



Customer Journey-in-a-Box | Playbook

Surface & Microsoft 365 Better Together

January 2023



For every \$1 of Microsoft revenue partners in Western Europe sell, customers purchase an additional average of \$6.70 of the partner's services and products.

\$1 =
USD



\$6.70
Western Europe



\$6.10
Total (Worldwide)



For every \$1 of
Microsoft revenue

Resale-led
partners make
\$2.21
in economic value

Services-led
partners make
\$5.75
in economic value

Software-led
partners make
\$7.86
in economic value

Customer Journey Insights

Surface and Microsoft 365 give people the freedom to work their way from anywhere, protected by Microsoft security and modern manageability.

⚡ Priority

- Grow account penetration in Top SMB accounts

🕒 Segment

- SMB and Scale

🗄️ Solution Area

- Modern Work: Surface

★ Hero SKU

- Surface PC and Hub devices & accessories

📈 Up/cross sell path

- M365 workloads: M365 business premium & M365 business standard

📊 KPIs

- # Workshops & Programs
- # Customer adds

Audience

Customer targeting

- **Expansion** – grow the Surface installed base through line up refresh
- **Acquisition** – win new customers leveraging from the zero-touch deployment and advanced security value pitch

Buyer Persona

- BDM and ITDM audience

Customer Offers

Surface Promotional offers will help you find the best price for your customer with attractive discounts on selected devices. For more details please visit SRA

Modern Work with Surface Program up to \$30 discount per device targeted at M365 Business Premium Customers (>25 licenses)

Drive upsell / cross-sell to M365 for Business leveraging the new [Microsoft 365 SMB new customer, upsell, and CSP legacy to CSP new commerce renewal promotion](#)

Partner Programs

Surface Modern Workshops via SWIF

With this program partners can drive workshops to engage with customers and show the value of modern Solutions with Surface and M365. For more information, please read the [SWIF playbook](#)

Marketing Campaigns & Assets

Laptops by design (LBD) campaign

This campaign focuses on the challenges SMBs face for the future and pairs them with modern technology. In this collection you will find ready-to deploy & customizable marketing assets covering the entire Surface Portfolio to help you engage new customers. Materials will be available in the SRA asset gallery from February 2023

Define what's next: Surface and Intel co-marketing campaign

This campaign essentially includes the same assets as the LBD campaign above, but with focus on Surface Pro & Surface Laptop. [Go to asset collection on SRA](#) or start using them directly in [DMC](#)

The Surface Business Case

Explore assets on the Total Cost of Ownership (TCO) model by IDC to respond to your customers' well-known question, "Why should we pay for a premium device?" [Go to asset collection](#)

Do More with Less with Surface

The DMWL cloud campaign will now also include Surface with dedicated assets on how modern devices can help customers achieve more. Asset collection coming to SRA in February.

→ For more localised sales, marketing materials and promotional offers, please visit your local SRA portal. See links on the "Surface Reseller Alliance" Slide.

Partner

Criteria

✔ Surface Workshop Program (SWIF)

- The workshop BOM is available to use for all partners
- To qualify for funding, partners must be Surface Authorized Resellers or Distributors
- Workshops must be dedicated to one customer at a time
- Partners must provide the attending customer name and deliver proof-of-execution (POE) materials required by local Microsoft Compliance Regulations.

✔ Intel “define what’s next” co-marketing campaign

- The campaign BOM is available to use for all partners
- To qualify for co-funding of demand generation activities, partners must be silver, gold or platinum Surface Authorized Resellers or Distributors
- Microsoft/Intel funding must be matched with the equivalent amount from co-op funds
- Partners must provide performance data on the campaign (reach & conversion) and deliver proof-of-execution (POE) materials required by local Microsoft Compliance Regulations.

Skilling and enablement

The Surface Reseller Alliance Portal (SRA) is a one-stop-shop for all our partners, where you can explore resources made to help you build and grow your Surface-based business. Below you will find some of the highlights of our skilling resources

Surface Academy

With the Surface Academy you can get trained and certified in selling Surface devices for both sales or technical tracks:

- [Surface PC core partner training](#)
- [Surface Hub core partner training](#)

Further Recommended Readiness

- [Zero-touch deployment training](#)

Learn to take advantage of Windows Autopilot to quickly and easily deploy customer devices—an experience that is zero-touch for customer IT.

- [Device-as-a-Service partner marketing program](#)
Accelerate your Surface and cloud businesses with the new Microsoft Surface Device-as-a-Service partner marketing program

- [Surface Sales Play Immersion](#)

Learn about our recommended sales plays, industry priority scenarios, and great customer conversations.

Surface Expert Zone

- ExpertZone is a learning platform that offers training in a snackable and on-demand format also offering rewards and recognition badges. [Sign up today at expertzone.microsoft.com](https://expertzone.microsoft.com)

Partner Webinar Repository

- We regularly hold partner update webinars on product announcements, partner campaigns and much more. You can catch up on hot topics at any time by watching the recordings on SRA. [view library](#)

M365 SMB masters program

- To upskill on M365 portfolio for SMB customers, please visit SMB Masters Program [Microsoft 365 & Security for Partners](#)

3 questions you should ask the customer:

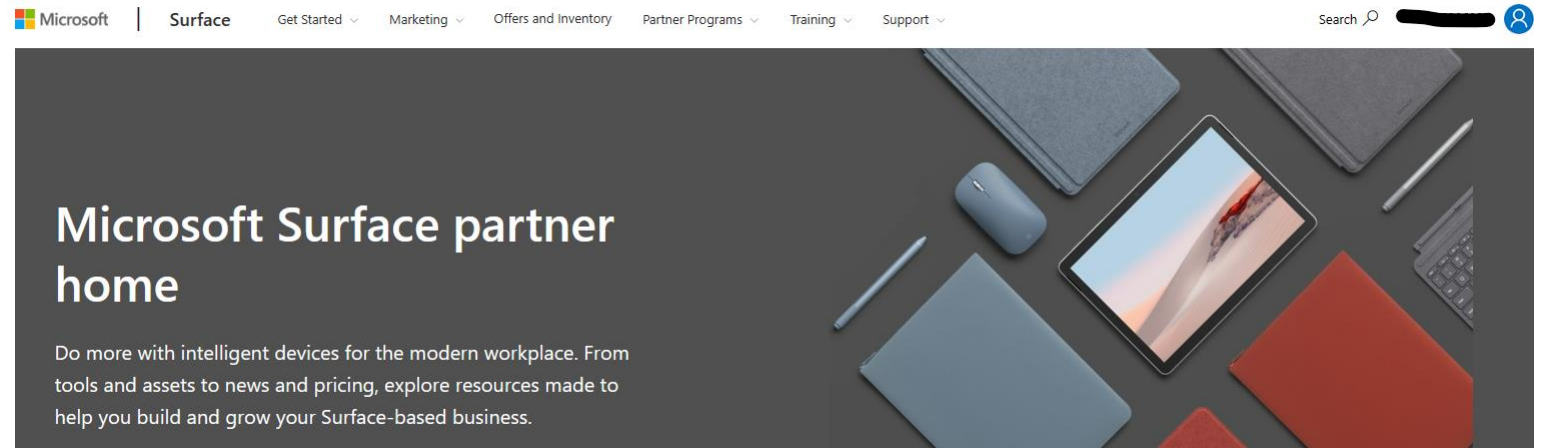
- How has your workplace changed in the last years?
- Finding better ways to collaborate is a challenge for most companies. How well does your team manage hybrid collaboration?
- Given the increase in cyberattacks, how are you thinking about security—for devices, business data, or identities?

Surface Reseller Alliance

Surface Reseller Alliance (SRA) is a program built specifically for resellers of Surface devices to enable you to be successful in their Surface business.

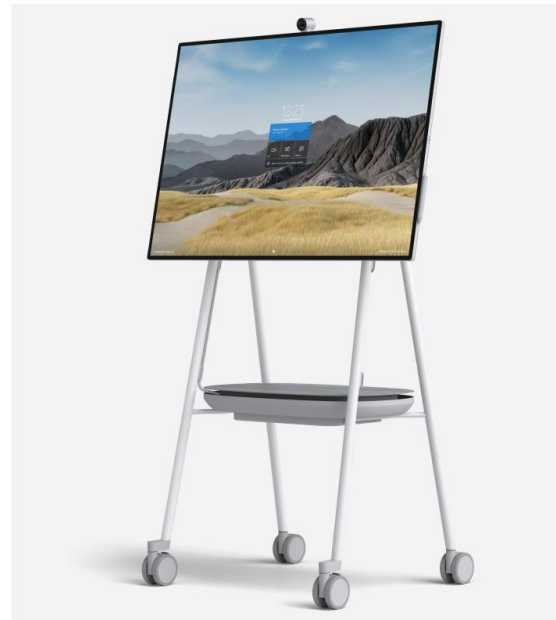
The SRA portal will provide you with information on how to **become a reseller**, how to **get trained**, what **customer offers** we have and provide **sales and marketing materials** to support your business growth.

Country	Language	Local Surface Partner Page Link
Austria	German	https://partner.microsoft.com/de-at/surface
Belgium	English	https://partner.microsoft.com/en-be/surface
Denmark	English	https://partner.microsoft.com/en-dk/surface
Finland	English	https://partner.microsoft.com/en-fi/surface
Ireland	English	https://partner.microsoft.com/en-ie/surface
Italy	Italian	https://partner.microsoft.com/it-it/surface
Netherlands	Dutch	https://partner.microsoft.com/nl-nl/surface
Norway	English	https://partner.microsoft.com/en-no/surface
Portugal	Portuguese	https://partner.microsoft.com/pt-pt/surface
Spain	Spanish	https://partner.microsoft.com/es-es/surface
Sweden	Swedish	https://partner.microsoft.com/sv-se/surface
Switzerland	German	https://partner.microsoft.com/de-ch/surface



Surface partner programs

Improve your business and the customer experience with Surface Partner Programs, ranging from warranty to reseller to pricing.



Create demand for Surface Modern Solutions

Access content and resources to become more confident in expanding your services



Understand competency tiers for reselling

The Surface Reseller Alliance Program rewards top commercial resellers. Discover the benefits and requirements for the Authorized, Silver, and Gold levels.



Surface Device-as-a-Service

Take Surface devices and Microsoft Cloud products to market together with Surface DaaS.

Customer Journey

Tactics

Funding & Incentives



Listen & Consult

- Partner led ABM Digital Campaigns, Telemarketing, Events, Webinars
- Run DMC Campaigns for Free.

Collaterals for marketing campaigns are available on the Surface Reseller Alliance Portal: <https://partner.microsoft.com/en-ie/surface>

- Co-op funds are available to partners: aka.ms/partnerincentives
- Authorized partners may request funding from local subsidiaries



Inspire & Design

- SWIF workshops (1:few)
- Surface Solution Assessment
- Proof of Concept

Surface Modern Workshops (SMW)
Surface Customer Immersion Experiences (CIEs)
 Surface Solution Assessment – Link to demo
 Pre-sales activities such as POC can be supported with Surface ECIF

- SWIF program
- Pre-sales ECIF: >20x ROI or 10x ROI for dark customers



Empower & Achieve

- Device seeding, Pre-sales ECIF

Device seeding programs available via selected distributors; partners can also purchase demo devices using co-op

Pre-sales activities such as technical assistance and application development can be supported with Surface ECIF

- Co-op: for the purchase of demo devices
- Pre-sales ECIF: >20x ROI or 10x ROI for dark customers



Realize Value

- End customer pricing programs
- Partner Incentives aka.ms/partnerincentives

Silver, gold and platinum authorized Surface PC Resellers have the opportunity to earn 2% rebate on all Commercial Surface sales to customers on the provided Surface MAL Dark Customer List, where device sales to the customer are >50 Surface PC units

- Partner Incentive aka.ms/partnerincentives
- End customer programs: for details contact an authorized Surface distributor



Manage & Optimize

- Training and adoption support

Post sales activities such as user training and adoption support, technical can be supported with Surface ECIF

- Post-sales ECIF: >20x ROI or 10x ROI for dark customers