CASH BACK PROGRAM

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Mestrado em Matemática Aplicada à Economia e Gestão

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ABSTRACT

The purpose of this report is to fulfil the internship requirement for the Master of Mathematics applied to Economics and Management International Z Academy program at University of Lisbon, Faculty of Science, to explain what I did, achieved and learned during my internship period (14 January 2013 till 12 July 2013) with a Company named Wunderman from Young & Rubicam Group in Prague, Check Republic.

As an intern I performed the role of Data analyst at Wunderman.

The report is divided into Eight Chapters. Chapter One presents an overview of the institution and how did Wunderman started and evolved since the 50’s as well as the believes of the company.

It will take us through the ambitions, aspirations and accomplishments of the company founders, how did the firm went from a small and typical agency in that time to became an International institution, part of the main Marketing Group of our times.

Chapter Two provides the background and purpose of the entire program, the main motivations to why our client, Microsoft created this project, to whom it was intended to and also the reason behind the incentives towards the SMB Segment.

In this Chapter, I will explain in greater detail the type of licenses that will allow the resellers to qualify for the program, how they can join the program and from that what will be the criteria for them to earn points.

Chapter Three describes all the tools used during this internship. This will be tools such as data bases, VBA (Visual Basic Application, SQL, Regsys, Microsoft Query, Exact Target, Share Point, Egnyte, EOLAS among other.

Chapter Four goes through all duties that were assigned to me, the process and methodology behind the daily work.

Here I will explain the procedures for the Data processing, considering that we receive data from different sources, which tools I used to consolidate the data and the steps towards that.

In the end I also depict here the manual tasks that this process entail.

Chapter Five intends to show though a Chronogram, how the daily tasks and the Weekly ones were organized.
Chapter Six describes the Contingency Plans for all possible Situations

Chapter Seven presents an in-depth analysis of the Results, our customer outcomes, Microsoft, as well as theirs partners outcomes. Goes through the expectations that Microsoft had in the beginning of the program such as Increase in capture new customers, expand their scope towards areas where currently they were not having the required market penetration, as well as the modernization of their current clients towards the most recent licenses and presents the strengths and weaknesses as well as the opportunities that the program created, not only for the future of the program but also my own development within the company and describes the future Goals of this program.

Finally, Chapter Eight discusses the complications that I encountered while completing the program, my contribution to the institution both its short and long-term effects as well as the impact of this assignment in my own personal and professional development.

The report focuses primarily on intern's duties and responsibilities, internship results, its successes and short comings, observations and conclusion.
RESUMO

Este relatório tem como objetivo cumprir os requisitos de estágio para o Mestrado em Matemática aplicada ao curso de Economia e Gestão Internacional da Faculdade de Ciências da Universidade de Lisboa. Pretendo neste relatório descrever o meu percurso, os objetivos alcançados e aprendizagem adquirida durante o estágio que decorreu no período de 14 de janeiro 2013 a 12 de julho de 2013 com a empresa Wunderman, parte do Grupo Young & Rubicam em Praga na República Checa, onde desempenhei o papel de analista de dados.

Este relatório encontra-se dividido em oito capítulos, o capítulo Um apresenta uma visão geral da instituição e como Wunderman começou e evoluiu desde os anos 50, assim como as crenças da empresa. Este capítulo leva-nos pelas ambições, aspirações e conquistas dos fundadores da empresa, como a empresa passou de uma típica pequena agência naquela época para se tornar uma instituição internacional, centrada em cativar os seus clientes e focada nas suas necessidades, tornando-se parte do principal grupo de marketing dos nossos tempos.

O capítulo dois fornece não só o contexto no qual este projeto se insere, mas também o propósito pelo qual a Microsoft decidiu criar o projeto, as principais motivações por trás do mesmo, o público alvo para o qual foi planeado e a razão da escolha do segmento SMB por parte da Microsoft para o Cash Back Program.

A base deste projeto assenta na premissa que os revendedores licenciados pela Microsoft possam receber prémios ou recompensa monetária de acordo com os critérios estipulados para vender as licenças selecionadas.

Neste capítulo, descrevo detalhadamente o tipo de licenças que permitem aos revendedores qualificarem-se para o projeto, como podem participar do mesmo e quais os critérios para ganhar pontos que lhe permitam receber os prémios ou a recompensa monetária estipulada. Para além de número de licenças vendidas, é também possível adquirir pontos completando certificações específicas referenciadas pela Microsoft.

No momento em que o programa foi lançado, o Office 365 era ainda completamente desconhecido no mercado e como tal, foram nomeadas e identificadas todas as novas creditações da Microsoft elegíveis para o programa sendo também nomeadas todas as licenças não válidas de forma a facilitar e clarificar a regulação do mesmo. Incentivos como os deste programa para as PMEs, servem majoritariamente como um catalisador para um crescimento sólido a nível mundial, apoiam as várias comunidades parceiras que mais tem impacto nos negócios de PMEs, incorporam fundos corporativos para oferecer uma oportunidade atraente de investimento para os Grupos de Negócios e apoiar a rentabilidade dos
parceiros.

O capítulo três descreve todas as ferramentas usadas durante este estágio. Nomeadamente bases de dados, VBA (Visual Basic Application), SQL, Regsys, Microsoft Query, Exact Target, Share Point, Egnyte, EOLAS entre outros.

No quarto capítulo descrevo todas as tarefas que me foram atribuídas, o processo e a metodologia por trás do trabalho diário. Aqui explico os procedimentos usados no tratamento de dados, a diferença de metodologia consoante a fonte dos dados recebidos, quais as ferramentas que usei para consolidar os dados e os passos necessários para tal. Muitas etapas no processamento de dados são automatizadas usando scripts de VBA (Visual Basic for Application) através do Excel, no entanto, após cada etapa de automação é necessário cruzar os dados manualmente. Os dados de cada base de dados são consolidados e finalmente toda a informação é compilada e preparada para o processamento adicional. Apesar de as ferramentas de automação que dispomos, parte das tarefas passavam também por trabalho manual. Diariamente era necessário validar os diferentes critérios de cada revendedor assim como prestar assistência quando necessário.

O Capítulo Cinco pretende mostrar através de um Cronograma, como as tarefas diárias e as Semanais foram organizadas durante os 6 meses de estágio.

O Capítulo Seis descreve os Planos de Contingência para todas as situações possíveis desde computadores danificados a possível erro humano.

No Capítulo Sete são analisados os resultados do nosso cliente, a Microsoft, e também os resultados dos revendedores. Inicialmente, o programa foi criado com o objetivo de captar novos clientes, expandir para áreas onde no período em questão não estavam a conseguir a captação de mercado desejada, mas também a modernização dos clientes atuais para as Licenças mais recentes. Efetivamente, no fim do projeto a Microsoft viu um aumento das receitas de mercado das pequenas e médias empresas em termos de volume, atingindo lucros crescentes de revendedores existentes assim como de novos. Neste capítulo apresento também os pontos fortes e fracos, bem como as oportunidades que o programa criou e os objetivos futuros do mesmo, assim como o meu próprio desenvolvimento dentro da empresa. Em relação a valores concretos, dos revendedores esperados que participassem no programa, atingimos uma cota de 82% de participantes ativos, distribuindo um valor total de 96,532 USD. A maior % de participação observou-se na Holanda, com 98% de participação por parte dos distribuidores. Em contrapartida, a Suíça teve o maior número de pontos submetidos, nomeadamente 44,157 correspondente a um valor total de 29,438.
Finalmente, o Capítulo Oito discute as complicações que encontrei ao completar o programa, a minha contribuição para a instituição tanto a curto como a longo prazo, bem como o impacto deste trabalho no meu desenvolvimento pessoal e profissional. Na minha opinião, a minha maior contribuição para a Wunderman foi poder trazer uma perspetiva externa ao projeto e estrutura da organização, sendo que, apesar de ser uma organização global, em Praga o escritório continua a trabalhar num ambiente muito fechado com poucas influências internacionais. Efetivamente, apesar de a empresa trabalhar globalmente e de ter escritórios espalhados pelo mundo, eu era a única internacional no escritório da República Checa no início deste estágio.

Durante o meu estágio, consegui simplificar o método por trás do projeto e também diminuir o número de possíveis erros. Graças ao meu trabalho na Wunderman, ganhei experiência em programação, bases de dados e em diferentes ferramentas da Microsoft usadas especialmente para trabalhar com os seus clientes.

A integração neste estágio permitiu-me adquirir competências em áreas técnicas mencionadas acima mas também me expôs a situações de pressão inerentes à dimensão das empresas que representei o que me permitiu um enorme crescimento profissional. Exposta a uma cultura tão distinta, acredito que me foi possível melhorar a capacidade de integração em equipes de trabalho de constituição variada e gerar sinergias através de participação ativa dentro e fora do contexto habitual de trabalho.

O projeto permitiu-me ter contacto com profissionais de toda a Europa de diferentes backgrounds, isso ajudou-me a adaptar a linguagem aos diversos tipos de interlocutores, tornando-me mais assertiva na exposição e defesa das minhas ideias mantendo sempre o respeito e consideração pelas ideias dos outros.

Este foi o meu primeiro contacto com uma instituição internacional, e durante esta experiência desenvolvi novas soluções para os problemas e solicitações profissionais que surgiram no decorrer no projeto, desenvolvendo novos processos com valor significativo para o projeto. Inicialmente trabalhei apenas como analista de dados sob a direção de Lenka Martinu, contudo, no decorrer do estágio houve a oportunidade de trabalhar com vários grupos dentro da organização. Graças à minha capacidade de ajuste à mudança e a novos desafios e como resultado do meu esforço neste projeto, no final do estágio fui convidada, não só a ficar na empresa, mas também a ficar responsável pela Gestão e coordenação do mesmo.

Foi-me ainda atribuído outro projeto, também para o nosso cliente principal, a Microsoft com o intuito de orientar e dinamizar as diferentes equipas com vista ao desenvolvimento e concretização dos mesmos resultados.
NOMENCLATURE LIST

Active X/Component Object Model - Active X/COM
Agreements Identifications - AID’s
Application Programming Interface – API
Cash Back – CB
Cash Back ID – CBID
Cashback data - CB.xlsx
Comma Separated Value – CSV
Common Business Oriented Language – COBOL
Common Internet File System – CIFS
Corporate Social Responsibility - CSR
Customer Support Tool – CST
Data Management Console – DMC
Digital Agency of Record - Digital AOR
Direct Attached Storage – DAS
Distributor name and Reseller Sub Region data – DIS
Dynamic Link Libraries – DLLs
Enrollment ID’s - EID’s
Exact Target – ET
Extensible markup Language – XML
Fiscal Year 2013 - FY13
Human Resources – HR
Information Technology – IT
Integrated Development Environment – IDE
Intelligent Management Center – IMC
Internet Content Provider’s – ICPs
Knowledge Base Marketing – KBM
Leadership in energy and Environmental Design - LEED
Microsoft Access - MS Access
Microsoft Developer Network - MSDN
MS Sales data - MS.xlsx
MS-Individual - MS-I
MS-Individual Data Management Console - MS-I DMC
Network Attached Storage – NAS
Network File System – NFS
Object Linking and Embedding OLE
Opel License - Open L
Open Database Connectivity – ODBC
Open License & Software Assurance Non Recurring - Open L&SA Non Recurring
Open Value or Open Value Subscription - Open V/MYO - Non Recurring
Packed Code - P-code
Personally Identifiable Information - PII
PHP Hypertext Preprocessor – PHP
Processed Data Western Europe - PD WE
Regsys data for WE area - RSW.xlsx

Regsys Wizard - RSW

Relational Database Management System - RDBMS

Return On Investment - ROI

Small & Mid-size Business - SMB

Software Assurance - SA

Storage Area Networks - SAN

Structured Query Language - SQL

Third-Generation Languages - 3GLs

United States Dollar - USD

User Defined Functions - UDFs

Virtual Private Network - VPN

Visual Basic for Applications - VBA

Western Europe - WE

Young & Rubican - Y&R
KEY WORDS/PALAVRAS CHAVE

Cash Back Program – Programa Cashback

Small & Mid-size Business – Pequenas e Médias Empresas

Data Management Console – Interface Gestão de Dados

Resellers - Revendedores

Claims - Requisitos

Return On Investment – retorno de investimento
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INTRODUCTION

This internship report is based on my experience as an intern for the Wunderman Prague.

As an intern at the Wunderman Company I learned the basic structure and operating principles of this organization while executing assignments and working with the professional staff. My major goal was, learn as fast as possible how to work with all the tools that are available in the project and after that be able to do everything in an autonomous way and at the same time, implement my recommendations or suggestions for improving the functioning of the program.

During my internship I participated in the weekly meetings with the primary responsible Director from Microsoft, worked with the SMB Regional Marketing Lead WE South and the Ancor Personnel, also with the Strategic Planer from Wunderman and the staff of different departments to prepare every step of the Project. I also worked on simple tasks such as data processing, validation of criteria, and talk with Microsoft partners.

Overall, I am very satisfied with the results of my internship. I was able to use my knowledge and apply it in a real and global organization. I was able to see some differences in functioning that resulted from my efforts.

I took this experience as an opportunity to see how big companies work, to gain international experience and try to learn different expertise in areas that I didn’t had the opportunity to deal before.
Chapter One: Institutional Overview

In 1958 Lester Wunderman, Irving Wunderman, ed Ricotta and Harry Kline decide to pursue their ambition of creating an agency that goes beyond the typical mail order agency of the day, and create one that focuses on engaging the customer. Wunderman, Ricotta & Kline opens its doors in New York City with a staff of 7 and no clients, but still bills over $2 million its first year.¹

Later on, in 1968, WRK goes international, opening offices in Canada, London and Paris.¹

In 1976, Young & Rubican(Y&R) grow internationally, acquiring Cato Johnson and other companies in the U.S. and Europe. Over the three years Y&R continues to fulfill its "whole egg" philosophy of offering expertise in every marketing discipline by expanding more in the U.S. and Latin America.¹

Later in 1986 Martin Sorrell founds WPP Group plc. and a year later WRK changes its name to Wunderman Worldwide to reflect its international network and servicing capabilities for multi-national companies.¹

In 1990 Wunderman Worldwide becomes an independent brand within the Y&R portfolio, building one of the strongest direct marketing and advertising networks in the world. Two years later Wunderman Worldwide and Cato Johnson merge and become the largest behavior-oriented communications company in the world.¹

It’s in 2004 that Microsoft consolidates its relationship-marketing business with Wunderman under the Team Microsoft banner.¹

From 2007 and next Wunderman expands its digital footprint by acquiring These Days (Belgium), Aqua Online (South Africa) and Blast Radius. Knowledge Base Marketing acquires a minority stake in Data Core Marketing. Wunderman continues to expand its digital footprint by acquiring AGENDA (Asia), Actis Systems (now Actis Wunderman, Russia), Kassius (France) and Designkitchen (U.S.).¹

Also Nokia selects Wunderman as digital AOR for its global business. Wunderman takes a leadership role in the Mobile Marketing Association.¹

In 2010 Advertising Age ranks Wunderman #1 Direct/CRM agency worldwide.¹

Knowledge Base Marketing expands across Europe and rebrands as KBM Group; also acquires I-Behavior and Marketing Direct Inc., (now KBM Group: Health Services).¹
Believes

As global citizens, Wunderman embrace the view that all relationships are local. That means they have responsibilities not only to the clients and the customers, but to the communities and the environment.  

In 2013 Wunderman launched a network-wide employee engagement initiative to promote more sustainable work behaviors in their 160 offices around the world with the ultimate goal of carbon and waste reduction. Each office has assigned a Sustainability Steward whose role is to champion the company’s operational guidance around IT, facilities, travel, studio, HR and LEED certification as well as rally co-workers to practice more sustainable work habits.  

They also aspire to not only make their own business more sustainable, but to use their talents to create meaningful initiatives that affect the causes that they and their clients care passionately about.
Chapter Two: Object of study

The WE Cash Back has been designed to reward and recognize top resellers for selling Volume License Agreements to Small and Midsize customers. From April 15th until June 30 2013, companies can be eligible to earn points redeemable for a variety of prizes. Points can be earned in the following ways:

- By selling a minimum of 1500€ of the following:
  i. Office 365 on Open License (Platinum)
  ii. Open Value, Open Value Subscription, and Open L agreements with Software Assurance, all products (Gold)
  iii. Open License Agreements, all products (Silver)
- By Completing select assessments and certifications as detailed below

Resellers can also maximize their points by selling Office 365 on Open and Annuity based agreements.

Further to the above, the minimum value of €1.500- needs to be attained by sales of either i, ii, or iii to be eligible. Sales value of the different categories (i,ii,iii) cannot be combined to reach the €1.500,- threshold for a certain level. The total deal value will be taken into account upon assigning points for eligible deals.

There are 4 easy Steps to Participate:

1. Sell an eligible Open License agreement, or successfully complete an approved assessment or certification based on the table below;
2. Submit the required information on the Report Sales tab on the Cash Back Program website;
3. Once points have been approved and updated in their profile, they can order prizes on the Prize catalogue using points or receive money according to the points;
4. All prizes will be sent to the company within 4 weeks of order approval.
2.1. Earn Points for Selling:

Table 2.1 - Rewarded Points

<table>
<thead>
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<th>Level</th>
<th>Qualifying Licenses</th>
<th>€ Value</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platinum</td>
<td>Sell Cloud Services: Including Office 365 on Open License, All Office 365 Plans</td>
<td>1500-2999</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3000-4499</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4500+</td>
<td>450</td>
</tr>
<tr>
<td>Gold</td>
<td>Sell Annuity On Premise:</td>
<td>1500-2999</td>
<td>75</td>
</tr>
<tr>
<td></td>
<td>• Includes Open Value, Open Value Subscription, and Open License with Software Assurance</td>
<td>3000-4499</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td>• All Products</td>
<td>4500+</td>
<td>225</td>
</tr>
<tr>
<td>Silver</td>
<td>Sell Non-Annuity:</td>
<td>1500-2999</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>• Includes Open License</td>
<td>3000-4499</td>
<td>75</td>
</tr>
<tr>
<td></td>
<td>• All Products</td>
<td>4500+</td>
<td>100</td>
</tr>
</tbody>
</table>

2.2. Other way to Earn Points

Other way to win points is to complete the trainings and certifications required for the Small Business Competency:

Earning the Small Business competency uniquely positions in their business to take advantage of the significant market opportunity in cloud services, demonstrating advanced skills and technology expertise, and providing cost-effective services.

Partners can earn points as they work towards achieving this competency.

They can complete the Get Licensing Ready curriculum to boost their licensing knowledge:

They will become a Volume Licensing expert by achieving accreditations through the Get Licensing Ready program. They will have to pass a series of 30 minute exams, and then submit the certificate on the Training Page to earn their points.
Table 2.2 - Training Accreditation

<table>
<thead>
<tr>
<th>Accreditation</th>
<th>Points</th>
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<tr>
<td>Microsoft Licensing Solution Specialist Light</td>
<td>25</td>
</tr>
<tr>
<td>Microsoft Licensing Solution Specialist</td>
<td>75</td>
</tr>
<tr>
<td>Microsoft Licensing Solution Expert</td>
<td>150</td>
</tr>
</tbody>
</table>

The following information is important details on eligibility:

- Only Open License Agreements are eligible when sold to a SMB business customer (5-250 PCs) who is not on Microsoft’s internal list of corporate accounts or Major accounts.
- Net new and renewal agreements will only be eligible
- All agreements must be purchased and invoiced between April 15th and June 30 2013.
- Participants cannot make more than one claim for the same customer during the offer period.

- Only claims submitted by 5PM EST on June 30, 2013 are eligible.
- The final value of the agreement will be determined by Microsoft’s administration
- Agreements can only be submitted once, under one particular sales level (i.e. either under Platinum, Gold or Silver).
- If the agreement contains a mix of Annuity and Non-Annuity pricing levels, the agreement can only be submitted under the sales scenario where the minimum revenue level has been met independently.
- If the agreement contains a mix of Office 365 and other products, the Platinum level of points will only be granted if the value of Office 365 SKU’s meets the minimum requirement.
- In order to qualify for Platinum, Gold or Silver, they must meet the minimum deal size/agreement value as mentioned in the specific table. The deal needs to contain at least the minimum of value based on the licenses/seats of that table. The total deal value will be taken into account for allocating points when eligibility has been reached for a certain level.

- The following agreements are not eligible:
  - Any Software Assurance ("SA") only purchase
  - Any purchase not executed through a Microsoft Open License Program
  - Not-For-Resale products
  - Microsoft software pre-installed or supplied by an Original Equipment Manufacturer
- Software acquired through charity pricing, TechNet or MSDN Subscriptions
- Upgrade licenses (if available)

- Existing Open License do not qualify
- For Office 365 Open, Open Value and Open Value Subscription the value of the agreement will be based on the value of year one only
- All assessments, certifications, and accreditations need to be completed on or after April 15th, 2013 to be eligible.
- Only one submission can be made per individual for each of the assessments, certifications or accreditations (based on the name of the certificate)
- All certificates must be valid and officially generated by the Get Licensing Ready Tool, the Partner Learning Centre, or the Microsoft Certifications Members site.

2.3. Motivations

The base of this program is that, resellers can receive prizes or cash back according to the promotion for selling licenses, when they receive money, a credit note is paid from Microsoft to a Microsoft Authorized Distributor in EU/EFTA after is application for the promotion has been accepted by Microsoft via validation email.²

2.4. Customer Relationship Strategy

Microsoft strategy to build and maintain strong customer relationship is order to build long-term customer loyalty and to capture customer lifetime value. In this context it is strategy to offer gifts & rewards for its long-term customers.

2.5. Why SMB Segment

SMB Incentives serve as a catalyst for solid growth worldwide for both commercial & public-sector business, support the various partner communities that most impact the SMB business, incorporate corporation funds to provide an attractive investment opportunity for the Business Groups and support partner profitability. Also combine corporate-defined and locally-chosen elements to provide consistency as well as flexibility.
2.5.1. FY13 SMB Channel Incentives contributed to:

- Adding 1.2M Office 365 M&P2 seats;
- Selling Open to 112,000 new customers globally;
- Engaging over 40,000 new resellers to sell Open and O365 globally;
- Renewing 38,000 Open license agreements that are coming up for Renewal;
- Optimizing the company utilization to drive $2B of incremental SMB revenue over the next 2 years;
- Certifying 200 distributors to drive $200M of incremental strategic workload revenue.

And also will:

- Land aggressive O365 Incentives to support efforts to compete against Google Apps;
- Launch Hyper V Campaigns Globally in SMB to Drive Shared Gain against VMWare;
- Implement distributors Solution Accelerator for Lync/UC to Drive Shared Gain against Cisco.

2.6. Why SMB Incentives

- Reward partners to dramatically accelerate new customer acquisitions with significant breakthroughs through adoption of Microsoft Cloud Services;
- Drive partners who can capitalize on the SMB market opportunity with Office 365 and critical solutions;
- Enable rapid sales growth on Growth and Incubation products and annuity contracts.
Chapter Three: Theoretical References

In this Project I had the opportunity of working with different tools and improve my technical knowledge, such as Data Bases, Visual Basic Application (VBA), SQL, Microsoft Query, DMC, Exact Target, among others.

3.1. Data Bases

Database systems store information in every conceivable business environment. From large tracking databases such as airline reservation systems to a child's baseball card collection, database systems store and distribute the data that we depend on. Until the last few years, large database systems could be run only on large mainframe computers. These machines have traditionally been expensive to design, purchase, and maintain. However, today's generation of powerful, inexpensive workstation computers enables programmers to design software that maintains and distributes data quickly and inexpensively. 3

3.2. SQL

The initials stand for Structured Query Language, and the language itself is often referred to as "sequel. SQL makes an RDBMS (relational database management system) possible. SQL is a nonprocedural language, in contrast to the procedural or third-generation languages (3GLs) such as COBOL and C that had been created up to that time. 3

SQL is the standard language used to manipulate and retrieve data from relational databases. SQL enables a programmer or database administrator to do the following 3:

- Modify a database's structure
- Change system security settings
- Add user permissions on databases or tables
- Query a database for information
- Update the contents of a database

ODBC is a functional library designed to provide a common Application Programming Interface (API) to underlying database systems. It communicates with the database through a library driver, just as Windows communicates with a printer via a printer driver. Depending on the database being used, a networking driver may be required to connect to a remote database. 3

NOTE: Nonprocedural means what rather than how. For example, SQL describes what data to retrieve, delete, or insert, rather than how to perform the operation. 3
3.3. Microsoft Query

Microsoft Query is a useful query tool that comes packaged with Microsoft’s Windows development tools, Visual C++, and Visual Basic. It uses the ODBC standard to communicate with underlying databases. Microsoft Query passes SQL statements to a driver, which processes the statements before passing them to a database system.³

3.4. Exact Target

With this tool we create any number of automated campaigns—from a monthly bill pay reminder to an annual birthday message.⁴

We can create any life cycle marketing campaign to acquire, onboard, engage, and retain customers. From mobile acquisition and welcome emails to cart abandonment campaigns, this tool helps to maximize the ROI in the customer lifecycle.⁴

It is possible to build hundreds of features – like Dynamic Content, Offer Management, Behavioral Remarketing, and live Content – this could help us act on Customers demographic, behavioral, and preference Data.⁴

Here we can also configure messages that are triggered by external events like purchases or websites interactions.⁴

This also has the ability to send thousands of unique, personalized emails per second.⁴

Exact Target enables us to view comprehensive campaign details across all our channels— Email marketing, Mobile Marketing, Social Media Marketing and the web and with real-time tracking and graphical reporting.⁴

We can get the metrics that we need to analyze digital campaign performance - including delivery rates, open rates, and click activity - or drill down into individual subscriber details like times of opens, link clicks, survey results, and more.⁴

3.5. Visual Basic for Applications

Visual Basic for Applications (VBA) is an implementation of Microsoft’s event-driven programming language Visual Basic 6 and it is associated integrated development environment (IDE).⁵
Visual Basic for Applications enables building user defined functions (UDFs), automating processes and accessing windows API and other low-level functionality through dynamic – link libraries (DLLs). It supersedes and expands on the abilities of earlier application-specific macro programming languages such as Word’s WordBasic. It can be used to control many aspects of the host application, including manipulating user interface features, such as menus and toolbars, and working with custom user forms or dialog boxes.  

As its name suggests, VBA is closely related to Visual Basic and uses the Visual Basic Runtime Library, but normally, it can only run code within a host application rather than as a standalone program. It can, however, be used to control one application from another via OLE Automation. For example, it is used to automatically create a Word report from Excel data, which are automatically collected by Excel from polled observation sensors. VBA has the ability to use (but not create) (Active X/COM) DLLs and later versions add support for class modules.

Code written in VBA is compiled to a proprietary intermediate language called P-code (packed code), which the hosting applications (Access, Excel, Word, Outlook and PowerPoint) store as a separate stream in COM Structured Storage files (e.g.,.doc or .xls) independent of the document streams. The intermediate code is then executed by a virtual machine (hosted by the hosting application).

3.6. Regsys

Regsys is a simple PHP script to register and login users into a MySQL database with the option to send a welcome email to new users.

Regsys allows for the deployment of campaign-related sites through which customers request information, download software, subscribe to newsletters and register for events. Information gathered from users may subsequently be used for additional marketing efforts.

The Profiling tool provides four components:

- External customer-facing Web pages where customers respond to campaigns and provide information;
- An internal administrative tool, Regsys Builder, where an IMC manager or designated agency defines the questions and information presented to the customer;
- A database that stores wizard configuration information;
- A RegSys Reports site that produces Excel reports based on the MS-I DMC permissions model.
Regsys provides an important function in gathering and storing critical customer profile information and contact preferences, enabling customized follow up communication, offer fulfillment and eventual lead hand-off to sales.  

Benefits & Performance Results

- Regsys complies with company policies regarding the collection and storage of user information.

- The application is integrated with MS-I and Windows Live ID, simplifying the development and implementation process for campaign site owners.

- The application provides a consistent user interface for the display and collection of profile information.

Figure 3.1 - Regsys Data
3.7. MS-Individual

MS-Individual (MS-I) is a suite of tools and services used to manage customer profile data. MS-I helps ICPs and subsidiaries collect, read, edit, and leverage data about the customer in order to improve our customers’ experiences with Microsoft.  

MS-I includes a scalable database that houses external customers personally identifiable information (PII) and contact preferences to support online relationships between Microsoft and its customers. Data stored can include name, contact addresses information, user-defined contact preferences (for contact points such as email, home telephone, or business address), as well as some marketing profile data and Exact Target (ET) newsletter subscriptions.  

MS-I includes a set of Web Services that are used to access the data in the database, including the MS-I Customer Service, which is used to read and write customer profile data when the user is authenticated with Passport. 

MS-I includes the DMC (Data Management Console) which allows ICPs to retrieve data about their customers when it is allowed under Microsoft’s privacy policy. 

MS-I includes the Bulk import tool which allows ICPs to update data about their customers when it is allowed under Microsoft’s privacy policy. 

MS-I is integrated with the CST (Customer Support Tool) which is an internal tool used to read and update customer profile data on behalf of the customer (i.e., CSR activities).
3.8. Data Management Console

The DMC is a windows client application that provides access to customer data stored in MS-Individual for use in primary use contact with customers and analytics. Most activities that involve the DMC are "advanced" scenarios and the tool's design reflects this expected higher level of understanding.

The DMC is an application installed from a web page that runs locally on each computer. It is necessary to have permissions to use this tool.

The DMC will run on a machine that is connected via VPN or Direct Access, however the machine must be *joined* to a Microsoft Corporate domain and the user must be logged in with a Microsoft Corporate user account to use the tool. This is a limitation of the tool, not a policy issue.

Regsys Reports is a tool for getting the data easier. We can register the XML formatted DMC request's files to be processed and the data delivered in an excel file. Once the data is ready, it is provided in an easy to use flat excel spreadsheet. This avoids the steps of coming back to the DMC getting the path and password to the file, downloading the ZIP archive, unpacking and unlocking it locally, and then joining all the tables into some flat view.

Most of the features begin a workflow that involves a regional approver. There are three primary feature areas in the tool as follows:

1. **Report**- Five key dimensions sampled daily to assist in sizing of export requests.

   The DMC Reports feature provides access to counts whose criteria align with the typical Data Export criteria. This allows us to determine in advance and at a low cost to the system how many records we are requesting. The numbers are provided primarily as a guide for export sizing and are summarized on a daily basis. Information from other systems or gathered by inspecting data exports should be treated as higher fidelity.

   **The following report types are provided**:
   - Subscriptions
   - Customer Counts
   - Contact Permissions
   - Regsys Wizard Execution History
   - Customer Flags
2. Export - Request PII or Non-PII data extraction from MS-I for delivery as a file

3. Import - Submit a file of data for upload into MS-I

![Data Management Console Tool](image)

**Figure 3.3 - Data Management Console Tool**

### 3.9. Share Point

We can use this wiki library to share information in a safe way and in an easily, accessible and modifiable format not only with the team involved in the project but also with the different Markets. Microsoft grants access to each library separated.9

### 3.10. Egnyte

Shared Folder is where all shared company files exist.

![Egnyte Tool](image)

**Figure 3.4- Egnyte Tool**

Here we can choose where our data is stored – in Egnyte, on local storage, or other hosting solutions (S3, Azure, Netapp Storage Grid). Egnyte provides two deployment models10:

- **Cloud**: Use Egnyte cloud file server to share access and store all business files online.

- **Hybrid Cloud** (local + cloud): Combine Egnyte cloud file server with any existing storage investment (NAS/SAN/Direct-attached), leveraging existing shares and access protocols (CIFS/NFS).
Egnyte Hybrid Cloud provides the ability to store, share, access and backup files using an online file server that can be synchronized with local storage.\textsuperscript{10}

Folders can correspond to a project, department, or client, allowing both employees and customers to securely access folders from anywhere.\textsuperscript{10}

![Figure 3.5 - Access and Share options](image)

### 3.11. Microsoft Sales (MS Sales)

Microsoft Internal database where we can access, through Master Agreement Number or Enrollment Number to all Licenses that they already sold, it could have a small delay in having all updated.\textsuperscript{11}

### 3.12. EOLAS

Microsoft Internal database more rudimentary than MS Sales but with no delay were, through Master Agreement Number or License Number, we can see the Licenses sold but only give us one partner at a time.\textsuperscript{12}
Chapter Four: Methodology

The whole validation process is divided between Programming work and Manual work.

4.1. Data Processing

I use different data sources to pool the data necessary for the validation procedure:

Data sources:

- Regsys wizard – registrant data
- CashBack application – submitted claims data
- MS Sales – all sales data

Many steps in data processing are automated using VBA (Visual Basic for Application) script in Excel. However, after each automation step, I need to perform manual data cross-check. Data from each data source is consolidated and finally all data is merged and prepared for further processing. Data consolidation is done individually.

Also, all the below mentioned scripts must be run in the order listed here to function properly.

4.1.1. Regsys wizard data consolidation

Registrant data is collected using a set of wizards (each wizard for each individual language). The data can be downloaded using Excel workbook Regsys Reports WE Cash Back.
And then Create Report appears.

Once this button is clicked VBA script will run. It imports data into individual sheets (max 5 different language wizards per sheet) and the code is interrupted with Stop statement.

```vba
mySheet.Range("A1:1").EntireColumn.AutoFit
mySheet.Range("A2:2").EntireRow.AutoFit
mySheet.Range("A?:").Select
mySheet.Name = "data " & c
o = c + 1
DoEvents
End Select
Next iReqSelect
Stop
Sheets("data 2").Select
Cells(1, 52).Select
Columns("A1:HH").Select
Selection.Insert Shift:=xlToRight
```
The reason for this is that data must be firstly downloaded before it is consolidated into one sheet in Excel. Data is downloaded once all data 1 to data n sheets are populated with data, after that code can continue in running (F5 key).

**Figure 4.4 - First Extension Data**

When the code is finished these sheets are added to the Excel with particular data for a country/area in each sheet.

**Figure 4.5 - Pulled Data**

The content of the *All data* sheet must be inserted into new file named RSW.

This way data from Regsys wizard is consolidated and prepared for further processing.

### 4.1.2. Cash Back application data consolidation

Cash Back application can be run using a shortcut.

Once this application is opened all submitted claims are displayed.
Figure 4.6 - Cash Back Application

All data must be copied into CB file in Excel. Here, data is processed using VBA script.

First, ClearCashBackOldAppData script must be run to delete test data from the data.

Figure 4.7 - ClearCashBackOldAppData script

Then, AddID_CB script must be run

Figure 4.8 - AddID_CB script

This way, each submitted claim is marked with unique CBID that can be later used to track the claim in further processing.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBID</td>
<td>Participant_Id</td>
<td>Participant_Id</td>
<td>Participant_Partner_Id</td>
<td>Participant_Lastloggedin</td>
<td>Participant_Locale</td>
</tr>
<tr>
<td>1</td>
<td>3750axr0k-6207-4t9f-959e-128a113121280</td>
<td>5-1-19-3-321106.751I-1813044208</td>
<td>fr-fr</td>
<td>8/12/2013 23:48</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>c00baf5c-6236-4994-9bfe-79de76e6906</td>
<td>5-1-9-3-322160-1901129304</td>
<td>ru-ru</td>
<td>9/10/2013 23:35</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>7340af6d-8fd6-4b20-b2ef-624bf70c8b04</td>
<td>5-1-9-3-32110737491-1873159582</td>
<td>de-de</td>
<td>9/11/2013 2:18</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>3410798c-4aa4-4c3b-951e-9487a91e3089</td>
<td>5-1-9-3-32211073491-1873159582</td>
<td>de-de</td>
<td>9/12/2013 5:48</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>5308199-166d-431e-8291-3e9f31b0790</td>
<td>5-1-9-3-1238061003-3624690584</td>
<td>de-de</td>
<td>9/12/2013 5:48</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>236a88e8-29b4-4d3f-9082-6a110d8edf07</td>
<td>5-1-9-3-1238061003-3624690584</td>
<td>de-de</td>
<td>9/12/2013 5:48</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>756b4a09-1d70-4dd6-aa3d-08be5e74a013</td>
<td>5-1-9-3-42791-2651220104</td>
<td>de-de</td>
<td>9/13/2013 2:40</td>
<td></td>
</tr>
</tbody>
</table>

Figure 4.9 - Consolidated Data

After that, two new columns are added at the end of the table
<table>
<thead>
<tr>
<th>T</th>
<th>U</th>
<th>Y</th>
<th>W</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>FR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>FR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>CEE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deutsch</td>
<td>GER</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>UK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>UK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brasschaat</td>
<td>WE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 4.10 - Country and Area Tracking**

Also, on the Sheet 2 the list of all Answer Open Agreement Number (AID’s) is created in second column in a form which can be directly used in MS Sales.

Once SplitRegionCB script is running new sheets are added into the file with claims for the particular area in each of these sheets.

**Figure 4.11 - SplitRegionCB Script**

This way data from Cash Back application is consolidated and prepared for further processing.

### 4.1.3. MS Sales data consolidation

**Pre - validation AID’s determination**

Each day valid AID’s must be determined and submitted to the portal.
Figure 4.12 - MS Sales open Valid Query

SplitRegionsMS script must be run afterwards to extract MS Sales data into separate sheets based on different geographical areas.

Figure 4.13 - SplitRegionsMS Script

In the *ALL sheet* it is necessary to check for eligible AID’s, this must be performed using ValidAgreementsMS script.
Figure 4.14 - ValidAgreementsMS Script

This is validated according to all criteria that I describe. Based on these criteria, the valid claims are indicated with yellow and green color after the script is running in Valid AID column. These must be manually cross-checked yet!

Green color corresponds to Exchange Online Plan 1 Open product and yellow to the rest products.

```
<table>
<thead>
<tr>
<th>Pricing Level</th>
<th>Summary Pricing Level</th>
<th>Reported Subsegment</th>
<th>Product Family</th>
<th>End Cust Purchase Licenses</th>
<th>End Cust Purchase Amount Cont E</th>
<th>Valid AID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Open Subscription - Non Recurring</td>
<td>Upper Mid Market</td>
<td>Office 365 Plan E1 Open</td>
<td>77</td>
<td>$7,193.82</td>
<td></td>
</tr>
<tr>
<td>Open</td>
<td>Open Subscription - Non Recurring</td>
<td>Upper Mid Market</td>
<td>Office 365 Plan E3 Open</td>
<td>14</td>
<td>$3,941.39</td>
<td>E</td>
</tr>
<tr>
<td>Open</td>
<td>Open Subscription - Non Recurring</td>
<td>Office 365 Mid/Large Business Open</td>
<td>Office 365/Mid/Large Business Open</td>
<td>23</td>
<td>$2,121.48</td>
<td>G</td>
</tr>
<tr>
<td>Open</td>
<td>Open Subscription - Non Recurring</td>
<td>Office 365 Mid/Large Business Open</td>
<td>Office 365/Mid/Large Business Open</td>
<td>67</td>
<td>$16,621.29</td>
<td>A</td>
</tr>
<tr>
<td>Open</td>
<td>Open Subscription - Non Recurring</td>
<td>Office 365 Mid/Large Business Open</td>
<td>Office 365/Mid/Large Business Open</td>
<td>2</td>
<td>$277.32</td>
<td>A</td>
</tr>
<tr>
<td>Open</td>
<td>Open Subscription - Non Recurring</td>
<td>Office 365 Mid/Large Business Open</td>
<td>Office 365/Mid/Large Business Open</td>
<td>2</td>
<td>$277.32</td>
<td>A</td>
</tr>
<tr>
<td>Open</td>
<td>Core Business Plan - Core Business</td>
<td>Office 365 Plan E1 Open</td>
<td>Office 365 Plan E1 Open</td>
<td>7</td>
<td>$453.72</td>
<td>0</td>
</tr>
<tr>
<td>Open</td>
<td>Core Business Plan - Core Business</td>
<td>Office 365 Plan E3 Open</td>
<td>Office 365 Plan E3 Open</td>
<td>3</td>
<td>$121.14</td>
<td>E</td>
</tr>
<tr>
<td>Open</td>
<td>Core Business Plan - Core Business</td>
<td>Office 365 Plan E3 Open</td>
<td>Office 365 Plan E3 Open</td>
<td>2</td>
<td>$467.22</td>
<td>E</td>
</tr>
<tr>
<td>Open</td>
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<td>Office 365 Plan E3 Open</td>
<td>Office 365 Plan E3 Open</td>
<td>13</td>
<td>$1,904.14</td>
<td>E</td>
</tr>
<tr>
<td>Open</td>
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<td>23</td>
<td>$691.18</td>
<td>E</td>
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<tr>
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<tr>
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<td>E</td>
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<td>Exchange Online Plan 1 Open</td>
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<td>$43.29</td>
<td>E</td>
</tr>
<tr>
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<td>Exchange Online Plan 1 Open</td>
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<td>$43.29</td>
<td>E</td>
</tr>
<tr>
<td>Open</td>
<td>Core Business Plan - Core Business</td>
<td>Exchange Online Plan 1 Open</td>
<td>Exchange Online Plan 1 Open</td>
<td>1</td>
<td>$162.26</td>
<td>E</td>
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<tr>
<td>Open</td>
<td>Core Business Plan - Core Business</td>
<td>Exchange Online Plan 1 Open</td>
<td>Exchange Online Plan 1 Open</td>
<td>1</td>
<td>$162.26</td>
<td>E</td>
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<tr>
<td>Open</td>
<td>Upper Mid Market</td>
<td>Exchange Online Plan 1 Open</td>
<td>Exchange Online Plan 1 Open</td>
<td>1,003</td>
<td>$26,493.44</td>
<td>E</td>
</tr>
</tbody>
</table>
```

Figure 4.15 - MS Sales Data

List of all valid AID’s from the first column must be copied into new Excel file named openAgreements and this file must be saved in csv format. It can then be uploaded into the WE SharePoint storage using: SharePoint Link13.

Also, this file must be uploaded into Cash back portal for pre -validation check14.

Once the file path for csv file is inserted and Classic radio button is selected, the Import button can be clicked.

Old AID’s are deleted from the portal and replaced with the new ones. This is what is then displayed:
4.1.4. MS Sales data download

The list of all available AID’s from Cash Back application that is available in second sheet of CB.xlsx file must be used as the only criterion in AID QUERY.xlsx file.

![Image of data import process]

Figure 2.16 - AID’s

![Image of AID data]

Figure 4.17- Valid AID’s

When this file is edited, Master Agreement Number criteria must be selected and the list of AID’s must be used as criteria in the query.
Once the result is returned from the query, it can be divided into separate sheets based on geographical region using SplitRegionMS script.

Then, data from ALL sheet must be copied into MS.xlsx file.

The same process must be performed with EID QUERY.xlsx file. The reason for this is the that sometimes registrants provide us Enrollment instead of Master Agreement Number and corresponding data from MS Sales must be determined based on these Enrollment ID’s (EID’s). In this file Enrollment criteria is used with all available AID’s from second sheet of CB.xlsx file.
Figure 4.21 - Partial Pivot Table

Again, SplitRegionMS script must be running and data from ALL sheet must be copied into MS.xlsx file just below the data from AID QUERY.xlsx file. Then, the duplication of all rows must be performed in this file as some copied data from AID QUERY.xlsx file and EID QUERY.xlsx file is identical.

This way data from MS Sales is consolidated and prepared for further processing.

4.1.5. Determination of Distributor name and Reseller Sub Region

In order to determine Distributor name and Reseller Sub Region, Distributor QUERY.xlsx file must be opened and edited in MSRA environment. Here, list of all AID’s from MS.xlsx file must be inserted into Master Agreement Number criteria separated with semi - columns.

Figure 4.22 - Distributor Query

Returned data must be then copied into DIS.xlsx file.
4.1.6. Consolidation of all data sources

These are the data sources prepared for further processing

- CB.xlsx – Cashback data
- RSW.xlsx – Regsys data for WE area
- MS.xlsx – MS Sales data
- DIS – Distributor name and Reseller Sub Region data

This processing will be performed in MS Access application *WE processing.accdb* file using prepared macros.

![Image of Access database with macros](image)

**Figure 4.23 - Macros**

There are three macros in this file with the following functionalities:

1. **Delete Old Tables**
   This macro deletes all existing tables from previous processing, namely CB, DIS, MS, RSW. These tables can be also deleted manually.

2. **Import Tables**
   This macro imports all required tables into MS Access. In order to macro function correctly all these tables must be in the following folder:
   C:\Users\w-anhenc\Documents\work\ WE CashBack
   These tables can be also imported manually.

3. **Export WE tables**
   This macro creates xxx.xlsx file in this folder PD WE storage  (that has to be created in
4.2. Manual Tasks

4.2.1. Items to be validated in each claim

1. Reseller name
2. Distributor name
3. Customer name
4. Segment of the end customer
5. Localization of the end customer
6. Type of product
7. Type of license
8. Count of sold licenses
9. Date of sales
10. Date of submission
   - Invoice checking
     - For valid claims (if all the criteria above are OK)
       - Name of the reseller in the invoice
       - Name of the customer in the invoice
       - Count of licenses
     - If low count of licenses in MS Sales database
       - Checking count of licenses in the invoice, if it is the same as in MS Sales data base

- Even if the claim was found in MS Sales query (based on the open agreement number), items 1, 2, 3, 10 require manual work because of the text fields validation - cannot be automatized. 6

- If the claim was not found in MS Sales database, all the items 1 – 10 require manual work – all items has to be found in Eolas. 6

- Other issues which require manual control in Eolas (even if the claim was found in MS Sales database) 6
  - Different count of sold licenses in MS Sales and in invoice
  - Different name of the end customer in invoice and MS Sales
  - Any unclearness in MS Sales

4.2.2. Mailbox Cash Back

- Assistance/help to the resellers, how to fill in the form for claim submission
- Communication with the resellers after the eligibility note is sent
  - Explanation why the claim was evaluated as invalid, what to do to change it:
    - New invoice has to be sent
    - Explanation of the association, if different resellers name and/or customers name are filled in
    - Others
  - After the additional explanation revalidation of the claims follows
4.2.3. Claims Validation

- Agreement status is active – Agreement Number (EOLAS) = Active
- Reseller name - Reseller name (Regsys) = Reseller Name (MS Sales)
- Customer Name - Customer Name (Cash back) = End Customer Top Parent Organization Name (MS Sales)
- Distributor Name (optional) - Distributor Name (Cash back) = Distributor Top Parent Name (MS Sales)
- Date of Submission – April 15, 2013 ≤ Date of Submission (Cash Back) ≤ June 30, 2013
- Date of Sale – April 15, 2013 ≤ Enrollment Sales Date (MS Sales) ≤ June 14, 2013
- Credited Worldwide Region (MS Sales) = ‘Austria, Belgium, Denmark, Finland, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Monaco, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland’
- Reseller Top Parent Worldwide SubRegion (MS Sales) = ‘Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Monaco, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, and United Kingdom’
- Summary Pricing Level (MS Sales) = Open L, Open L&SA Non Recurring, Open V/MYO - Non Recurring, Open Subscription - Non Recurring
- Product Family (MS Sales) = ‘Office 365 Midsize Business Open, Office 365 Plan E1 Archiving, Office 365 Plan E1 Open, Office 365 Plan E3 Open, O365 Pro Plus Open, Exchange Online Plan 1
- Count of sold licenses Per Customer Per Partner - 5 ≤ MS Sales Licenses (MS sales) ≤ 25 for Office 365 Midsize Business Open, Office 365 Plan E1 Archiving, Office 365 Plan E1 Open, Office 365 Plan E3 Open and O365 Pro Plus Open (cumulative count)
- End Customer Customer Segment (MS Sales) = ‘Breadth SMB’
- End Customer SubSegment (MS Sales) = ‘Core MidMarket’ OR ‘Education Breadth’ OR ‘Core Small Business’ OR ‘Government Breadth’ OR ‘Lower MidMarket’ OR ‘Upper MidMarket’ OR "Other SMSP"
Chapter Five: Chronogram

Daily Basis

- Data preparation
  o MS Sales query update
  o Regsys Wizard update
  o Summary of all data sources for evaluation

(Cash Back application, MS Sales, Regsys)

- Claims validation
  o Primary validation based on the steps 1 – 10 above
  o Claims revalidation based on additional information sent via mailbox

- Mailbox management
  o Collection of additional data from resellers for claim validation
  o Assistance/help to the resellers

Weekly Basis

- Emails distribution
  o Data preparation
  o Distribution through Exact target
    o Manual distribution to the reseller whose email is restricted in Exact target

- Coordination with Microsoft Responsible
<table>
<thead>
<tr>
<th>Tasks</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6 Months Project</td>
</tr>
<tr>
<td></td>
<td>Daily</td>
</tr>
<tr>
<td></td>
<td>Weekly</td>
</tr>
<tr>
<td>MS Sales query update</td>
<td></td>
</tr>
<tr>
<td>Regsys Wizard update</td>
<td></td>
</tr>
<tr>
<td>Summary of all data sources for evaluation</td>
<td></td>
</tr>
<tr>
<td>Claims revalidation based on additional information sent via mailbox</td>
<td></td>
</tr>
<tr>
<td>Primary validation based on the steps 1 – 10 above</td>
<td></td>
</tr>
<tr>
<td>Collection of additional data from resellers for claim validation</td>
<td></td>
</tr>
<tr>
<td>Assistance/help to the resellers</td>
<td></td>
</tr>
<tr>
<td>Data preparation</td>
<td></td>
</tr>
<tr>
<td>Distribution through Exact target</td>
<td></td>
</tr>
<tr>
<td>Manual distribution to the reseller whose email is restricted in Exact target</td>
<td></td>
</tr>
<tr>
<td>Coordination with Microsoft Responsible</td>
<td></td>
</tr>
</tbody>
</table>
### Table 6.1 – Contingency Plan

<table>
<thead>
<tr>
<th>Probable Situations</th>
<th>Contingencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC Damage</td>
<td>Data backup in online platforms</td>
</tr>
<tr>
<td>Outside access to PII Data</td>
<td>AI data is sent it throughout a Secure VPN Connection</td>
</tr>
<tr>
<td>Duplicate Claim from reseller</td>
<td>After identifying that, cancel one</td>
</tr>
<tr>
<td>Reseller Name Does Not Match</td>
<td>Confirm in other databases, check invoice directly</td>
</tr>
<tr>
<td>Customer Name Does Not Match</td>
<td>Confirm in other databases, check invoice directly</td>
</tr>
<tr>
<td>Type of Licenses belong to another category</td>
<td>Change it manually and notify Reseller</td>
</tr>
<tr>
<td>Amount belongs to another Category</td>
<td>Change it manually and notify Reseller</td>
</tr>
<tr>
<td>Another person registered with the Reseller data</td>
<td>Notify the reseller and confirm if the data is safe</td>
</tr>
<tr>
<td>Personal Error</td>
<td>Always ask a second person to double check the data</td>
</tr>
<tr>
<td>Vacations</td>
<td>Creation of standard procedure after implement the process</td>
</tr>
<tr>
<td>Fail of personal accesses</td>
<td>Several persons with the rights for the same accesses</td>
</tr>
</tbody>
</table>
Chapter Seven: Results and Results Analyses

7.1. Microsoft outcomes

- Activate and enable partners to sell OPEN and Cloud into SMBs;
- Shift towards Cloud revenue in SMB (Google Compete).

7.2. Partner outcomes

- Benefit from the incentive investment to shift business mix to Cloud Services;
- Increase profitability via incentives and effective use of cooperation funds.

7.3. Client (Microsoft) expectations with this incentive program

- Continue to capture new customers at same rate as in FY13
  - Increase in capture rate of new customers in areas with more than 40% of their market still available;
  - Adjust for seller capacity to be at 2 deals/seller at minimum and 2.5 deals/seller maximum;
- Expand - Driving incremental penetration into current O365 accounts. For areas where the current account penetration is <40% the methodology takes the account penetration to 40%;
- Compete – Currently the win rate is 20%. The assumption is to drive incremental 10% win rate in every area;
- Modernize - 47% of addressable sockets (54.6M) need to be modernized (WinXP, Old Office) to be ready for Office365. Goal to win drive 20% account penetration into these accounts.

In the end of the program I was able to analyze all my work and the work of the team behind this project and I think that it had some good points but also it still have some work that needs to be done.

7.4. What went well?

- Lots of education happened during process to all parts involved;
- Engaged segments earlier/better than FY13;
- Generally neutralized shift & churn discussion;
• Partnership with SMSG;
• Strong Relationships with resellers and distributors;
• Microsoft has seen a revenue increase in the volume based SMB market, with increased profits from both existing and new Resellers.

7.5. And not so well

• Scorecard and revenue negotiated separately and timelines were out of sync
• Business Group and Marketing & Operations not aligned early enough to gain execution approval
• Cyclical negotiations with multiple parties
• Need of internal Microsoft Office Division alignment prior to negotiation
• Large and complex model because had so different companies involved for each step of the way.

Also, I was able to view the total points redeemed by partners.

The overall WE percentage of points redeemed was 82%, for a total value of 96,532 USD.

Netherlands had the highest % of points redeemed: 98%.

Switzerland had the highest number of points redeemed: 44,157 (total value of 29,438 USD).

<table>
<thead>
<tr>
<th>Sub</th>
<th>Points Earned</th>
<th>Points Redeemed</th>
<th>Remaining Points</th>
<th>% Points Redeemed</th>
<th>Total Value in USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>9.369</td>
<td>8.170</td>
<td>1.199</td>
<td>87%</td>
<td>5.447</td>
</tr>
<tr>
<td>Finland</td>
<td>3.223</td>
<td>2.768</td>
<td>455</td>
<td>86%</td>
<td>1.845</td>
</tr>
<tr>
<td>Ireland</td>
<td>4.939</td>
<td>4.249</td>
<td>690</td>
<td>86%</td>
<td>2.833</td>
</tr>
<tr>
<td>Italy</td>
<td>21.175</td>
<td>16.825</td>
<td>4.350</td>
<td>79%</td>
<td>11.218</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>2.879</td>
<td>1.268</td>
<td>1.611</td>
<td>44%</td>
<td>845</td>
</tr>
<tr>
<td>Netherlands</td>
<td>25.659</td>
<td>25.072</td>
<td>587</td>
<td>98%</td>
<td>16.715</td>
</tr>
<tr>
<td>Norway</td>
<td>7.142</td>
<td>5.953</td>
<td>1.189</td>
<td>83%</td>
<td>3.969</td>
</tr>
<tr>
<td>Portugal</td>
<td>2.095</td>
<td>664</td>
<td>1.431</td>
<td>32%</td>
<td>442</td>
</tr>
<tr>
<td>Spain</td>
<td>14.566</td>
<td>12.674</td>
<td>1.892</td>
<td>87%</td>
<td>8.448</td>
</tr>
<tr>
<td>Sweden</td>
<td>19.776</td>
<td>13.488</td>
<td>6.288</td>
<td>68%</td>
<td>8.992</td>
</tr>
<tr>
<td>Switzerland</td>
<td>51.101</td>
<td><strong>44.157</strong></td>
<td>6.944</td>
<td>86%</td>
<td><strong>29.438</strong></td>
</tr>
<tr>
<td>Total</td>
<td><strong>175.684</strong></td>
<td><strong>144.798</strong></td>
<td><strong>30.886</strong></td>
<td><strong>82%</strong></td>
<td><strong>96.532</strong></td>
</tr>
</tbody>
</table>
**Program Results**

Figura 7.1 – Program Results

**% of Points Redeemed**

Figura 7.2 – % of Points Redeemed
7.6. **In the future we are thinking in:**

- Learn the program details earlier and the local implementation decisions
- Leverage against local initiatives
- Plan for Cooperation activities with partners

I’m now managing the project for FY14 and I believe that some things are needed in order to achieve better results this time, so some things we are doing different, such as:

- Early, comprehensive education of stakeholders on the process
- Earlier and tighter alignment between Business Group, Segments and SMSG HQ up to the executive level
- Lock on preliminary Sub Scorecard much earlier to enable preliminary target cascade
- Reduce variability in the target by making the process more tops down and mechanical, with clear guardrails
- Effectively manage the escalation process for revenue and scorecard to keep change to a minimum in both magnitude and frequency

7.7. **Goals**

- Create awareness, understanding and interest in Microsoft’s Cloud Services offering
- Engage partners and field to support the cloud offerings
Chapter Eight: Conclusions

During the six months, I realized that it takes many steps to achieve a common goal. This was ascertained by a number of observations:

I did observe that teamwork played the most important role in achieving common goal. But sometimes it was also important to work independent. And the goal must be to find a way to combine it in the right way.

In my opinion, my major contribution to Wunderman was to be able to bring an outside perspective to the project and structure of the organization, because, despite this being a Global organization, here in Prague continues to work in a much-closed environment.

During this time, I was able to simplify the method of doing this project and alongside also diminish the number of possible error.

Thanks to my work in Wunderman, I gained experience in Programing, Data Bases and in different tools from Microsoft used specially to reach out their clients. I believe that my expertise scope increased. I was able to integrate theory, research, and personal skills in the field, I could see as programming has a real effect when we need to run and analyze data in order to be able of select specific criteria in databases as fast as possible...

I had the opportunity to be involved in the operations of specific functional areas and to develop and refine my skills relative to Customer Service and Data Departments.

I initially worked only as analyst for the data under the direction of Lenka Martimu, but I also had the opportunity of working with multiple groups within the organization as result of my effort on this project, in the end of the internship I was invited to be part of the company, managing not only this but also another Project for Microsoft.
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8. http://team/sites/ms-i/DMC/Pages/Home.aspx - consulted at 14th July 2013


11. MS Sales Database


15. Microsoft official website http://www.microsoft.com/emea/mos/ - consulted at 1 July 2013