

## MidMarket Deskflip

Notes for programmer

**Delivery method:** Deskflip

**Title of flip book:** Opportunity Identification and Co-Marketing Readiness Guide

### Tabs in deskflip

- Main (title page)
- [About this guide](#)
- [Join PartnerWorld](#)
- [Become a Reseller](#)
- [Opportunity management enablement](#)
- [Demand generation Co-Marketing](#)

**Note:** All links outside the content of the deskflip should be prefaced with the popup icon.

## About this guide

### Notes for programmer

When the user clicks the **About this guide** tab the following text appears and audio launches:

Click the links on the left side to learn about:

- [Overview](#)
- [How to navigate](#)
- [Contents](#)
- [Glossary](#)
- [Trademarks](#)

### **Overview**

The purpose of this guide is to provide you with easy to follow instructions that will walk you and your company through the steps necessary to set up and manage your IBM opportunities. Additionally, it will link you to education and other resources.

Completing the recommended education helps you understand each process before completing the steps.

In some instances, you and/or company might have completed some of these steps. For example, you might already have your IBM ID or your company might be currently registered in the PartnerWorld Profiling System (PPS). If so, it is not necessary for you to complete these steps again.

This guide is for North America and Europe only at this time.

### **How to navigate**

To access a specific topic, click the tab on the right side of the module.

To access a specific subtopic within a topic tab, click the subtopic link located on the left side of the topic tab.

To navigate within a topic or subtopic, click the Next or Previous link at the bottom of the page.

### **Contents**

The readiness guide contains information and links to information about the following topics:

- 1) Join PartnerWorld
  - Register for an IBM ID
  - Register your company
  - Add employees to your company's membership
- 2) Become a Reseller (Optional)
  - IBM software reseller
  - IBM hardware reseller
- 3) Opportunity management enablement
  - Create opportunities in Global Partner Portal
  - Spreadsheet alternative for opportunity management – [Business to Business \(B2B\)](#)
- 4) Demand Generation/Co-Marketing

## Glossary

- Authorized portfolio - Products designed to deliver leading capabilities, and requires highly skilled Business Partners who have demonstrated advanced skills through certifications and approved solutions through Software Value Plus. Authorized Portfolio products can ONLY be sold by Business Partners who have been authorized by IBM.
- Authorized Profile Administrator (APA) – Individual who has administrative authority to update PPS and perform on-going maintenance to the company's location and employee information.
- Business Partner Administrator - Responsible for creating positions, adding users initiating the process to terminate employee access to Global Partner Portal and initiating collaboration with other Business Partner firms.
- Business to Business (B2B) – Refers to the electronic relationships and transactions between IBM and Business Partners.
- Co-marketing - Marketing practice that leverages the strengths of IBM offerings and our Business Partners sales and service delivery to create value for our joint customers. Typically a joint effort / co-sponsored / co-branded activity. Tactic focused on Customer Value-Add. Co-marketing helps position innovative IBM and Business Partner joint solutions as leading the market and best-suited to solve our customers' business and technology challenges.
- Demand generation - The goal of targeted marketing programs to drive awareness and interest in IBM and our Business Partners' joint solutions. Demand generation strategies may include: building awareness; market positioning; validation our position; or, supporting a customer evaluation. Demand generation tactics may include e-mail and/or print mailing, telemarketing, advertising, press releases, and other outbound marketing activities.
- Global Partner Portal – Single place for Business Partners to create and manage opportunities and to engage IBM within that process.

- IBM PartnerWorld Agreement – Required contract which must be accepted when a company applies for participation in the PartnerWorld program, which in turn provides access to the PartnerWorld Profiling System (PPS).
- .Open portfolio - Products designed to reach the broadest market possible. Open Portfolio products can be sold by **ALL** IBM Business Partners and are designed to offer rapid time-to-value.
- Oppty Focal – Can view or edit all opportunities for the entire company. They can make updates to the opportunities for their team without being on the sales team themselves and can add or change sales team members on an opportunity.
- PartnerWorld Contact Services -- First point of contact for all Business Partner questions about the PartnerWorld program, offerings and their relationship with IBM
- .PartnerWorld Profiling System (PPS) - Online system that helps you maintain and support your IBM® PartnerWorld® relationship. The system enables you to view and update your PartnerWorld profile and is the central area to access information on agreements, benefits, and relationships with IBM.
- PartnerWorld Web site – Is designed to provide easy, fast access to IBM resources o our Business Partners need to grow their business and increase profitability.
- Primary Relationship Contact (PRC) – Highest level of access in PPS, including APA authority. Can update any information in the profile, sets other employees' access privileges, and performs ongoing maintenance to the company's profile information. Via email, PRC invites employees to register in PPS.

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# Join PartnerWorld

## Notes for programmer

When the user clicks the **Join PartnerWorld** tab, the text below appears. Clicking the this tab also launches the business value audio.

Click the links on the left side to learn how to:

[Obtain an IBM ID](#)

[Register your company](#)

[Add employees to your company's membership](#)

## ***Obtain an IBM ID***

### **Who takes these actions**

- Any IBM Business Partner employee needing access to PartnerWorld.

### **Prerequisites**

None

### **Special considerations**

If you already have an IBM ID, then skip this step.

At a minimum, the following people should register for an IBM ID:

- 1) Person signing the [IBM PartnerWorld Agreement](#)
- 2) Person who will administer company information in the [PartnerWorld Profiling System \(PPS\)](#)
- 3) Person(s) performing [opportunity management \(OM\)](#) tasks when enabled for OM
  - [Business Partner Administrator](#) – 1 per company
  - [Oppty Focal](#) – 1 per location
- 4) Employees who will be added to company's membership

**Note:** In some cases, one person might perform multiple tasks listed above.

### **Recommended education:**

[PartnerWorld Web site tour](#)

### **Steps to register for an ID:**

Follow steps on [Join PartnerWorld](#) page – Step 1

Notification: 24-72 hours to receive your *Welcome to PW* email

## ***Register your company***

### **Who takes these actions**

Individual authorized to sign IBM PartnerWorld Agreement on behalf of the legal company and administer profiles in the IBM's registration system (PPS).

### **Prerequisites**

[IBM ID](#)

### **Special considerations**

**IMPORTANT:** Contact [PartnerWorld Contact Services](#) when unsure if your company is registered and to verify your status to administer profiles.

**Note:** Duplicate company registrations can cause unpredictable system results.

**IMPORTANT:** After you and your company are profiled, update your company's profile every 9-12 months.



See the *Why update your profile* demonstration in the right nav on the Join PartnerWorld page.

### **Steps to register your company:**

1. Go to [Join PartnerWorld](#) page – Step 2.
2. Click **Submit a PartnerWorld program application for your company.**
3. At the bottom of the page, in the **Create a profile/associate to an existing profile** section, click **Apply to join the PartnerWorld program.**

Notification: Allow up to 5 business days for e-mail notification of approval.

### **Additional resources:**

- [PPS Quick Reference Guide](#)
- [PPS User's Guide](#)

## ***Add employees to your company's membership***

### **Who takes these actions**

- Person(s) who will administer company information in PPS ([APA](#) or [PRC](#)) or
- Employee who self-associates with their location

**Insert Graphic:** [http://a248.e.akamai.net/f/248/47541/1d/www-200.ibm.com/partnerworld/images/pub/pub\\_join123\\_530x120\\_2.jpg](http://a248.e.akamai.net/f/248/47541/1d/www-200.ibm.com/partnerworld/images/pub/pub_join123_530x120_2.jpg)

### **Prerequisites**

- [IBM ID](#)
- Country enterprise with location profiles loaded into PPS

**Special considerations**

Ensure key employees loaded into PPS:

- [APA\(s\)](#) or [PRC](#) for location profile(s)

Prepare for opportunity management enablement by loading the following employees:

- [Business Partner Administrator](#) – 1 per company
- [Oppty Focal](#) – 1 per location

**Note:** In some cases, one person might perform multiple tasks listed above

**Steps to add employees to your company's membership:**

Go to [Join PartnerWorld](#) page – Step 3

**Additional resources:**

- [PPS Quick Reference Guide](#)
- [PPS User's Guide](#)

## Become a Reseller (optional)

### Notes for programmer

When the user clicks the **Become a reseller** tab, the following text appears. Clicking the Become a Reseller tab also launches the business value audio.

Click the links on the left side to learn how to:

[IBM software reseller](#)

[IBM hardware reseller](#)

## IBM software reseller

### Why resell software?

- Develop new revenue streams
- Reduce development costs
- Identify new business projects
- Enhance client satisfaction

### Who takes these actions

APA authorized to sign agreements on behalf of the company

### Prerequisites:

- [IBM ID](#)
- Company and employees registered in PPS

### Special considerations

- Take a moment to read the high-level definition of [authorized](#) and [open](#) portfolios – SW.
- For a complete understanding of these portfolios, see [IBM Software Value Plus](#).

### Recommended education

[IBM Software Value Plus Overview](#) - 28 Oct 2009 webcast replay: How to ensure you are an Authorized IBM Software Business Partner.

### Steps to become a Software reseller:

1. Determine whether the products your company intends to resell are [open or require authorization](#).
2. If the products you plan to sell require authorization, follow the steps at [http://www-200.ibm.com/partnerworld/pwhome.nsf/weblook/pat\\_sw\\_growthroughskills\\_criteria.html](http://www-200.ibm.com/partnerworld/pwhome.nsf/weblook/pat_sw_growthroughskills_criteria.html)



### **Additional resources:**

- See the **Learn More** and **Information for your client** sections on the [Software Value Plus](#) main page.

## ***IBM hardware reseller***

### **Who takes these actions**

Contact that will be responsible for this Business Partner relationship

### **Pre-requisites:**

[IBM ID](#)

### **Special considerations**

IBM Canada has a unique process for System x firms (outlined below). All other Canadian product lines are handled via the North America process.

### **Recommended education:**

[www.ibm.com/partnerworld/resellerapply](http://www.ibm.com/partnerworld/resellerapply) (North America)

## **Steps to become a hardware reseller**

### **NORTH AMERICA**



See [How to apply to become a hardware reseller](#). (If you have registered and received your IBM ID, you do not need to complete that step again.)

### **CANADA System x**

1. Apply to the [Trial Program](#). (No IBM ID is required).  
**Note:** Click **Next** on the bottom of the pages until prompted to select a sponsoring Distributor. The application form will be displayed.
2. Complete and submit the application form.
3. After successfully submitting the criteria for the Trial Program, including IBM management approval, you are transitioned to be an IBM Authorized Reseller.

### **EUROPE**

Go to the [Selling IBM products and/or services](#) page and follow the instructions.

# Opportunity management enablement

## Notes for programmer

When the user clicks the **Opportunity Management Enablement** tab, the text below appears. Clicking the **Opportunity Management Enablement** tab also launches the business value audio.

Click the links on the left side to learn how to:

[Create opportunities in Global Partner Portal](#)

[Use the spreadsheet alternative for opportunity management \(B2B\)](#)

## Who takes these actions

Company contact responsible for opportunity management

## Pre-requisites:

- Company contact responsible for opportunity management must have [IBM ID](#) and a valid email address
- Company loaded in PPS registration system

## Special Considerations

- For Europe, you will receive an email from IBM inviting you to enroll in Global Partner Portal. If you have not received this email or have misplaced it, contact [PartnerWorld Contact Services](#) (PWCS).
- If you are unsure whether your company is registered in Global Partner Portal, contact PWCS.
- You will receive a confirmation email that you are enabled in Global Partner Portal.

## Recommended education:

**IMPORTANT:** Complete the Global Partner Portal registration form (see Steps for opportunity enablement below) and then review the Overview information at:

[https://www-304.ibm.com/jct01005c/partnerworld/mem/sell/sel\\_gpp\\_home.html](https://www-304.ibm.com/jct01005c/partnerworld/mem/sell/sel_gpp_home.html)

Once on this page, click the [Training tab](#). You will be taken to Global Partner Portal training page where you are prompted to select a language; you must also select the Admin and/or Oppty Focal roles.

## Steps for opportunity enablement:

1. Complete the Global Partner Portal [registration form](#).
2. Review the readiness details, especially the browser details, at: [https://www-304.ibm.com/jct01005c/partnerworld/mem/sell/sel\\_gpp\\_access.html](https://www-304.ibm.com/jct01005c/partnerworld/mem/sell/sel_gpp_access.html).

Duration: Enablement can take up to 4 weeks after completing the registration form.

## Additional resources:

See recommended education

## ***Create opportunities in Global Partner Portal***

### **Pre-requisites**

Must have received access to Global Partner Portal

### **Special considerations**

None

### **Recommended education:**

[Create an opportunity](#) online help topic

### **Steps to create an opportunity**

See the [Create an opportunity](#) online help topic

### **Additional resources**

None

## ***Spreadsheet alternative for opportunity management (B2B)***

### **Who takes these actions**

Any IBM Business Partner interested in using the spreadsheet alternative

### **Prerequisites**

- Must be enabled on Global Partner Portal
- Must have Microsoft Excel™ loaded

### **Special considerations**

None

### **Recommended education:**

[Global Partner Portal online education](#)

### **Steps for spreadsheet alternative**

See [How to make the Add-In part of your opportunity management process](#).

### **Additional resources**

[IBM Global Partner Portal Opportunity Management B2B Add-In for Microsoft Excel™ User Guide](#)

# Demand generation Co-Marketing

## Notes for programmer

When the user clicks the **Demand generation Co-Marketing** tab, the text below appears. Clicking the **Demand generation Co-Marketing** tab also launches the business value audio.

## Who takes these actions

Any IBM Business Partner employee needing to create demand generation and co-marketing tactics

## Prerequisites

IBM PartnerWorld member with:

- [IBM ID](#)
- Company registered in PPS

## Special considerations

None

## Recommended Education

**Note:** Complete the *steps for demand generation/co-marketing* below before accessing the recommended education.

- Review the [Integrated Demand Generation Toolkit](#).
- Learn how Co-Marketing can be leveraged to generate leads: <http://marketblox.com/bp/asset/get.aspx?AssetId=155703>
- Review the [Campaign Designer Video Presentation](#) to understand the value of using IBM Campaign Designer.

## Steps for demand generation/co-marketing:

1. Go to the [Campaign Designer](#) home page.
2. Click **Sign in**.
3. At the Campaign Designer login screen, click **Register** if you are a new user or **Login** if you are an existing user.

## Contact us

### Notes for programmer

When the user clicks the **Contact us** tab the following text appears.

We welcome your feedback and suggestions to improve this guide. We solicit your ideas for changes and additions to this offering. Please send us an [e-mail](#).