

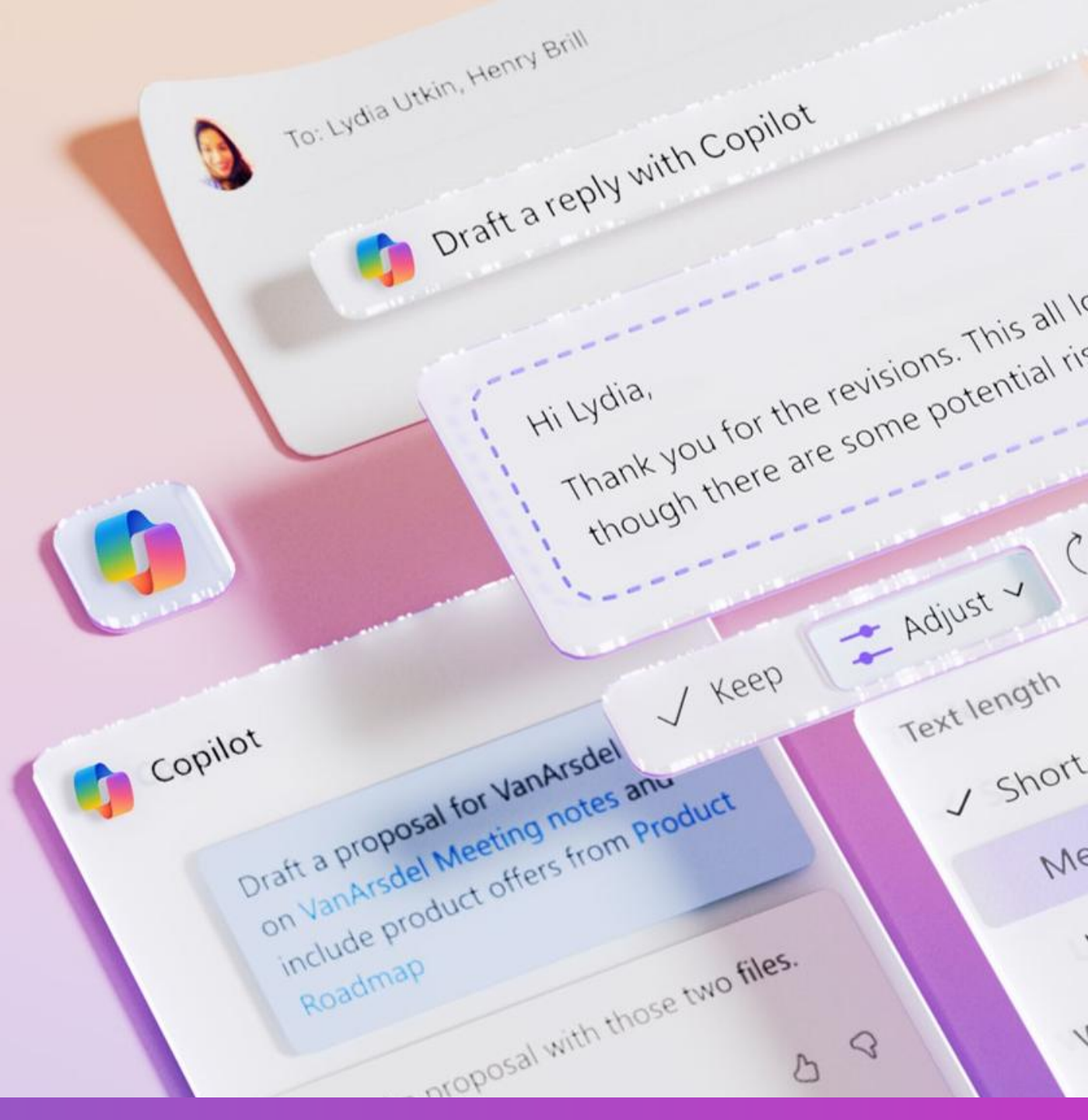


Partner Center Referral Sharing Walkthrough

Sharing SMB deals with Microsoft
for active co-selling





EMEA SMB FY26

Why sharing referrals with Microsoft

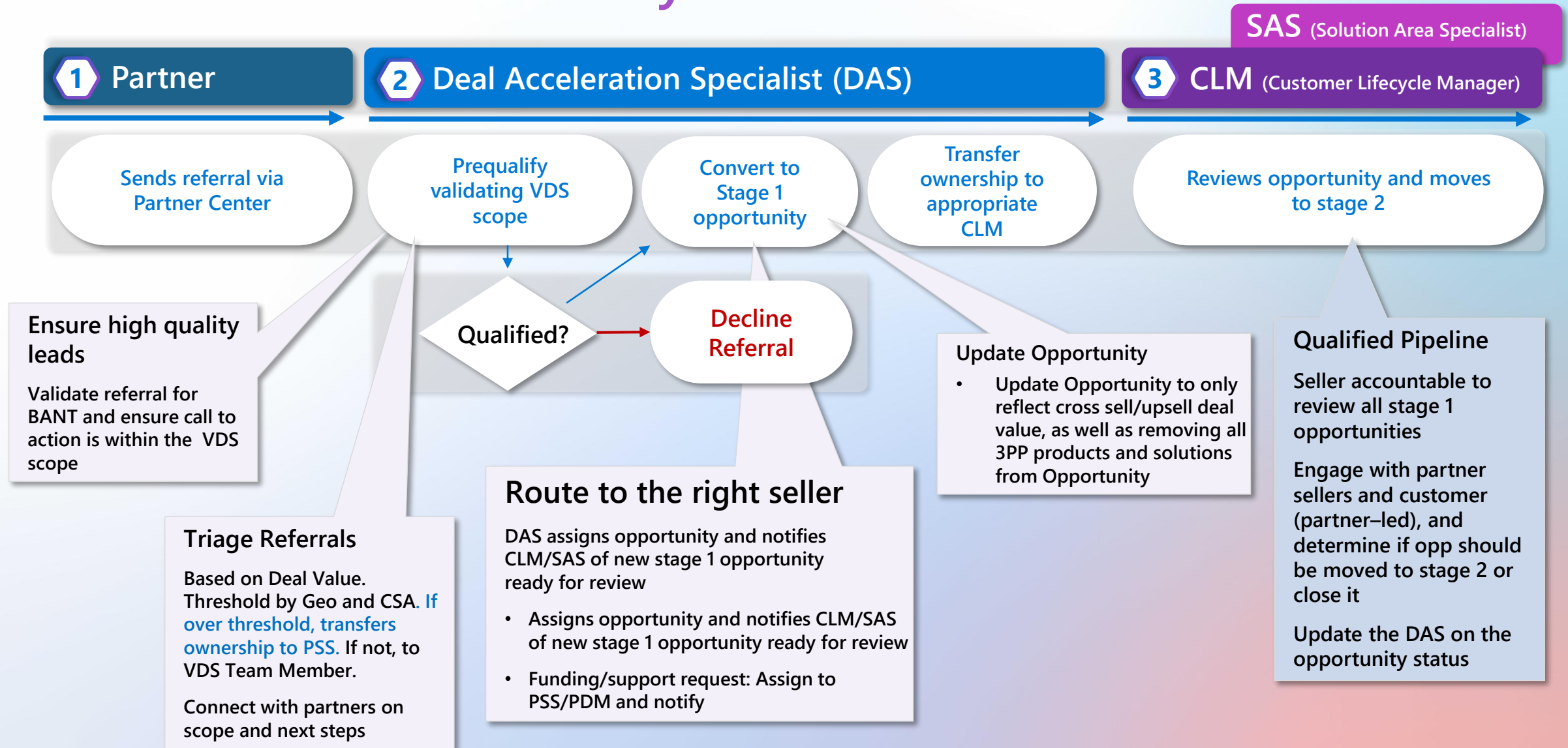


Why should you share referrals with Microsoft

**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*

Inbound referral delivery flow to Microsoft



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

Tags

[IPCosell]

Currency

UK Pound

Partner Role

Partner Program

Timeline

+ -

Search timeline

Enter a note...

Microsoft Expiry Date

11/12/2024

Microsoft Accepted Date

Partner Perspective

Deal Value

£12,000.00

Referral Status

Active

Referral SubStatus

Accepted

3 Need – Solutions/Products

SummaryPeopleSolutions/ProductsRelated

Partner Engagement Solution

<input type="checkbox"/>	Name	Products or S...	Solution Type	Qua...	Price	Curr...	Est. Clos...
<input type="checkbox"/>	Ascent So...	Ascent Software L...	3P	0			

2 Authority – Customer Team

SummaryPeopleSolutions/ProductsRelated

Customer Team

<input type="checkbox"/>	FirstName	Last Name
<input type="checkbox"/>	Toby	Hennes

4 Timeline – Close Date

SummaryPeopleSolutions/ProductsRelated

Partner Updated Date

10/29/2024

Referral Campaign

Tags

[IPCosell]

Currency

UK Pound

Microsoft Status Reason

Microsoft Closing Date

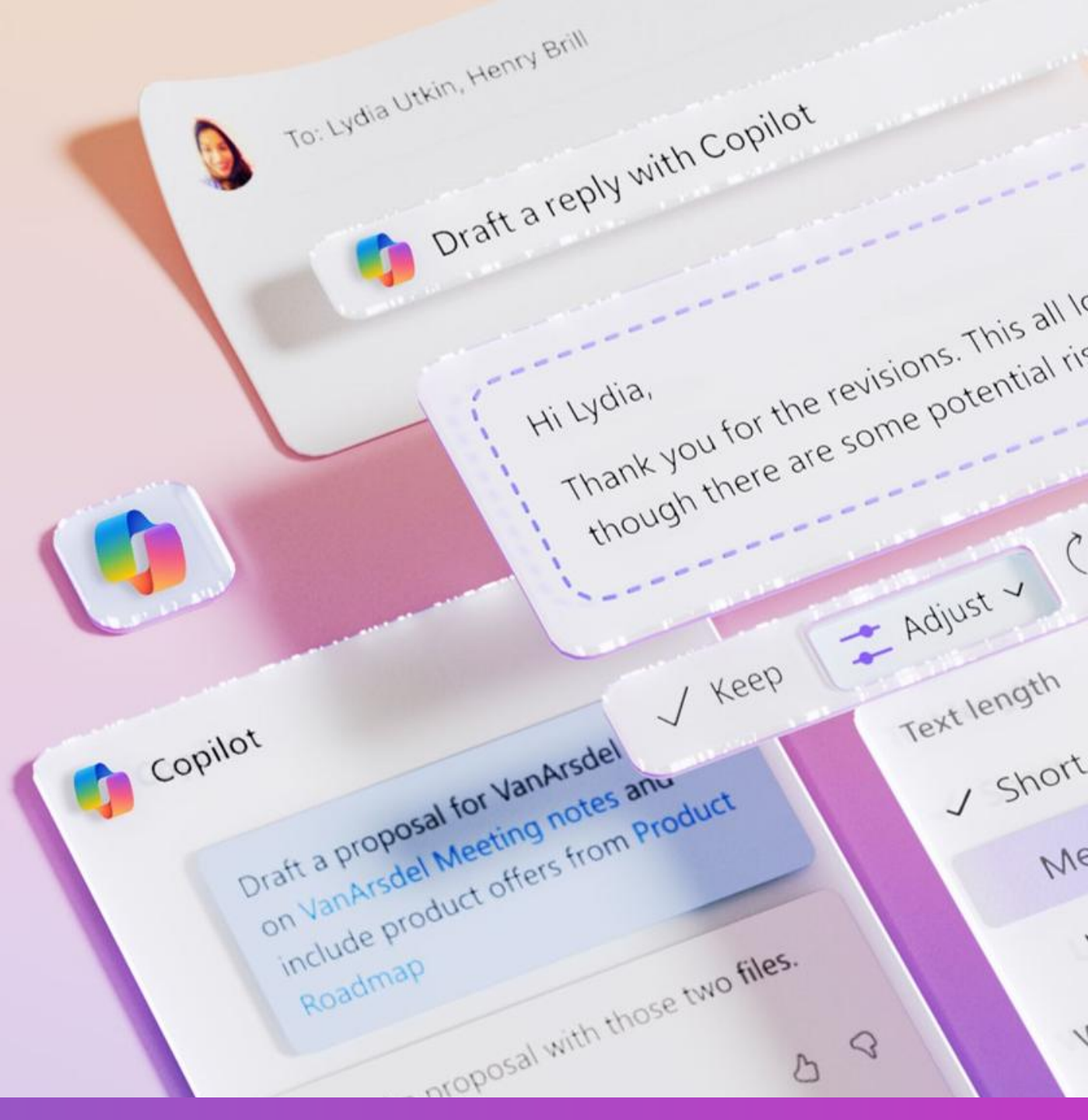
11/14/2024

Microsoft Expiry Date

11/12/2024

Microsoft Accepted Date

Solution Plays



FY26 AI Business Solutions Solution Plays

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

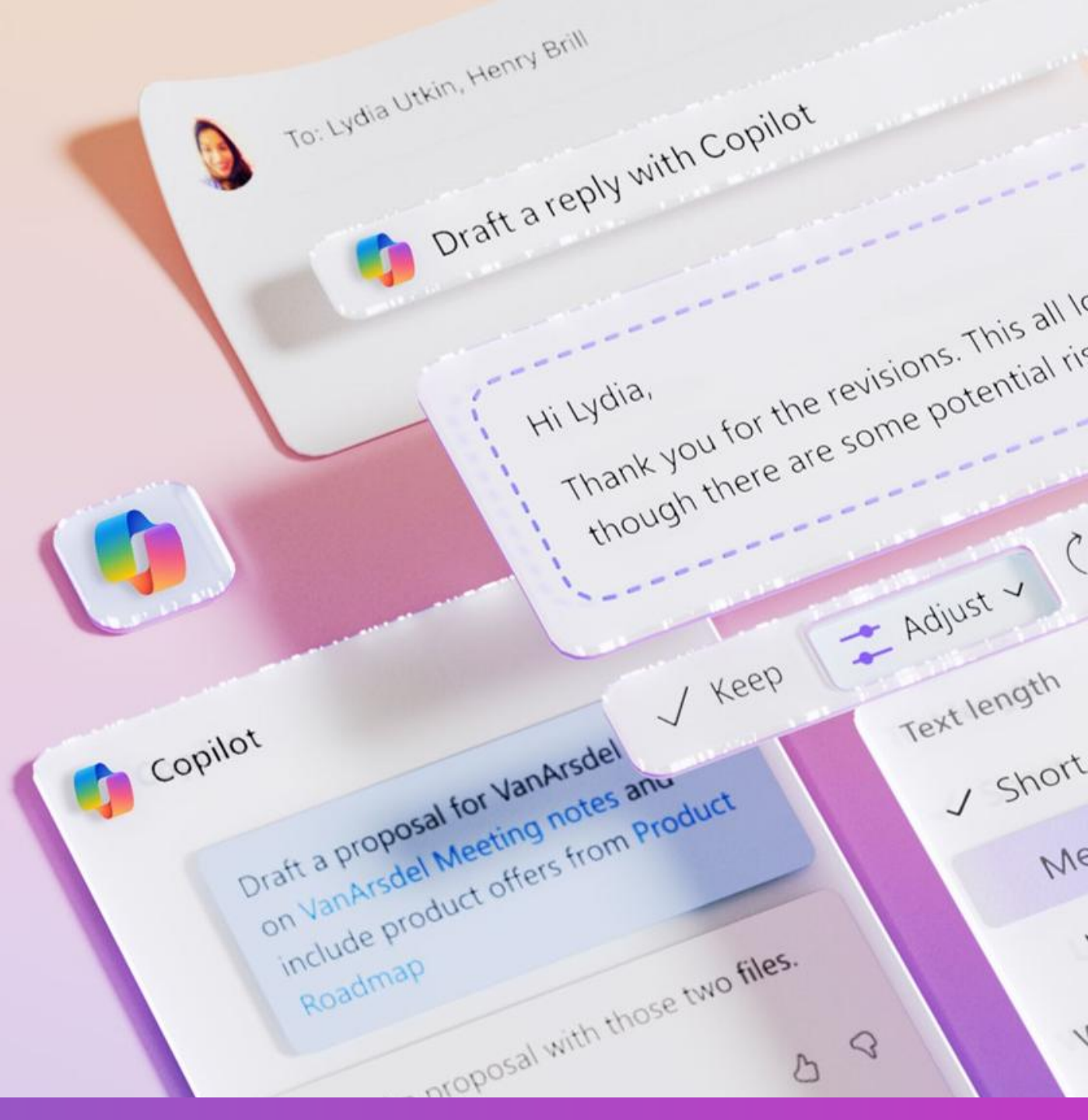
FY26 Security Solution Plays

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

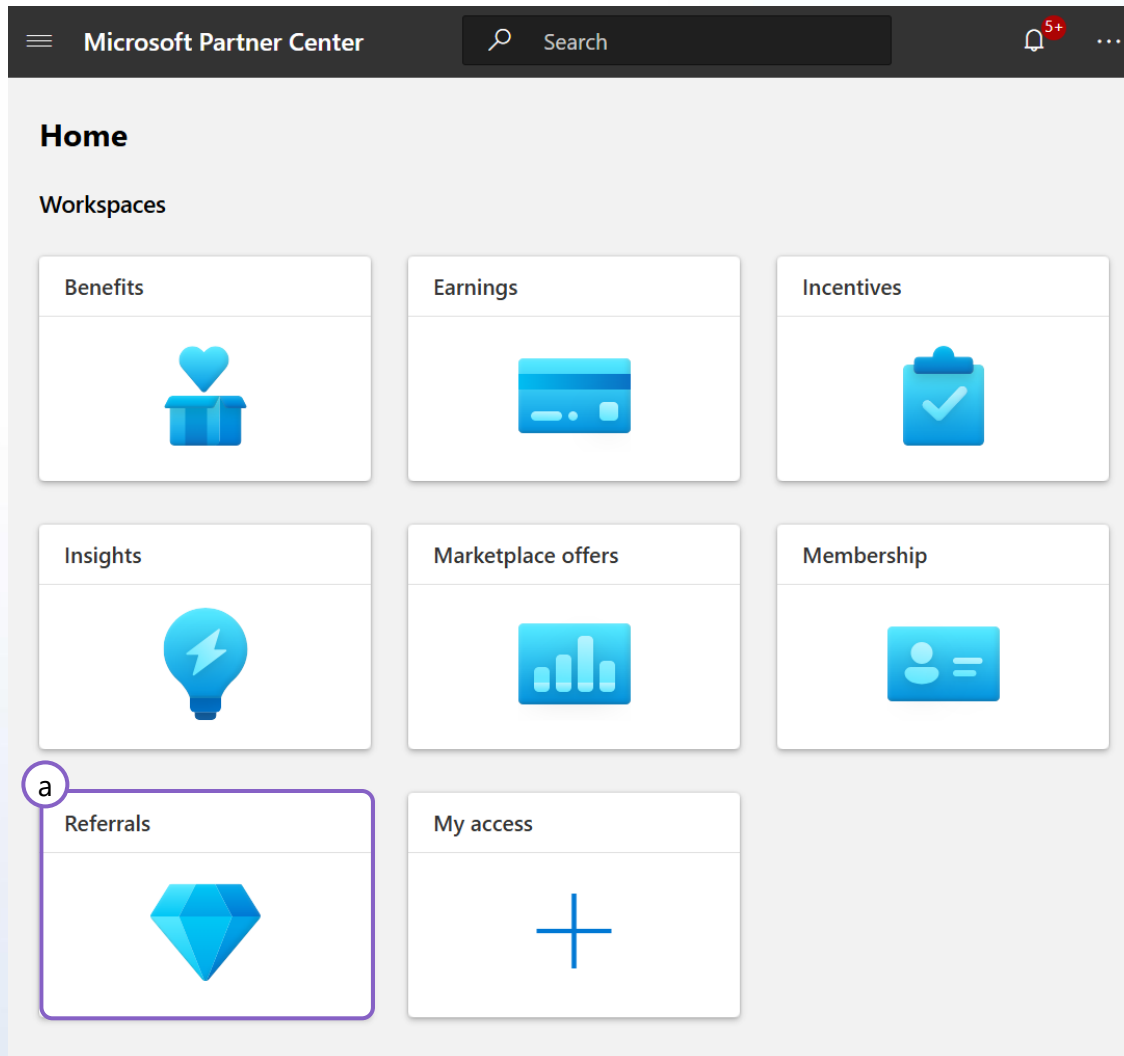
FY26 Cloud & AI Platforms Solution Plays

FY26 Growth Drivers		Solution Plays				
Led by Cloud & AI	Mainstream		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.

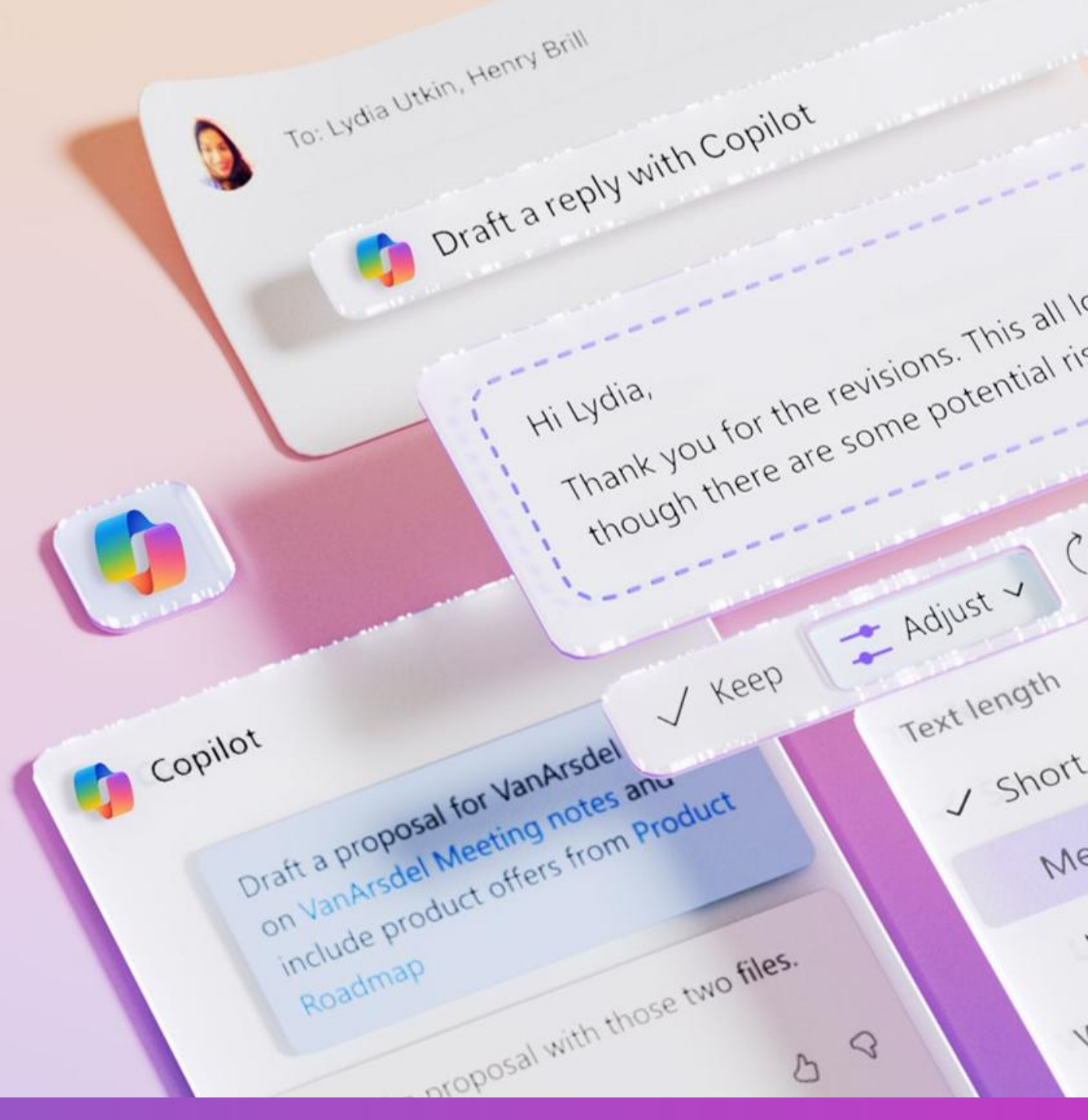
Referrals workspace orientation

The screenshot shows the 'Referrals' workspace. On the left is a sidebar with navigation links: Home > Referrals, Business profile, Leads, Co-sell, Solutions, Opportunities (highlighted with callout 'a'), Routing rules, PRACR reporting, ISV Connect deals, ISV Connect invoices, Analyze, Summary, Leads, Co-sell opportunities, and Partner cohort. The main area is titled 'Referrals | Co-sell opportunities' and includes a description of co-sell opportunities with a 'Learn more' link. Below this are tabs for 'Inbound', 'Outbound' (selected with callout 'b'), and 'Favorites'. A status bar shows '0 Deal registration - Action required'. A toolbar contains '+ New deal' (callout 'c'), 'Upload', 'Download', 'Columns', 'Filters', and a search bar (callout 'd'). Below the toolbar is a table of referrals. The first row is highlighted with callout 'e'.

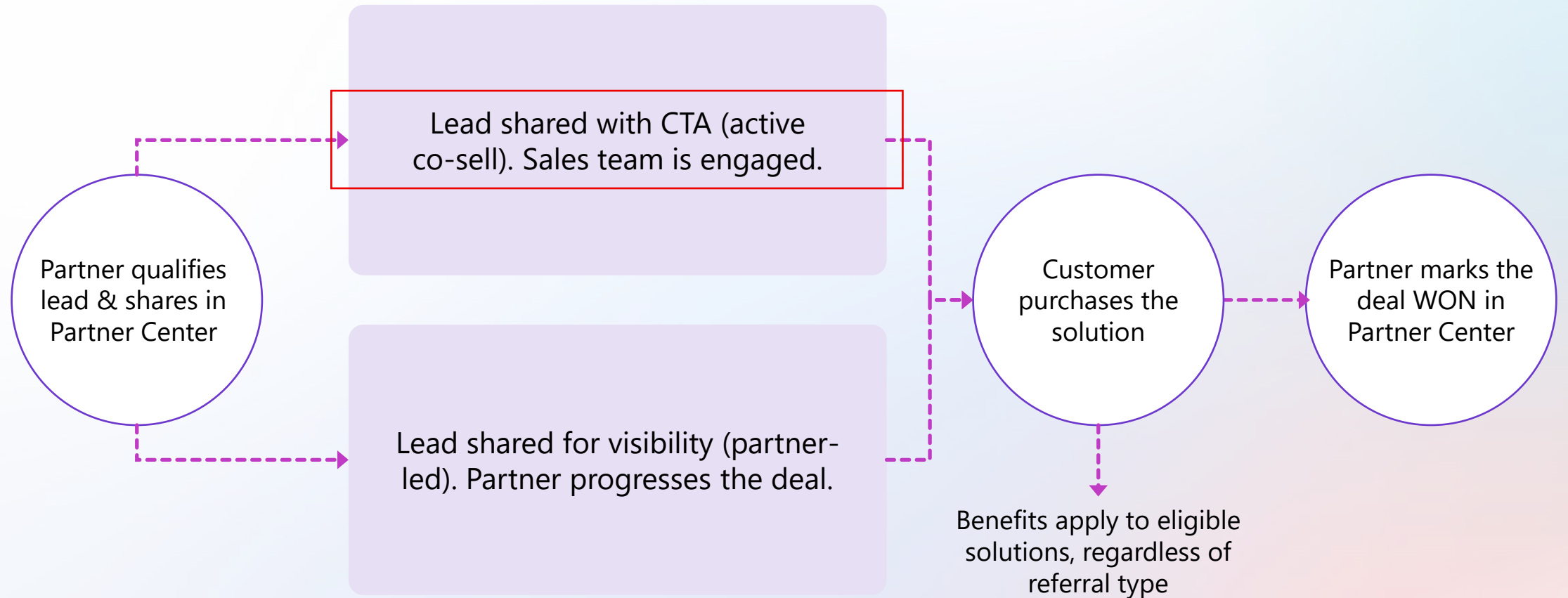
Deal name	Customer name	Type	Status	Microsoft status	MACC eligibility	Value	Close date	Country	
test deal 415w	FORD MOTOR COMPAN ...	Partner-led	Created		Yes	\$50,000.00	5/30/2025	United States	☆
test 123 demo	FORD MOTOR	Partner-led	Created		No	\$1,234.00	4/24/2025	United States	☆
Test deal with P&...	P&G	Partner-led	Created		No	\$10,000.00	6/14/2025	United States	☆
Test deal with Lo...	LOREAL	Partner-led	Created		No	€10,000.00	8/25/2025	France	☆
Test deal with Ca...	CATERPILLAR	Partner-led	Created		No	\$10,000.00	7/25/2025	United States	☆

- 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

Home > Referrals

Business profile

Leads

Co-sell

Solutions

Opportunities

Routing rules

PRACR reporting

ISV Connect deals

ISV Connect invoices

Analyze

Summary

Leads

Co-sell opportunities

Partner cohort

Referrals | Co-sell opportunities

Co-sell opportunities are deals where collaborative selling is done by multiple parties to meet a customer need.
[Learn more](#)

Inbound

Outbound

Favorites

Have any questions? Ask [AI assistant](#)

All deals that are created by your company and sent to Microsoft sellers and partners.

0 Deal registration - Action required

1

New deal

Upload

Download

Columns

Filters

Type 3 letters to start searching

Deal name	Customer name	Type	Status	Microsoft status	MACC eligibility	Value	Close date	Country	
test deal 415w	FORD MOTOR COMPAN ...	Partner-led	Created		Yes	\$50,000.00	5/30/2025	United States	☆
test 123 demo	FORD MOTOR	Partner-led	Created		No	\$1,234.00	4/24/2025	United States	☆
Test deal with P&G ...	P&G	Partner-led	Created		No	\$10,000.00	6/14/2025	United States	☆
Test deal with Lo ...	LOREAL	Partner-led	Created		No	€10,000.00	8/25/2025	France	☆
Test deal with Ca ...	CATERPILLAR	Partner-led	Created		No	\$10,000.00	7/25/2025	United States	☆

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

Select your customer

Home > Referrals > Co-sell opportunities > New deal

Customer

Deal details

Solutions

Help from Microsoft

Partner collaboration

Review and create

New deal | Customer

Customer company

Search customer

☒ Location and name

☐ Microsoft Account ID

1

Customer company location ⓘ *

United States

Customer company name ⓘ *

starbucks

Search

Customers

50 results found

2

Microsoft Managed (1)

Microsoft Unmanaged (0)

Other (49)

3

Starbucks

125 PARK AVE, NEW YORK, United States

Microsoft ID: 1-C6139Q

6 linked account(s)

Starbucks Corporation

2401 Utah Ave, SEATTLE, United States

Microsoft ID: 1+78XD+27851

Linked account

MACC

Starbucks Corp

2401 Utah Ave S, Seattle, United States

Microsoft ID: 11-6QS1V

Linked account

Starbucks Corporation

2401 Utah Ave S 8TH FL, Seattle, United States

Microsoft ID: 9-ULVPYKMVS

Linked account

STARBUCKS CORPORATION

4

Proceed

Next

Cancel

Proceed

- 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)

Home > Referrals > Co-sell opportunities > New deal

Customer

Deal details

Solutions

Help from Microsoft

Partner collaboration

Review and create

New deal | Customer

Customer company

Search customer

☒ Location and name

☐ Microsoft Account ID

Customer company location ⓘ *

United States

Customer company name ⓘ *

starbucks

Search

Details

Customer name:

Starbucks

Location:

125 PARK AVE, NEW YORK, United States

MACC eligibility:

No

Microsoft Account ID:

1-C6139Q

5

Customer contact ⓘ

(Optional)

First name

Last name

Phone number ⓘ

Email

Adding a valid email and phone for the customer contact helps Microsoft seller evaluate the opportunity better and increases the acceptance rate.

6

Next

Cancel

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

Home > Referrals > Co-sell opportunities > New deal

Customer
Deal details
Solutions
Help from Microsoft
Partner collaboration
Review and create

New deal | Deal details

1 Select deal type*

☒ IP Co-sell
Deals that are shared with Microsoft sellers for co-selling using an IP solution.

☐ Services Co-sell
Deals that are for services opportunities such as deployment, managed services etc.

☐ IoT
Deal that are for IOT solutions

☐ Solution assessment
Deals that are created by Solution Assessment partners

☐ Private
Deals that are **not** shared with Microsoft sellers

2 Deal details*

Deal name*

Location*

Required

Estimated value*

Currency*

Estimated close date*

You can increase the acceptance rate by 15% by adding an accurate deal value.

3

CRM ID

Marketing campaign ID

- 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

Add deal details (*continued*)

Home > Referrals > Co-sell opportunities > New deal

☒ Customer

☐ Deal details

☐ Solutions

☐ Help from Microsoft

☐ Partner collaboration

☐ Review and create

Estimated value *

Currency *

Estimated close date *

You can increase the acceptance rate by 15% by adding an accurate deal value.

CRM ID

Marketing campaign ID

Customer objective

Solution Areas and Solution Plays are used to identify the customer's objectives in the opportunity and also help identify the appropriate seller in the Microsoft Sales team to collaborate in the opportunity.
[Learn more](#)

4

Solution area *

Solution play *

5

Partner Notes/Customer Need ⓘ

An example is - the customer needs a basic disaster recovery solution, or the customer bought a new organization and needs 1,000 seats more of M365 E3. Do not add any Personally Identifiable Information here.

Adding relevant notes increases your acceptance rate by Microsoft by 5%.

6

Customer purchase intent ⓘ *

☐ Yes

☐ No

☐ Have not decided

7

Team members * ⓘ

+ Add Contact

Previous

Next

Cancel

...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

The screenshot shows the 'New deal | Solutions' page. On the left, a sidebar contains a navigation menu with 'Customer', 'Deal details', 'Solutions', 'Help from Microsoft', 'Partner collaboration', and 'Review and create'. The 'Solutions' section is active. In the main area, there's a '+ Add' button (circled with a red 1), 'Edit' and 'Delete' buttons, and a search bar. Below these is a table with columns: 'Solution name', 'Solution Id', 'IP co-sell eligibility', and 'Publisher name'. A message states: 'No solutions were added to this deal. Please add solutions to create this deal.'

The 'Add Solutions' modal is open, showing three tabs: 'Your company's solutions', 'Microsoft solutions', and 'Third party solutions'. The 'Your company's solutions' tab is selected. It contains a search bar with the text 'Operationalize Partner Reporte ... Operationalize Partne'. Below the search bar is a table with the same columns as the main page. One solution is listed and selected with a checkbox: 'Operationalize Partner Reported ACR (PRACR) Reporting for MS Partners' with Solution Id 'bbb41c2a-26af-4243-832d-a11feddc269b', IP co-sell eligibility 'No', and Publisher name 'Carve Partners LLC'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

2

3

4

- 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

Home > Referrals > Co-sell opportunities > New deal

✓ Customer

✓ Deal details


✓ Solutions

Help from Microsoft

○ Partner collaboration

○ Review and create

New deal | Help from Microsoft

 Choosing a specific type of help can increase the acceptance rate by 8%

Identify the type of help you would like from Microsoft *

No help required at this point of time

Would you like Microsoft sellers to view this deal? *

☐ Yes

☐ No

This referral will be visible and actionable to the Microsoft Sales team. This referral will be a partner-led co-sell opportunity.

1

Identify the type of help you would like from Microsoft *

No help required at this point of time

No help required at this point of time

Workload - specific value proposition

Customer technical architecture

Proof of concept / Demo

Quotes / Licensing

Post - sales customer success

General or other

- 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

Home > Referrals > Co-sell opportunities > New deal

✓ Customer

✓ Deal details

✓ Solutions

Help from Microsoft

○ Partner collaboration

○ Review and create

New deal | Help from Microsoft

💡 Choosing a specific type of help can increase the acceptance rate by 8%

1

Identify the type of help you would like from Microsoft *

Quotes / Licensing

2

Customer contact *

First name *

Last name *

Phone number ⓘ *

Email *

3

Notes to Microsoft

Type notes here. Do not add any personality identifiable information here.

- 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*)

Home > Referrals > Co-sell opportunities > New deal

✓ Customer

✓ Deal details

✓ Solutions

✓ Help from Microsoft

● Partner collaboration

○ Review and create

New deal | Partner collaboration

1

+ Add

Edit

Delete

<input type="checkbox"/> Partner name	Estimated close date	Estimated value	Solutions
No partners have been invited to this deal			

< Previous 1 Next >

Pre 2

Next

- 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

Home > Referrals > Co-sell opportunities > New deal

Customer

Deal details

Solutions

Help from Microsoft

Partner collaboration

Review and create

Notes: Add notes here

Contacts: JW Jana Waitman

Solutions [Edit](#)

Search

Solution name ↑	Solution Id	IP co-sell eligibility	Publisher name
Operationalize Partner Reported ACR (PRACR) Reporting for...	bbb41c2a-26af-4243-832d-a11feddc269b	No	Carve Partners LLC

< Previous 1 Next >

Microsoft [Edit](#)

Help from Microsoft: No help required at this point of time

1 ☒ By checking this box, I confirm, on behalf of myself and my company, that I have obtained sufficient consent to:

- Provide the customer's contact information to Microsoft and invited partners if provided
- Provide my company's employee information to Microsoft and invited partners that I am inviting
- Grant Microsoft and invited partners the right to use such information to contact the customer or partner employee for purposes of fulfilling Microsoft's obligations to partner and customer.

Prev 2 Create deal Cancel

- 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

Home > Referrals

Business profile

Leads

Co-sell

Solutions

Opportunities

Routing rules

PRACR reporting

ISV Connect deals

ISV Connect invoices

Analyze

Summary

Leads

Co-sell opportunities

Partner cohort

Referrals | Co-sell opportunities

Co-sell opportunities are deals where collaborative selling is done by multiple parties to meet a customer need.
[Learn more](#)

Inbound

Outbound

Favorites

Have any questions? Ask [AI assistant](#)

All deals that are created by your company and sent to Microsoft sellers and partners.

0 Deal registration - Action required

+ New deal

↑ Upload

↓ Download

Columns

Filters

Type 3 letters to start searching

Deal name	Customer name	Type	Status	Microsoft status	MACC eligibility	Value	Close date	Country
test deal 415w	FORD MOTOR COMPAN ...	Partner-led	Created		Yes	\$50,000.00	5/30/2025	United States
test 123 demo	FORD MOTOR	Partner-led	Created		No	\$1,234.00	4/24/2025	United States
Test deal with P&G ...	P&G	Partner-led	Created		No	\$10,000.00	6/14/2025	United States
Test deal with Lo ...	LOREAL	Partner-led	Created		No	€10,000.00	8/25/2025	France
Test deal with Ca ...	CATERPILLAR	Partner-led	Created		No	\$10,000.00	7/25/2025	United States

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

Edit deal details

Home > Referrals > Co-sell opportunities > Test Deal #2

1 Deal details

Solutions

Help from Microsoft

Partner collaboration

Test Deal #2 | Deal Details

2 [Edit](#)

3

Customer

Customer name: Starbucks [Insights](#)

Location: 125 PARK AVE, NEW YORK, United States

Deal name: Test Deal #2

Deal type: Private

Marketplace purchase intent: Have not decided

Referral ID: 2d109c84-295b-4e38-9634-6c876b8ae576 [Copy](#)

Location: Partner ID (formerly MPN ID): 6738611

Created date: Dec 26, 2023

Estimated close date: Jun 28, 2024

Estimated value: \$25,000.00

Currency: USD

Team members * [Edit](#)

JW Jana Waitman

Solutions / Public offers [Edit](#)

Solution name ↑ Solution Id

Won **Lost**

Deal details

Deal name *
Test Deal #2

Deal type
Private

Marketplace purchase intent ⓘ
☐ Yes
☐ No
☒ Have not decided

Referral ID
2d109c84-295b-4e38-9634-6c876b8ae576

Estimated close date *
06 / 28 / 2024

Estimated value *
25000

Currency *
USD

CRM ID

Marketing campaign ID

Notes
Do not add any Personally Identifiable Information here.

Save **Cancel**

- 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

Home > Referrals > Co-sell opportunities > Controso MW Security Posture

Deal details

Solutions

Help from Microsoft

Partner collaboration

Controso MW Security Posture | Deal Details

Try New
[Take a tour](#)

The new view will become permanent on April 30, 2023. Please make sure you are comfortable with the changes by then since you will no longer be able to toggle to the old view.

This referral is not eligible for Azure IP Co-sell deal registration. [Know why](#)

Collaborate with other partners to co-sell solutions. [Learn more](#)

€3,600.00
Estimated deal value

OUTBOUND

Your company's deal progress

Created Won/lost (Pending) Closed

Qualify

2

Close deal

When you close a deal you will no longer be able to edit it. Are you sure you want to proceed?

Yes No

Customer

Customer name: ELPEDISON S.A.

Location: Thessalonikis - Veroias Rd (7th km - palaia), Echedoros, P.O.Box, THESSALONIKI, Greece

Contacts: CP Christos Poutouris

Details [Edit](#)

Deal name: Controso MW Security Posture

Deal type: Co-sell

Referral ID: ee9633e3-587b-44ac-8ecc-2d15e97ad1f7

Location: Partner ID (formerly MPN ID): 5456038

Created date: Mar 28, 2023

Estimated close date: Nov 15, 2023

Estimated value: €3,600.00

Notes: Microsoft Endpoint Detection

Team members [Edit](#)

1 Won Lost

[Close as error](#)

- 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

Home > Referrals > Co-sell opportunities > test

Deal details

Solutions

Help from Microsoft

Partner collaboration

test | Deal Details

The new view will become permanent on April 30, 2023. Please make sure you are comfortable with the changes by then since you will no longer be able to toggle this view.

This referral is eligible for Azure IP Co-sell deal registration.

Collaborate with other partners to co-sell solutions. [Learn more](#)

€25,000.00
Estimated deal value

OUTBOUND

Your company's deal progress

Created Won/lost (Pending) Registration Review

Qualify Develop

Mark as developed

Propose Negotiate

Customer

Customer name: LA POSTE

Location: 9 Rue du Colonel Pierre Avia, Paris, France

Contacts: ML Manon Le Gallic

Details [Edit](#)

Deal name: test

Deal type: Co-sell

Referral ID: 8a61bb3c-622d-4a6c-baa5-65bbd9bbc8fc

Location: Partner ID (formerly MPN ID): 5456038

Created date: Mar 14, 2023

Estimated close date: Mar 13, 2023

Estimated value: €25,000.00

Team members [Edit](#)

Won Lost

Lost

Your feedback is important to us

Let us know why you are closing this deal so we can provide better deals in the future. We won't share this feedback with the customer. The deal will be moved to Closed after you select a reason for closing.

Reason for closing*

- Customer / opportunity too small
- Customer did not have budget
- Customer / opportunity too small
- Customer did not respond
- Customer selected another vendor
- My solution or service is not a fit
- Not a customer
- Proposed timeline too short
- Report as abuse, spam, or phishing
- Other...

Close deal Cancel

- 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

Home > Referrals > Co-sell opportunities > Test

Deal details

Solutions

Help from Microsoft

Partner collaboration

Test | Deal Details [Take a tour](#) < Previous Next >

⊗ This referral is not eligible for Azure IP Co-sell deal registration. [Know why](#)

Collaborate with other partners to co-sell solutions. [Learn more](#)

\$1,234.00
Estimated deal value

OUTBOUND PARTNER-LED

Your company's deal progress

Created Won/lost Closed

Qualify | MCEM Listen & Consult

Mark as qualified

Develop | MCEM Inspire & Design

Propose | MCEM Empower & Achieve

Negotiate | MCEM Empower & Achieve

Customer

Customer name: FORD MOTOR COMPANY MACC [Insights](#)

Location: THE AMERICAN RD, DEARBORN, United States

MACC eligibility: Yes (As on Dec 3, 2024)

Details [Edit](#)

Deal name: Test

Deal type: Partner-led

Won Lost

Clone Opportunity

Close as error

Actions

Close as error ×

Your feedback is important to us

Let us know why you are closing this deal so we can provide better deals in the future. We won't share this feedback with the customer. The deal will be moved to Closed after you select a reason for closing.

Reason for closing*

Duplicate - sent by Microsoft

Duplicate - created through bulk upload

Duplicate - created in Partner Center

Duplicate - sent by Microsoft

Connector data sync issues

Customer matching issues

Solution issues – explain in notes

Test referral

Data error

Others - explain in notes

Close deal Cancel

- 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

Home > Referrals > Co-sell opportunities > Test

Deal details

Solutions

Help from Microsoft

Partner collaboration

Test | Deal Details

Take a tour

Previous

Next

This referral is not eligible for Azure IP Co-sell deal registration.

Know why

Collaborate with other partners to co-sell solutions.

Learn more

\$1,234.00

Estimated deal value

OUTBOUND

PARTNER-LED

Your company's deal progress

Created

1

Won/lost

Closed

Qualify | MCEM Listen & Consult

Mark as qualified

Develop | MCEM Inspire & Design

Propose | MCEM Empower & Achieve

Negotiate | MCEM Empower & Achieve

Customer

Customer name:

FORD MOTOR COMPANY

MACC

Insights

Location:

THE AMERICAN RD, DEARBORN, United States

MACC eligibility:

Yes (As on Dec 3, 2024)

Details

Edit

Deal name:

Test

Deal type:

Partner-led

Won

Lost

Clone Opportunity

Close as error

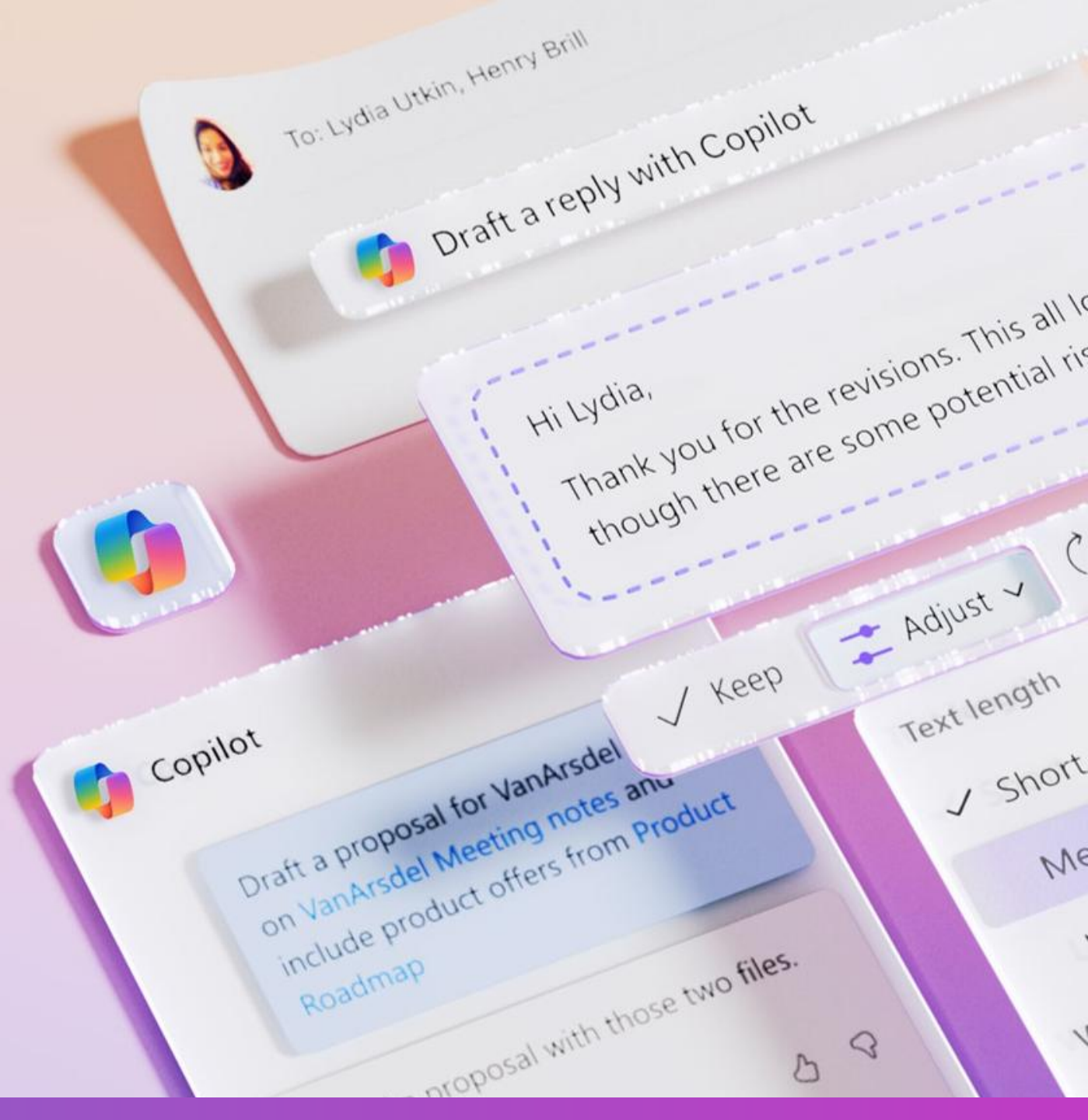
Actions

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
- Providing 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



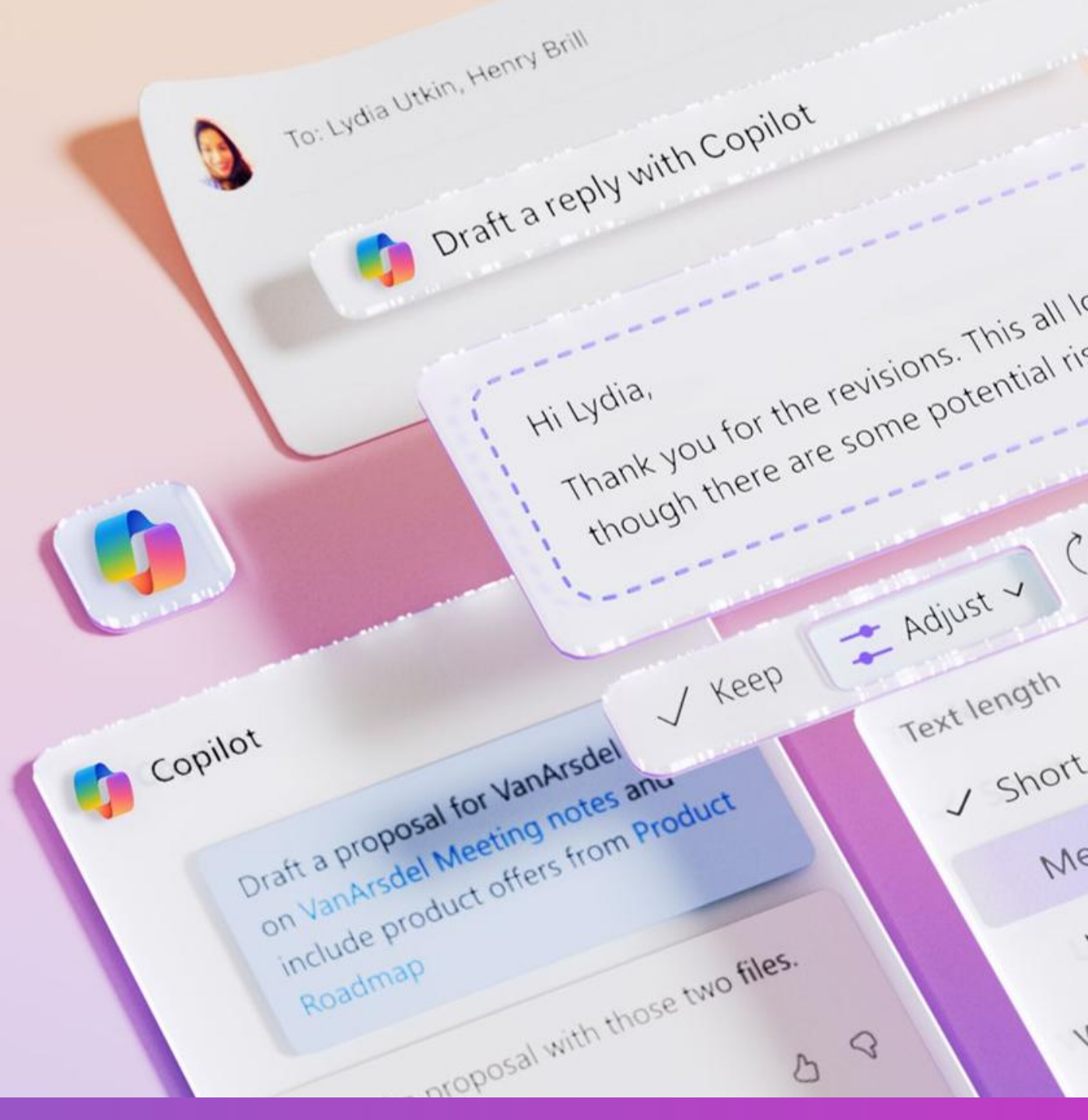
Provide a high-level overview of the potential opportunity and where possible the use case

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: **Do**s and **Don't**s

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



Do

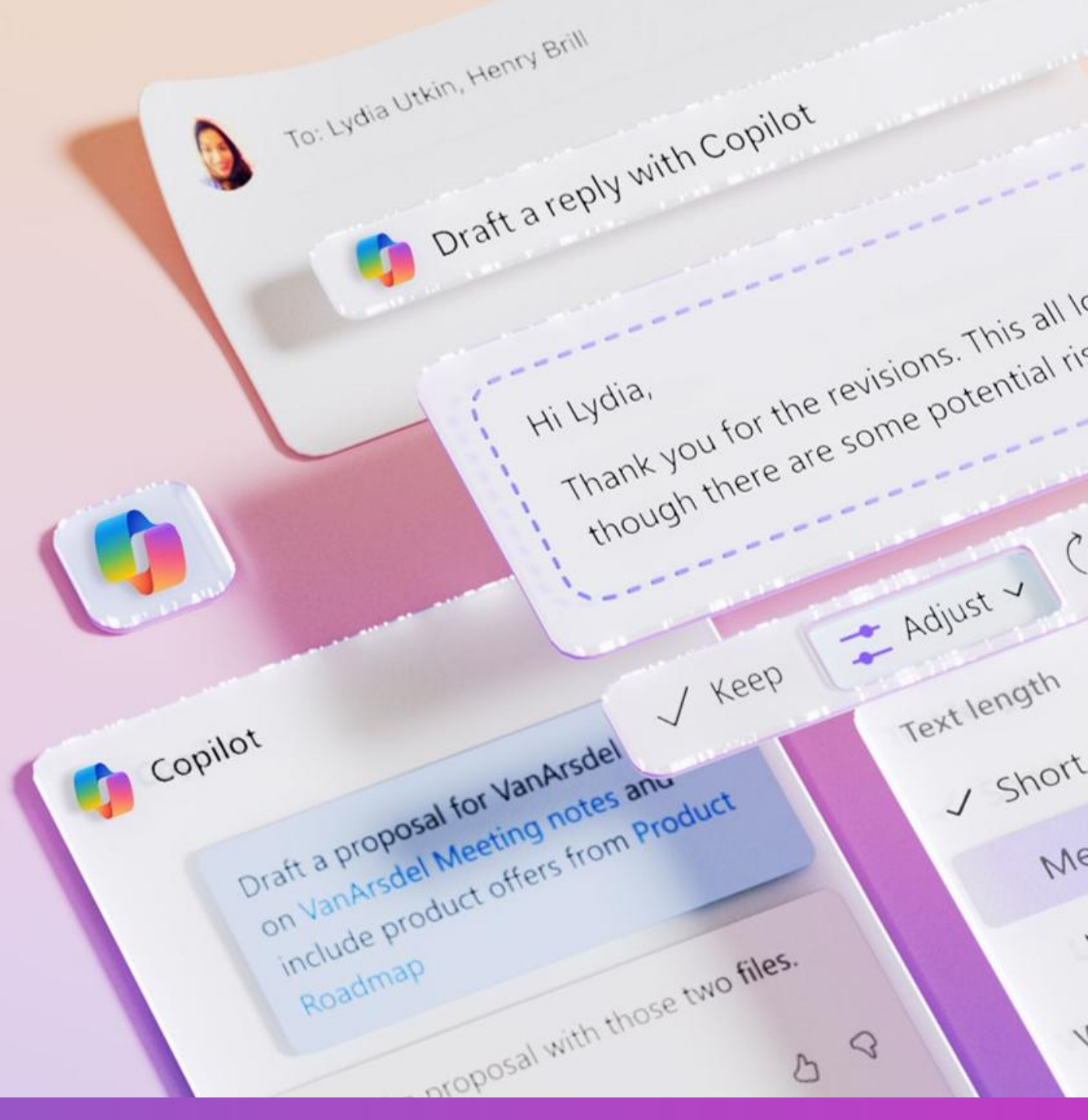
- ✓ Share relevant deals from your CRM to Microsoft in a timely fashion
- ✓ Keep estimated close dates updated
- ✓ Map deals to a known customer
- ✓ List the right team member contacts from your team
- ✓ Ask for help when needed
- ✓ Add quality notes for the Microsoft seller
- ✓ Close out deals that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



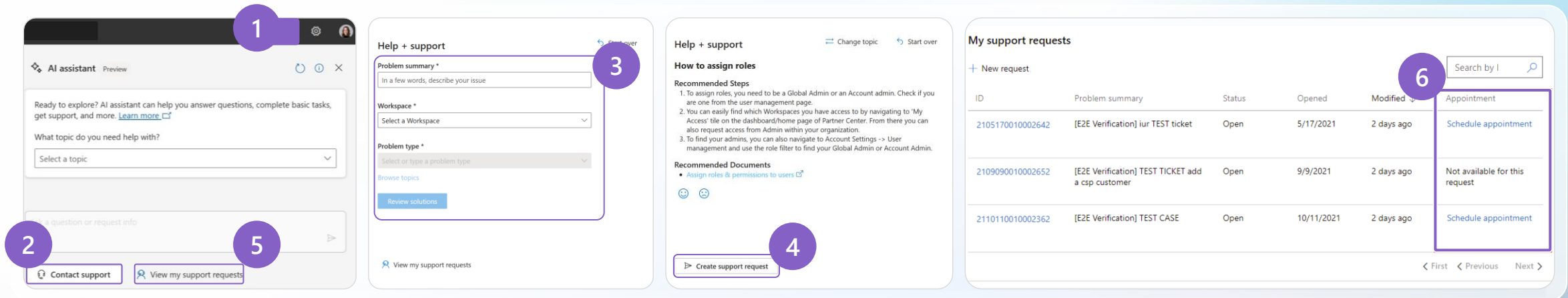
Don't

- 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

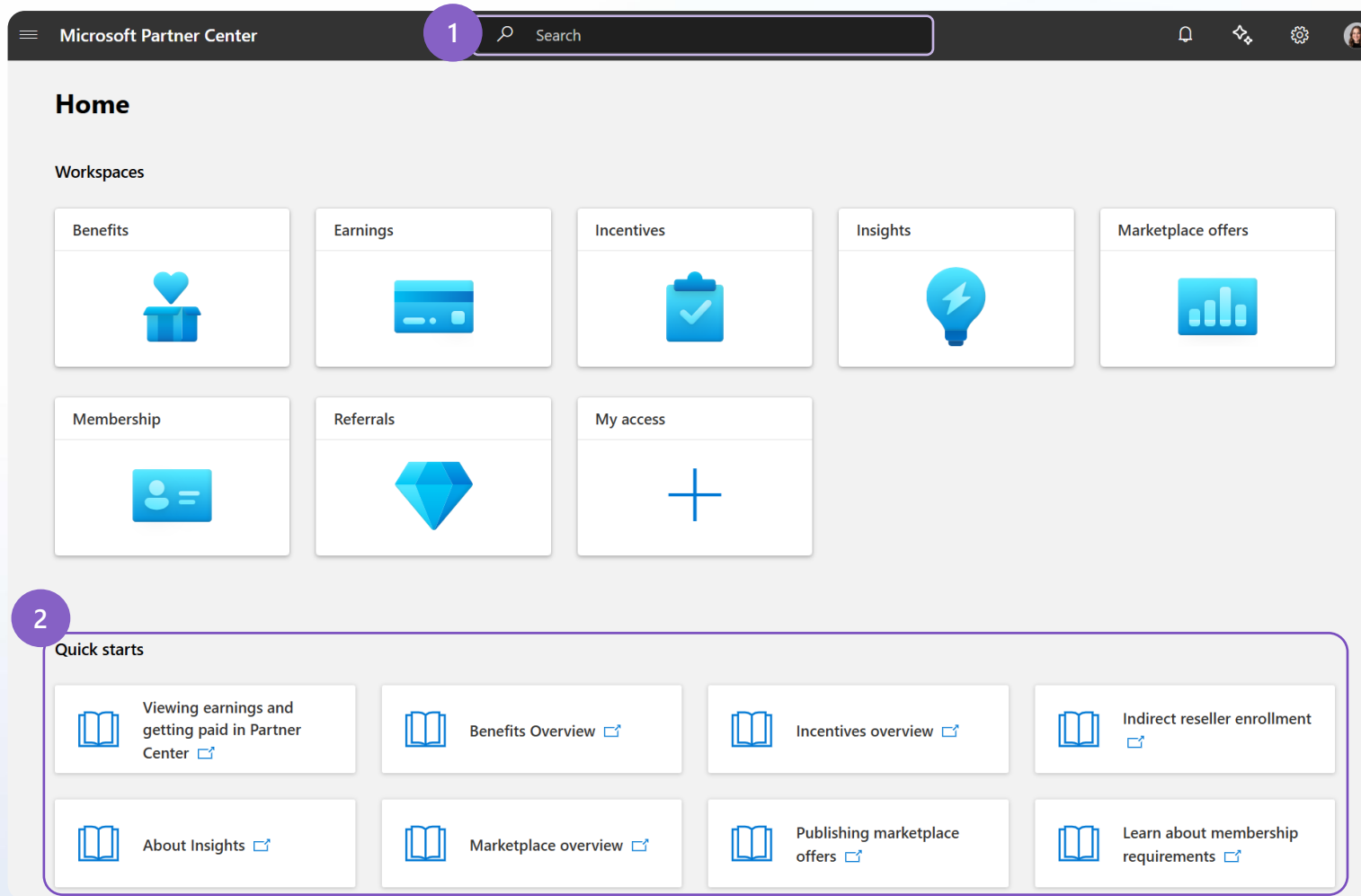
5

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](#)