

IBM

Co-Marketing

Guide

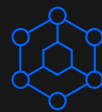
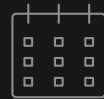


Table of contents

Introduction to Co-Marketing & how to use the guide



Welcome to the IBM Co-Marketing Guide

This guide will help you request Co-Marketing funds, plan your activities and file for reimbursement.

You may need to refer to this guide often, so be sure to bookmark it.



Hi, I'm Marcy and I'm here to walk you through IBM Co-Marketing!

Getting started



Benefits

As an IBM Business Partner, you have access to key advantages that differentiate and grow your business. Co-Marketing is one of several marketing benefits available, all designed to help you effectively reach your audience and generate new leads. You can combine Co-Marketing funds with other IBM marketing benefits to save time and effort.



Terms & Conditions

When you accept your Co-Marketing Incentive Offering you will also need to read, accept and sign the Co-Marketing Terms and Conditions (Ts&Cs). This guide is a companion to the Ts&Cs.



Funding

With Co-Marketing, we provide you with marketing funds to help offset the costs as you drive demand for you and IBM when promoting products and services operating on or containing IBM products and services.



Co-Marketing Center tool

You will use the (CMC) tool to accept your Incentive Offering(s), sign the Ts&Cs, request Co-Marketing funds and submit your claim for reimbursement once you have completed your marketing activity.



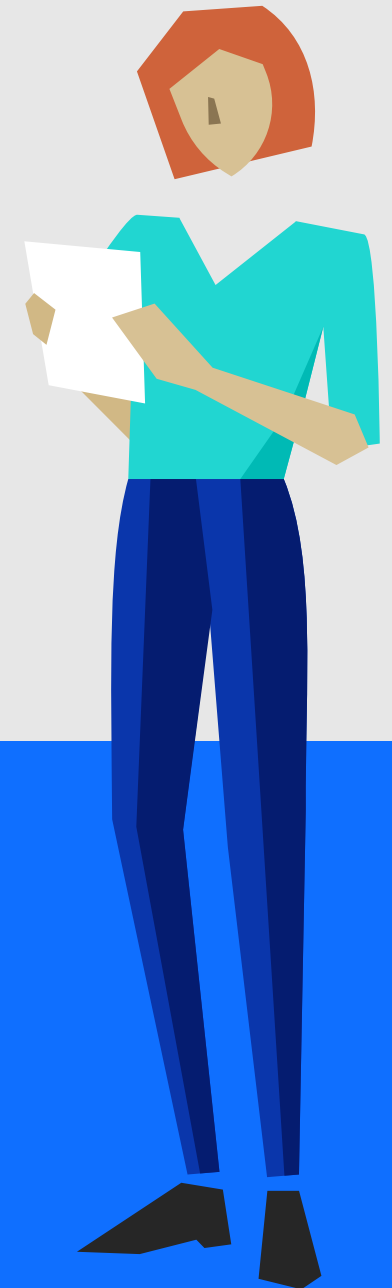
Incentive Offerings

Multiple Co-Marketing Incentive Offerings are available, each aligned with specific IBM initiatives. You may be eligible for funds from one or more Co-Marketing Incentive Offering(s). In case of conflict between this guide and Ts&Cs, the latter will always prevail.



Contact us

If you have questions about Co-Marketing, contact your local IBM Co-Marketing Program Manager, or send an email to ibmcmc@us.ibm.com



Definitions and acronyms

Advertorial

Advertisement in the form of editorial content. This expense is not reimbursable.

Country Enterprise ID (CEID)

Your company's PartnerWorld ID which we use to recognize you.

Claim

Your request for reimbursement in the Co-Marketing Center tool. Complete proof of performance will help speed up the approval of your claim.

Co-Marketing Program Manager

Your IBM Co-Marketing contact who will help you with any Co-Marketing related questions.

Conference Pass

A trade show ticket, which gives you access to the entire event.

Exhibitor Passes

A trade show ticket, which gives you access to the exhibitor hall.

Gift Card

Pre-paid (stored-value) money card issued by a retailer or bank. This expense is not reimbursable.

Government Owned Entity (GOE)

Includes any officer, director, employee or representative of:

→ The government of any country, state, region, province, county, city, town, territory, municipality or other locality, including any government agency, department or public enterprise

→ Any entity subject to public procurement laws or regulations

→ Any public international organization (e.g., the United Nations or World Health Organization)

→ Any government instrumentality, including any utility company, organization licensed to provide public services, educational institution, or other entity, whether privately held, publicly traded or otherwise constituted, that is owned, controlled or funded by any entity listed earlier or by a government official

→ Commercial business enterprises operating under a federal government power of attorney, or with Management Operating Contractor (MOC) status

IBM-approved Co-Marketing Agency

An agency contracted by us to assist you in the design and execution of your Co-Marketing activities. You can also delegate CMC administration and lead entry to them.

Marketing Activity Plan (MAP)

Funding request for your planned Co-Marketing activity. You need to submit your MAP in the Co-Marketing Center tool.

My Sales Assistant (MySA)

where leads, generated by your Co-Marketing activities, must be entered.

IBM PartnerWorld Co-Marketing Terms and Conditions (Ts&Cs)

The contract between you and IBM which you must accept before utilizing Co-Marketing funds. (This guide is a companion to these Terms and Conditions).

Unique Control ID (UCID)

Identifier for your Co-Marketing campaign created after your MAP is approved. Each activity has an associated, unique UCID.

Itemized Third-Party Invoice

An invoice that describes an expense and sets forth the amount of the expense, the date it was incurred and the supplier seeking payment.

IBM Digital Content Marketing



Introduction

IBM Digital Content Marketing (DCM) is a free-of-charge marketing automation tool that has ready-to-use digital marketing tactics and assets.

Who can use it

Business Partners registered in PartnerWorld with one capability or competency and higher.

How to access DCM



Register for DCM on



(after confirmed registration)



Ready-to-use campaigns & tactics

Digital campaigns and tactics such as emails with integrated offers, lead response forms, web syndication pages, web banners, and social media content are ready to use (or easily customized) in the DCM platform.

Simply activate the digital tactics, step through the personalization activities and engage your clients.

Choose from a Business Partner library of assets, or customize your own PDF assets to be distributed digitally.

Analyze the executed digital tactics in DCM with insightful metrics and use campaign collateral for follow-up activities.



Learn more about DCM

Webcast replays are listed in date order on our Digital Content Marketing. Here you will find videos on Content Syndication, email marketing, social automation and digital marketing best practices for you to create an integrated marketing campaign.

Already using other marketing tools? Easy App Connectors port IBM DCM content to your existing marketing tools.

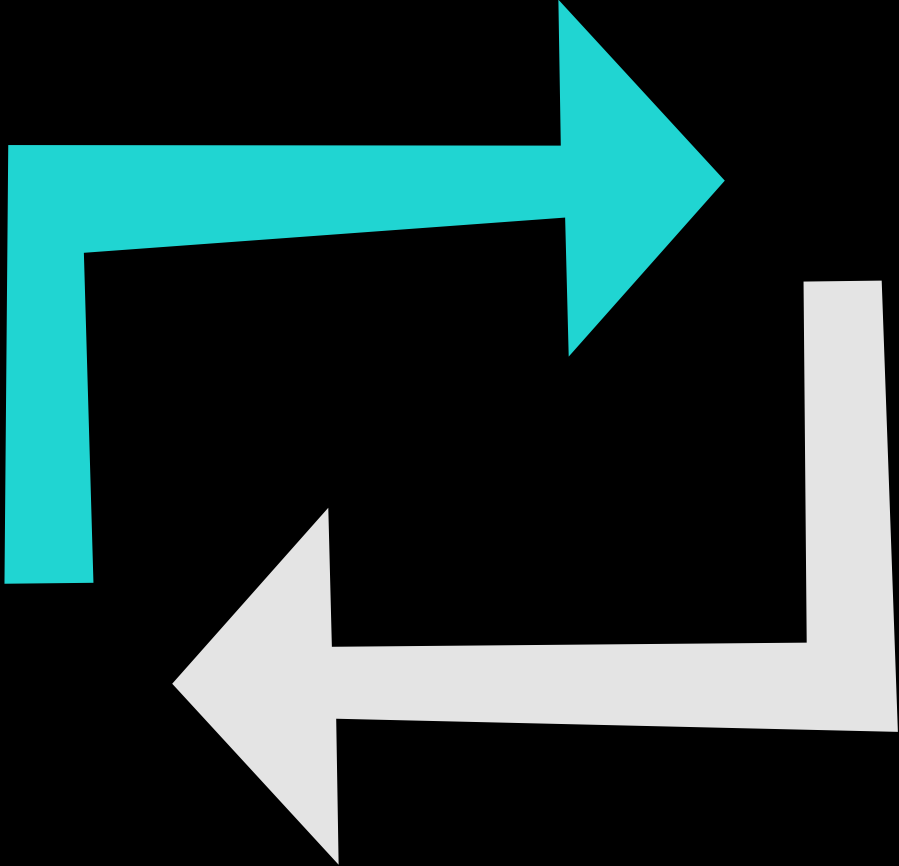
contains videos, tutorials, guides and FAQs about Digital Marketing.

Need Help?

Send an email to IBM Digital Content Marketing at ibmdcm@us.ibm.com



Co-Marketing process



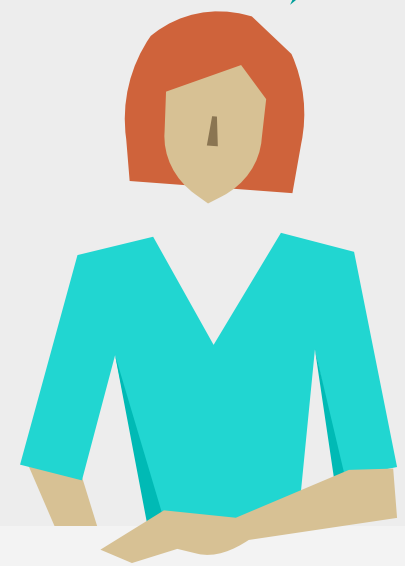
High level Co-Marketing process

Eligible Business Partners can apply for IBM Co-Marketing to help fund their campaigns.

The Co-Marketing Center (CMC) is the tool where Incentive Offerings, Marketing Activity Plans and claims are managed.



This graph shows you how the Co-Marketing process works



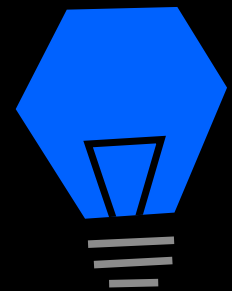
Understanding the graph

- MAP Marketing Activity Plan
- Ts&Cs Terms and Conditions
- UCID Unique Control Identifier

- Business Partner Action
- IBM Action

Spending Categories

All Co-Marketing activities must promote, demonstrate or explain IBM products or services, or your solution that includes IBM products or services.



Digital Marketing



Digital Marketing

This section covers all online marketing communications including webpages, forums and digital activities such as:

- Email campaigns
- Search engine optimization
- Social media campaigns
- Web advertising
- Webinars

Which expenses are reimbursable?

- ✓ Creation, production and distribution of digital media
- ✓ Purchased list of prospects
- ✓ Lead generation services such as providing contact information for prospects, database and internet searching, prospecting and email nurturing
- ✓ Temporary personnel hired directly or retained through a staffing company for an approved campaign
- ✓
- ✓
- ✓ Inbound marketing services
- ✓ Marketing Consultation provided by IBM or a reputable, qualified marketing firm*

* Marketing Consultation must be for an approved digital marketing activity. Services include setting marketing strategy and associated targeting and messaging, SWOT analysis, developing a response platform and progress tracking

Which expenses are not reimbursable?

We are unable to offer reimbursement for certain types of expenses. However, provided there are no other issues or concerns, such expenses will not impact the rest of your claim.

Non-reimbursable expenses include:

- ✗ Sales incentives
- ✗
- ✗ Services, capital equipment or equipment used in routine business operations (such as furnishings, telephone equipment, corporate signage or company stationery)
- ✗ Software, demonstration equipment or visual aid equipment (such as PCs, laptops and monitors)
- ✗
- ✗ Prizes of material value which are awarded through lottery, drawing or other game of chance
- ✗ Activities where you are promoting both IBM and IBM competitor products and technologies without prior written approval

Which expenses are not allowed?

The following activities will cause your entire claim to be denied:

- ✗ Providing cash, cash equivalent or gift cards convertible to cash to any participant
- ✗ Paying speaker fees to any
- ✗ Organizing or participating in a lottery, drawing and other game of chance where the value of the prizes exceeds the per-person gift limit
- ✗ Exceeding per-person limits for gifts, meals/refreshments

Be sure to keep Third-Party Invoices, make a screenshot of the social media, ad, creative assets or anything else you will need later on as proof of performance.

Proof of performance

All Digital Marketing activities

- Itemized Third-Party Invoices
- Copy of digital media (such as screenshots from social media, blogs, videos or emails from email campaigns)

Additional activities and their proof of performance:

Inbound marketing services

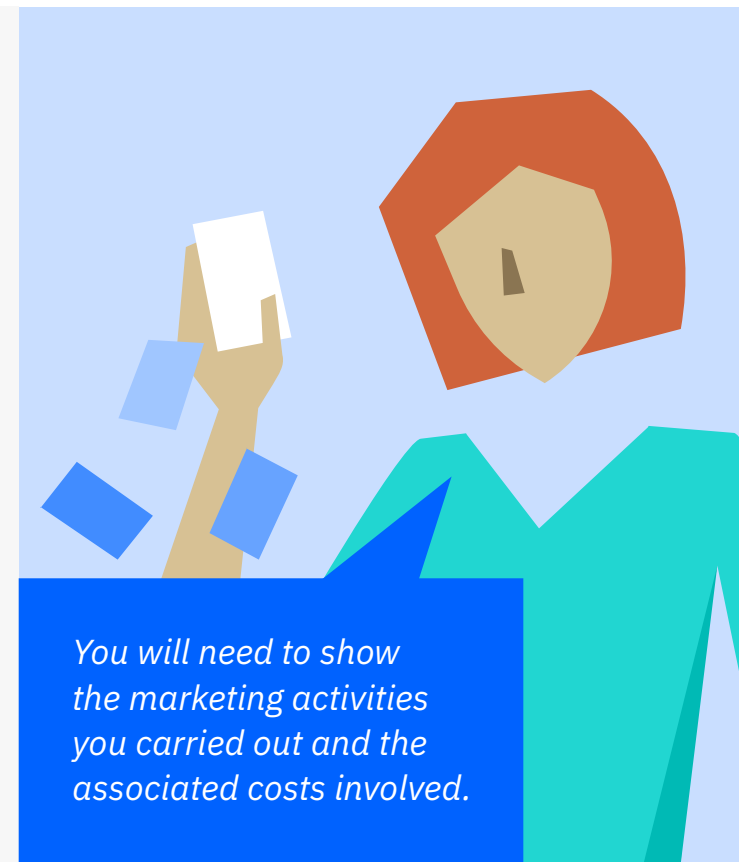
- + Vendor contract identifying the services

Lead generation and webcasts

- + Vendor contract where the services are identified

Search engine optimization

- + Screenshots demonstrating the SEO work carried out



You will need to show the marketing activities you carried out and the associated costs involved.

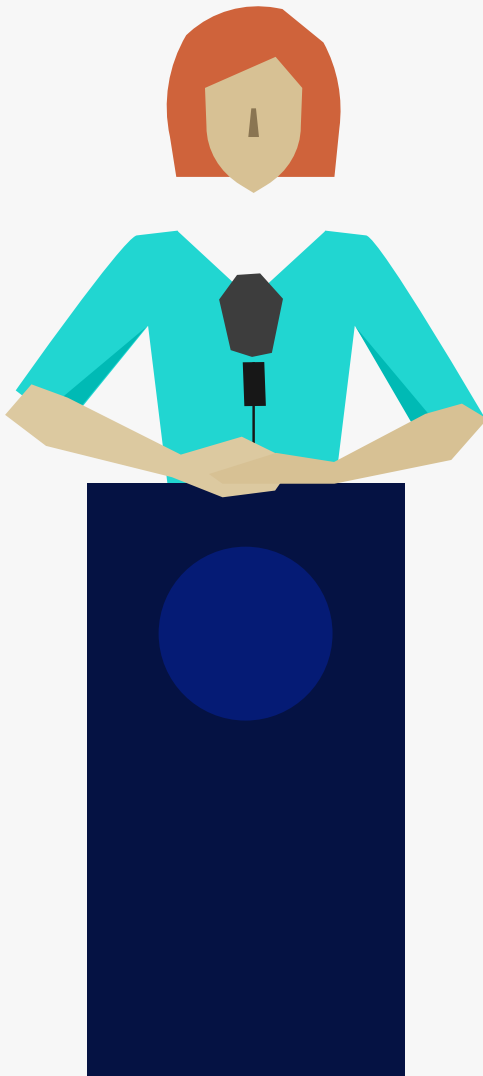
Temporary personnel

- + Timesheet (signed and approved by your management), including employee names, job titles, start dates, total hours worked, total salaries paid and a description of the activities completed

Webinars and webcasts

- + Invitation or agenda

Reimbursing promotional gifts and speaker fees



Promotional gifts

We can reimburse promotional gifts provided as part of your Digital Marketing activity. Include the cost estimate for gifts in your MAP to ensure those expenses are considered at claim time. We only reimburse expenses you provided an estimate for. You must still submit the invoice with the gift expenses even if you don't want reimbursement from IBM for them.



Speaker fees

Speakers cannot be IBM employees, prospective clients, or your own employees. We will only reimburse expenses you have provided estimates for.



Per-person limits for gifts

Ensure your gifts remain within the per-person limit set out in your MAP. For example, if you purchase four different gifts, in total they cannot exceed the per-person limit. This includes associated expenses like engraving, packaging and mailing. Even if you won't seek reimbursement, you still need to stick to the per-person limit.



Per-MAP limits for speaker fees

The per-MAP limits apply to all speakers covered by the same MAP. For example, if you claim fees for two speakers, the MAP-limit applies to the total sum of the speaker fees. You can find the limits in the Incentive Offering details or when submitting your MAP.



Per-MAP limits for gifts

The per-MAP limits apply to all gifts covered by a single MAP. If you purchase four different gifts, the limit applies to the sum of the costs for all of them. You can exceed the per-MAP limit, but not the per-person limit. Be aware that activities exceeding the per-MAP limit will only be reimbursed up to this amount.



Travel and lodging for speakers

We do not reimburse travel, lodging or per diem expenses for speakers. If you would like to learn more, reach out to your Co-Marketing Program Manager.

Examples of Digital Marketing activities

Email marketing

Let's say you're organizing a digital campaign to promote IBM Watson Workspace.

You begin by sending out an introductory email, then a second email with more in-depth information that references a case study and demo showing how Watson Workspace drives team collaboration. In parallel, you create a landing page about Watson Workspace and direct prospects there.

Finally, the campaign will conclude with a third email directing prospects to the website and scheduling one-on-one meetings.

Proof of performance

- Copies of each email
- Screenshot of the landing page
- Copy of the demo
- Third-Party Invoices for email creation and distribution, landing page development and demo creation

Search engine marketing

As part of a campaign promoting Business Analytics, you intend to drive traffic to your website using Search Engine Marketing.

You create a list of keywords (like 'business', 'analytics', 'business analytics' and your company name) and choose Google as your Search Engine Marketing provider.

Users who search for one or more of your keywords will find a URL to your website within the first few search results.

Proof of performance

- Screenshot from Google showing your company name as a result when searching for business analytics products
- Google invoice

Webinar

You plan to host a webinar to promote IBM Security.

You invite a security expert to speak about security issues in the targeted industry.

Three weeks before the meeting, you send invitation emails with the registration landing page to the invitees, followed by a reminder email one week before the meeting. After the webinar, you send a thank-you email and gifts to follow up.

Proof of performance

- Copy of the webinar invitation
- Invoices for the registration page creation, webinar management, gifts and the speaker fee

Save time and money

Check out

, our platform of marketing tools like web content syndication, email marketing and social automation.

You can browse through our database of ready-to-execute activities and larger campaigns which are designed to help you to generate leads and save you time and money.



Event Marketing



Event Marketing

This section covers:

- Customer conferences
- Marketing seminars
- IBM trade shows
- Third-party trade shows

Event venues

Selecting a venue

All venues must be appropriate for a business meeting. When selecting a venue it is important to determine if _____ (GOE) employees will attend. You have more flexibility in selecting event venues where no GOE employees will attend as there may be legal restrictions which limit GOE employees from attending certain venues.

For events without GOE Employees

You can select a briefing or conference center, exhibit hall or a restaurant, hotel or other location with a separate private meeting room where the location and meeting room are both appropriate for a business meeting.

For events with GOE employees

You can select a briefing or conference center, exhibit hall, hotel or a restaurant appropriate for a business meeting.

Additional venue options

If you want to use a different type of venue, contact your Co-Marketing Program Manager to discuss your venue request. We will consider the following:

- Does the venue have a separate, closed-to-the-public space for meetings?
- Is it regularly used for business meetings?
- Does it have audio/visual equipment and seating to present business meeting content?
- Does the venue and related activities create an appropriate atmosphere for a business meeting?



Customer conference and Marketing seminar

A face-to-face event held over one or multiple days for prospective clients to increase sales of your and IBM products and services. Most events typically include a solution or product presentation and one-on-one briefings with clients and prospects.

Eligible expenses

- Facility or venue rental costs (including IBM Briefing Center expenses)
- Digital and Other Marketing expenses related to the event
- Utilities, telephone, internet
- Shipping and delivery of event materials
- Meals/Refreshments
- Promotional gifts
- Local courtesy ground transportation to and from the event
- Speaker fees
- Entertainment for non-employees
- Lead retrieval system

Required proof of performance

- Itemized Third-Party Invoices
- Agenda
- Proof of IBM content
- See additional proof of performance in the Digital and Other Marketing sections



Trade shows

Exhibiting at or sponsoring an IBM or third-party trade show. Does not include trade shows that you organized.

Required proof of performance

IBM trade shows

- Itemized Third-Party Invoices
- Sponsorship package details
- See additional proof of performance in the Digital and Other Marketing sections
- Agenda for activities you organized in conjunction with IBM trade show
- Proof of IBM content for activities you organized in conjunction with an IBM trade show

Third-Party trade shows

- Itemized Third-Party Invoices
- Sponsorship package details
- See additional proof of performance in the Digital and Other Marketing sections
- Agenda
- Evidence of IBM content

Eligible expenses

- Sponsorship fees
- Digital and Other Marketing Expenses related to the event
- Rental of furnishings, carpet and A/V equipment
- Booth assembly and cleaning
- Utilities, telephone, internet
- Shipping and delivery of event materials
- Signage and booth display
- Meals/Refreshments
- Promotional gifts
- Speaker fees
- Entertainment for non-employees (except for third-party trade shows)
- Lead retrieval system

Reimbursing sponsorship packages for a third-party or IBM trade show

Some benefits in the sponsorship package could make your claim ineligible. This section will explain what you can do if your package includes passes, lodging, or a game of chance.



Sponsoring meals and refreshments

You can sponsor pre-approved coffee and/or dessert breaks, meals and receptions at IBM trade shows. For third-party trade shows, only coffee and/or dessert breaks can be sponsored.



Event and trade show passes

Trade show passes included in the sponsorship package must only be used by your employees or non-GOE client employees with pre-approval. At MAP time, you will need to select how you plan to use the passes. At claim time, you need to identify the individuals who received the passes along with the means to contact them. Passes cannot be given to IBM employees.



Sponsorship packages that include lodging

Sponsorship packages which include lodging as a benefit will be reimbursed if the lodging is used only by your employees and all other benefits included in the package are eligible for reimbursement. At MAP time, you need to identify your employees who will use the lodging and the means to contact them and the event organizer. You will have to confirm these details when submitting your claim



Game of chance included in the sponsorship package

You may choose to participate in the game of chance if you meet the criteria below. Otherwise, you need to opt out.

You can **participate** in the game of chance by stamping trade show booklets of visitors to your booth. In order to do so, you need to obtain written confirmation from the event organizer that:

- The game of chance and the prize comply with all applicable laws
- The prize winner will be selected randomly
- _____ will not be permitted to win the prize exceeding the per-person limit for gifts

You need to submit the copy of the confirmation from the event organizer with your claim.

To **opt out**:

- Submit a copy of the opt-out email with your claim
- Send an email to the event organizer prior to the event stating your intention to opt out of the games of chance
- Confirm in writing that you did not participate in the game of chance



Event press release

If the sponsorship package does not include press release costs, we will reimburse them provided that you follow the _____ on the PartnerWorld page for preparing and issuing press releases.

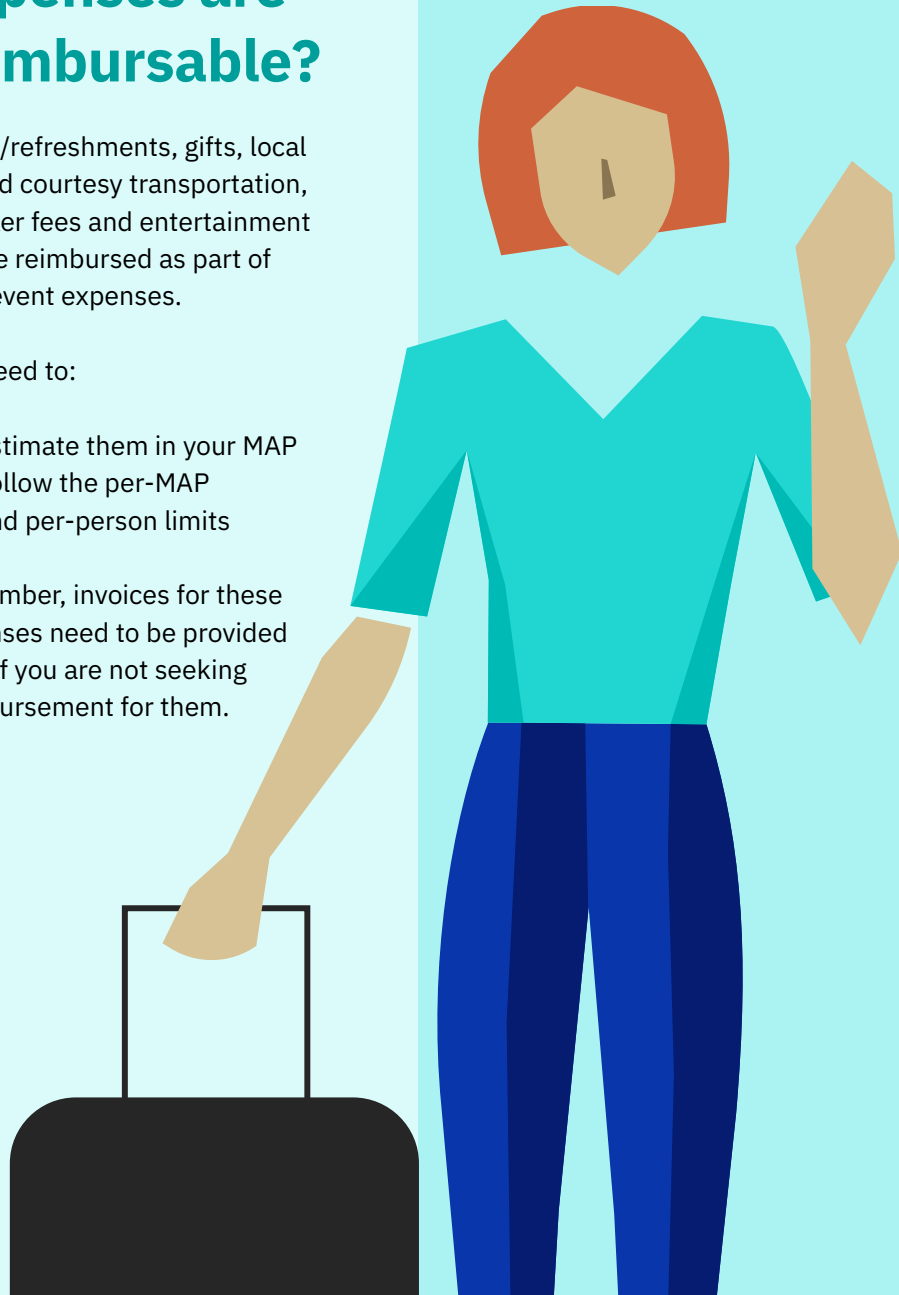
Which expenses are reimbursable?

Meals/refreshments, gifts, local ground courtesy transportation, speaker fees and entertainment can be reimbursed as part of your event expenses.

You need to:

- Estimate them in your MAP
- Follow the per-MAP and per-person limits

Remember, invoices for these expenses need to be provided even if you are not seeking reimbursement for them.



Per-person and per-MAP limits

There are two types of limits – per-person and per-MAP. The limits can be found in the Incentive Offering details in CMC or when submitting your MAP.

You can exceed the per-MAP limit, but not the per-person limit. Be aware that activities exceeding the per-MAP limit will only be reimbursed up to this amount. Exceeding the per-person limits will make your entire claim ineligible. Both limits apply to all activities covered by a single MAP.



Local courtesy ground transportation

We will reimburse you for provided event courtesy transportation, such as a taxi or bus, including parking fees, for attendees. Not an eligible expense for trade shows.



Meals/Refreshments

Can be offered immediately before, during or immediately after the event at the selected event venue or restaurant that is appropriate for a business meeting. Expenses for alcohol are allowed only in accordance with local laws, if reasonable in price and offered within a professional business setting. Associated sales taxes and gratuities are included within the per-person and per-MAP limits. The per-person limit is a daily limit.

At IBM trade shows, you can host a breakfast, lunch or dinner if the meal does not conflict with any scheduled trade show activities.

If you have questions about daily limits, reach out to your Co-Marketing Program Manager.



Promotional gifts

The cost of a gift and associated expenses such as engraving, packaging and mailing are included within the per-person gift limit. The number of the gifts qualifying for reimbursement will be based on the estimated number of attendees. If the actual number of attendees is higher than the estimate, reimbursement will be based on the actual number of attendees.



Speaker fees

Speakers cannot be IBM, prospective client or your employees. Note that paying speaker fees to a GOE speaker will make your entire claim ineligible for reimbursement.

We do not reimburse for travel, accommodation and per diem expenses for speakers.



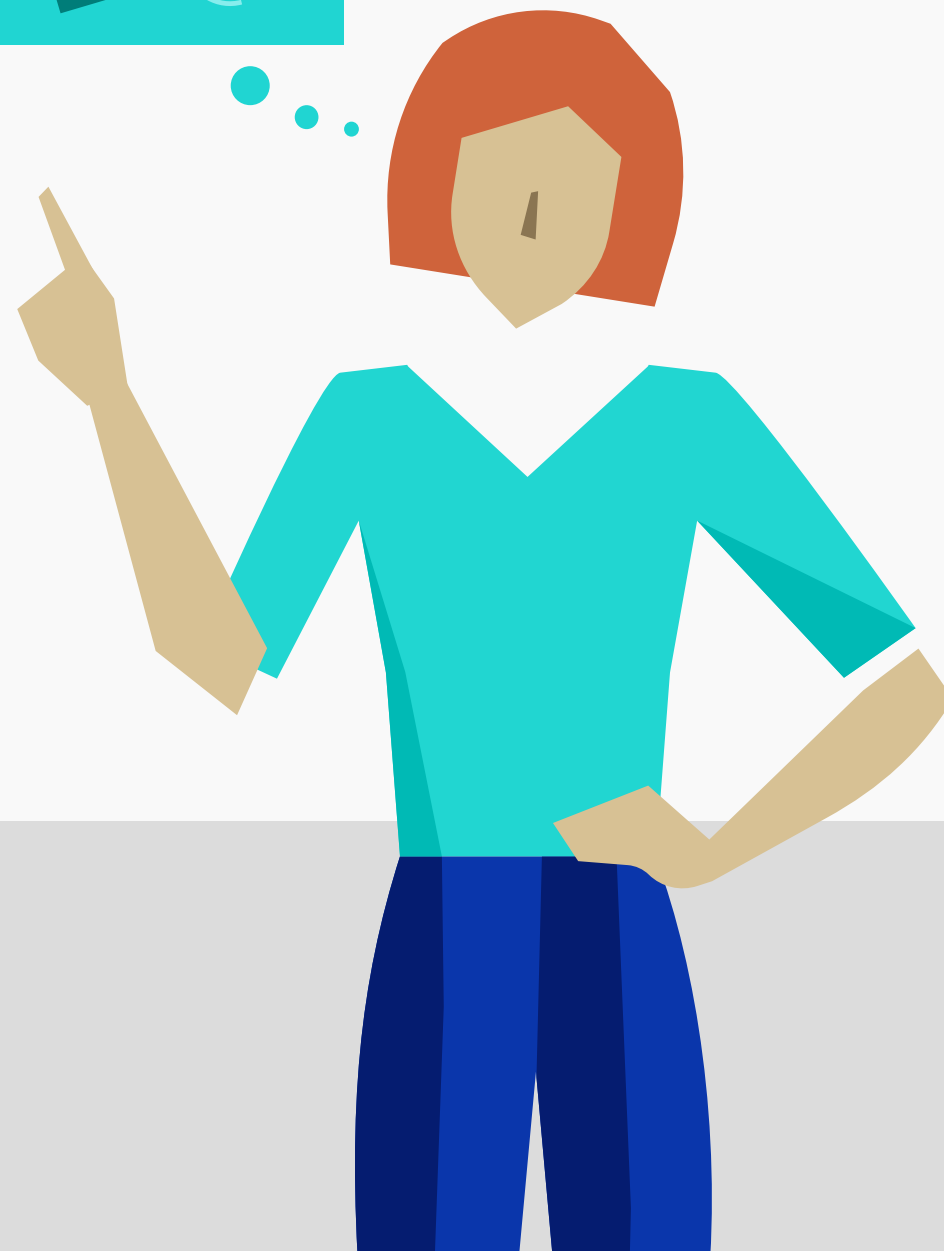
Entertainment

We will reimburse entertainment that is reasonable, customary and an integral part of your marketing activity. GOE employees must be permitted to pay the fair market value of the entertainment even if IBM is not reimbursing those expenses.

At IBM trade shows, you can host entertainment if it does not conflict with any activity scheduled by IBM as part of the trade show.

Not an eligible expense for third-party trade shows.

If you would like to learn more about the limits, reach out to your Co-Marketing Program Manager.

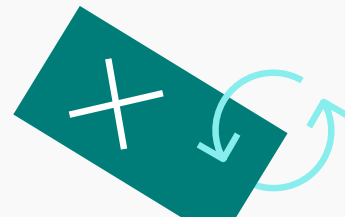


Which expenses are not reimbursable?

We are unable to reimburse certain types of expenses. However, provided there are no other issues or concerns, such expenses will not impact the rest of your claim. If you plan to promote both IBM and IBM competitor products

and technologies, you will need the approval of your IBM Co-Marketing Program Manager at MAP submission time. Non-reimbursable expenses include:

- ✗ Sales incentives
- ✗ Advertisements
- ✗ Services, capital equipment or equipment used in routine business operations (such as furnishings, telephone equipment, corporate signage or company stationery)
- ✗ Software, demonstration equipment or visual aid equipment (such as PCs, laptops and monitors)
- ✗ Gift cards
- ✗ Prizes of material value which are awarded through lottery, drawing or other game of chance
- ✗ Sponsorship fee for IBM to participate in a Business Partner-led event
- ✗ to attend an IBM or third-party event in lieu of purchasing a sponsorship package. If you need to purchase more passes for your employees to staff the booth, we will reimburse the least costly passes for that purpose
- ✗ Travel, lodging and living expenses (such as per diem) excluding local courtesy ground transportation



Which expenses are not allowed?

The following activities could result in your entire claim being denied. To prevent this from happening, here are some things to avoid:



- ✗ Providing cash, cash equivalent or gift cards convertible to cash
- ✗ Exceeding per-person limits for gifts, meals/refreshments and entertainment as part of the event or satellite activities
- ✗ Inviting or allowing family members or guests of your customers or prospects to participate in a marketing activity, or paying their expenses
- ✗ Organizing or participating in a lottery, drawing and other games of chance where the value of the prizes exceeds the per-person gift limit
- ✗ Paying speaker fees to any
- ✗ Paying a sponsorship or hosting an event for the benefit of a not-for-profit organization, without prior IBM approval
- ✗ Holding an event at an inappropriate venue
- ✗ Providing entertainment as part of the event, or any satellite activities in connection with the event that includes GOE employees where such employees have not been permitted to pay the fair market value of entertainment

Examples of Event Marketing activities

Business breakfast

You're organizing an event to promote IBM Cloud products. You send out an invitation email leading to the landing page and promote the event on social media. A week before, you send a reminder email. The event takes place in a hotel's business meeting room. The agenda starts with a business breakfast, followed by sessions about IBM Cloud and concludes with lunch. Every attendee gets a small gift. The week after the event you send a follow up email with more information about IBM Cloud and a call to action.

Proof of performance

- Copy of the invitation, reminder and follow up emails
- Screenshot of the landing page and other social media activity
- Event agenda
- Invoices for emails, landing page creation, social media ads, venue rental, meals and promotional gifts

Trade show

You want to sponsor a third-party trade show which will be a great opportunity to present your IBM product portfolio to new prospects. The sponsorship will include a booth, logo visibility and a speaker slot on the main stage.

Proof of performance

- Copy of the agenda
- Presentation showing IBM promotion
- Invoice for the sponsorship package
- Sponsorship package details

Sponsorship

You want to sponsor an IBM trade show to present your company as an IBM reseller. The sponsorship will include a booth, logo visibility and two trade show passes.

Proof of performance

- Invoice for the sponsorship package
- Sponsorship package details



Other Marketing



Other Marketing

This section covers:

- Advertising
- Telemarketing
- Direct Marketing



Common expenses

- ✓ Purchased list of prospects
- ✓ Lead generation services such as providing contact information for prospects, database and internet searching and prospecting
- ✓ Inbound marketing services
- ✓ Temporary personnel hired directly or retained through a staffing company for an approved campaign
- ✓ Related promotional gift
- ✓ Marketing Consultation provided by IBM or a reputable, qualified marketing firm*

*Marketing Consultation must be for an approved marketing activity. Services include setting marketing strategy and associated targeting and messaging, SWOT analysis, developing a response platform and progress tracking.

Proof of performance

Lead generation services

- Itemized Third-Party Invoices
- Vendor contract where the services are identified

Inbound marketing services

- Itemized Third-Party Invoices
- Vendor contract identifying the services

Temporary personnel

- Itemized Third-Party Invoices
- Timesheet (signed and approved by your management), including employee names, job titles, start dates, total hours worked, total salaries paid and a description of the activities completed

Which expenses are not reimbursable?

We are unable to reimburse certain types of expenses. However, provided there are no other issues or concerns, such expenses will not impact the rest of your claim.

Non-reimbursable expenses include:

- × Sales incentives
- ×
- × Services, capital equipment or equipment used in routine business operations (such as furnishings, telephone equipment, corporate signage or company stationery)
- × Software, demonstration equipment or visual aid equipment (such as PCs, laptops and monitors)
- ×
- × Prizes of material value which are awarded through lottery, drawing or other game of chance
- × Activities where you are promoting both IBM and IBM competitor products and technologies without prior written approval

Which expenses are not allowed?

The following activities will cause your entire claim to be denied:

- × Providing cash, cash equivalent or gift cards convertible to cash to any clients
- × Organizing or participating in a lottery, drawing and other games of chance where the value of the prizes exceeds the per-person gift limit
- × Exceeding per-person limits for gifts



Advertising

Creation and placement of ads for demand generation

Reimbursable expenses

Ad creation and placement through advertising media, including:

- Print
- Billboards
- Signage and Banners
- Radio
- Television

Proof of performance

- Itemized Third-Party Invoices
- Evidence of ad placement with date(s) executed
- Copy of ad

Telemarketing

Demand generation marketing via telephone

Reimbursable expenses

- Vendors for telemarketing services

Creation, production and distribution of telemarketing materials, including:

- Scripts
- Call guides
- Briefing materials

Proof of performance

- Itemized Third-Party Invoices
- Copy of scripts, call guides or campaign briefing materials

Direct Marketing

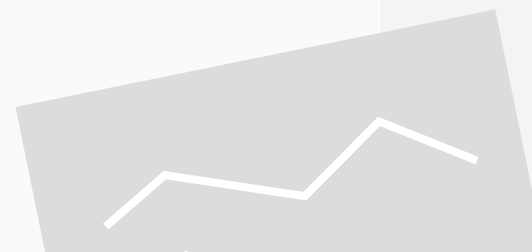
Printed demand generation materials mailed or distributed directly to customers

Reimbursable expenses

- Creation, production and distribution of printed marketing materials
- Postage and shipping for direct mail

Proof of performance

- Itemized Third-Party Invoices
- Copy of the distributed printed marketing materials





Reimbursing promotional gifts



Promotional gifts

We can reimburse promotional gifts provided as part of your Other Marketing activity. Include the cost estimate for gifts in your MAP to ensure those expenses are considered at claim time.

We only reimburse expenses you provided an estimate for. An invoice for promotional gifts still needs to be provided even if we won't reimburse them.



Per-MAP limits for gifts

The per-MAP limits apply to all gifts covered by a single MAP. If you purchase four different gifts, the limit applies to the sum of the costs for all of them. You can exceed the per-MAP limit, but not the per-person limit. Be aware that activities exceeding the per-MAP limit will only be reimbursed up to this amount.



Per-person limits for gifts

Ensure your gifts remain within the per-person limit set out in your MAP. For example, if you purchase four different gifts, in total they cannot exceed the per-person limit. This includes associated expenses like engraving, packaging and mailing. Even if you won't seek reimbursement, you still need to stick to the per-person limit. If you would like to learn more, reach out to your Co-Marketing Program Manager.

Examples of Other Marketing activities

Advertising

You hire an advertising agency to create and place an ad in a tech magazine that your audience subscribes to.

Proof of performance

- Copy of the ad from the magazine
- Invoice from the advertising agency

Direct Marketing

You recently launched a new Power 9 campaign and want to inform your current and potential clients by sending them a direct mailer and a notebook as a gift with your company's logo.

Proof of performance

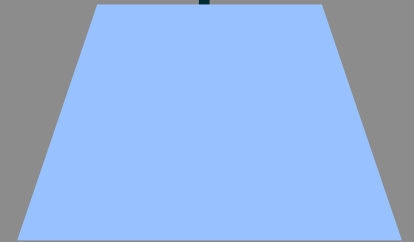
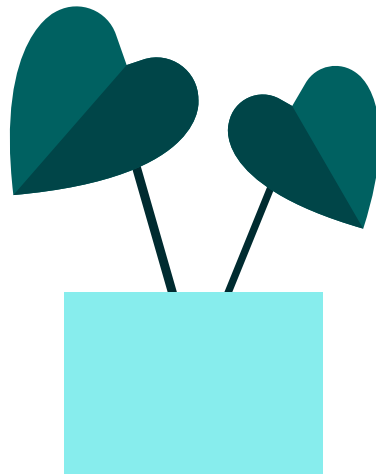
- Copy of the mailer
- Invoices for direct mailing, notebooks
- Receipt for postage expenses

Telemarketing

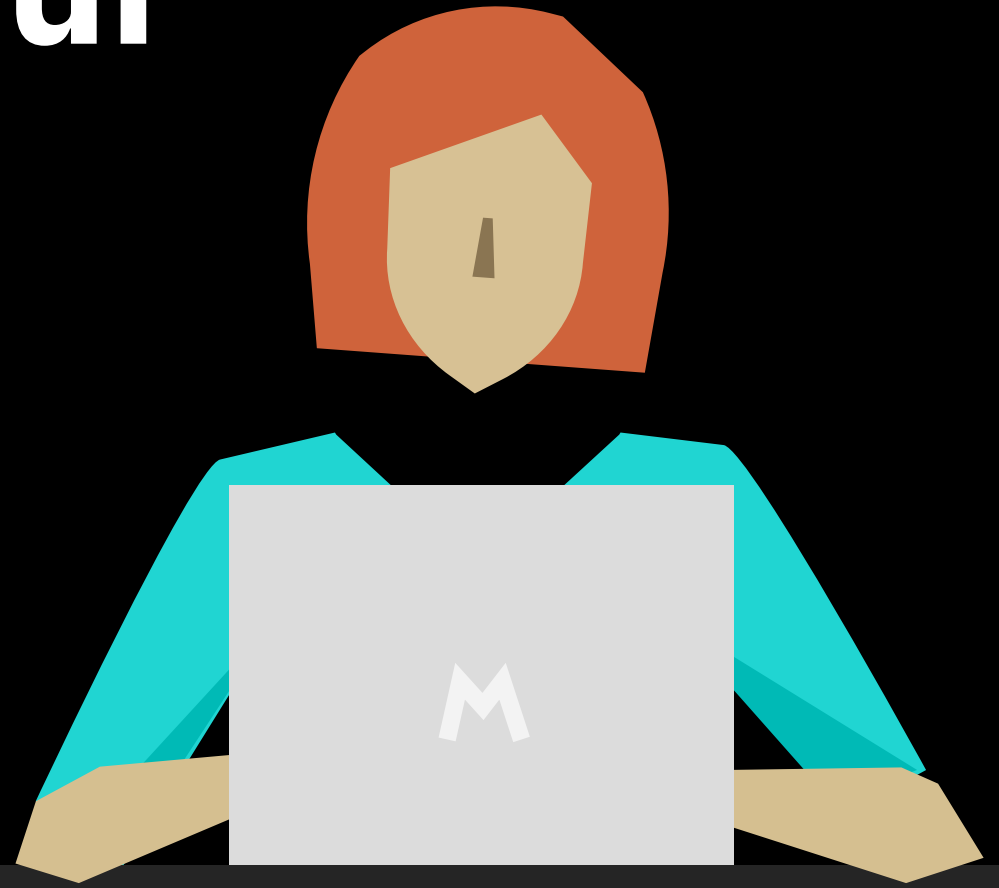
You hire a telemarketing vendor to create a script and call your clients and prospective clients to promote the new IBM Flash offer.

Proof of performance

- Copy of the script
- Invoice from the telemarketing vendor



Submitting your Co-Marketing request



Submitting your funding request

Request Co-Marketing funds by submitting a Marketing Activity Plan in the



6 tips

for your Marketing Activity Plan (MAP)



Ensure your campaign promotes IBM

Top-of-the-funnel activities need to be linked to a campaign which will drive IBM revenue.



Wait for approval before getting started

The following listed expenses may be reimbursable prior to us approving your MAP. Be sure to attach these invoices to your MAP, and we will let you know if these expenses are reimbursable.



Submit your MAP at least 7 calendar days before the start of your planned activity

to give us sufficient time to review and approve your request.



Submit a venue request

to your Co-Marketing Program Manager if your desired location for the event does not meet the description of eligible venues in the section.



Describe your marketing activity and the costs

Providing as much detail as possible can accelerate MAP approval.



Continue to update your MAP

as you finalize your planned activity.

- Advance facility booking
- Bulk production of marketing items
- Annual or on-going fees for marketing services related to demand generation
- Retainers or deposits for agency services
- Advertising
- Eligible event pre-registration sponsorships

Running Co-Marketing activities across borders

As Co-Marketing funds are allocated based on the country associated with your [activity](#), we generally expect activities to be executed in that country.

If your plans are to run the activity in a different country, obtain prior approval from your Co-Marketing Program Manager to ensure:

- The marketing activities leverage your ability to sell IBM products and services in the country where the funds are allocated
- You are complying with the IBM Co-Marketing Terms & Conditions applicable to that country
- You are in line with local tax regulations and, if necessary, seeking tax advice

Lead Progression

Progression activities are designed to turn leads into wins.

Since they are not part of lead generation, it isn't necessary to submit new leads. To qualify for lead progression funding, you will need to:

- Add the opportunity numbers from at least two validated leads to the MAP description field
- Ensure marketing activities are not part of an on-going client relationship
- Your progression marketing activities are defined as unique activities directed at two or more end-user clients for the purposes of progressing leads to a win status



Need extra help?



Co-Marketing Center tool

you can find it on



How to Guides

in the "Help, Education & FAQ" section of the [IBM Co-Marketing](#) home page



Videos

on the IBM Co-Marketing [home page](#)

Submitting your claim

Getting reimbursed for your executed Co-Marketing activity using the



How it works?



Launch CMC from the PartnerWorld website



Create a claim in CMC



Attach proof of performance and expenses



Submit your claim



You're done!

Proof of performance

To support your claim, you need to provide invoices and other documentation. This can include Third-Party Invoices or credit card receipts.

Internal invoice

To claim internal, non-labor expenses, such as postage costs for mail campaigns, you will need an internal invoice on your corporate letterhead.

In-house marketing or production department

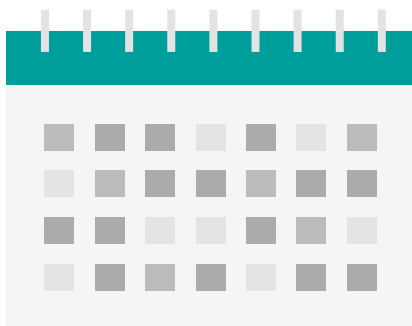
If you have an in-house marketing or production department, you can use your internal company rate card instead of invoices. The rate card needs to pre-date the activity, be approved at MAP time and cannot be created solely for purposes of your Co-Marketing claim. Be sure you understand the use of rate cards as we may verify your in-house production capabilities and rates if necessary.

IBM-approved Co-Marketing agency

If you delegate an activity to an IBM-approved Co-Marketing agency, the agency will be responsible for submitting invoices and other relevant documentation in the CMC tool. You remain responsible for the conduct of the agency.

6 tips

for a successful claim →



60 calendar days

Claims need to be submitted within 60 days of the activity end date in the Marketing Activity Plan (MAP).

After that, your MAP will expire and you won't be able to submit your claim for reimbursement.



Reach out to your Co-Marketing Program Manager

if you miss the deadline for submitting your claim within 60 days after the activity end date in the MAP.



Understand which proof of performance is required

for each spending category in the relevant sections of this guide.



Ensure your claim matches the spending categories

in the MAP as additional spending categories might not be reimbursed. If anything changes, contact your Co-Marketing Program Manager.



Make sure your expenses are itemized

such as a third-party invoice or credit card receipt.



Identify each activity's expenses by UCID

if you are submitting an invoice for multiple activities.



Claim each expense only once

For example, if a brochure is used for multiple activities such as direct mailer and an event, you can claim the costs for the brochure in one claim only.

Ready to get started?
You can find the
on PartnerWorld



How to Guides

in the "Help, Education & FAQ" section of the [CMC](#) home page



Videos

on the IBM Co-Marketing

Payment information



Banking information

We will provide you with instructions on how to give us your banking information in order to facilitate payment.



Currency Conversion

We may choose to reimburse you in USD based on our local financial policies. If you are to be reimbursed in USD, you need to convert that amount to USD based on a valid exchange rate on the date the expense was invoiced. You must use xe.com, oanda.com, Reuters, or a country central bank currency conversion site as the source of the exchange rate for the currency conversion. The same sources must be used when converting your third-party invoices from one currency to another.



Taxes

U.S. sales taxes will be reimbursed. Other non-U.S. transaction taxes included on your third-party invoices such as VAT or GST, which you can recover, will not be reimbursed. You need to indicate the tax type on an invoice at claim time.

In countries where tax invoices are required, you must provide an electronic copy and a hard copy of the tax invoice for the approved claim amount plus any applicable tax at the local country rate. The softcopy invoice should first be uploaded in CMC within 7 calendar days of the date of payment request. The hard copy should be mailed to IBM within the next 30 days. We will provide you with instructions for uploading tax invoices and mailing addresses at claim approval.

Your tax invoices must be submitted in the currency in which you will be reimbursed and include correct legal name details of the IBM entity that will settle the invoice. We reserve the right to validate that the charging of VAT or similar transaction taxes, such as GST and sales taxes, is legally correct and that any invoice or equivalent document issued to IBM complies with applicable tax laws.



Reimbursement

We will reimburse you either directly or through a third-party vendor. We are not able to reimburse your suppliers directly.



**Was your
campaign
successful?**



Co-Marketing success

We provide marketing resources, content, tools and funding for you to run successful campaigns.



Track your success

A view of your Co-Marketing usage and results by Incentive Offering, or Co-Marketing funding, will be available to you in the second half of 2018 via your Business Partner dashboard. To ensure your Co-Marketing results appear on your Business Partner Dashboard, you must add the corresponding Co-Marketing UCID to the opportunities you enter in IBM's opportunity management system, called My Sales Activity, or MySA.



Funding criteria

Also starting in the second half of 2018, you will need to demonstrate a positive return on your Co-Marketing funds to qualify for additional funds. This applies to Co-Marketing Incentive Offerings which are measured on positive return on investment (Win Revenue).



Opportunity Management

contains a field where you can apply the Co-Marketing UCID, or identifier, for the opportunity. For accurate details on your Business Partner dashboard, be sure to progress and close all opportunities you enter.



Agencies

The IBM approved Co-Marketing agencies, where available, can help you if you do not have the time, or expertise, to generate demand for your IBM solutions.

© Copyright IBM Corporation 2018

IBM Corporation
New Orchard Road
Armonk, NY 10504
Produced in the United States
June 2018

IBM, the IBM logo, ibm.com, IBM Security, IBM Cloud, Power 9, IBM Flash and IBM Watson Workspace are trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at “Copyright and trademark information” at www.ibm.com/legal/copytrade.shtml. The content in this document is current as of the initial date of publication and may be changed by IBM at any time.

Not all offerings are available in every country in which IBM operates. The Business Partner performance data and client examples cited are presented for illustrative purposes only. Actual performance results may vary depending on specific configurations and operating conditions.

THE INFORMATION IN THIS DOCUMENT IS PROVIDED “AS IS” WITHOUT ANY WARRANTY, EXPRESS OR IMPLIED, INCLUDING WITHOUT ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY OR CONDITION OF NON-INFRINGEMENT. IBM products are warranted according to the terms and conditions of the agreements under which they are provided.

The Business Partner or client is responsible for ensuring compliance with laws and regulations applicable to it. IBM does not provide legal advice or represent or warrant that its services or products will ensure that the Business Partner or client is in compliance with any law or regulation.

Statements regarding IBM’s future direction and intent are subject to change or withdrawal without notice, and represent goals and objectives only.

