Geo Expansion Playbook

Unlock your growth around the world
About this playbook

This playbook is intended for leadership of new and existing Microsoft ISV partners intent on achieving scale through international expansion into new markets.

The goal of this playbook is to help you optimize your plan for business growth. Learn how the Geo Expansion program supports your new market entry with a predictable, right-sized experience based on your business objectives and market demands.

In this playbook, we will walk through the framework for engaging in the program, preparation business strategy work to do in advance, and important tips for success based on learnings from successful partners.

To get the most value of this playbook:

- Get your team together and discuss which pieces of the strategy each person is responsible for.
- Share the playbook with your sales, marketing, support, technical, and managed services teams.
- Leverage the resources available from Microsoft to help maximize your profitability.
- Share feedback on how we can improve this and other playbooks by emailing GeoExp@Microsoft.com.
# Table of Contents

What is Geo Expansion? ................................................. 4
  Our shared opportunity ........................................... 5
Give and gets .................................................................. 6
  Eligibility criteria ...................................................... 7
Rollout timing ................................................................. 9
  How to engage ............................................................ 10
  Geo Expansion rollout map ........................................ 10
Do your homework ....................................................... 11
  Laying the groundwork for success ............................ 12
  Who are your customers? .......................................... 12
  What is your value proposition? ................................. 13
  How do you differentiate yourself? ......................... 13
  Do you have collateral ready? .................................. 14
  Get Co-sell ready! ..................................................... 15
Need help? ..................................................................... 16
Tips for success in nomination process ....................... 17
Maximize your opportunity ........................................... 18
Focus on specific vertical or industry ......................... 18
Showcase of Co-sell wins ............................................. 19
Solution map optimization .......................................... 19
What’s next? ............................................................... 20
Summary ....................................................................... 21
Resources ...................................................................... 22
  Microsoft resources ................................................. 23
  Identify your customers ............................................. 24
  The four magic questions ........................................ 25
  Your differentiators ................................................ 25
  Competitive benchmarking ....................................... 26
  Collateral chart ......................................................... 27
  Build your business plan .......................................... 27
  Customer win summary .......................................... 28
  Customer success story .......................................... 28
What is Geo Expansion?

An internal growth strategy in which an entrepreneurial business scales by expanding from its original location to additional geographic sites.
Our shared opportunity

Globally, partners are betting their business on international expansion and are aggressively investing significant resources to expand into new geographies.

Partner investments range from: opening an office, to hiring a sales force, to executing targeted go-to-market campaigns, to looking for strategic partnerships.

Over the years we have identified several inconsistencies in how partners are informed about available Microsoft resources and programs in a new territory where the network of contacts have not yet been formed. The Geo Expansion program offers a predictable and consistent experience to all partners looking to scale their business in these new markets.

Drive scale of your strategic solutions into new markets with Microsoft. Our goals for your experience are to achieve the following:

- Expedite your entry into new markets to accelerate performance.
- Create a predictable, consistent market entry experience that scales.
- Secure opportunities from competition through innovative partner solutions.
- Drive mutual pipeline and revenue growth in new geographies.
Give and gets

Access Go-To-Market services for a target country based on tiered criteria and commitment.
Eligibility criteria

Digital nurture engagement
All partners that meet the entry criteria are engaged digitally with supporting resources and guidance to navigate the Microsoft ecosystem of the desired target market.

Engage
Build capacity in target country, refine your value proposition, identify solution gaps, and drive your expansion plan leveraging Go-To-Market (GTM) programs.

Commitments
- Co-sell prioritized ISV in host country.
- Solution listed in Marketplace.
- Co-sell ready in target country.
- Customer references and high quality BOM.

Benefits
GTM Services
- Activation Webinar with WW GTM resource desk.
- Webcast & office hours engagements.
- Access to target country GTM engines and programs.
- P2P program guidance.
- Digital accessibility assessment services (paid).

Resources
- Activation Webinar with WW GTM resource desk.

Collaboration engagement
This level of the program is at invitation only to a limited set of partners as determined by the target country Microsoft team, based on a strong nomination from a partner demonstrating in-depth preparation to enter the market, and commitment to partnership with Microsoft sellers.

Activate
Engage with a Partner Development Manager (PDM) to strategically scale your solution as part of the target country GTM Co-sell motion.

Commitments
- Competitive opportunity/risk assessment.
- Seller/deploy resources ready in target market.
- Target list of accounts & commit to drive 10 co-sell wins.

Benefits
Invitation for PDM engagement
- Co-sell pipeline reviews.
- Invitation to participate in target country sales events, including industry days and speed-sell events.

Resources
- Geo Expansion Collaborate playbook.
Deep commitment
This level of the program is at invitation only to a limited set of partners as determined by the target country Microsoft team, based on a strong nomination from a partner demonstrating the highest level of commitment to partnership with Microsoft sellers.

Grow
Drive deeper penetration with development and execution of a joint GTM plan and prioritized solutions for Co-sell motions.

Commitments
- Commit to achieve Azure Customer Revenue (ACR) with Microsoft in target country.
- Commit to invest funding in GTM activities.
- Active opportunities or engagement in Microsoft priority accounts.

Benefits

**Invitation for PMA engagement**
- Prioritized within co-sell motions.
- Invitation to participate in Co-sell day and MTC events.
- Joint GTM envisioning and GTM plan creation.
- Evaluation and guidance for prioritized partner listing.

**Resources**
- Geo Expansion grow playbook.
- Joint marketing plan templates.
Rollout timing

Expand your digital transformation at one of our 50+ locations around the globe.
How to engage

1 Understand when Geo Expansion launches for your desired target market

US and Western Europe have programs live today. Roll out for remaining regions began August 2019.

2 Engage with your host country PDM

- Prepare your business case for Geo Expansion.
- Determine your commitments based on program criteria.

3 Complete the nomination form

- Work with your PDM who will complete the nomination form.
- Reach out to GeoExp@Microsoft.com with specific program questions.

Geo Expansion rollout map

Launch dates

- August 1, 2019: US, Western Europe, Israel
- September 1, 2019: Australia, Canada, UK, CEE, LATAM, MEA
- January 1, 2020: France, Germany, India, Japan, APAC, GCR
Do your homework

Take the required steps to thrive in your partnership, accelerate business opportunities, and grow profitability.
Laying the groundwork for success

Geo Expansion is a journey that starts with you.

Landing in a new market successfully starts with defining your value as a business and your goals.

To prepare to successfully capture mindshare from Microsoft sellers in new markets, that means crisply articulating answers to questions such as:

- Who are your customers?
- What is your solution value proposition?
- How do you differentiate your solution vs the competition?
- Do you have a powerful set of customer collateral?

The following content provides guidance and tools to help answer each question, and ensure your homework is complete before engaging in the Geo Expansion program.

Who are your customers?

Identify

Indicate who your solution is geared for, so prospects know right away if it is designed for them. Is your solution suited best for small businesses or large enterprises? Is it optimized for a specific type of customer? In which regions will it available? Be clear and descriptive.

What makes a customer a best customer?

Follow this process to identify your best customers:

- Get your staff involved.
- Define 3 to 5 best customer characteristics that matter to you.
- Select 5 to 10 customers that rate highly in those characteristics.
- Search for prospects in your Geo Expansion target market that match these best customers.

Next steps

Look for prospects with similar characteristics:
- Customers vs. prospects.
- Business vs. technical decision makers.
- Influencers vs. decision makers.
- Vertical market or company size.

Complete a customer profile
Answer relevant questions about a customer. Use the example table as guidance.

Create your target prospect list
Leverage the customer profile to build a target prospect list for your Geo Expansion market.
What is your value proposition?

Assert
Your value proposition is the collection of things that make your company’s products and services special to your target marketplace. These statements summarize why a prospect should buy your products and services.

What’s your pitch?
• Articulate your specialty.
• Describe your “wow” factors.
• Make it memorable.
• Include vertical markets and segments.
• Include geographic location if appropriate.

How do you differentiate yourself?

Stand out
Customers often compare solutions, so it is important to differentiate yours from competitors, to hold a clear and unique position. Before you begin your expansion into new markets, benchmark your messaging and content against that of competitors.

How do you differ?
☐ Is the messaging on your solution different from that of competitors?
☐ Have you clearly highlighted the value you offer customers?
☐ Have you identified key compelling business pains and benefits rather than just listing features?
☐ Have you articulated what you are best at?
☐ Have you mentioned who will benefit most from your solution?
☐ Do you offer prospects a self-driven buying journey?
☐ Does your messaging and language speak to a specific buyer persona?
☐ Have you carved out a unique position in the market?

Next steps

The four magic questions
Distribute a survey or answer these questions yourself to develop your value proposition:
• What do your clients love about your company?
• What kept them awake at night that you solved?
• What would they change about your company?
• What are competitors doing that clients wish you did?

Next steps

Use the benchmarking charts to measure your solution against your competitors in:
• Client service.
• Deep vertical market knowledge and experience.
• Product expertise.
• Geographies served.
• Types of businesses served.
• Cloud experience.
• Price.
• What you have that they don’t.
• Your wow factor.
Do you have collateral ready?

Support
Consider the right collateral for each stage of your buyer’s journey.

Next steps
- Take inventory of your collateral.
- Evaluate each item’s relevance and usability.
- Associate each item to a stage of your buyer’s journey.
- Fill the collateral chart.

Explore
- Website SEO
- Blogs
- Animated videos
- Content syndication

Evaluate
- Infographics
- Solution data sheets
- On demand webinars

Purchase
- PowerPoint presentations
- ROI tools
- Case studies

Expand
- Website content
- Whitepapers or eBooks
- Success stories

Renew
- Social media
- Testimonials
- Comparison guides

Advocacy
- Social media
- Newsletters
- Interviews
Get Co-sell ready!

Set your company up for success.

✓ Assess your business readiness for Geo Expansion.
   Take the Geo Expansion readiness assessment

✓ Verify you have a minimum of 3 customer wins; at least one in each geography where you will be Co-sell active.
   How to submit customer wins: Partner Center Sales Connect

✓ Use the Geo Expansion checklist to build your business plan.
   Refer to the template in the resource section.

✓ Plan to have at least one dedicated partner sales contact for each Co-sell active geography (one contact can cover multiple countries/markets).

✓ Ensure your solution is listed in the Marketplace.
   Visit OCP catalog: aka.ms/ocpcatalog

✓ Enable and activate Partner Center Sales Connect or Partner Center to refer and track for lead sharing.
   Get started in Partner Center Sales Connect: https://partnercenter.microsoft.com/

✓ Complete and upload your Co-sell* BOM to your solution listing in the Marketplace.
   Review co-sell BOM resources on OCP Catalog: aka.ms/ocpcatalog
   Don’t have a co-sell BOM yet? Contact GTM@Microsoft.com to get started!

*Co-sell is a collaborative selling initiative that enable partners and Microsoft to drive joint revenue and customer success.
Need help?

Engage Microsoft Go-To-Market services.

Get access to resources and benefits to help you with your assets. The GTM resource desk can help you with personalized consultation and editorial review.

Learn more at https://partner.microsoft.com/reach-customers/gtm
Tips for success in nomination process

Demonstrate your proven expertise in delivering quality solutions in a specialized area of business.
Maximize your opportunity

Go above and beyond.

Successful partners in the Geo Expansion program give careful consideration in positioning solutions mapped to Microsoft priorities.

Ahead of filing your nomination in the Geo Expansion program with your Microsoft Partner Development Manager (PDM), outline your business opportunity for the following:

- **Focus on a specific vertical or industry.**
  
  If your solution is truly cross-industry, determine which vertical or industry you’ve had the strongest customer success.

- **Showcase of Co-sell wins.**
  
  Have a few key Co-sell wins ready to showcase for the target market team. This demonstrates your success. Wins in the target market are even better!

- **Solution map optimization.**
  
  Optimize for the Microsoft solution map to help increase priority of your offering.

Focus on specific vertical or industry

Each vertical market is unique and requires the building of a deep understanding of that markets’ specific requirements and needs. Sometimes the strategy, organizational structure, sales process, development process and even some of the code used in one vertical market may translate to others.

**The strategy**

- Become a knowledgeable “insider” in a very specific market.
- Add another market when gross margins and revenue growth are consistently meeting goals.
- Look for vertical markets that have similar characteristics to your primary focus.

**Top five tactics for targeting verticals**

- We participate in industry or vertical events and conferences. 50.0%
- We partner with other channel partners to enhance our total solution. 45.9%
- Our sales force is specialized by industry or vertical. 45.0%
- We optimize our website to attract customers from within an industry or vertical and invest in SEO/paid search as a part of the strategy. 37.6%
- We have hired subject matter experts from within the industry or vertical. 35.5%

Source: IDC Survey, n=242, 2016
Showcase the success of your solutions to drive Microsoft product consumption. This data helps highlight your sales team success and build confidence with Microsoft Sellers to reach out and collaborate to drive Co-sell wins with your solution in their market.

Customer success story
If you want to go in-depth, you can create a customer success story – a powerful tool that can help show sellers how you have successfully deployed your solution. These questions can help outline your story:

- Who is the customer? What do they do?
- What was their problem, and what challenges prevented them from easily solving the problem? Keep these pertinent to the solution.
- How did the customer find out about your solution? Did they consider other providers? What criteria did they use to select you and Microsoft?
- What was the joint solution? How did it address the customer’s challenges?
- How did they implement the joint solution? How long did it take? What new challenges did the implementation create?
- What results did your solution give them – both anecdotally and measurably?
- Was there anything spectacular about how easy it was to deploy or engage employees?

Solution map optimization
To be considered solution map optimized, partners should have solutions and services offerings that uniquely meet local customer’s business needs—aligned to industry solutions and solution areas.

To qualify
- Be Co-sell ready or IP Co-sell ready.
- Proven solution or application in each specific area or market.
- Validated by local technical sales teams.
- Proactively sharing leads with Microsoft.

Benefits
- Highest priority for local Co-sell engagements.
- Higher priority for partner referrals from Microsoft.
- Joint customer and territory planning with Microsoft.
- Access to custom GTM benefits and marketing programs.
- “Preferred” placement in AppSource or Azure Marketplace.
## What’s next?

The collaborative journey of a Co-sell deal.

**Co-sell ready? Let’s go!**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Share an opportunity</td>
<td>Partners or Microsoft sellers initiate the process by sharing opportunities. Partner or field seller (AE, SSP, ISE, CS, ECM, TCM)</td>
</tr>
<tr>
<td>2</td>
<td>Opportunity accepted</td>
<td>Partners review and accept Microsoft opportunities, Microsoft reviews and accepts partner opportunities. Partner or field seller (AE, SSP, ISE, CS, ECM, TCM)</td>
</tr>
<tr>
<td>3</td>
<td>Work together to close the deal</td>
<td>Post signature, deals are set to 100% in MSX and PSC to advance. Partner and field seller (AE, SSP)</td>
</tr>
<tr>
<td>4</td>
<td>Register an IP Co-sell deal for win validation</td>
<td>For the field to qualify for incentives, deals must be registered by the partner via the Co-sell desk and be qualified. Partner</td>
</tr>
<tr>
<td>5</td>
<td>IP Co-sell win is validated for approval</td>
<td>Co-sell desk—in collaboration with the audit team—reviews deals, validates, and approves wins. Co-sell desk</td>
</tr>
</tbody>
</table>

**IP Co-sell wins get credited**

OCP Co-sell desk: [CoSell@microsoft.com](mailto:CoSell@microsoft.com)

A one-stop-shop to answer questions and simplify deals for Microsoft and partners—worldwide.
Summary

Thank you for taking the time to review this playbook. We hope you have gained new insight on how to successfully grow your business by taking advantage of the Geo Expansion program, engaging with new markets, and forming strategic partnerships.

Next steps

- Understand when Geo Expansion launches for your desired target market.
- Engage with your host country PDM.
- Complete the nomination form.

Review the details here.
Resources
Microsoft resources

Links to additional instructional materials referenced in this playbook.

- **Digital Transformation eBook Series**
  How successful business have made the most of the digital transformation opportunity.

- **Modern partner series part 2: Differentiate to stand out.pdf**
  What solution providers need to know to thrive in the Cloud and beyond.

- **Azure Marketplace and Appsource best practice guide.pdf**
  Drive traffic to your app online with a Microsoft marketplace listing.

- **Foundational Marketing: Buyer personas and cloning your Best Clients.pptx**
  Learn what makes a client great, then add more of them to your base.

- **Foundational Marketing: Competitive differentiators.pptx**
  Make customer thought processes the basis of your marketing strategy.

- **Foundational Marketing: Value propositions and elevator pitches.pptx**
  Build your value proposition around solutions to customers’ problems.
# Identify your customers

Create a customer profile for your best clients.

<table>
<thead>
<tr>
<th>Customers that rate highly on your “Best Customer” criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
<tr>
<td>3.</td>
</tr>
<tr>
<td>4.</td>
</tr>
<tr>
<td>5.</td>
</tr>
<tr>
<td>6.</td>
</tr>
<tr>
<td>7.</td>
</tr>
<tr>
<td>8.</td>
</tr>
<tr>
<td>9.</td>
</tr>
<tr>
<td>10.</td>
</tr>
</tbody>
</table>

## Customer profile example

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job function</strong></td>
<td>HR management</td>
</tr>
</tbody>
</table>
| **Who?**                     | **Demographics**  
Typically female,  
Admin: 20s – 30s, Professional: 30s – 50s |
| **Goals**                    | Frictionless HR functions, Streamlined reporting. Employee access.                                                                         |
| **Challenges**               | Disconnected sources of information. Overwhelming reporting requirements. Manual processes require too much time.                          |
| **Why would they buy?**      | Save time. Never miss important deadlines. Provide employee self-service access.                                                          |
| **Why?**                     | No-obligation free trial makes it easy to try the product.                                                                                  |
| **Why would they buy from you?** |                                                                                          |
| **What do they do for fun?** |                                                                                          |
| **About them**               |                                                                                          |
| **What keeps them awake?**   | Deadlines, reporting, compliance issues.                                                                                                    |
# The four magic questions

**Customer survey.**

| Client name: |
|------------------|------------------|
| **What do you love about us?** |
| **What keeps you awake at night and how do we help you sleep?** |
| **If you were CEO of our company what would you change?** |
| **What is our competition doing that you wish we would do?** |

## Your differentiators

Take the time to critically evaluate your current business. Keep it simple and focused.

*How are you different from your competition?*

1. 

2. 

3. 

4. 

5.
Competitive benchmarking

Example format for analyzing competitors.

<table>
<thead>
<tr>
<th>Competitor</th>
<th>Competitor</th>
<th>Competitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are they selling?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do they sell?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deals you won and why</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deals you lost and why</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What you have that they don’t</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is their “wow” factor?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Score your business compared to your competitors.

<table>
<thead>
<tr>
<th>Competitor</th>
<th>Competitor</th>
<th>Competitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example using a scale of -5 to +5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client service</td>
<td>+5</td>
<td></td>
</tr>
<tr>
<td>Unique solutions or IP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deep industry knowledge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Certifications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deep product knowledge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of business served</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cloud experience</td>
<td>+2</td>
<td></td>
</tr>
<tr>
<td>Speed to market</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>-2</td>
<td></td>
</tr>
</tbody>
</table>
Collateral chart

Associate each item to a stage of your customer’s journey.

<table>
<thead>
<tr>
<th>Customer 1</th>
<th>Customer 2</th>
<th>Customer 3</th>
<th>Customer 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Explore" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image2" alt="Evaluate" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image3" alt="Purchase" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image4" alt="Expand" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image5" alt="Renew" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image6" alt="Advocacy" /></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Build your business plan

Your guide to successful preparation for Geo Expansion.

**Activity Checklist**

**Planning**
- Market opportunity defined with customer scenarios for which your solution will be an ideal fit.
- Competitive differentiators defined by customer scenario and identified competitor.
- Forecast to support financial cost of operations and sales volume needed to be profitable.

**Preparation**
- Three-year business plan developed including direct or through-partner financial model.
- Product compliance assessed with target country laws and GDPR.
- Product and marketing collateral localized for target market.

**Entry**
- Resources allocated to drive launch activities, including events, conferences, meetings.
- Experienced sales, marketing and delivery people ready to engage with Microsoft.
- Initial target list of accounts identified.

**Expansion**
- Plan for collecting learnings from entry stage to accelerate success.
- Marketing and sales resource increases prioritized to scale market reach.
- Budget assigned to increase growth.

Take the free assessment at [https://www.crossborderexpansion.com/](https://www.crossborderexpansion.com/)
Customer win summary

<Insert solution name (as it appears in Marketplace)>

Win #1
- Customer company:
- Customer country:
- Win date:
- Partner sales contact:

Customer company logo
<Insert logo>

Win #2
- Customer company:
- Customer country:
- Win date:
- Partner sales contact:

Customer company logo
<Insert logo>

Win #3
- Customer company:
- Customer country:
- Win date:
- Partner sales contact:

Customer company logo
<Insert logo>

Customer success story

<Insert customer name>

Win Results

Insert proof point 1

Insert proof point 2

Insert proof point 3

Insert 25 – 35-word customer testimonial.
- Insert deal size
- Insert closed date
- Insert vertical/region