



Customer Journey-in-a-Box | Playbook

# Surface Customer Workshops Investment Funds (SWIF)

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

Workshops play a very important role in the customer journey as it enables customers to experience how innovative & premium devices with modern management can deliver value and solve for pain points and/or enhance modern work. They are best followed with a device seeding to increase the conversion rate.

## ⚡ Priority

- Grow Surface account penetration

## ★ Hero SKU

- Surface PC and Hub devices & accessories

## 🕒 Segment

- Strategic
- Major Commercial & Public Sector
- Corporate and SMB Scale

## 🏗️ Up/cross sell path

- M365 workloads

## 📊 KPIs

- # Workshops & Programs
- # Customer Adds

## 🗃️ Solution Area

- Modern Work: Surface

## Audience

### Customer targeting

- Customers from all segments and industries are eligible for SWIF workshops.
- We however suggest that you:
  - select customers, with whom you have had a previous engagement with (demand generation campaign, initial customer qualification) .
  - focus on managed customers eligible for the customer adds partner incentive .
  - align with your Microsoft PDM to Identify high propensity customers.

### Buyer Persona (Key decision makers)

- For a successful device project aim to engage both IT and Business decision makers as well as HR leads.

## Campaign material

- **Surface Modern Workshops via SWIF (1: few)**  
The Surface Modern Workshops (SMW) are partner-led, pre-sales engagements with customers, designed to show the value of modern solutions with Surface and Microsoft 365 and help partners drive customer demand. Workshops cover the entire Surface device family, innovative approaches to modern management and deployment with Windows Autopilot, and how partners can bring it all together.
- **Customer Immersion Experiences (CIEs) via SWIF (1:1)**  
A Customer Immersion Experience (CIE) is a facilitated, hands-on workshop that allows customers (BDMs, ITDMs, IT Pros and End-users) to test-drive the latest Microsoft Modern Work solutions in a live cloud environment.

### Bill of Materials (BOMs)

- [Surface Modern Workshops \(SMW\)](#)
- [Surface Customer Immersion Experiences \(CIEs\)](#)
- [Surface Digital Marketing Content \(DMC\) Campaigns](#)

### Additional resources

- [Partner led marketing guidelines](#)
- [Brand Central](#)

# Partner

## Criteria

- ✔ Partners must be a Surface Authorized Device Reseller.
- ✔ Partners can conduct the Workshops themselves or through an approved 3party trained vendor.
- ✔ Workshops can be 1: few or 1:1.
- ✔ Partners are responsible to deliver POE as per local compliance requirements for POs.
- ✔ In addition, they must provide details of the workshop: date, number of attendees and customer and TPIDs. This data will support the performance results.

## 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](#)

## 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?

# 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](https://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](https://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](https://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

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