

MPN Country Qualification

RSC Agent Call-Downs



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Course Overview

This course informs RSC Agents of the changes in how Partners with locations in multiple countries qualify for competencies. It also describes how RSC Agents will perform the call-downs to Partners to guide them through these changes. Competencies earned in one country may no longer be inherited by another country. Each country must earn a competency in order to retain an Active Earned status, though a second location within that country may still inherit the competency (Active Inherited status).

Course Objectives

After completing this course you will be able to:

- Explain the MPN country qualification policy updates coming in October 2013
- Describe the RSC Agents call-down process, including the content, timing, and purpose of each call
- Locate and use the email templates and call scripts with Partners
- Demonstrate how to locate, download, encrypt, and interpret the Partner information created by the Per Geo Preview Tool (PGPT) Report

The following icons will be used throughout the instructor's notes:

-  Helpful instructor information
-  Information to be shared with CSRs
-  Individual activity
-  Pair/Group activity

Course Timing

Course Section	Minutes
MPN Country Qualification Overview	55
Call-downs	120
Log Calls in ConnectUs	15
Resources	5
Post-Course Activities	
Assessment	30
Survey	15
TOTAL	4 hours

Prerequisites

Agents must have a general understanding of competencies, benefits, and incentives

Resources and Technology Required

No one needs access to the PGPT tool or to a call logging tool. There are PGPT reports in the folders used during the calls (and in this training), and there is also a report uploaded to the training portal. Access to the Extranet site below is required, as that is where the call-down documents are. There is also a VKB: #2791743 "MPN Country Qualifications.

IMPORTANT: Course Preparation

Before delivering this course, make sure you have access to and are familiar with the required materials on the extranet site below. In particular, know how to download, password-protect, and interpret the layout and content of the PGPT Report. You will have to demonstrate this later in the course, and ask RSC Agents questions about what is in the report and how to interpret it. Also make sure you have the Microsoft Office Excel software program and know how to password-protect a document (instructions are in the course). Agents will also use a sample report to role play toward the end of the course. If there are issues downloading reports, a copy of one is available on the training portal.

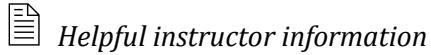
The link below has documentation on all of the following items:

1. **Call Scripts** – guidance for RSC Agent calls
2. **Email Templates** – follow-up to Partner calls
3. **Partner-facing email** – This went out December 5 to Partners as an introductory email
4. **Partner list for regions** - region-specific lists for managers only
5. **PGPT Report** – RSC Agents will download the reports from this folder

<link removed>

Have this link open before training begins so you are ready to show agents the documents here. If possible, they can have this site open as well to look at on their own computers.

MPN Country Qualification Policy Updates



Helpful instructor information

This lesson should take approximately 55 minutes to complete.

This lesson discusses how Partners inherit and qualify for competencies. Countries will no longer inherit competencies from other countries. To retain an Active Earned status, each country must earn its own competency. However, additional locations within that country will inherit that country's competencies.

Lesson Objectives

After completing this lesson, RSC Agents will be able to describe the following competency changes:

- Each country must earn its own competency to retain an Active Earned status in that country
- Additional locations within each country may inherit this competency and achieve an Active Inherited status
- This change begins in October 2013
- This change also impacts competency benefit and fee maximums
- Partners have options to maintain, modify, or give up competencies in various countries

MPN Country Qualification

Previously, Partners with locations in multiple countries could earn a competency in one country, and it was recognized in any other country associated with that Partner ID. These additional locations received an “Active Inherited” status, because their competency status was inherited from the first country. Different countries could share competency benefits.

Starting in October 2013, each country in which the Partner operates must earn its own competency to retain an Active Earned status. Competencies in that country may only be inherited by other locations within that country. The status of the second location in that country will be Active Inherited.

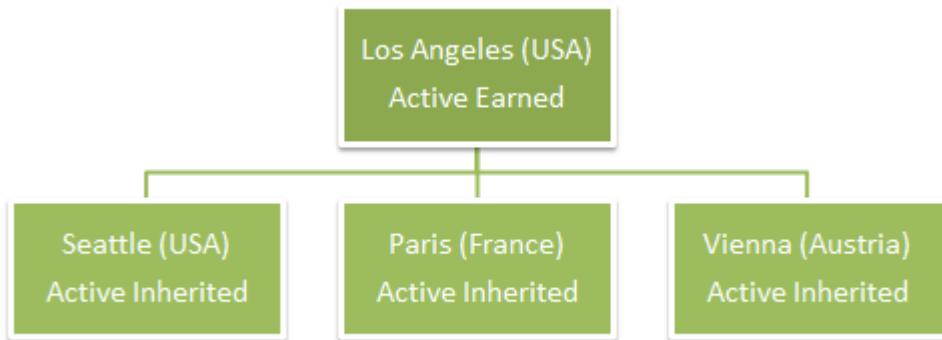
Incentives Requiring Competencies

This policy update is also relevant to Partners with incentives that require competencies. A country must achieve its own Active Earned status in order to remain in the incentive. Other locations within that country may inherit this competency.

 *Information to be shared with CSRs*

The two diagrams below show the policy updates in how Partner organizations are being restructured. Notice that the Current State shows one Active Earned location (Los Angeles, USA) with all additional locations (USA, France, and Austria)) inheriting its competencies. The Future State shows that the Active Earned competency does not impact the locations in other countries (France and Austria) – only the additional location within that country (Seattle, USA) retains the Active Inherited status.

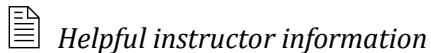
(Current) Global Qualification Policy:



(Future) Country Qualification Policy:



Benefit and Fee Maximums



*Helpful instructor information
There is a lot of detail in this topic, so be sure agents understand all of the minor differences and details.*

This shift from global to local (country-based) includes all elements of a competency – such as customer references, assessments, and application tests.

Fill in the information below. Be sure to include all of the important points, as you will use this information to complete an exercise in a couple of minutes.



Information to be shared with CSRs

The only exception is competency fees. Partners must only pay a fee for the first 10 countries in which they earn competencies (a second location within a country does NOT count toward this total, because it is an Active Inherited, not an Active Earned, location).

What is the exception to the competency rule above?

Partners must also earn and purchase ATKs (Additional Benefit Toolkits) separately for each desired location.



Information to be shared with CSRs

These ATKs do not count toward a Partner's 10-competency limit.

Do these ATKs count toward a Partner's 10-competency limit? _____

 *Information to be shared with CSRs*

The existing core competency benefits that have a maximum are not changing (licenses and technical support). Partners are allowed up to 15 times these core competency benefits. Additional locations inherit the competency status of their country, but they are not eligible for other core benefits.

These benefits are calculated by country and ATK locations (in other words, all Active Earned locations. Again, Active Inherited locations do not count toward this total).

How is the number of core competency benefits calculated (to determine the maximum of 15)?

They are calculated by country and ATK locations – in other words, all Active Earned locations

Summary Table

The table below shows a sample set up of a Partner. The red rectangles show the maximum limits for competency fees (10 countries) and Core Competencies (15 Active Earned locations). The bolded cells have associated notes below the table that explain why the cell contents are what they are.



Note:

These divisions are technically split by “subsidiary” and not by country. However, in nearly all situations, there is a one-to-one match between subsidiaries and countries. The term “country” is used here and in VKB. Details are in VKB #2791743: “MPN Country Qualifications.” Just know that the terms are largely interchangeable when you see the word “subsidiary.”

Country	Location	Competency	Fee Paid	ATK	Core Competency
Country 1	HQ	Active Earned	Yes	No	Yes
Country 1	Location A	Active Inherited	No	No	Shared with HQ
Country 2	HQ	Active Earned	Yes	No	Yes
Country 3	HQ	Active Earned	Yes	No	Yes
Country 3	Location B	Active Earned (1)	ATK Fee	Yes	Yes (4)
Country 4	HQ	Active Earned	Yes	No	Yes
Country 5	HQ	Active Earned	Yes	No	Yes
Country 6	HQ	Active Earned	Yes	No	Yes
Country 7	HQ	Active Earned	Yes	No	Yes
Country 7	Location C	Active Inherited	No	No	Shared with HQ
Country 8	HQ	Active Earned	Yes	No	Yes

Country	Location	Competency	Fee Paid	ATK	Core Competency
Country 9	HQ	Active Earned	Yes	No	Yes
Country 10	HQ	Active Earned	Yes	No	Yes
Country 11	HQ	Active Earned	No (2)	No	Yes
Country 11	Location D	Active Earned	ATK Fee (3)	Yes	Yes
Country 12	HQ	Active Earned	No	No	Yes
Country 13	HQ	Active Earned	No	No	Yes
Country 14	HQ	Active Earned	No	No	No (5)
Country 15	HQ	Active Earned	No	No	No
Country 16	HQ	Active Earned	No	No	No
Country 16	Location E	Active Inherited	No	No	No
Country 17	HQ	Active Earned	No	No	No

Notes

1. ATK gives location an “Active Earned” status
2. 11th competency and all additional competencies are free
3. Even though the 10-competency limit has been reached, Partner locations still must pay for ATKs
4. ATK Fee earns this location its own set of Core Competencies
5. Maximum Core Competencies is 15 Active Earned competencies

Exercise: Fill in the Blanks

 or  Individual or Pair/Group activity

 Helpful instructor information

Spend about 15 minutes on this exercise. Discuss any answers that RSC Agents do not understand. Agents should be able to explain how competency statuses, competency fees, and how core competencies are calculated.

Complete the blank cells in the table below, using the information and table above as guides. Discuss the answers with your instructor.

Country	Location	Competency	Fee Paid	ATK	Core Competency
Country 1	HQ	Active Earned	Yes	No	Yes
Country 2	HQ	Active Earned	Yes	No	Yes
Country 3	HQ	Active Earned	Yes	No	Yes

Country 4	HQ	Active Earned	Yes	No	Yes
Country 4	Location A	Active Earned	ATK Fee	Yes	Yes
Country 5	HQ	Active Earned	Yes	No	Yes
Country 6	HQ	Active Earned	Yes	No	Yes
Country 7	HQ	Active Earned	Yes	No	Yes
Country 7	Location B	Active Inherited	No	No	Shared with HQ
Country 8	HQ	Active Earned	Yes	No	Yes
Country 9	HQ	Active Earned	Yes	No	Yes
Country 10	HQ	Active Earned	Yes	No	Yes
Country 11	HQ	Active Earned	No	No	Yes
Country 12	HQ	Active Earned	No	No	Yes
Country 13	HQ	Active Earned	No	No	Yes
Country 14	HQ	Active Earned	No	No	Yes
Country 14	Location C	Active Earned	ATK Fee	Yes	No
Country 15	HQ	Active Earned	No	No	No
Country 15	Location D	Active Inherited	No	No	No

Answers and Explanations:

- *Country 4 HQ is Active Earned because it is the headquarters.*
- *Country 4 Location A has an ATK and ATK Fee because it is Active Earned, even though it is a Location and not a country headquarters. Locations only have an Active Earned status with an ATK and ATK Fee. Otherwise they are Active Inherited.*
- *Country 7 Location B is Active Inherited because the Core Competencies are shared with the headquarters. If the Core Competencies were not shared, this location would require an Active Earned status.*
- *Country 8 HQ is Active Earned because it is a headquarters.*
- *Country 11 HQ is the 11th earned competency (not including ATKs), so everything from there on is No Fee. Countries 9 and 10 are charged the fee, but the 12th is not for the same reason.*
- *Country 14 Location C has an ATK, so it also has an Active Earned status and an ATK Fee.*
- *Country 14 no longer receives Core Competencies, because the Partner reached their maximum number of allowed Core Competencies with Country 13. This is also why Country 15 does not have an IUR.*

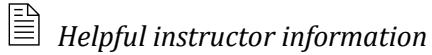
- *Country 15 Location D is Active Inherited because it is a location, not a country headquarters, and has no ATK.*

Partner Actions

What is the required action for Partners? Those with locations in more than one country will have to choose one of these options:

- Ensure future competency status within the desired countries by meeting the missing requirements and planning to pay the enrollment fee for that country (remember, the fee only applies for up to 10 countries)
- Choose countries in which they would like to maintain competencies, and rearrange assets to meet the full requirements in that country (They will likely lose competency status in other countries)
- Take no action and lose the competency statuses and benefits in countries without an Active Earned status.

Call-Downs



This lesson should take approximately 2 hours to complete.

This lesson describes the purpose, process, and resources for the Phase 1 and Phase 2 call-downs.

Lesson Objectives

After completing this lesson, RSC Agents will be able to:

- Describe the purpose and process of each call
- Locate, define, and use the call-down templates and tools available to RSC Agents on the extranet
- Explain how to follow-up with Partners after a call, or in the event that they cannot be reached

Call-Down Overview

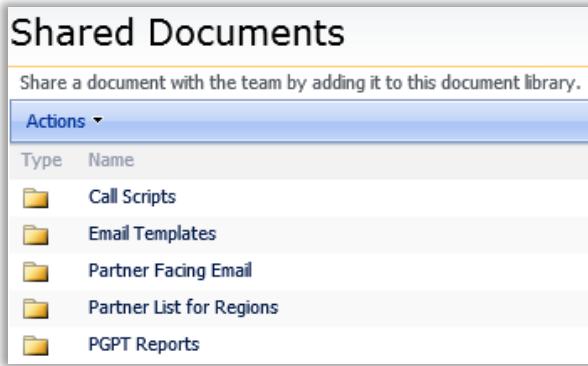


Helpful instructor information

Spend 5-10 minutes on this section, depending on whether or not agents need to read the introductory email sent to Partners and familiarize themselves with the information there.

RSC Agents will be calling Partners to discuss these policy updates in a series of call-downs. The first two phases are described in the next sections. Partners received an introductory email on December 5th introducing these policy updates. These emails are available in all Partner languages and are located on the extranet SharePoint that contains all of the documentation RSC Agents will need. Open this link now.

Microsoft Partner Network - RSC Extranet Site > Shared Documents > CR154 - Org Hierarchy Call Down



Type	Name
Folder	Call Scripts
Folder	Email Templates
Folder	Partner Facing Email
Folder	Partner List for Regions
Folder	PGPT Reports



Information to be shared with CSRs

Open this link. Explain to RSC Agents what these folders contain and open each one to show them:

1. **Call Scripts** – guidance for RSC Agent calls
2. **Email Templates** – Post-call emails that agents will send as a follow-up to Partner calls
3. **Partner-facing email** – This introductory email went out December 5 to Partners
4. **Partner list for regions** - region-specific lists for managers only. Not for agents.
5. **PGPT Report** – RSC Agents will download the reports from this folder

If agents have not already seen the introductory Partner email, open the email in your language for them to read. Agents can also open these on their own computers. Keep this site open, as you will refer to the documents in these folders throughout the course as they are mentioned.

Only some RSC Agents will be performing the call-downs. However, all agents must be prepared to explain the policy updates and their impact on Partners, as provided in the introductory email that was sent to Partners.

Phase 1



Spend 10 minutes on this section.

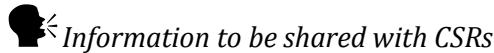
The Phase 1 call should accomplish these tasks:

- Establish the correct Partner contact for the call-down discussion (this should be the HQ Primary Program Contact)
- Confirm that the Partner has read the introductory email sent on December 5
- Discuss the organization changes at a high level
- Schedule a follow-up call for Phase 2

Phase 1 is expected to begin during the second week of December and last through end of January or early February.

Call Attempts

Agents will make three attempts to contact Partner in this phase. They will reach out to the HQ Primary Program Contact the first two times (this is listed in VMT and in the PGPT Report).



If there is no success reaching this person, the third attempt can be used to contact a Business Decision Maker listed in VMT (Company Search > Account Information > Assign Contact Roles > Program Contacts).

What can an RSC Agent do if the HQ Primary Program Contact cannot be reached after two attempts?

Microsoft Partner Network

Wild Apricot Inc. Organization Partner ID: 1015232 [Active] [Sign Out](#)

VMT Home Manage Company Home Membership Status Requirements & Assets Organization Information Orders & Benefits Administration
[Company Search](#) >> [Account Information](#) >> [Assign Contact Roles](#) Signed in as Fiore, Kristin

Manage People

Associated People Add New People Pending People Microsoft Certified Professionals **Program Contacts** Privileges

Use this table to assign a contact role to an Associated Individual, or remove an Individual from a contact role. To fill an empty role or change the Individual assigned to that role, click Assign. A search window will open, allowing you to locate the desired Individual to fill that role. To remove an Individual from a role, click Remove.

Select Location
 [Select](#)

Program Contacts -- Wild Apricot Inc. (TORONTO)

Contact Roles	Name	Technical ID	Associated Location	City	E-mail	Rights
*Primary Program Contact						Global Assign Remove
*Executive Contact						Global Assign Remove
*Sales/Marketing Contact						Global Assign Remove
*First Technical Contact						Local Assign Remove
Second Technical Contact						Global Assign Remove
Third Technical Contact						Global Assign Remove

Contact information removed



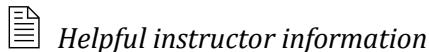
If agents don't reach the individuals they are contacting, they should leave voice mails. If three attempts were made and agents were unable to reach any of the individuals, they can follow up with an e-mail (a different template is provided for this situation).

Call Preparation

Before calling a Partner, be sure you have done these things:

1. Review the introductory email that went out to Partners on December 5 and be comfortable discussing that information at a high level.
2. In case the Partner would like to move directly into Phase 2 on the first call, agents MUST KNOW how to read the PGPT report as well before they make the Phase 1 call.
3. Be prepared to schedule a follow-up meeting with the Partner for the February – May time frame.

Call Content



Helpful instructor information
Open the Call Scripts folder and view the script for this call.

Here is a breakdown of the content and timing for this call. Note that the entire time for the call should be approximately 16 minutes.

ACTIVITY	DETAILED DESCRIPTION OF STEPS / TASKS	MINS
Prep Work	TOTAL Prep Work	3.00
	Review VKB Article/Training (if needed)	0.50
	Review e-mail that went out to all partners (if needed)	0.50
	Partner call list	0.25
	Look up correct contact person in VMT	0.50
	Review Partner specific details	1.00
	Open ConnectUs to log activity	0.25
Talk Time	TOTAL Talk Time	10.00
	Open - Purpose of Call	2.00
	Explain Changes	5.00
	Coordinate next call	2.00
	Wrap Up Call	1.00
Wrap-up	TOTAL Wrap Up	3.00
	Document notes in ConnectUs	1.50
	Confirmation e-mail for Phase 2 call to Partner	1.50

If a Partner asks why this change is happening, RSC Agents may provide this explanation:

“We are making this change to ensure that our customers work with Partners who can meet their capacity and capability needs. We want to provide deeper partnerships via rewards and enablement while ensuring an optimal customer experience. Additionally, this will allow local Microsoft offices to identify Partners with high capabilities in their area and engage them appropriately.”

If a Partner would like to move immediately into Phase 2 during this first call, agents should be able to do this. This is why it is important to understand the PGPT report before the first call.

Post-Call Activity

After completing a Phase 1 call, RSC Agents will send a follow-up email to Partners that includes the scheduled time for the Phase 2 call. This template is located on the extranet.

rest of course removed