Partner Guide: OCP GTM

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Introduction

Welcome to the Microsoft One Commercial Partner GTM tool – commonly called OCP GTM – where Microsoft Account Team member and Partners' contacts curate OCP Solutions.

OCP GTM is...

- A repository of material to support Microsoft sellers in co-marketing and co-selling partner solutions. Microsoft creates and maintains OCP GTM, including connecting it to other partner systems such as MPN, Appsource and MSX.
- A collaborative workspace where you and your OCP Account Team create, maintain, and improve your solution collateral, both prospectively and in response to seller requests. Your Account Team makes sure your account and solutions are set up and ready, invites you* to join them on OCP GTM, and keeps you advised of which collateral requires your attention. You – the partner – are primarily responsible for providing the information and collateral for your solutions.
- Not accessible without an account. However, after you join and sign in, you can add contacts to your account and then invite them to join GTM too, so getting your crew onboard is easy.

*OCP invites the first person from your company to join, and can invite others as well, but people at your company who have been invited, joined, and signed in to OCP GTM can then invite their colleagues to join too.

OCP GTM is not...

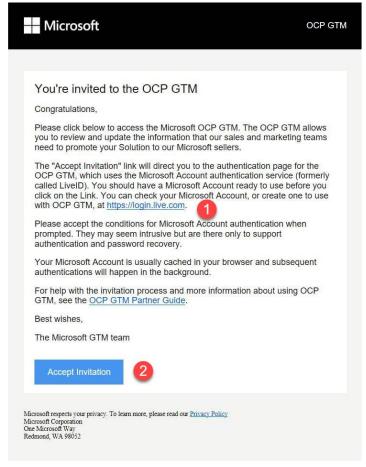
- A marketplace. No direct sales or leads generation take place on OCP GTM.
- For customers. Only Microsoft employees and your own staff can access the site, and only your Account Team and your staff can edit your account and collateral.

Being Invited to OCP GTM

If you are listed in OCP GTM as a Contact for a partner account, you can be invited to work on your company's records (one for your account, plus one per solution) in OCP GTM. Your invitation comes in an email from <u>cosell@microsoft.com</u>, sent to the corporate email address listed in your contact information.

1. Before you accept the invitation and sign in to OCP GTM, prepare a Microsoft Account to use

2. Click **Accept Invitation** to sign in to OCP GTM using the Microsoft Account you prepared



When you click Accept Invitation the first time, you go to a Microsoft authentication page where you can sign in with a Microsoft Account (formerly called a **LiveID**) or create one to use. This account will identify you once you sign in and will be associated to your corporate email listed in OCP GTM.

Preparing a Microsoft Account to use for OCP GTM

Before you accept the invitation, you need to sign in to a <u>Microsoft Account</u> to use for OCP GTM authentication. It is important to use an account that is not already in OCP GTM. To prepare a Microsoft

Account, you can either pick one you already have and verify it is not listed as a contact in OCP GTM, or create a new Microsoft Account just for GTM. Creating a new account is a good idea, but if you have an account and know it has not been used for your contact info in GTM (or anyone else's) it will work just as well.

You can create a new account at <u>http://login.live.com</u>.

Sign in the first time

When you have signed in to your Microsoft Account, click Accept Invitation in the invitation email.

At the following prompt, enter the Microsoft Account address you prepared for OCP GTM, click **Next**, and follow the prompts.

Sign in	
Email, phone, or Skype	
Next	
No account? Create one!	

When asked to allow the MS Go To Market app to access your info, click Yes.

1 🧥 🕸 <mark>-</mark> 🐼 5 🕨
MG Let this app access your info? msgtm.azurewebsites.net
MS Go To Market needs your permission to:
Access your email addresses MS Go To Market will be able to see the email addresses in your profile.
You can change these application permissions at any time in your account settings.



That's it for your first time signing in – now your credentials are stored so your subsequent logins will be much simpler.

The Partner Page

When you sign in as a partner, you see an overview of your account, divided into sections.

- If you're named as a contact in more than one Partner Account, the first thing you'll see on sign-in is a list of those accounts. Just pick the one you want to work on.
- If there are actions you can complete, you'll see a button for each one, at the bottom of the relevant section.

OCP GTM USER GUIDE FOR PARTNERS

CP GTM Industry Maps - Solution Are	ea Maps 👻 Partner Solutions More 👻		Search Solutions and Parti Search Hi Joshua!
CONTOSO-E	PARTINERCINE NAME PARTINERCINE HAME Contoso -4473	MI'N ID MI'L ID MI'N COMPETENCY -4473 4787175 None	
Partner Partnership Traini	ing & Documents		
Microsoft as an example company and domain	ontoso University) is a fictional company used b ain. Our mission is to build great solutions for P gy. We build dream solutions that comes with d	Partners IN-MARKET	·
Edit / Add Logo Contacts		View Solutions	
	Contact Type	View Solutions	Actions
Contacts	Contact Type Microsoft Partner Technical Sales		Actions
Contacts Microsoft Contacts		Location	Actions
Contacts Microsoft Contacts Mason McCoy Tricia Callahan	Microsoft Partner Technical Sales	Location United Gragdom Unknown Country	
Contacts Microsoft Contacts Mason McCoy	Microsoft Partner Technical Sales	Location United Kingdom	Actions Actions Actions
Contacts Microsoft Contacts Mason McCoy Tricis Callahan Partner Contacts	Microsoft Partner Technical Sales PDM-R Contact Type	Location United Kingdom Unknown Country Location	Actions

From this page, you can view and edit all kinds of data and collateral about your business – it's your general starting point.

Viewing & Editing Solutions

You are the expert when it comes to your business. Your Microsoft Account Team member will help you with and is responsible for your success using OCP GTM, but ultimately you must be the source of information and materials that sellers will use to market your solutions.

Opening a solution

On the Partner page, click View Solutions to see your solution records.

		_ [
	Solutions (8)	
ed by or Partners ch dream	CONTOSO-DEMO 1 co-sell prioritized Contoso-Demo Engg in-Market Contoso-Test Duplicate in-Market Contoso In-Market Contoso Demo 1 in-Market Contoso's GDPR Widget	•
	View Solutions	

When you click **View Solutions**, a **Solutions** page opens in the same window and displays a list of your solutions:

CONTOSO- LOCATION Test, Test, United States	E2E DEMO 1 © ISV PARTNERONE NAME PARTNERONE ID MPN ID MPL II Contoso -4473 -4473 4787	
Partner Partnership Tra	ining & Documents	
Partner / Solutions		
Solutions (8)		
CONTOSO	mission is to build great solutions for Partners and Custo team.	rsity) is a fictional company used by Microsoft as an example company and domain. Our mers who believe in our technology. We build dream solutions that come with dream
Quick View > Go To Solution View Readiness	Readiness: Co-Sell Prioritized Total 12-mo Partner Revenue (Avg Azure Deal): 20000 Dynamics Average Deal size Cost of ISV IPs: - Sourced Deals: - registered, - approved Cost Prioritized (Cost Prioritized) Cost Prioritized Cost Prioritati Prioritized Cost Pr	Azure License: Bundled SQL Average Deal Size in # of Cores: - Shared Opportunities: - Incentives: Internal Biz Apps IP Co-Sell

Click **Go To Solution** in the left nav to open the Solution page, where you can see more detailed attributes and collateral for the solution.

The Solution Page

Partner	Partnership	Training & Documents					
Partner / Solu	tions / Solution	1					
View Platform View Readine Open in CRM View Countrie	55	CONTOSO-E Contoso Ltd. (also mission is to build team. Readiness: Co-Sell Azure License: Bur SQL Average Deal Shared Opportuni	known as Contoso and Cor great solutions for Partners Prioritized dled Size in # of Cores: - ies: - Biz Apps IP Co-Sell		e in our technology. We Countries: 5 Total 12-mo Partner R	rosoft as an example compan build dream solutions that co evenue (Avg Azure Deal): 200 al size Cost of ISV IPs: - itered, - approved	ome with dream
Contacts	3						
Microsoft Conta	icts	Contact Type		Location			Actions
Mason McCoy		Microsoft Partner Technic	al Sales	United Kingdom			
Tricia Callahan		IPDM-R		Unknown Country			
Partner Contact Steven Thomas bbm efd III John Smith III	-	Contact Type Partner Marketing Partner Marketing - GTM Partner Sales	Services	Location Australia Albania Canada, United States			Actions Contact Contact Contact
Financial Servic • Banking & • Oth	es & Capital Markets er Industry Solution	dustry Solution Category • ^{Category} • > Building Block	Add / Edit Conta	Industry Map A Education • Higher Education	n		•
This solution is Add Industry		iated to any solution maps.		Solution Area N	Collaboration (GLOBAL Maps Associatio	ns	
Collateral				Marketplace Li	nks		

- 1. The solution record displays on a subpage of the Solutions page, in the same browser tab. You can go back to the Solutions page using the navigation breadcrumb near the top.
- 2. Basic solution information displays near the top: its readiness for various sales activities, platform, average deal sizes, etc.
- 3. The contacts are in two tables: Microsoft (lists your OCP Account Team) and Partner (lists folks at your company). If you see links to the right of your contacts, click to edit the Partner contact and/or invite them to OCP GTM.
- 4. Additional attributes and collateral are further down the Solution page (image is cropped; some attributes not depicted).

Basic solution information

Not all the data you see can be edited in OCP GTM. Solution Name and Partner name must be edited through your Account Team

Contacts

This section displays names and email addresses for contacts at your business, as well as the Microsoft Account Team members. If you need to change something, or add a new contact, click Add/Edit Contacts.

Contacts			
Microsoft Contacts	Contact Type	Location	Actions
Mason McCoy	Microsoft Partner Technical Sales	United Kingdom	
Tricia Callahan	IPDM-R	Unknown Country	
	· · · · · · · · · · · · · · · · · · ·		
Partner Contacts	Contact Type	Location	Actions
Steven Thomas 💼	Partner Marketing	Australia	Contact
bbm efd 🔳	Partner Marketing - GTM Services	Albania	Contact
John Smith 🔳	Partner Sales	Canada, United States	Contact
	Add / Ed	it Contacts 🖌 View More	

Click Add/Edit Contacts to change or add a Partner Contact. People listed under Partner
 Contacts can be invited to work in OCP GTM on your solutions – if you see an Invite link you can invite them yourself.

		· · · · · · · · · · · · · · · · · · ·		- 1
Microsoft Contacts	Email	Contact Type	Location	Actio
Mason McCoy		Microsoft Partner Technical Sales	United Kingdom	Edit
Tricia Callahan		IPDM-R	Unknown Country	Edit
Partner Contacts	Email	Contact Type	Location	Actic
Steven Thomas 👪		Partner Marketing	Australia	Edit Invite. Conta
bbm efd 🗰		Partner Marketing - GTM Services	Albania	Edit Invite Conta
John Smith 🔳		Partner Sales	Canada, United States	Edit Invite Conta
		Partner Sales	United States	Edit Re-Invite Conta
alessandro pistilli 📰				
alessandro pistilli 📰 gfd dsf 📰		Partner Marketing - GTM Services	Algeria	Edit Invite Conta

- Click + New Contact (top left corner of form) to create a new Partner Contact.
- To edit the details of a listed contact, click EDIT in that row, in the Actions column

Edit Collateral

Collateral is files or text descriptions of the materials that support the seller and any co-sell or GTM activity. It's one of the most important areas for your focus. You can add collateral at the Partner level (for collateral that applies to all your solutions) and at the Solution level (for collateral that is solution-specific).

Add Partner-Level Collateral

If you have multiple solutions, you can upload Partner-level collateral that will show up in all of them.

1. At the bottom of the Partner page, click **View Collateral**.

Platforms	Collateral (8)
Azure	Collateral 2 Collateral 3 Collateral 1 Collateral 4 Contos wins Octo Statalog Leer Guide for partners.docx OCP Catalog - FY18 Partner Guide - Jan2018.pdf
	View Collateral

2. On the Collateral page, click +Add New Collateral.

+ New Collateral		All ty	Des 🔻	All languages 🔻
Title	Category	Language	Collateral	Action
Lollateral 2	Cloud Customer Case Study		Contoso	🖋 Edit
▲ Collateral 3	Reference Architecture & Dependencies		Contoso	🖋 Edit
▲ <u>Collateral 1</u>	Customer One Pager		Contoso	🖋 Edit
▲ <u>Collateral 4</u>	Customer One Pager	Greek	Contoso	🖋 Edit

3. The Add New Collateral form has a banner that tells you the collateral will be Partner-level collateral. Under Category, click **Choose a category**.

Add New C	ollateral		×
Partner-Lev	el Collateral		
Category			
Choose a cate	gory		•
This field is requi	red.		
Туре			
File	Url	 Text 	
Language			
Choose a lang	uage		•
downloaded b personnel to b	ny collateral you uplo		
		Save	ncel

- 4. After you choose the Category, specify the Type whether the collateral is a file you will upload, a URL, or text. For example, suppose the video showcase is a file and you'd like it available in OCP GTM. When you set the Type, the form changes to accommodate the collateral; in our example, you specify File, and an upload button appears.
- 5. Add a Title and pick a language, then click **Save**.

Add New Collateral to a Solution

You can also add or edit collateral for a specific solution.

1. In the Collateral section (bottom left of Solution page), click **View Collateral**.

Collateral	Marketplace Links
OCP Catalog User Guide for partners.docx OCP Catalog - FY18 Partner Guide - Jan2018.pdf OCP CATALOG Invitation.docx	No marketplace links found.
	Offer Type
	No offer type
View Collateral	Edit Marketplace Links Edit Offer Type

- 2. On the Collateral subpage that opens, you can do several things:
 - Click the name of any listed collateral to download/view it
 - Click the EDIT link to the right of a listed item to make changes to that item

• Click +Add New Collateral above the list of items to upload new material

CONTOSO-DEMO 1				
+ New Collateral			All types	All languages
Title	Category	Language	Collateral	Action
& OCP Catalog User Guide for partners.docx	Customer Presentation	English	CONTOSO-DEMO 1	/ Edit
A OCP Catalog - FY18 Partner Guide - Jan2018.pdf	Reference Architecture & Dependencies		CONTOSO-DEMO 1	✓ Edit
CCP CATALOG invitation.docx	Customer One Pager	English	CONTOSO-DEMO 1	✓ Edit

There are many kinds of collateral our sellers use. When you click **+Add New Collateral** to upload an item, a form helps you categorize the collateral, so sellers know what to expect.

1. Click **Choose a category** to see a list of choices. Pick the category that best matches the item you are uploading. For example, suppose you have a video that showcases your solution – you'd pick **Video** from the list.

Add New Co	ollateral			
CONTOSO-DE	VIO 1	>		
Category				
Video		v		
Туре				
File	Url	 Text 		
Title				
Language				
Choose a langu	age	Ŧ		
Please note that any collateral you upload might be downloaded by Microsoft personnel or other partner personnel to be used with customers. You are responsible for ensuring any collateral you upload is appropriate to be shared with third parties.				
		Save		

 After you choose the Category, specify the Type – whether the collateral is a file you will upload, a URL, or text. For example, suppose the video showcase is a file and you'd like it available in OCP GTM. When you set the Type, the form changes to accommodate the collateral; in our example, you specify File, and an upload button appears.

Add New C			×
CONTOSO-DI	EMO 1		
Category			
Video			۳
Туре			
File	Url	Text	
File			
1 Choose fil	e		ר
Title Language			
Choose a lang	uage		۳
Please note that any collateral you upload might be downloaded by Microsoft personnel or other partner personnel to be used with customers. You are responsible for ensuring any collateral you upload is appropriate to be shared with third parties.			
			ncel

3. For URL and Text items, you just enter the hyperlink or text in the form. For files, click Choose file to start the upload. When you pick a file, the file name is used for the **Title**

Add New C	ollateral	
contoso-de	.MO 1	
Category		
Video		
Туре		
File	Url	Text
File		
▲ Test.xlsx		
Title		
Test.xlsx		
Language		
Choose a lang	Jage	
downloaded b personnel to b	ny collateral you uplo	
		Save

4. Click **Choose a language** and select the language that the item uses, then click **Save** to upload the item to OCP GTM

Microsoft Account Team members can help with collateral

For more information, templates, and the benefit of their experience, you should talk to your Microsoft Account Team member about maximizing the value of your collateral.

Industry

The industry that your solution targets is important to sellers, who use that information to filter results when searching for the right Solution. Your Microsoft Account Team member specifies this information in the OCP CRM system, typically before your solution is listed in OCP GTM. You can add selections here, but you cannot remove any selections that were added in the CRM system. Be cautious in adding more industries unless your solution truly emphasizes them – there's a limit of three. If you're tempted to add all industries, consider using Solution Areas, which are designed to represent activities that pertain across industries, such as talent management.

Solution Area/ Building Block

Solution Areas also provide information that sellers use to find solutions in OCP GTM. Whereas Industry is about what kind of business a solution targets, Solution Area is about what your solution does for those businesses. For example, Media & Cable is an Industry, whereas Business Applications is a Solution Area. There's a limit of 5 Solution Areas.

Note that you must specify a Building Block when you add a Solution Area.

Marketplace Links

If you have already registered a solution in AppSource or Azure Marketplace, please add the appropriate URL to the Marketplace Links section.

1. At the bottom of the page, click Edit Marketplace Links.

Collateral	Marketplace Links
OCP Catalog User Guide for partners.docx OCP Catalog - FY18 Partner Guide - Jan2018.pdf OCP CATALOG invitation.docx	No marketplace links found.
	Offer Type
	No offer type
View Collateral	Edit Marketplace Links Edit Offer Type

2. Add the URL to the appropriate box, then click Save.

Marketplace Links	×
 These URL(s) will link a user to AppSource or Azure Marketplace for the Solution. If your solution is not already on one of these sites, we recommend that you consider placing it there. Millions of customers frequent these marketplaces and they will be able to directly view your solutions and contact you. You can get more information on lis your solution on AppSource here, and on Azure Marketplace here. If your Solution is already on AppSource or Azure Marketplace, please add the URL here. You can easily locate your solution on AppSource or Azure Marketplace by using the Search bar locat the top right area. 	nend nt ting <u>ere</u> .
AppSource	
Azure Marketplace	
Partner Center/Pinpoint	
Save	ncel

Offer Type

This selection will streamline the publishing of this solution to Azure Marketplace or AppSource

1. At the bottom of the page, click Edit Offer Type

Collateral	Marketplace Links
OCP Catalog User Guide for partners.docx OCP Catalog - FY18 Partner Guide - Jan2018.pdf OCP CATALOG Invitation.docx	No marketplace links found.
	Offer Type
	No offer type
View Collateral	Edit Marketplace Links Edit Offer Type

2. Select an **Offer Type** in the drop-down list.

ſ	Offer Type	×
	Please select an "offer type" for this solution. This selection will streamline the publishing of this solution to Azure Marketplace or AppSource.	
l	How to choose an offer type	
	Choose an offer type	•
		1
		-
	Save	

CHANGE LOG

• July 17, 2018 – First FY19 version