

POE Template

POE gives Microsoft the opportunity to validate that partners have been involved in driving Usage (OSU) growth and/or have engaged in Pre-Sales (OSA) activities. POE ensures the right partners are rewarded for investing their resources to drive world class solutions for our shared customers and prospects. The purpose of this template is to assist Partners in providing POE that contains all requisite elements of an approvable claim. *If you have existing documentation that contains the elements of valid POE it can be submitted in lieu or in support of this template.*

- Usage of this template is recommended when submitting CPOR claims for OSA and OSU association.
- Alternate POE documents are acceptable if all requisite elements are included.
- Program and policy resources available here: <https://partner.microsoft.com/membership/partner-incentives>

POE Template Instructions:

Section 1: Fill out all information in the Partner and Customer Information section. Ensure that the Customer information matches the information entered in your CPOR claim in Partner Center.

Section 2: Provide valid customer acknowledgment dated within 12 months of claim submission.

Section 3: Provide details on engagement activities & supporting documentation.

Section 4: (Usage Only): Select product(s)/workload(s) by activity type. If solution area is Business Apps, please check Business applications and specify product names in space provided.

Section 1: Partner and Customer Contact Information

**Denotes optional fields. All fields are required unless stated otherwise.*

| | |
|---|--|
| Partner Company Name | |
| Customer Company Name | |
| Customer Signatory Name (printed) | |
| Customer Signatory Role or Job Title | |
| Customer Domain Name | |
| Customer Tenant ID | |
| * Project Name | |

Section 2: Customer Acknowledgment*

*Customer acknowledgement **must** be dated within 12 months of claim submission. Applicable for Dates Signed field below.

Customer Signature

Date Signed

Public Sector Disclosure (Public Sector customers in U.S and Puerto Rico only): By signing this document, the customer listed in Section 1 acknowledges that partner listed in Section 1 will seek association to our Microsoft Customer Tenant ID under the Microsoft Partner Incentives program, and that as part of their association, the partner may receive monetary fees, commission or compensation from Microsoft in connection with the services provided to the customer.

(Public Sector) Customer initials here: _____

Section 3: Scope of Work Details

3.1 – [OSA Pre-Sales, Usage]

Customer Subscription Information Disclosure (Business Applications Only)

By signing this document on Page 1, the customer listed in Section 1, Page 1 agrees that Microsoft can share customer subscription information with the partner listed in Section 1, Page 1 only for the purposes of becoming claiming partner of record.

Customer initials here: _____

3.2 – [OSA Pre-Sales – Required]

Provide Business Apps (Dynamics/PowerBI) product name(s) and subscription IDs.

- Specify whether the customer is purchasing the product for the first time, migrating from on-premise to cloud (including dual licensing), or adding additional seats to an existing subscription.

3.3 – [OSA Pre-Sales, Usage – Required]

Describe the customer’s specific business need and/or benefit for the solution using the claimed product(s)/workload(s)

3.4 – [OSA Pre-Sales – Required]

Describe or provide documentation for:

- Pre-Sales activities and work which led to the seats being purchased under the agreement

3.5 – [Usage – Required]

Describe or provide documentation for:

- Specific work influencing the customer’s usage of the claimed product(s)/ workload(s)

3.6 – [OSA Pre-Sales, Usage – Recommended]: Provide supporting documentation demonstrating your claimed work activity. If the nature of the work changes over the course of the engagement, be sure to provide updated POE to maintain POR association. Examples of acceptable materials include but are not limited to:

- | | | | |
|-------------------------|-------------------|------------------------|---------------|
| • Statement of work | • Support logs | • Deployment roadmaps | • Milestones |
| • Solution architecture | • Visual diagrams | • Migration plans | • Timelines |
| • Service tickets | • BREP Partner | • Service descriptions | • User counts |

Section 4 (Usage Only): Select activity type and product(s)/workload(s)

| | |
|--|--|
| <p>Deployment & Implementation</p> <p><i>For example, but not limited to: Hands-On Deployment, Installation & Provisioning, Solution Design & Execution, Configuration, Customization</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |
| <p>Migrations</p> <p><i>For example, but not limited to: On-Premises to Cloud, Tenant to Tenant, Transition from other cloud services to Microsoft Cloud Services</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |
| <p>Adoption & Change Management</p> <p><i>For example, but not limited to: Substantial Admin & User Training, Significant Workshops and Transitional Support</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |
| <p>Remote Guidance</p> <p><i>For example, but not limited to: Phone & Email Guidance, Supporting & Guiding Customer's Own Deployment or Migration Activities</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |

Section 4 (Usage Only): Select activity type and product(s)/workload(s)

| | |
|--|---|
| <p>Pilots</p> <p><i>For example, but not limited to: Designing & Launching Limited Pilot Programs to Test Solution for Customer, Reporting on Pilot Outcomes)</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |
| <p>Advisory Services & Planning</p> <p><i>For example, but not limited to: Analyzing Customer's Current State, Recommending Solution or Implementation Plan</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |
| <p>Customer Support</p> <p><i>For example, but not limited to: End User Support for Existing Solutions, Request Based Tickets, Calls, Emails, Managed Services</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |
| <p>Other</p> <p><i>Please Specify.</i></p> | <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> Microsoft 365 Apps <input type="checkbox"/> Outlook Mobile <input type="checkbox"/> Teams Platform <input type="checkbox"/> Teams Meetings <input type="checkbox"/> Teams Phone System <input type="checkbox"/> Teams <input type="checkbox"/> Business Applications (<i>Specify product names</i>): <input type="checkbox"/> Azure Active Directory Premium (AADP) <input type="checkbox"/> Azure Advanced Threat Protection (AATP) <input type="checkbox"/> Office Advanced Threat Protection (OATP) <input type="checkbox"/> Microsoft Cloud App Security (MCAS) <input type="checkbox"/> Microsoft Defender Advanced Threat Protection (MDATP) <input type="checkbox"/> Microsoft Information Protection (MIP) <input type="checkbox"/> Microsoft Intune <input type="checkbox"/> Yammer |