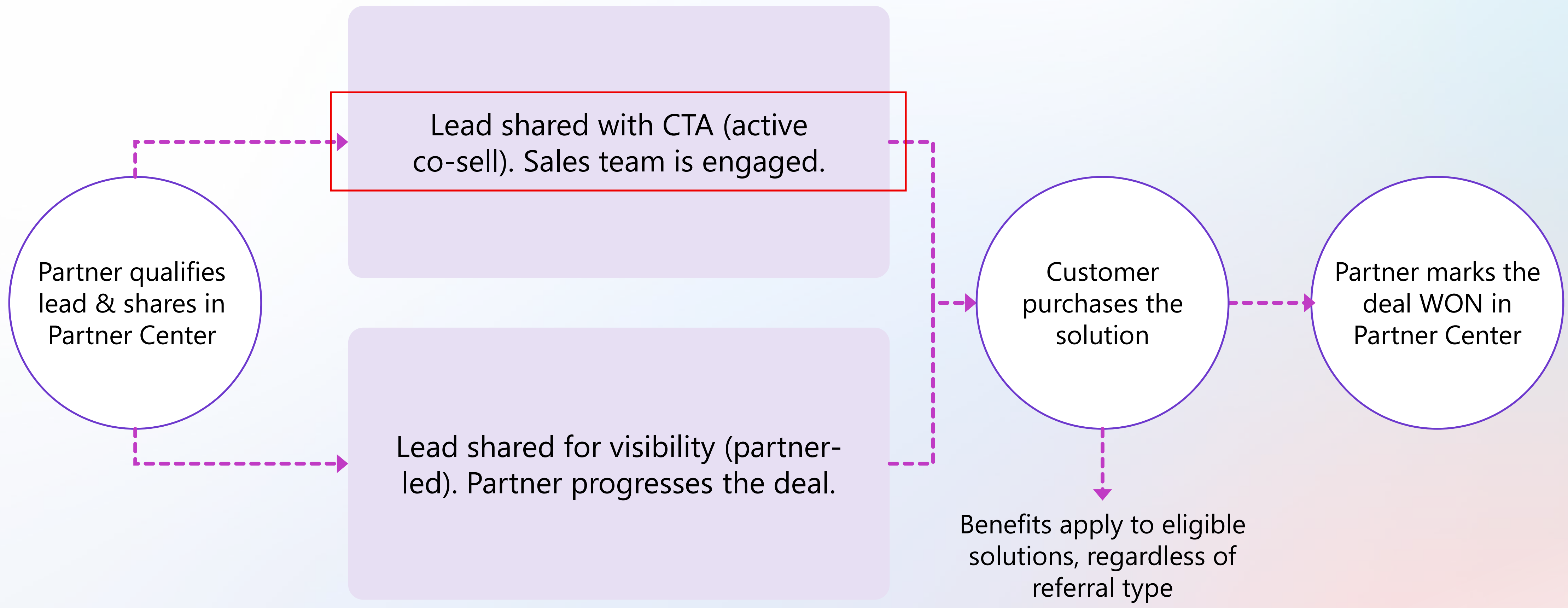
d. Use these buttons to customize your view and filter + search for referrals.

e. Created referrals show up in grid view, summarizing key info. Click on the deal name to see details & manage the deal.

Deal sharing process



Partner-to-Microsoft co-sell deal flow

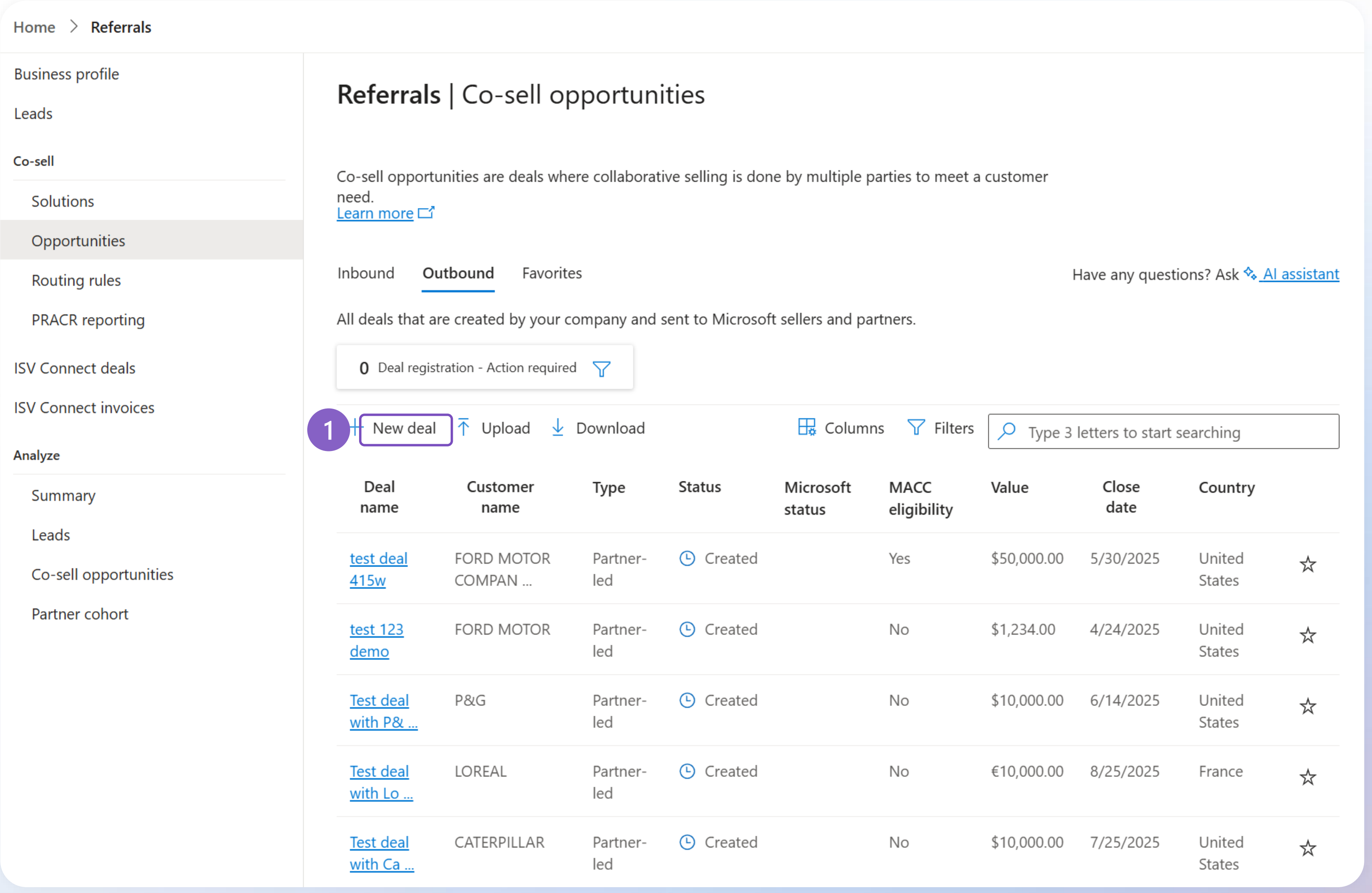


Important concepts defined

Deal sharing types	• Active co-sell referral: Shared with a call to action to the Microsoft sales team requesting help to co-sell the deal. Requires acceptance from Microsoft. • Partner-led referral: Shared for visibility with the Microsoft sales team. Does not require acceptance from Microsoft.
Sharing vs registering a deal	• Sharing a deal: This is done by creating a net new referral in Partner Center – either active co-sell or partner-led. • Registering a deal: This is an additional action taken on an already shared referral that is closed as won. Only IP co-sell deals can be registered and must meet qualification criteria to see this option.
Qualified deal	Microsoft considers deals qualified when they meet the BANT criteria. Only qualified deals should be shared as Active co-sell.
MACC	Microsoft Azure Consumption Commitment. This is Microsoft's cloud agreement for customers.

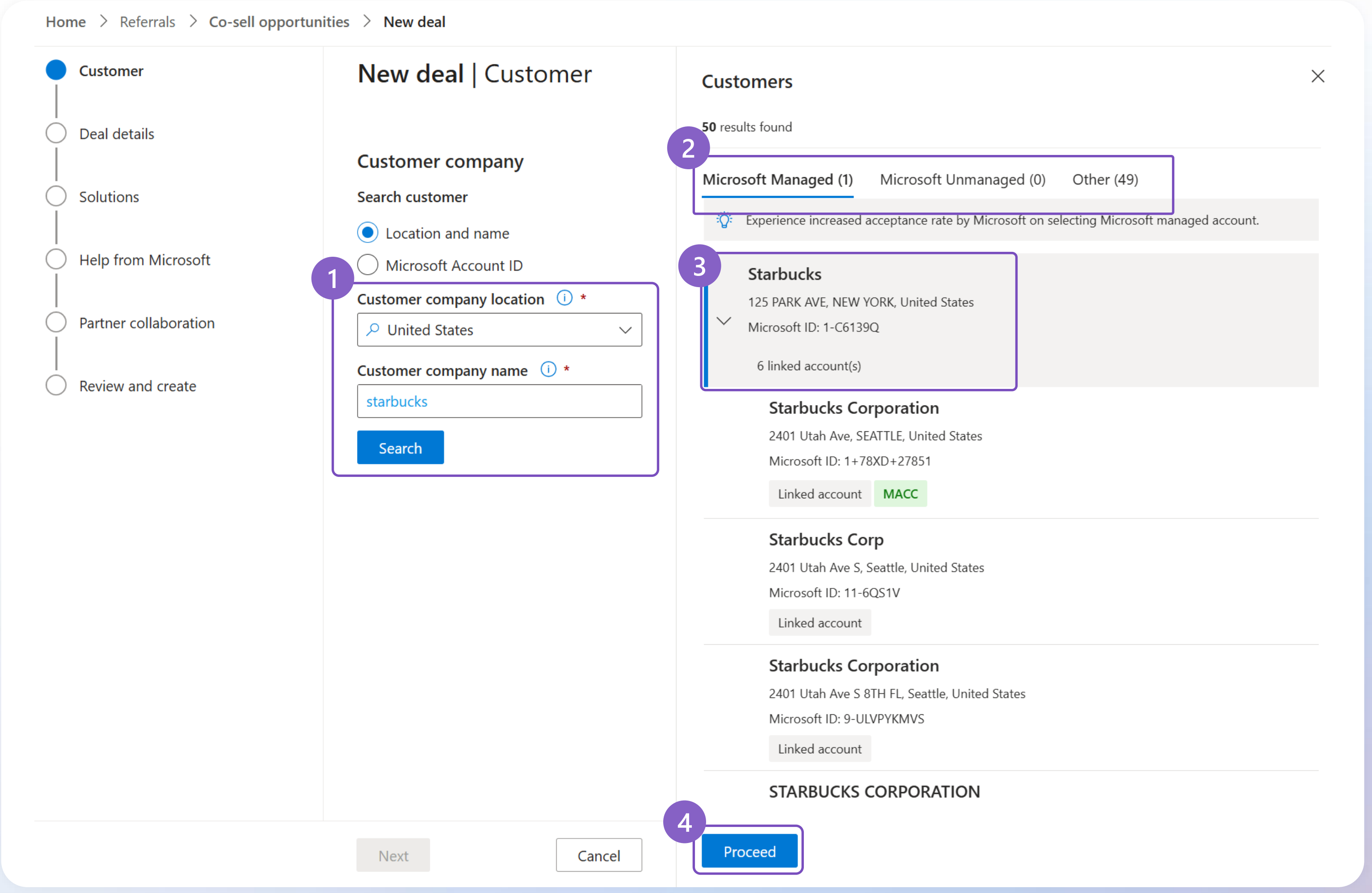
Creating a New Referral

Creating a new referral



1. Select +**New deal** to start the referral creation process.

Select your customer

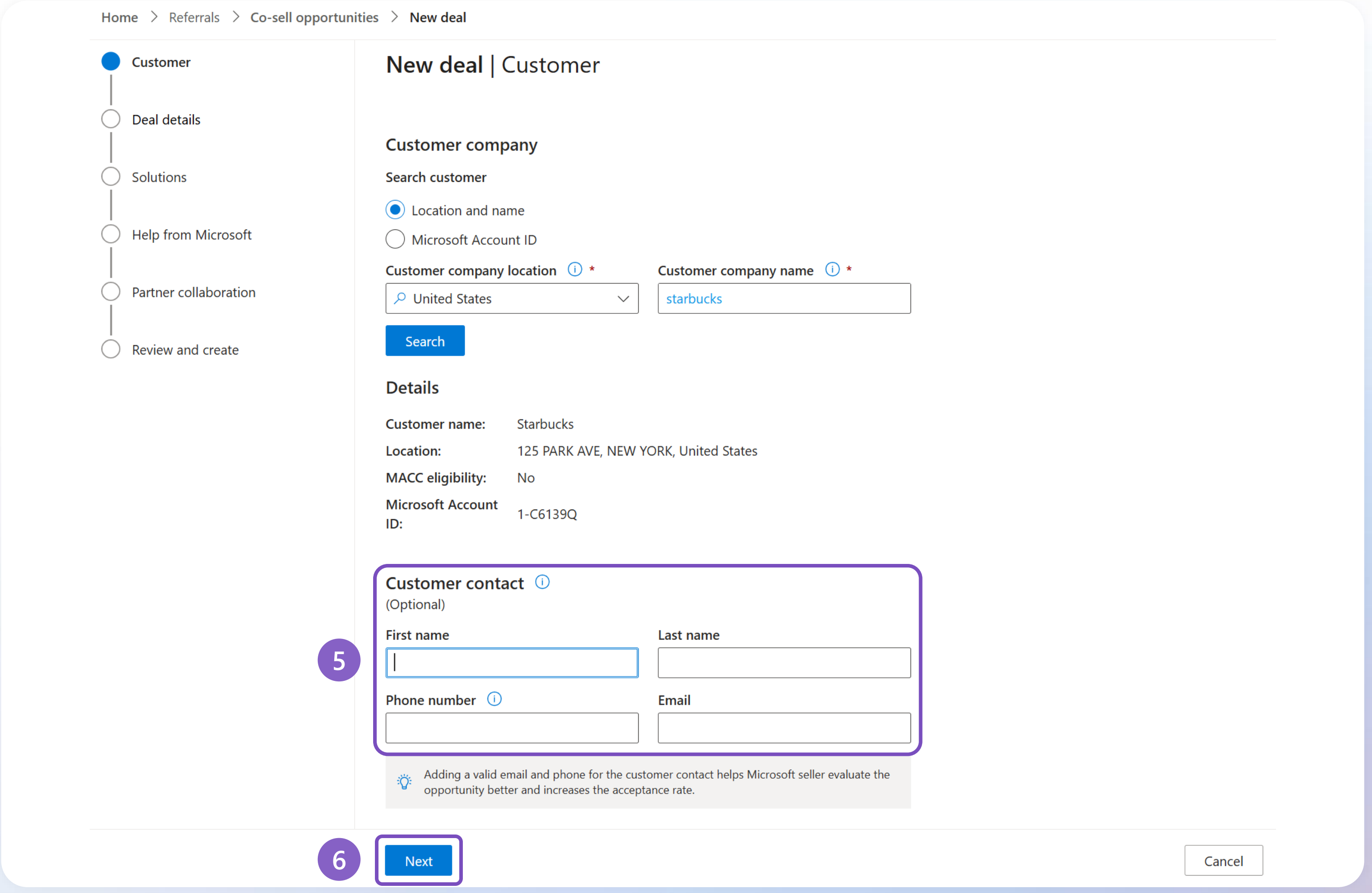


1. Enter the company location (country) and the company name, then select **Search.**
2. Search results populate in 3 categories:
   - **Microsoft Managed:** List of managed accounts.
   - **Microsoft Unmanaged:** List of unmanaged accounts.
   - **Other:** Legacy list of accounts. *There may be multiple results for the same company. You can use the D-U-N-S number to confirm you are selecting the exact match for the customer you're working with.*
3. Select the appropriate customer record. *Note: All linked accounts roll up under the parent account.*
4. Select **Proceed** to advance to the next step.

Tip!

Ensure you have entered the right customer information at this step, as you cannot edit this information after you have completed the referral creation process.

Complete the customer information (optional)

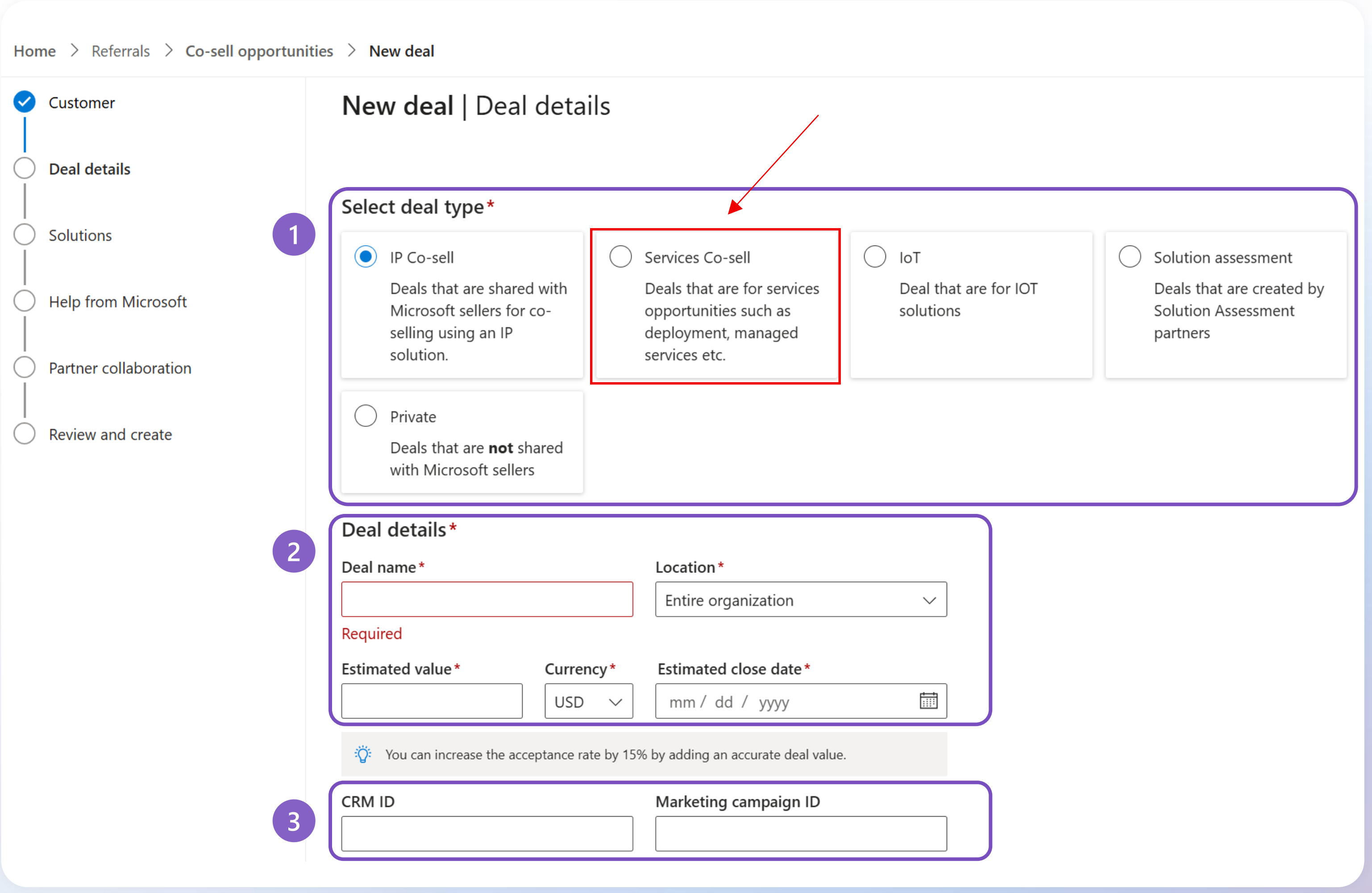


5. Enter customer contact information (first name, last name, phone number, email), which will be shared with the Microsoft seller.

   This step is optional at this stage, however, customer contact details are **mandatory** if you are planning to request Microsoft seller help in closing the opportunity.

6. Select **Next** to proceed to the next step

Add deal details



1. Select the appropriate deal type
   - Best option is **"Services Co-Sell"**
2. Add details of the current deal:
   - **Deal name**: Enter any text here leveraging "good referral" guidance. Be descriptive but avoid adding sensitive information as this is visible to Microsoft.
   - **Estimated value**: Estimate the minimum value to Microsoft, either in consumed (Annual ACR) or billed revenue (Annual Billed/Contract Value, i.e. license value excluding partner services), not binding.
   - **Estimated close date**: Select a date in the future the deal is expected to close; not binding.
3. Add optional information:
   - **CRM ID (Optional)**: Enter a unique identifier from your CRM to make it easier to keep pipeline updated.
   - **Marketing campaign ID (Optional)**: Enter **#PartnerGTM** if the deal was influenced by Microsoft marketing funds or MCI Funded Engagements

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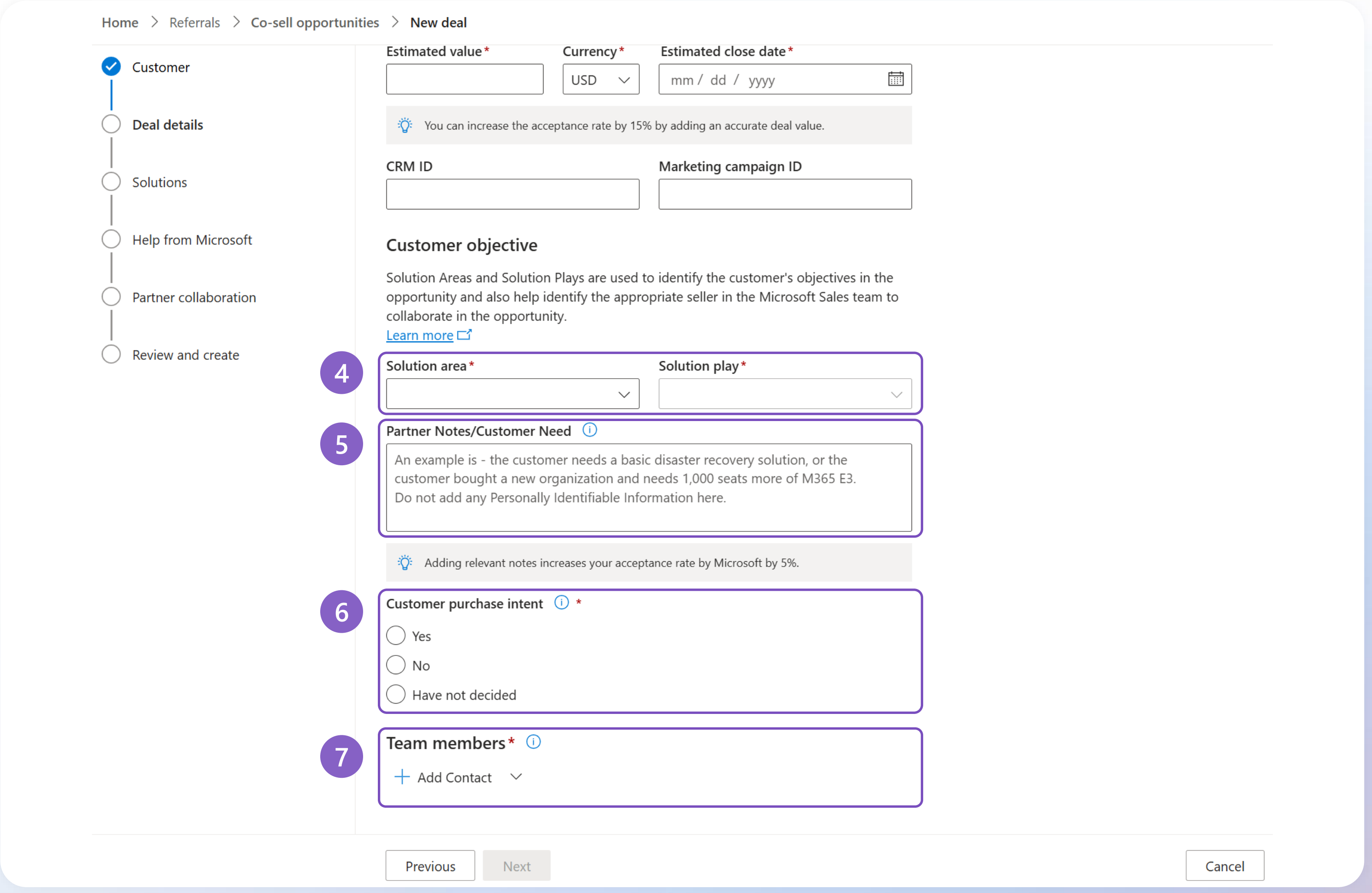
Add deal details *(continued)*



...continued...

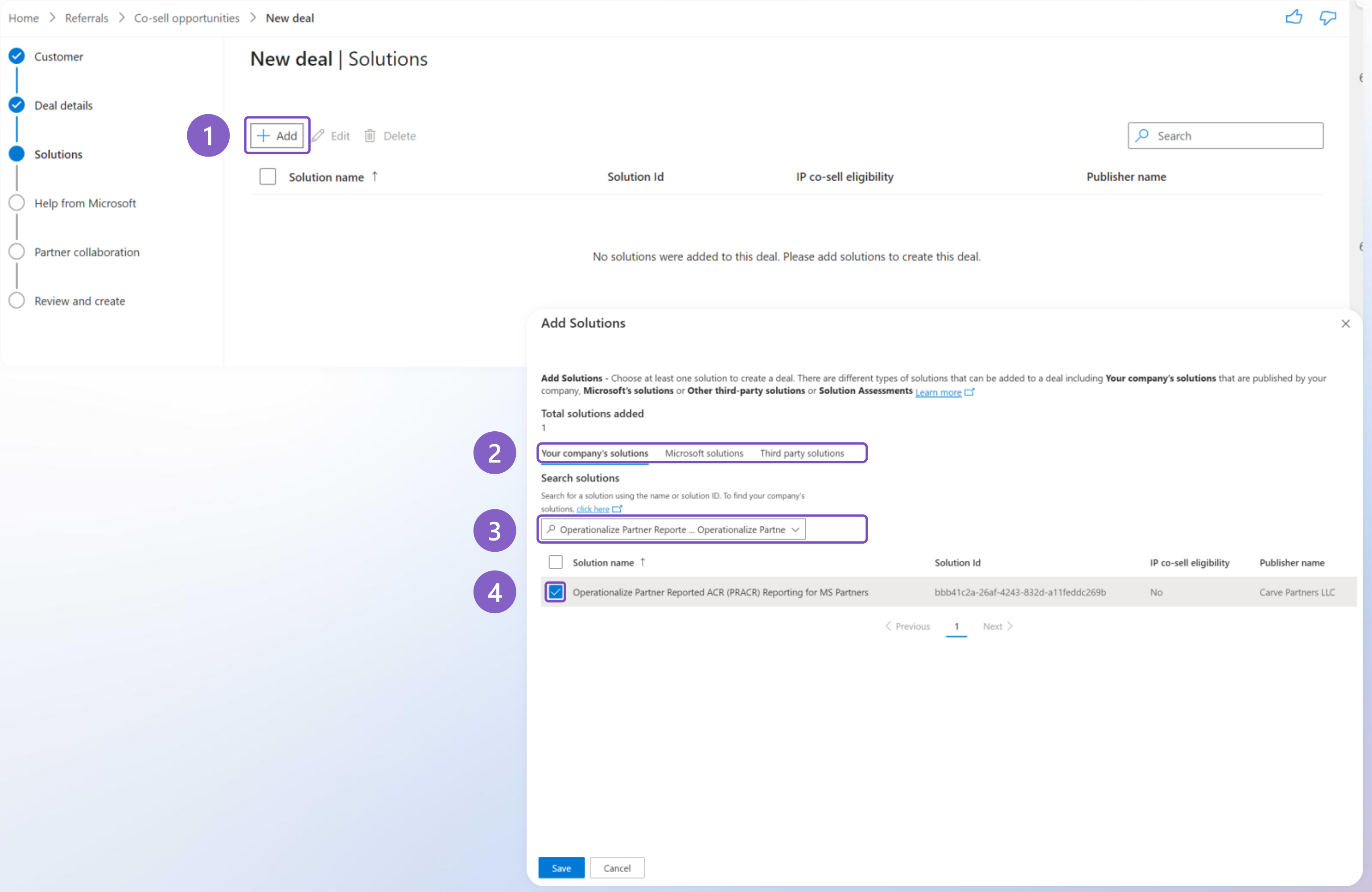
4. Select Solution area and Solution play from the dropdown.
5. Add notes. These will be visible to Microsoft and should be relevant to a Microsoft field seller audience.

   Clearly articulate your engagement with the customer thus far and customer need (e.g., why does customer need/want 300 seats of M365 E3)

   Note *that if you are selecting active co-sell, this field will show up again later and become required.*
6. Confirm customer purchase intent
7. Add contacts from your team who can answer questions about this deal (not a VP!). You must enter one and can enter multiple (important in case we need to validate info with you). Then, select **Next.**

Tip!
You can always come back to update the Customer purchase intent if you get more clarity later. The more accurately you use this field, the better engagement you can expect.

Add solutions



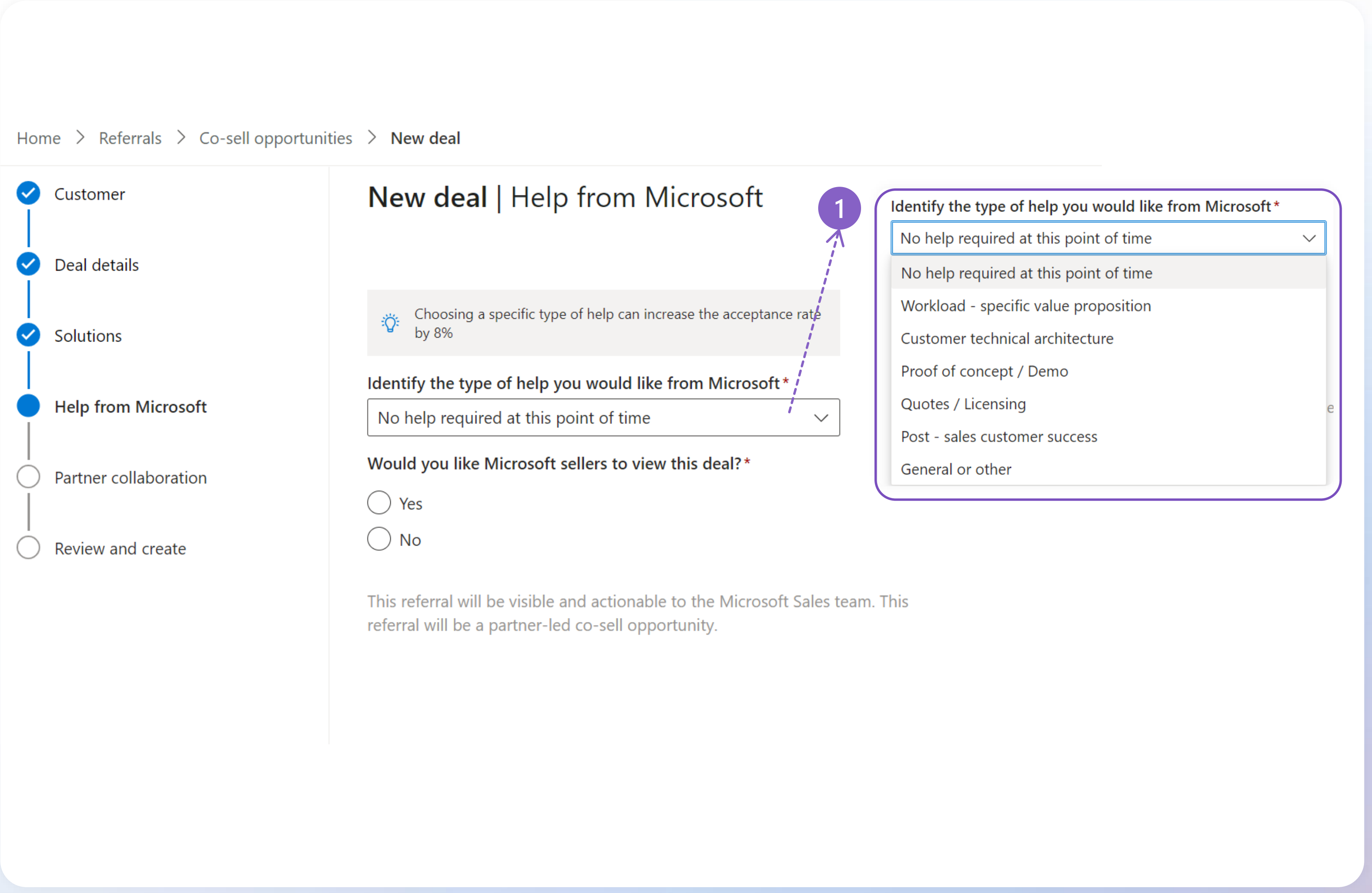
1. Select + **Add** to open the solutions pane.
2. You have the option to search 3 databases: Your company's solutions, Microsoft solutions, or third-party solutions.
3. Enter the solution name into the search, then select the appropriate solution from the dropdown.
4. Select the appropriate solution(s), then select **save**.

Best Practice

If you are creating an active co-sell referral, ensure you add the right solution to meet criteria for acceptance.

- *IP co-sell deals (ISV only) need an IP co-sell eligible solution attached.*
- *Seat-based opportunities need a relevant Microsoft solution attached.*

Indicate type of help needed



1. Select the type of help you'd like from Microsoft.

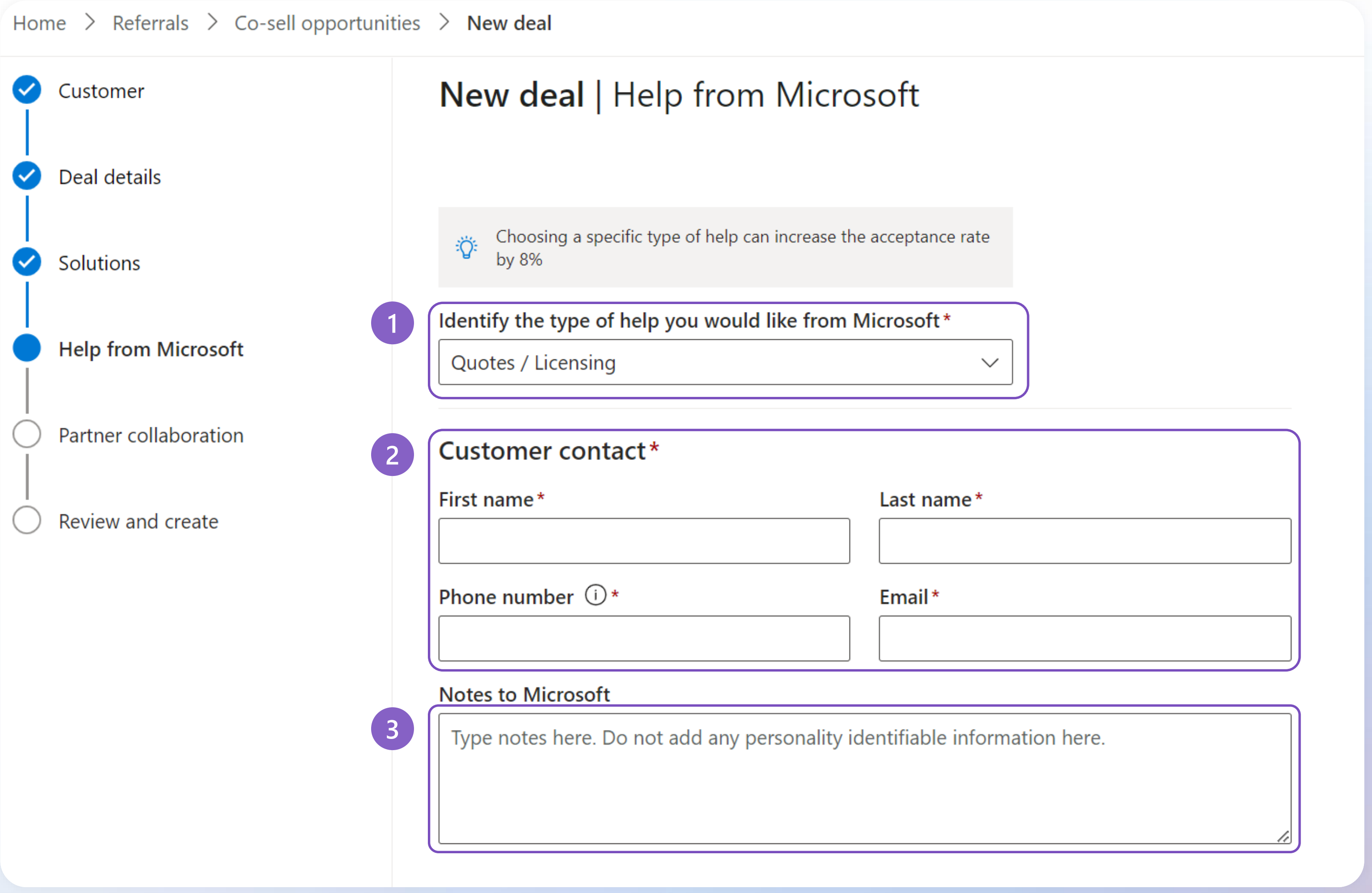
   Most appropriate for engagement with Microsoft sellers are "**Workload**" or "**Proof of concept/Demo**". We recommend you select "**Quotes/Licensing**" when customer is ready for purchase.

   If you selected "No help required at this point in time" this lead will NOT follow the process for active co-sell with Microsoft.

Best Practice

Do not create private pipeline, as this is not visible to Microsoft

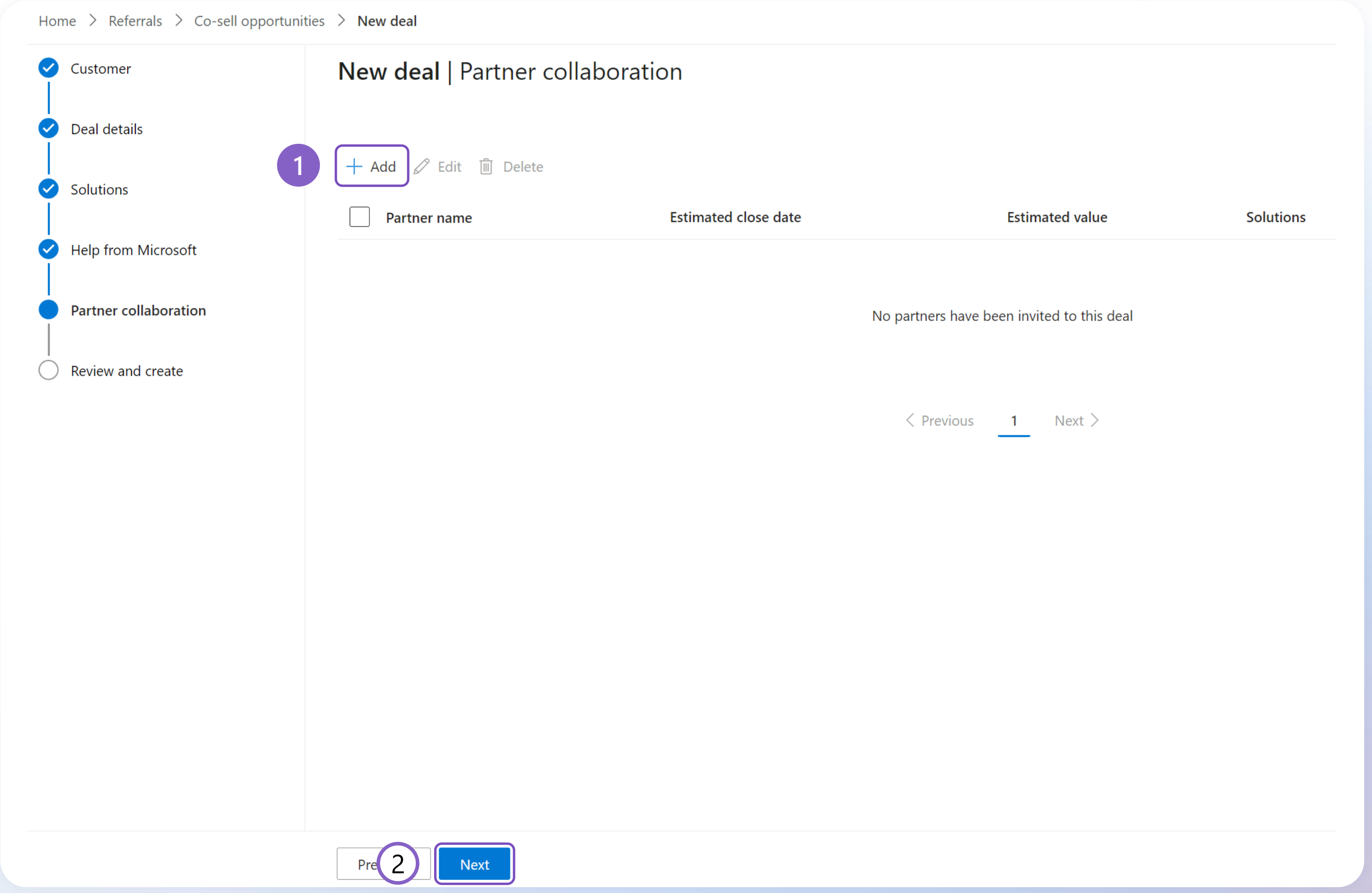
Create an active co-sell referral



1. Select the specific type of help you require from Microsoft.
2. Enter customer contact information *(first name, last name, phone number, email)*.
3. Add detailed notes to Microsoft providing context around the deal. Notes for active co-sell opportunities are critical in determining the quality of the opportunity and should always be included with every active co-sell opportunity.
   - *Provide BANT criteria - Budget ($$), Authority (who), Need (what), Timeline (when) - to indicate a qualified deal*
   - *Communicate value to Microsoft seller*
   - *Include a clear ask for Microsoft support*
   - *If you are an indirect reseller please flag here the name of the Distributor you are working with to facilitate alignment*
   - *If you want to engage a Microsoft PSS (Solution Area aligned) please flag it here (include name, if you know who)*

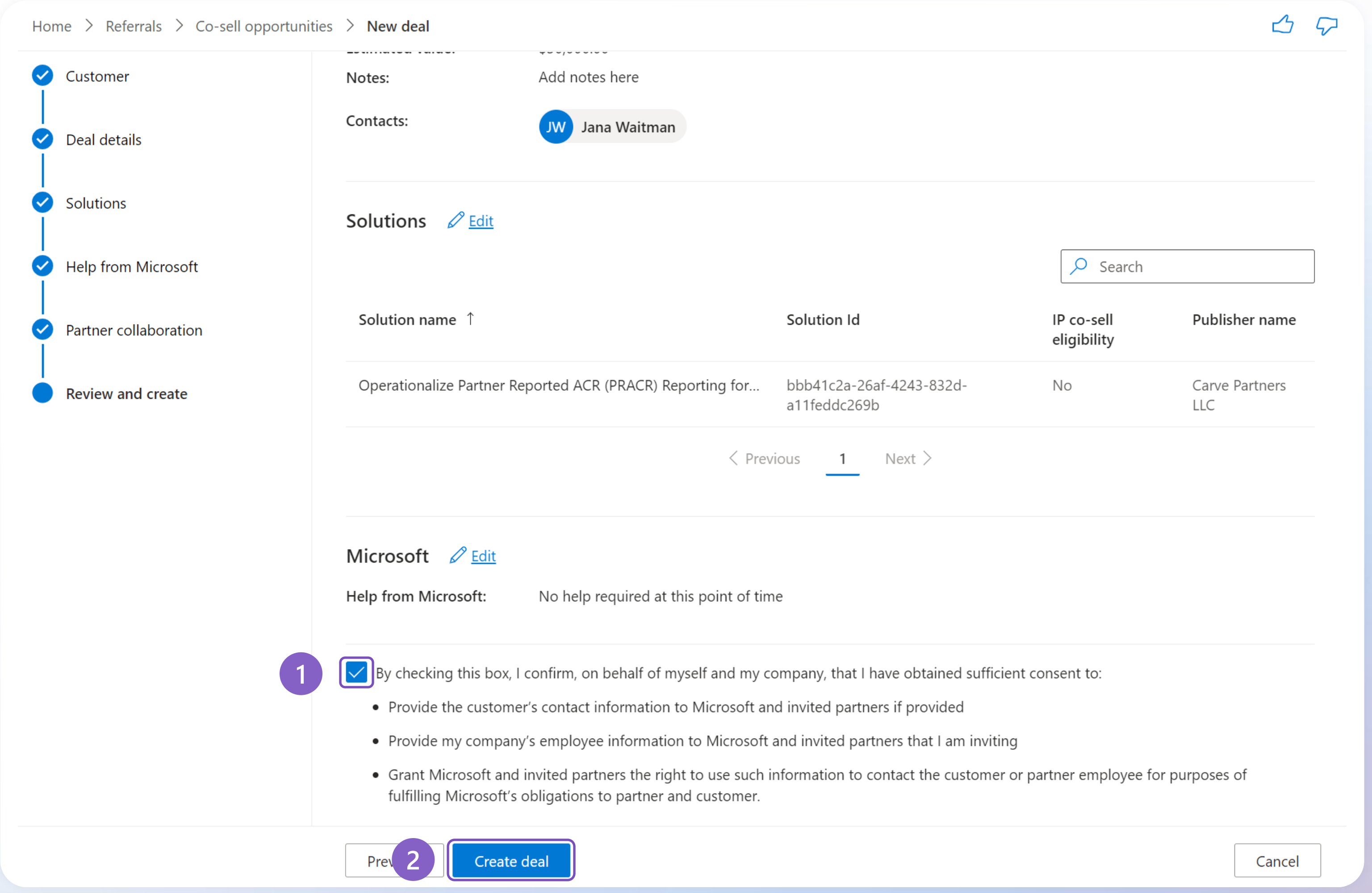
Then, select **Next**

Partner collaboration *(optional)*



1. If you wish to add a partner to collaborate with you on closing the deal, select +Add and enter their details
2. Otherwise, select Next to skip this step

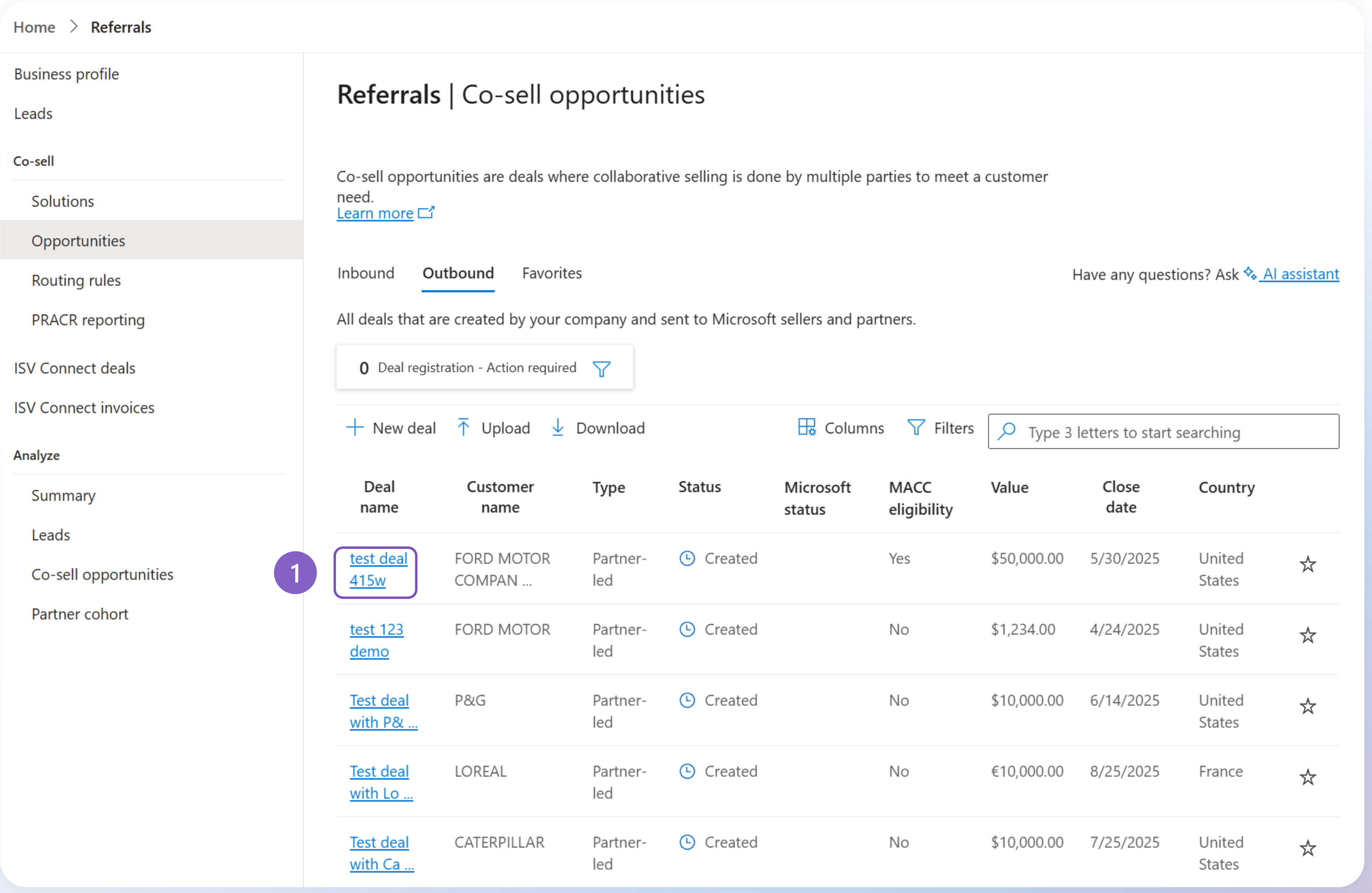
Review details & create deal



1. Review information provided to ensure it is correct. Then, check the box to confirm that you have permission to share this information with Microsoft
2. Select **Create deal** to create the deal

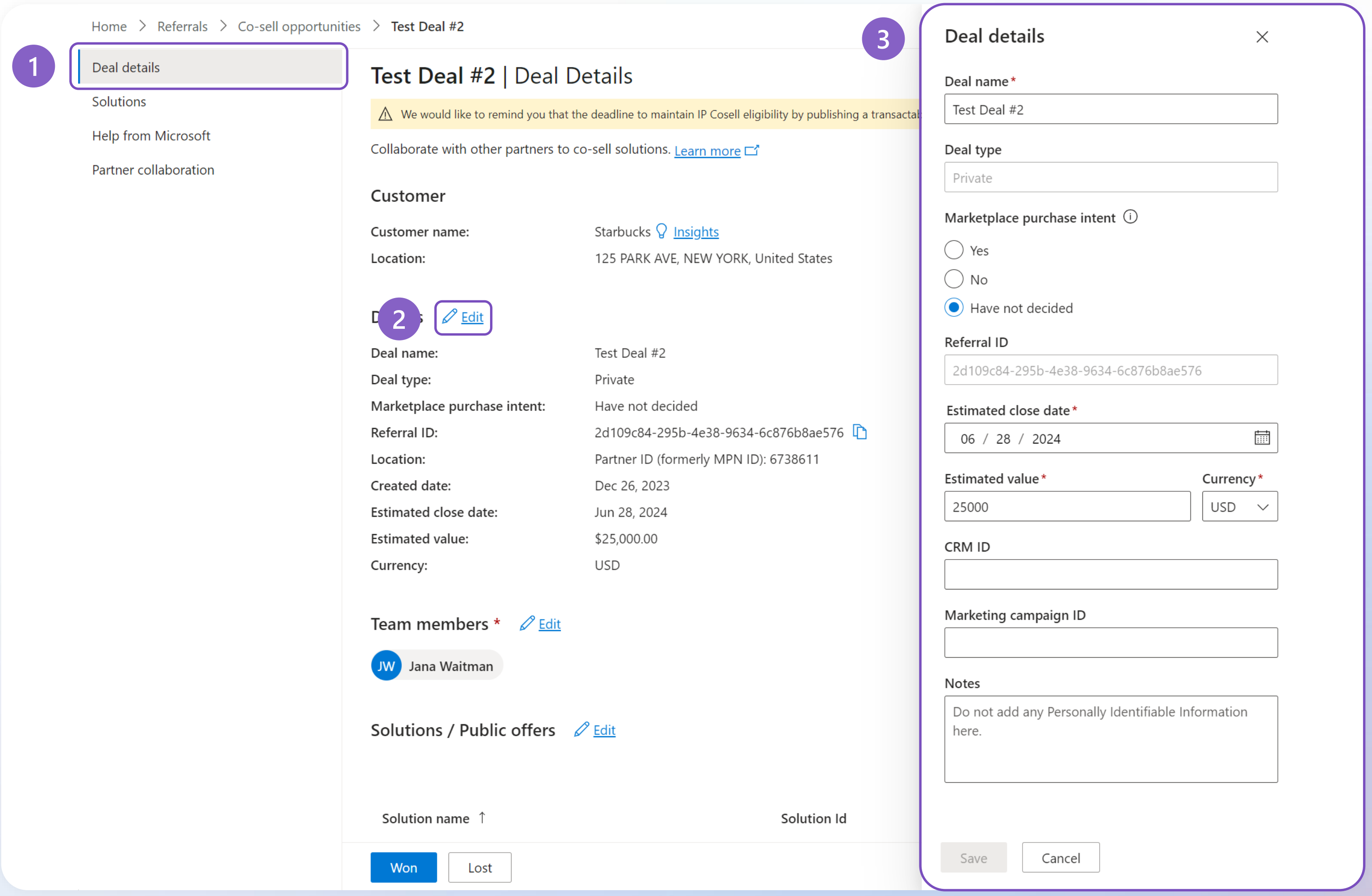
Managing an existing referral

Managing an existing referral



1. Select the deal name for the referral you need to manage

Edit deal details

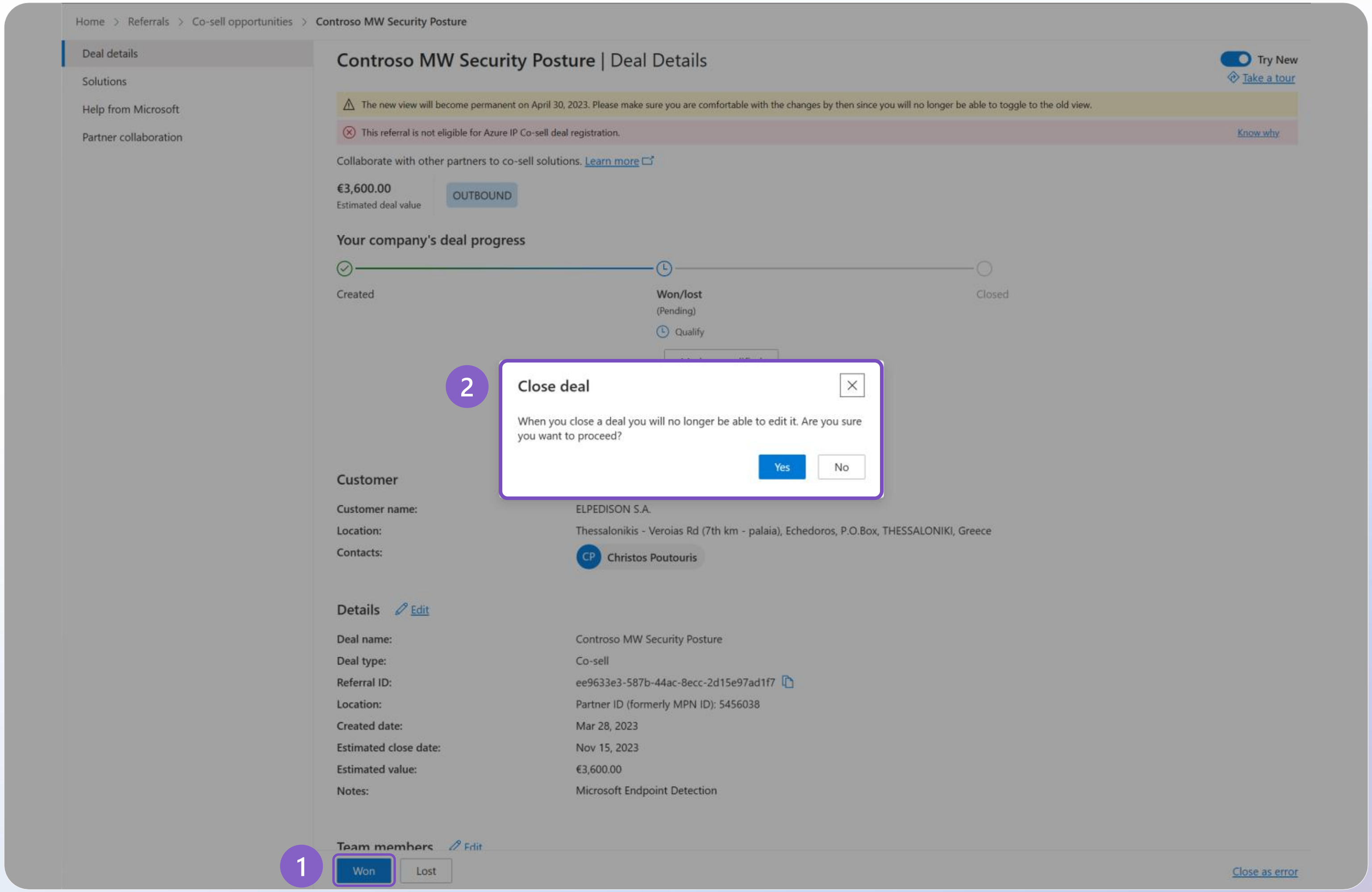


1. Navigate to the **Deal details** page
2. Select **Edit** next to a section to open the editing pane
3. Make relevant changes, then hit **Save**

Commonly updated fields:

- Estimated close date: Ensure this date is in the future to show to Microsoft that you have active pipeline.
- Marketplace purchase intent: Indicate the customer's intent to purchase on the Marketplace.
- Marketing campaign ID: Add a campaign ID code if this referral is associated with Microsoft marketing funds to show ROI.
- Notes: As your referral develops, keep the notes section updated.

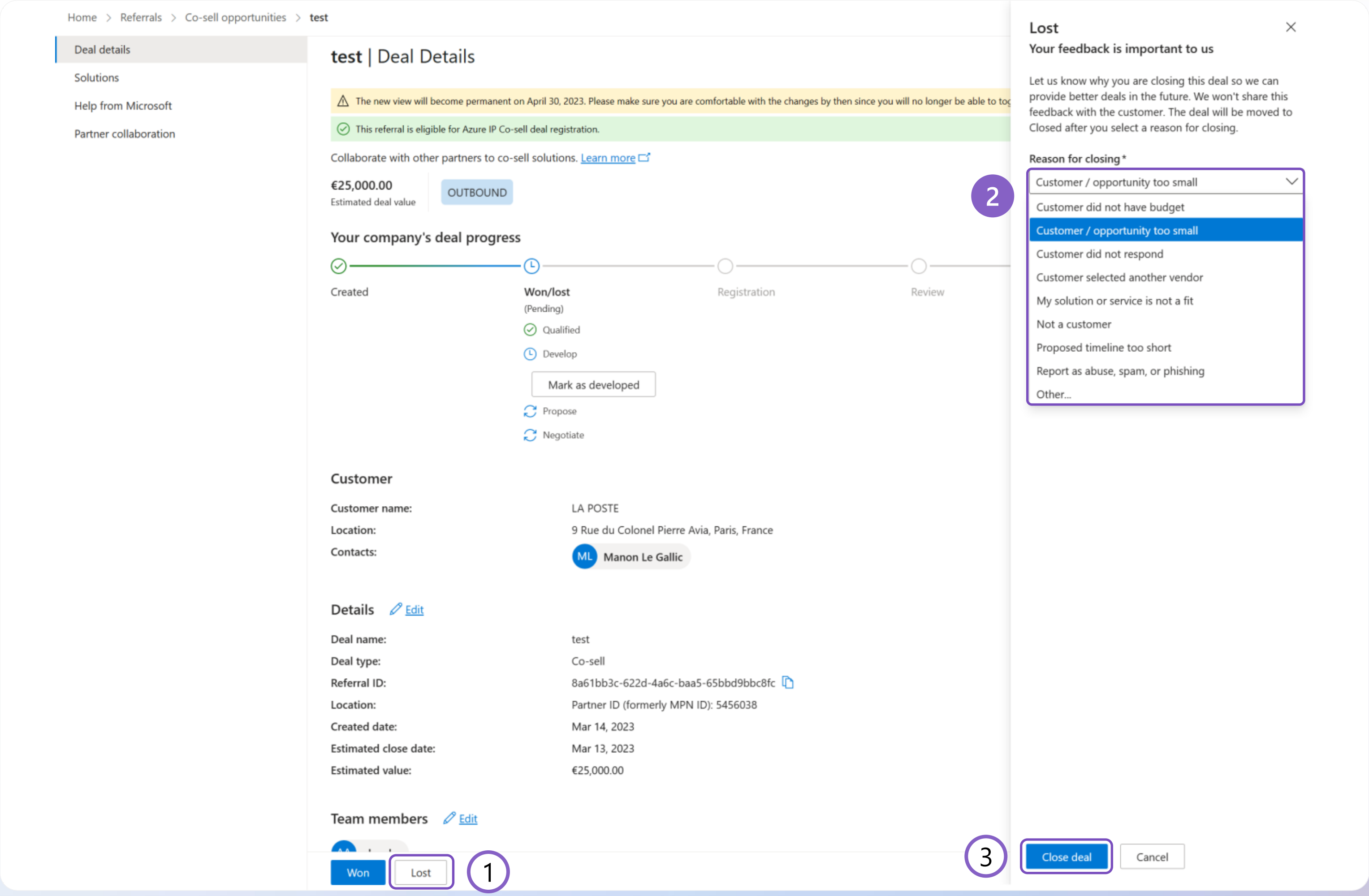
Close a referral as won



1. Navigate to the referral you wish to close as won and double-check that the details are correct. Select Won
2. Select Yes in the popup to acknowledge that once you close a deal, you will no longer be able to edit it

Once you close the deal, the deal progress will update to 'closed' and you will no longer be able to edit the details

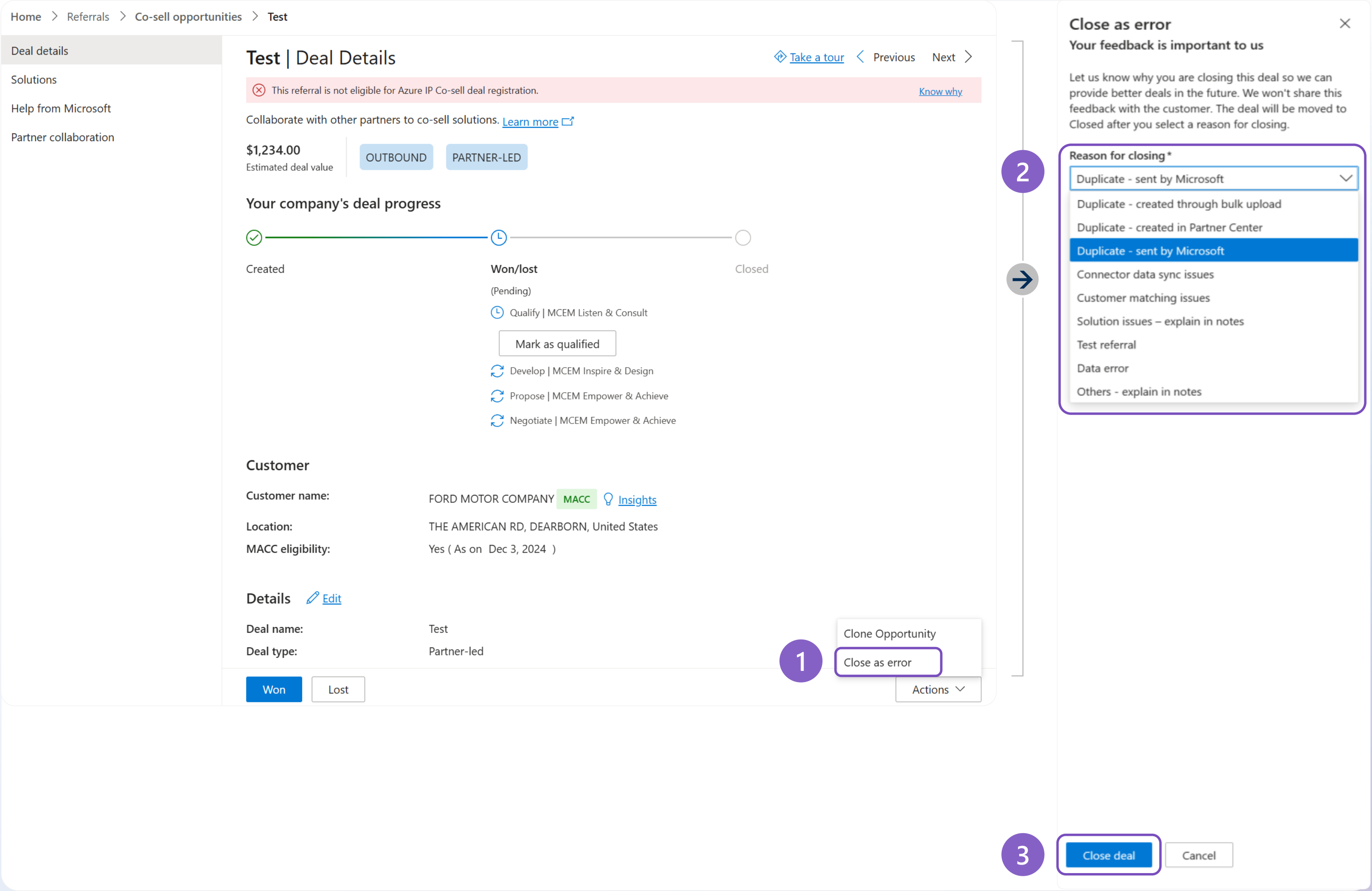
Close a referral as lost



1. Navigate to the referral you wish to close as lost and double-check that the details are correct. Select Lost
2. Select a reason for closing from the dropdown menu. Add notes to provide additional context *(optional)*
3. Select close deal. Select Yes in the popup to acknowledge that once you close a deal, you will no longer be able to edit it

Once you close the deal, the deal progress will update to 'closed' and you will no longer be able to edit the details.

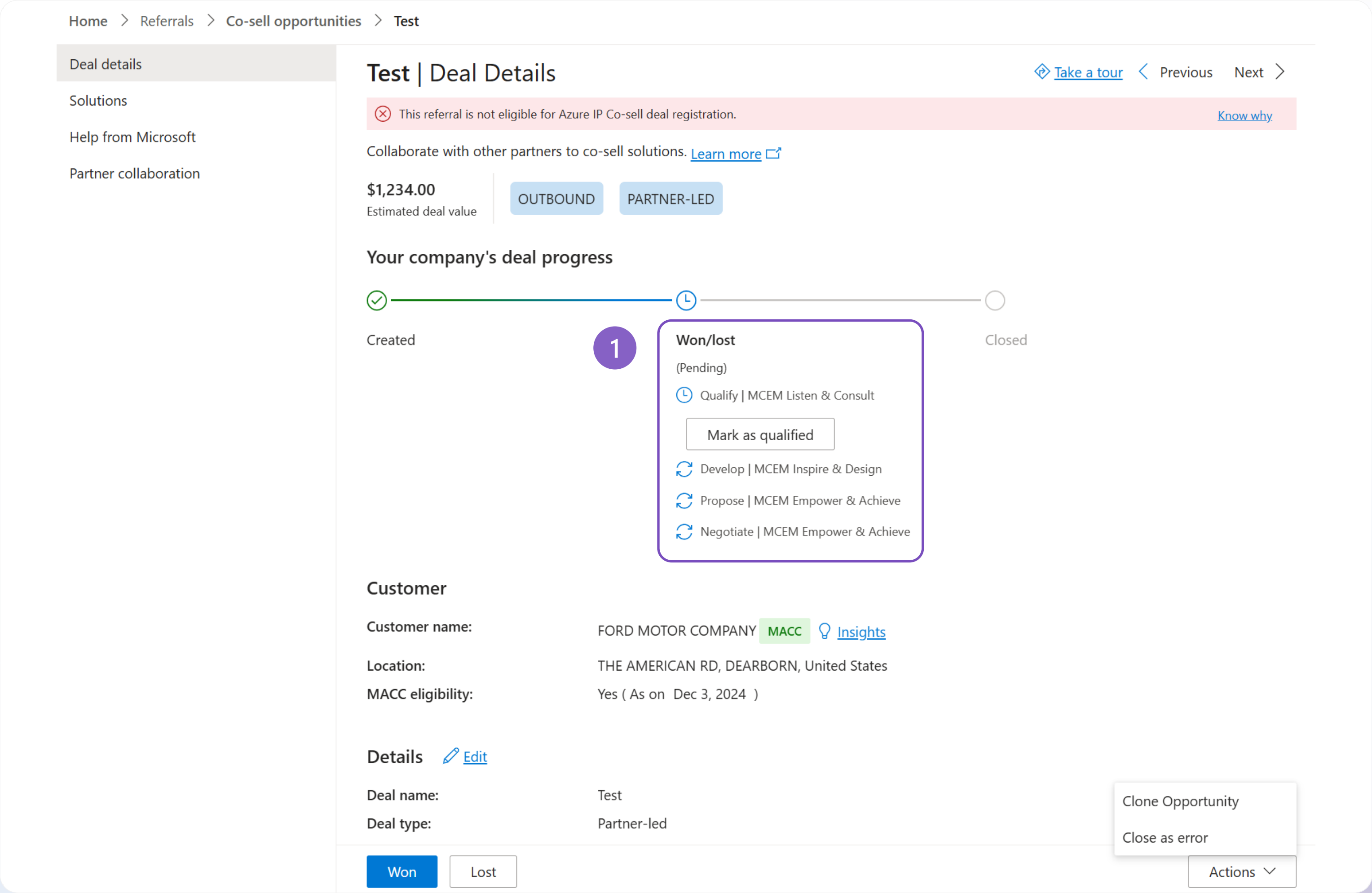
Close a referral as error



1. Navigate to the referral you wish to close. Select Actions > Close as error
2. Select a reason for closing from the dropdown menu. Add notes to provide additional context (*optional*)
3. Select close deal. Select Yes in the popup to acknowledge that once you close a deal, you will no longer be able to edit it

Once you close the deal, the deal progress will update to 'closed' and you will no longer be able to edit the details

Update sales stage

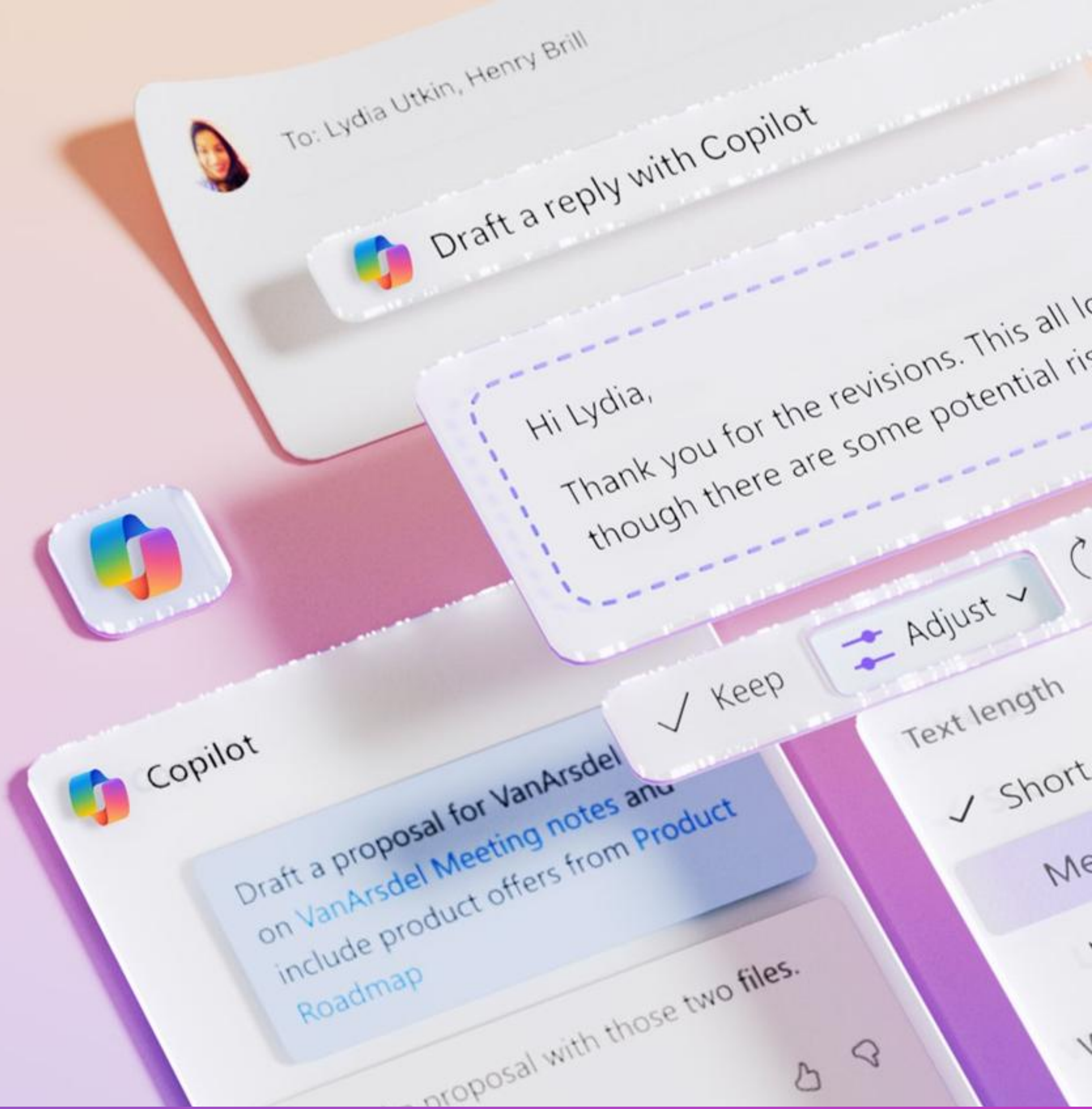


1. To indicate the sales stage to Microsoft, select the corresponding button in the deal progress bar. ***Note** that moving the sales stage here does NOT move it on the Microsoft system for the seller.*

Sales stages defined:

Sales stage	Percent completed	Definition	MCEM Stage	MCEM Stage Exit Criteria
Created	10%	Creating an outbound deal	Listen and Consult	Qualified opportunity
Accepted	10%	Accepting an inbound deal	Listen and Consult	Qualified opportunity
Qualified	20%	Qualifying the value of the deal and the customer requirements before proceeding further	Listen and Consult	Qualified opportunity
Developed	40%	Developing the deal further to understand the detailed requirements to either prepare a POC or any other artifacts required for a formal proposal	Inspire and Design	Customer Aligned to solution & business case
Proposed	60%	Making a formal proposal to the customer based on their requirements	Empower and Achieve	Customer Agreement in place
Negotiated	80%	Negotiating the final terms based on the proposal to get to the final state – winning or losing the deal	Empower and Achieve	Customer Agreement in place
Won	100%	Marking the deal as won	Realize Value	Customer has executed the agreement and deployment can begin

Anatomy of a Good Referral



Anatomy of a Good Referral

1

Deal Name:

Enter a Deal Name including Customer Name - Solution Area - Customer Need

- **Example 1 [Security]**: Contoso – Security – M365 E5 1000 Seats
- **Example 2 [Azure Security]:** Contoso – Sentinel/XDR - $1,000 per month projected
- **Example 3 [Modern Work]:** Contoso – M365 Copilot or M365 E3 or M365 Business Premium - 1000 Seats
- **Example 4 [Biz Apps]:** Contoso – ERP Finance SCM or CRM Sales or CRM Service or Business Central or LowCode or BizApps Copilots – 300 seats or 300k ACV
- **Example 4 [Azure]:** Contoso – Azure Infrastructure or Data & AI or App Innovation – $1000 per month projected

2

Estimated Value:

- Estimate the **minimum value to Microsoft**, either in consumed (Annual ACR) or billed revenue (Annual Billed/Contract Value*, i.e. license value excluding partner services)

3

Solution Area - Solution Play – Campaign ID

- Pick the Solution Area (i.e. AI Business Solutions or Modern Work) and Solution Play (i.e. Secure Productivity) that most closely aligns to this opportunity
  (in the next slides, you will have a summary of Solution Plays per Solution Area and respective hero workloads)
- Identifying the right solution area determines the right Microsoft seller that will get the opportunity
- These selections will be refined and verified when you meet with the Microsoft team
- As relevant, please ensure that “#PartnerGTM” is added to Campaign ID field in the referral. If the referral is connected to a special sales motion with Microsoft, you can add additional tags, i.e. “NIS2”, “SMCDublinSummit”, etc.

Anatomy of a Good Referral

4

Partner Notes / Customer Need

- Clearly articulate your engagement with the customer thus far and customer need (e.g., why does customer need 1,000 more seats of M365 E5)
- If an Indirect Reseller, always mention the name of the Disti you work with to facilitate alignment with Microsoft sellers

5

Help From Microsoft and Notes

- Select the best option that describes how you would like Microsoft to work with you on this opportunity
- **Ideally, always choose "workload specific" or "proof of concept"**
- **If you select 'Partner-Led' or "No Help Needed", you will NOT be connected with a Microsoft seller**
- Proving rich context is the best way to enable quick engagement with a MS seller

6

Customer Contact

- Provide a customer point of contact and any context to help the Microsoft team evaluate the engagement (e.g., customer budget, desired outcome, timeline)

7

Partner Contact

- Provide a partner's point of contact with whom the Microsoft team should engage to discuss the deal.
- **Do not enter a VP of Sales name** as a contact unless that person is willing and able to respond specific questions about the deal

Notes section: What would a good cosell referral look like

1. **Context:** recently met CTO (29/10) who's reviewing their multi-cloud strategy as part of their wider IT transformation, following a recent PE house takeover. Account has large O365 estate and he's keen to move at pace, to accelerate their adoption of AI – he spoke about a particular use case with leveraging Copilot to drive better EX and cost efficiencies but concerns around data over exposure.

   Provide the opportunity owner with the history of how this lead originated, including who they met, when and what area they are interested in exploring further

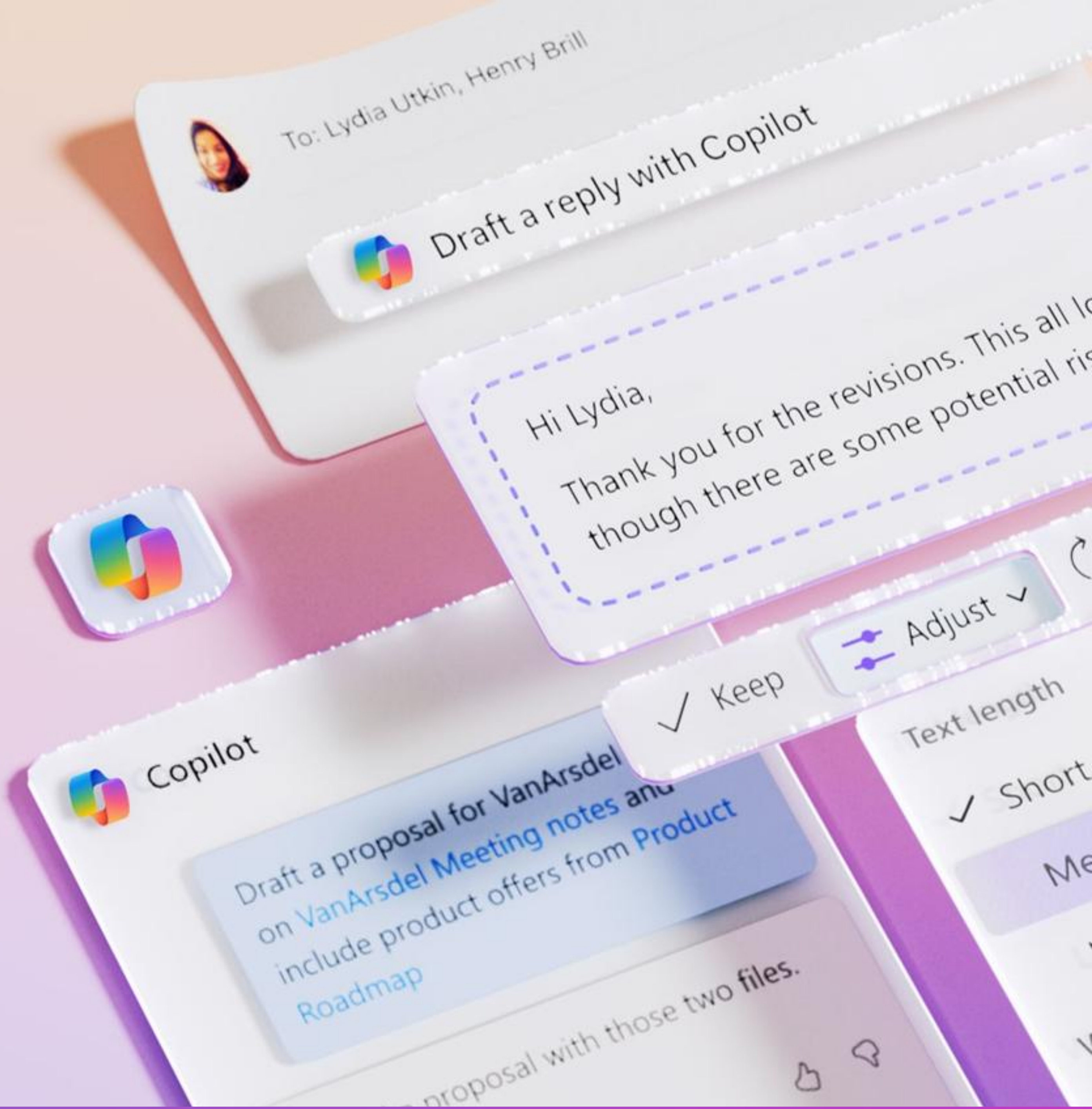
2. **Opportunity:** potential for 500 seats M365 E5 upsell, keen to understand if E5 right choice over E3, with AI expansion opportunities with Copilot for M365, perhaps explain deal size estimation ie 100 copilots seats @ $360 per seat per year

   Provide a high-level overview of the potential opportunity and where possible the use case

3. **Next steps:** we would like to discuss opportunity further with Microsoft account team and understand how we work together early to help shape customers security and AI strategy with the view of having a follow up with the CTO within the next two weeks.

   Provide clear next steps for how the opportunity owner can help drive this opportunity forward with the partner with a clear view on the expectations set with the customer for follow up.

Pipeline Best Practices



Best practice: Establish a referral sharing framework

Use these four steps as your foundation for QUALITY pipeline

Qualify
Set parameters to identify relevant pipeline to share with Microsoft

Align
Ensure your sales & ops teams and your CRM are aligned to your sharing strategy

Share
Add referrals, sharing for visibility only or selecting a call to action

Govern
Develop a process to keep pipeline updated and accurate

Best practice: Maintain the high impact fields

Where to focus	Why it's important
Qualify and upload all **relevant pipeline** in your CRM to Partner Center	An accurate & complete pipeline provides a clear picture into upcoming opportunities & potential impact
Close out deals that are **won/lost**	Keep efforts focused on relevant deals and avoid cycles back-and-forth with Microsoft reaching out on old deals
Update **estimated closed date** on all referrals with a due date in the past	A pipeline with estimated closed dates in the past indicates hygiene issues and can be seen as unreliable. Microsoft uses these dates to prioritize opportunities
Add a **#PartnerGTM** campaign tag for any referrals tied to a marketing campaign	Capture the ROI of any Microsoft marketing funds that influenced your pipeline to create a case to receive additional funds in the future
Check your **Inbound referrals** tab weekly to avoid deals expiring	Partners have 14 days to accept/decline referrals received from Microsoft. If they are not actioned, they will expire & lead to missed opportunities
Re-share any **active co-sell** deals that expired	Re-share expired referrals to ensure all relevant deals show up as open pipeline

Best practice: Dos and Don’ts

Maintaining a healthy pipeline is at the core of a successful Microsoft partnership. Follow these quick tips to ensure you show up well

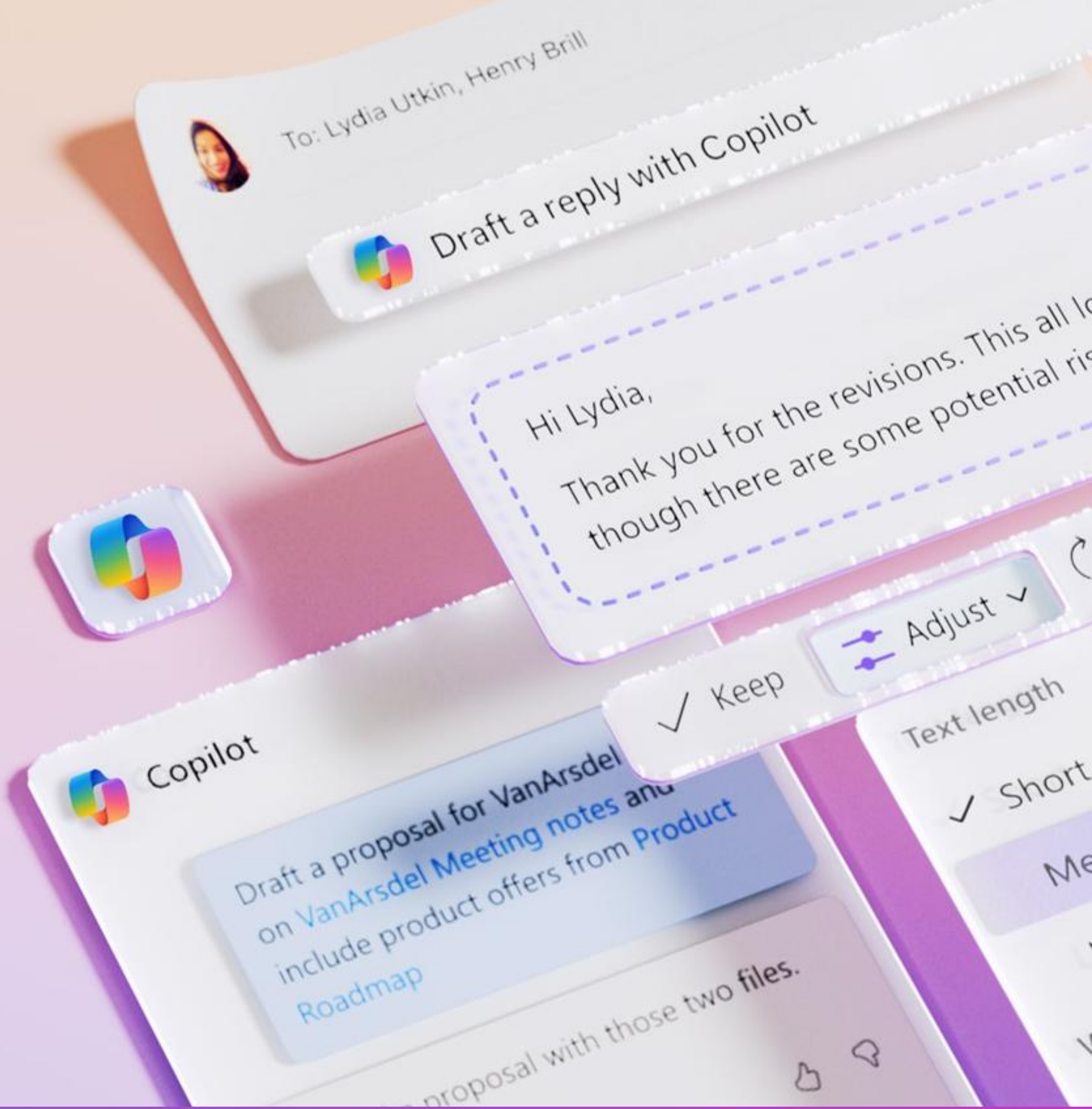
Do

- ✓ Share relevant deals from your CRM to Microsoft in a timely fashion
- ✓ Keep estimated close dates updated
- ✓ Map deals to a known customer
- ✓ List the right team member contacts from your team
- ✓ Ask for help when needed
- ✓ Add quality notes for the Microsoft seller
- ✓ Close out deals that are won/lost/error

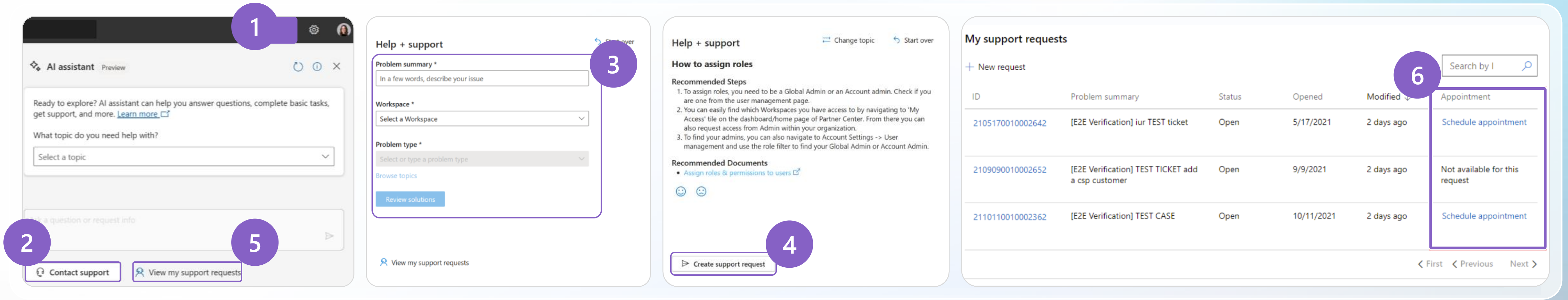
Don’t

- x Don’t forget to update the deal value as the deal progresses
- x Don’t share internal notes in the notes field that are irrelevant to Microsoft
- x Don’t share deals as “private” if your intent is to co-sell
- x Don’t forget to re-share expired/declined deals
- x Don’t enter inflated or incorrect information
- x Don’t spend time learning the bulk process unless you’re managing a high volume of deals

Getting help in Partner Center



Learn to navigate the support feature



1

Select the AI Assistant icon from the navigation bar

2

Enter your topic to request info. [See here for prompt suggestions.]() If needed, select Contact Support to initiate the process of opening a ticket

3

Enter a brief overview of the issue, select the relevant workspace, and pick a recommended problem type. Select **Review solutions**. You will be shown recommended steps and links that may help to resolve your problem without submitting a ticket

4

If your problem persists, select **Create Support Request**. Fill in the information and select **Submit**. A partner support rep will follow up with you by phone or email. For some topics, you can schedule a support appointment by following steps 5 and 6

5

To schedule an appointment:

At the bottom of the AI Assistant pane, select **View my support requests**

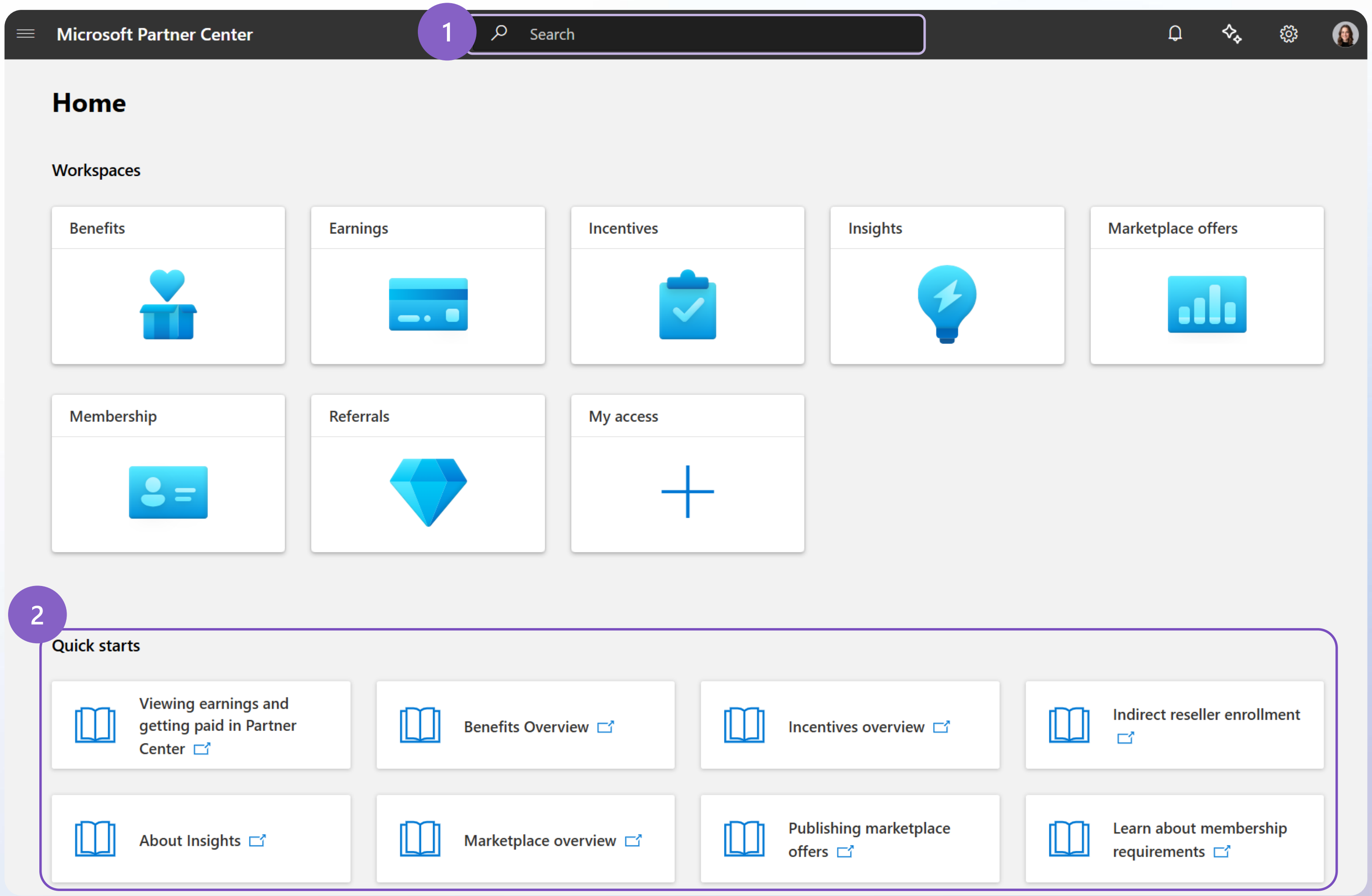
6

Use one of the following methods to schedule an appointment:

Under My support requests, find the support request you're looking for, then click the Schedule appointment link -OR- Under My support requests, select your open request to view ticket details, then select Schedule an appointment.

Select an available date and then time and select Schedule this appointment to book your appointment with an advocate.

Search technical docs



1. Use the search bar to discover technical documentation within Partner Center
2. Click on the quick links or tooltips within Partner Center to navigate to the technical docs for more detailed information

Resources

Co-sell resources

- Selling with Microsoft
- Referral and co-sell support
- Partner Center technical documentation
- Payout & Tax Profiles

Marketplace

- Publisher Guide for partners
- Marketplace support for publishers
- Marketplace customer documentation
- Publishing Guide by Offer Type

Partnership resources

- Microsoft marketing resources
- Build partnership
- MAICPP Benefits Guide
- Solutions Partner with Certified Software designations Guide
- Solutions Partner designations
- Microsoft Commerce Incentive
- Microsoft partner resources

Technical resources

- Technical resources through ISV Success
- Mastering the Marketplace self-serve technical guidance