

FY26 Quick to Market Voucher Program Updates - MWSDO and Copilot [AmericasEMEA]-20250701_110039-Meeting Recording

July 1, 2025, 3:00PM

1h 2m 41s

● **Amy Jarosky (AG Consulting Partners Inc)** started transcription



Patricia O'Rourke 0:04

These comments are it.
Amy, back to you.
see you.



Amy Jarosky (AG Consulting Partners Inc) 0:12

Welcome everybody. Thank you so much for joining us today and for your funny jokes. We appreciate them. This is the FY26 Quick to Market Voucher program updates for Modern Work and Security Deployment offer and copilot.



Patricia O'Rourke 0:20

Yeah.



Amy Jarosky (AG Consulting Partners Inc) 0:30

For the Americas and EMEA region, we have lots of updates for you. As always, we are recording this call. If you'd like to rewatch the session, you may head on over to the FPC portal blog within the next day or so.

If you want to turn on live captions, feel free to do so in your team's app by the More button. And as always, we are here to support you and answer any questions that you have along the way. So definitely post your questions in the chat during the presentation. We've a great team here on board, ready to answer those.

For you and then we will have time for some Q&A at the end where we will enable the mics as well. So again, thank you all very, very much for being here and I will now turn it over to Patricia O'Rourke.



Patricia O'Rourke 1:24

Oh, hello everybody. Welcome to fiscal year 26 and so we are excited to do a refresher of our changes for the QTM M365 and Kopala vouchers. As you know, we run multiple programs under QTM.

1:25

Yeah.



Patricia O'Rourke 1:43

But today we're going to focus on on our largest programs to date and review some of the changes. I'm sorry, I reviewed some of the changes that we have to date.



Matt Gibson 1:50

Hi Hassam, how are you?

Doing well, doing well, thanks.

Thanks for joining. Are you able to hear me?



Patricia O'Rourke 2:00

And so a couple of things that we're going to cover today is program updates and name changes. So yes, we have some cool name changes for our QTM program. We're going to do a quick overview of M365E3E5 migration and deployment voucher.

Formerly known as Modern Work and Security Employment Offer. Additionally, we will do an overview of Copilot Voucher. We do have minor changes there happening. We are talking about CSP and RAP and what's next.

SOWPOAE updates, we will have Adam with us kind of do an overview of of that and best practices and then we'll move into Q&A which we have on our call our wonderful, our wonderful business sponsors.

To answer any additional questions you may have regarding program and future investments. So next slide.

Hey, So what is changing? And I'm going to say hi to all my former partners, existing partners and everybody that we've collaborated in the past when I want to say since 2019. Here we are.

So the changes are very basic but important nonetheless. So the modern work and security deployment offer modern work has rebranded to A to ABS and we'll we'll have Ricardo explain what that means.

But modern work and security deployment offer will be now labeled as M365E3E5 migration and deployment voucher. That is to avoid some confusion on the field this way as well because this group manages multiple offers including ESF, therefore making it very, very clear that this is the deployment.

Voucher and we're going by E3E5 is not. We don't have acronyms for it, so it's going to be a mouthful for you all. The workloads remain the same for FY20 from FY25.

There's no changes for this fiscal year in terms of workloads.

For this particular program, SOWS and POES, this is something different and we're going to explain why. Because of the name change, you're going to have the both FY26 and FY25 in the same document, so you can use it accordingly.

Again with Copilot deployment offer, we're rebranding it to M365 Copilot voucher to keep it consistent. The workloads remain the same. SOW and POE will have changes. This is.

It will have a list of suggested activities for you and we will ask for you to to at least have one or two of those activities in the SOW and Poe before I want to say this fiscal year you've seen it more like a free form. So we're moving into a more.

Detail activity and there's a reason for that. There's a new program coming out that we'll be attaching where it's too soon to tell you, but we'll we'll we'll get a teaser out for you as we're currently in the process to informing internal stakeholders.

So the the biggest news here is that you won't be required to be a fast track ready partner to join either of these programs. A participation in these programs will not require the FRP status, but it will require you to opt in again. So for you that love opting in.

Into new documentation. You will get them for ME3, ME5 and copilot Voucher. We're going to try to consolidate it together and send it your way and we'll show you a timeline on when that's going to happen. No additional on boarding or anything is required. It's just an umpteen because we do have a standing terms.

No, Jamie.

Sorry about that, but it's it's it's good. I want to say it's still cap. Let's be very clear.

This is a limited program. Not everybody can leverage our vouchers. You have to go through. It's sent by invitation.

It will require folks, if they want nominated and they have a voucher, we will need, they will need to go through approval. So yes, this is still a very limited partner program.

And like I said, the new terms and conditions will be sent out anticipated mid-july

and all you need to do is update.

And we'll cover what a as this program is continuation continuing, we will cover some of the questions in the chat in a minute about SOW and Poe, OK.

Next line.

So this is what our program, I want to say timeline looks like. So we're hosting these office hours to bring some awareness to the changes. We are in the process of updating and republishing all the terms and conditions.

So bear with me, I'm the one updating the terms and conditions and going through that paperwork. We will have it by next week. It's specifically for those that are a redraft like or an OP team like Copilot and.

The E5E3E5 voucher, so expect that for July 12 we we have a a portal. Let's be clear that the portal is going maintenance from July 1st to 11 for.

SOW and POE submissions. What we have done to avoid any issues with those vouchers that may be expiring in that week, we have or we will grant an extension, automatic extension of two weeks. Please know.

That we're going to be granting an automatic extension by two weeks, but please do try to get those in prior to that deadline and we'll talk more about that. And July 12, we will open up for the dead redemption activities and SOW and POE submission will be made available for oral.

All of our programs. You should expect the terms for ME3ME5 voucher and copilot no later than July 18th. My goal is to do it end of next week, but stay tuned.

And then on July 25 is when we plan to and the extension for those vouchers that fell under the portal maintenance or blackout dates, OK.

OK. And I will start answering the questions after we cover some of our stuff.


I also want to discuss is some of the vouchers that are actually ending this fiscal year. So we had a couple of pilots that ran through Q4Q4Q3Q4. So the CSP voucher and round wrap voucher will not be renewing in FY26 meaning.


New customer nominations coming from the field will not be accepted or was not going to be accepted as of today. And for that we will honor any existing voucher out there. I want to make it very clear.


And I and I have, I have Lila on the call. Yeah. Well, going back to Rab Voucher, I can't stop staring at the columnist. This is, this is hilarious. But the Rab Voucher is it. It was a good pilot because it identified a need.


Because it identified a need on potential new usage vouchers. So let's see what FY26 bring in Q2Q3. But let's talk a little bit about CSB and what that means to you

because we have a pipeline of vouchers that will be issued by Wana see Lila.
Do you mind coming off mute and kind of explaining what that flow is gonna look like?

 **Woods, Lela** 10:30
And.

 **Patricia O'Rourke** 10:31
Thank you.

 **Woods, Lela** 10:32
So as Patricia mentioned, we have a pipeline of what we call pre-approved nominations. So the field has nominated and we've conditionally approved opportunities. We're not accepting any new nominations from the field, but those that have been conditionally or pre-approved.
In FY25 as those close and when they the vouchers will be issued in FY26 so. All pre-approved nominations in FY25 will be honored. As I said, no new nominations. All vouchers approved in FY25 will be valid through the expiration date that's outlined in the voucher.
And something important to drive home is that for these two pilots, we will not be issuing any extensions or exceptions.

 **Patricia O'Rourke** 11:35
Thank you, Lila. And again, like I said, it's going to be business as usual in FY26 for CSP in a nutshell, but it is important. I'm sure you're working closely with the field on this, so no net new nominations.
But expect to receive vouchers. OK, next slide.
Thank you, Amy. So this is a high-level overview. Some folks I saw in the chat that they're asking about, you know, more investments and so forth. The investments remain the same for Kapila, 75K is the maximum.
And for ME3ME575K as well, and as you know, you can stack them. We're also maintaining the minimum for copilot at 500 seats. What you're going to see different, let's be clear, the compete voucher is not a separate voucher. It is embedded into the ME3ME3ME5 migration deployment.
Voucher and that had it has increased to 100K. So if the seller identified that it's a

complete scenario under either the migration or the deployment voucher, that voucher amount will be higher depending on the deal. Does that make sense? Hopefully that explains it and so next slide again minor minor changes to these programs as as it is again for you all are familiar how it works. The Microsoft field nominates it once approved the deal signed, the customers issue a voucher and the customer presents.

The voucher to the partner of they choosing, they must be opted in into the program. There's a couple of things on the qualifying partner eligibility and I think Corianne, you answered some of that question. The partner eligibility will remain the same as you must have one.

Of a selected group of specializations, which is similar to what you saw for the Fast Track Ready program in FY25. So you will have a similar list of specializations there.

OK, so hopefully that answers your question in terms of voucher reduction.

Redemption. The redemption process will stay the same via the FBC portal. Adam will talk about that. And as a reminder, voucher payments are inclusive of any tax obligations as per the program terms. OK, no changes in terms of commercial customers and public sector.

As an FYI.

Next slide.

And let me let me answer a question that I saw here. Yes, these vouchers are EA agreements only. You're absolutely correct. It's exclusive of CSP.

OK, so this is what the statement, the current statement of work or the brand new statement of work will look like. As soon as we publish it, it will have the new name. For those that are wondering, should we, which one should we use? So if you currently have and I think Adam, you you'll get to it, but I just want to make it very clear.

If you have an SOW signed, please use the POE, the same document you use for the POE. Don't use the FY26 just recently released. If you get a new voucher, please go ahead and move forward with the E3E5 migration.

SOW and POE I know it's a little bit of confusion. It gets confusing, but let's ensure that if you have a statement of work signed last fiscal year, let's ensure you use the POE and it will be all together in the same document. So all you need to do is detach it. We won't cause more confusion.

So this is again the POE and SOWSOWPOE for FY26 for former deployment, a modern work deployment offer now named M365V3E5 migration and deployment.

OK.

Next line and then for copilot voucher, same scenario here. You don't have to be an FRP, but you must be a jumpstart copilot jumpstart ready partner. So that is one of the requirements to join this program to be a jump.

Jumpstart Ready Partner. If you have not joined the program in the past and you have recently become Jumpstart Ready, we'll have an e-mail available for you to reach out to us, OK?

Any questions around here?

So I just want to make it very clear. The copilot voucher and the E3E5 is EA only CSP. We're still going to be issuing vouchers for CSP. There's no inclusion of CSP.

On this particular terms for these programs.

So let's go over who's eligible customers for copilot. You have to have you are commercial managed public sectors and includes U.S. federal and EDU customers.

You need to have at least 500 seats and tip or licenses purchased and and.

And it's it operates similarly than M ME3ME5 voucher program and that is basically led by the sales team, which they're the ones who submit for approval. And then we get the voucher, we issue the voucher to the customer and then the customer engages a partner. We do publish a list of copilot.

Jumpstart partners that are opting into the program. That is something that we update every other month because we haven't had a high incidence of.

Partners wanting to join recently, but we will republish it as soon as we do the opt-ins for this program.

OK, next line.

So this is the little twist on on on the copilot vouchers. So we are instead of having the free form if you will, we will have a statement of work in a POE that will list us suggested activities and description of the activities to be performed. Stay tuned when we publish it and review it please so you.

See which activities we're targeting for you to drive with your customers.

OK, next line.

And I'm going to go ahead and and pause for a minute and see if we can answer some of the questions that we have on the chat, if that's OK. Or should we just wait till the end? Give me thumbs up if you want us and for me to answer some of the questions or we can wait till the end.

When we can come off mute.

We'll continue. You want me to answer some of the questions? Let's go ahead and

do that. Let's pause here because Adam is going to deep dive into all the great stuff about voucher redemption.

So with regards to some questions that I've seen about FRP, let's be very clear, it's not a requirement, but we are inviting you to join E3E5 again without you having to be an FRP.

So we have identified all the partners that have been engaged this past year. You're going to get an invitation and it's basically tied to this core group of partners as it is now to initiate FY26, OK. And there is a capacity on how many partners can join these programs.

So you can review it in the terms and conditions.

I think I answered that the submission will continue to be the same through the FPC portal and we answered the question about extension on the vouchers that may be impacted by the blackout.

So this is a good question, Jamie. Why did Ms. decide not continuing the CSP voucher? So this was a pilot program that came to us via. They wanted to test it out. This pilot is going back to basically MCI.

And so that support is going to be provided by MCI. That's a business decision. We don't engage necessarily. That's a business sponsor decision. And so we are continuing to issue vouchers like I said and there is a pipeline of vouchers to be issued. Obviously that is a.

Limited on a first come for serve. That's how we plan this. Well, we will continue to support those deals that closed and you will potentially end up with.

If you opted in for the program and you have a customer that was eligible, then we may see more vouchers coming your way.

And this is great feedback again around CSP. I'll take it back to the sponsors. They're going to be here both Ricardo and Facundo later to answer some of the questions. Let's wait for those so you can voice your your your comments on on the CSP side of the House.

And and the three-year CSP was not included. Lila, correct me if I'm wrong, but that's not part and we're not making any edits on that as we stopped issue any new nominations that are coming in as of yesterday.

OK.



Woods, Lela 21:26

You are correct.



Patricia O'Rourke 21:28

The three-year CSP agreements that were not considered for this pilot.

And what does it mean to have opted in? It means we will resend the terms for FY26, which are now basically a standalone agreement. And so you will get the one for M365V3E5 voucher and you're going to get one for copilot.

We will issue those out to you. Whoever is in our system as the person who gets those agreements, please ensure they mark you as opt-in.

And I think I clarified that the the current programs that we're speaking about, Copilot and E3E5 are EA exclusive.

OK. So moving it along, I'll go ahead and hand it over to Adam and I'll come back to some of your questions.



Adam Rosenblatt (AG Consulting Partners Inc) 22:35

Thanks, Patricia. Good morning, good afternoon, good evening, everyone. Back back one slide, please.

My team manages the QTM registration. My team is QTM registrations team, so we engage with many of you on reviewing your SOWS and POES. Lots of familiar names here, so some of this will be just a reminder and for those of you who are new.

This will be very useful information. So on the left is an example of what a voucher looks like. Vouchers are issued to customers and the customer presents it to their selected partner for redemption with us through the fast track or through the through the portal. We'll call it that.

So once the once they provide you the voucher, you engage the customer, develop an SOW around the relevant eligible workloads and submit it to us for our review and approval. Once we approve the SOW, then you're free to begin the work.

I want to just emphasize, if you're new, that it's really important that you don't engage in the work until the SOW is approved, because in the past we've seen instances where they've where where workloads that were ineligible were declared and they already delivered it and that could lead to some disappointment.

So we'll approve it. You begin the work. In the meantime, the payment will start processing. You'll complete the work and then complete a POE document and submit it for us for approval. The POE document is basically saying we delivered what we promised we were going to deliver in the SOW and then once we approve the POE.

Then the second part of the payment is an issued or initiated unless the voucher was issued to a public sector customer, in which case you'll receive 100% of the payment on approval of the POE. Next slide please.

Lace.

Some best practices around SOWS and POES. First of all, thanks everybody for snapping to what we updated last year and that has been in the instruction sheet. Attached to every SOW and POE document, it's improved our efficiency and I believe it's improved your efficiency as well on understanding what we expect and smoothing the process and shortening the turnaround time on reviews of these documents. One thing that we're going to request this year is.

When you send a document, we want documents that are not. Occasionally we receive documents that are photocopied or scanned or askew, and we're gonna really want them to be in a in a Word or PDF type document.

Document. Basically the litmus test is if you can copy, you know if you can select text on it and copy it, that's acceptable. We're going to start using some new tools this year to evaluate these documents and we'd like to receive them in a form that we can ingest.

As well, I don't know. Patricia, are you gonna do you want to speak to that teaser?



Patricia O'Rourke 25:48

We're good. Keep on going.



Adam Rosenblatt (AG Consulting Partners Inc) 25:48

Maybe not.

All right, please follow the instructions that are attached to the SOW and POA documents. It helps. It'll help you to have a better submission the first time around. That includes.

A.

The the style of signature or what's acceptable for us in terms of signatures selected how it provides an example of how we'd like to see your workloads described and you know I'd say that we're really asking for.

A short form description of the work that you plan to do. We know that with your customers you put together very extensive SOW documents of multiple pages and that's great, but for our purposes we really just want a very high level.

Summary of what you're gonna do around the workloads that you select on SOWS.

One way you could do that is to, you know, grab a tool like Copilot and run your large SOW and have it abstracted out into a shorter list.

The shorter your list is, the easier it is for us to evaluate. The longer your list is, the greater the chance that we're going to come back and ask you to make some changes if it doesn't meet our requirements or we have questions about it. So take that to heart and let's all make this a little easier on us.

You need the voucher to complete an SOW because it contains the expiration date and the voucher number and the voucher value of things that you need to complete the form. Always complete the form. Every question on the form as I mentioned, keep the details brief.

We do encourage you or we have encouraged you to send your documents to us for review before signing. I think once you've done that a couple of times and understand what our expectations are, then we've seen partners that are able to just. You know, freestyle it and subsequently submit, you know, acceptable documents on the first go. So that's great. We want the the customer and partner information that's contained in those documents to match the person that's signing the documents. So most of you have done a good job of that, but occasionally we send documents back because there's a mismatch there. As I mentioned before, don't deliver any work until the SOW is approved and select the fiscal year based on what is indicated on the voucher in the top part of the table.

Regardless of what day it is today, so you could be still redeeming a FY25 voucher this month. Proof of execution template. Same applies digital documents only. Please do not submit a POE until after we've approved the SOW. We've seen this before.

And it's, you know, if there's risk in that and that you could have delivered work that was not approvable, the POE should match your approved SOW that we make that really easy for you. Nothing should change between the approval of the SOW and the delivery of the work and the approval of the POE.

Again, full information, signers, POE cannot be signed on the same day as the SOW. Somebody's going to look at that and go, how did you deliver \$50,000 worth of services in a single day and because you're signing the documents.

You know you're.

Their legal documents, and that's what I have on best practices for these documents. Any questions?

Nope. All right, I'll take a look at the at the the chat and see if there's any in there.



Patricia O'Rourke 29:50

Yeah. And if there's any questions, let's, let's, let's go ahead and address in the chat. But I also want to say that we are working internally to ensure that we, you know, improve some of our processes for SOSOW and Poe submissions. It's going to take, you know.



Adam Rosenblatt (AG Consulting Partners Inc) 30:00

M.



Patricia O'Rourke 30:10

It's in the in let's say in the pipeline to improve that experience. I know a lot of you have make it clear that we can make it smoother and things like that. So we're working through with the internal teams to create a pipeline of automation and potentially AI tools, but in the meantime we continue with the process. S.



Adam Rosenblatt (AG Consulting Partners Inc) 30:31

Which is one more point if I may, with the new SOWS and POES, the updated ones, what you may what you will find are.



Patricia O'Rourke 30:33

Yes.



Adam Rosenblatt (AG Consulting Partners Inc) 30:42

Two years worth of documents in the same document. So there'll be an instruction sheet which you should read and then remove, and then there'll be.

At least for modern work and or what was called modern work, pardon me and copilot the FY25 and the FY26 version and you should also remove the version that you're not completing in there. So it's a exercise in subtraction now for all those documents. So and that's very important. So thank you.



Patricia O'Rourke 31:13

I see a question for you. So you will accept only electronic signatures. Did you answer that, Adam?



Adam Rosenblatt (AG Consulting Partners Inc) 31:19

I did not answer it, but no, we will always take traditional handwritten manually signed documents. Digital signatures should be should contain some type of audit trail, DocuSign, Adobe, whatever, verifiable, things like that. What we won't take is. A copy and paste signature. So if you if you have a customer hand signed or took a signature on the SOW and it was like cut and paste from the SOW under the POE, we're going to, we're going to notice that and we're going to send it back to you.



Patricia O'Rourke 31:57

So thank you, Adam. And then I I see questions around the the blackout date. So as we're preparing all the documentation, I get everything available to you in the back end. We did plan for a blackout date similar to last year. We did have a blackout date.

And July, what we have done for any voucher that is expiring again from July 1st to the 11th, we have a blanketed extension I believe through July 25. So let's ensure that you won't have any issues.

The goal is for you to, you know, to ensure that we don't reach the last minute, but we understand how customers, you know, sometimes it's hard to sign the documentation, but any issues with voucher extensions through that time which we have identified, it's in the hundreds of vouchers that could.

Potentially expire. If you are actively working with a customer that has a voucher expiring between these dates, we will extend it so you have no issues of rejection of your POE or SOW submission.

Hopefully that answers the question and again it's it's about a week and change of of weight for SOW and POE submissions. OK, I hear you Jamie with the need more automation for this program. We are we've taken extensive feedback from from many of you and so we're.

Working to improve those in the upcoming months.

OK, Adam, there's a question for you. Where exactly can we send SOWMPOE before signing for you to assess?



Adam Rosenblatt (AG Consulting Partners Inc) 33:41

To the to the QTM registration e-mail which is FTSP from the same e-mail that

vouchers come from and that you have other correspondence with us. It's FTSP
incentiveclaims@microsoft.com.



Patricia O'Rourke 33:41

Can we go back to some?

Mhm.

And we'll we'll we'll show it over here. I think we can, if you can post it in the chat, that would be great. Just a reminder for CSB vouchers and all the vouchers that have six months expiration date, you know there's some extension rules.

That we have implemented due to audit constraints. I want to thank the partners for working with us to achieving some of the you know we we've seen a decrease in escalation. So I truly appreciate that and so but as a reminder if you have a voucher that expires in six months make sure that.

If a customer has a voucher that expires in in six months, I'm sure to engage quickly and I as a rule of thumb would not engage with a with a budget that is expiring in two weeks, but that's a business decision for you to make, OK.

As a reminder that the extension is not guaranteed. We do escalate to our business sponsors on those. So next slide.

And so the call to action to all of you is accept the new terms, engage with the customers quickly and submit your SOW and POE promptly. And like Adam mentioned for if by any chance the partners on this call do not receive an SO and a terms to opt in.

Specifically for E3 E 5 voucher, please e-mail pxppartnersupport@microsoft.com.

Now if you are already an FRP, that means you meet the eligibility criteria cuz you must have one.

Or more of the specializations for the program. So I'm pretty sure that most of the partners on this goal, if not all, are eligible for the M365B3E5. It's a continuation in other years if we didn't have any changes, what we would do.

We would just republish the terms because again we are separating the terms from FRP. That means you will need to opt in. So we're sure that we have you logged for FY26 for copilot. However, I want to make it very clear only if you are a copilot jumpstart.

Eddie Partner, you would be eligible to join that program, OK?

Cool. Next slide. I believe we're towards the end and we're going to open up the mics. I'm trying to make it as efficient as possible for you. And again, like Adam

mentioned, if you have questions around statement of work, please go ahead and submit it to Adam's team.

Updated program information, you know we're going to get it out to you by next weekend of next week is my promise. Fingers crossed everything goes well and we're looking forward to basically chatting with you about other programs that we may have in the pipeline in the coming weeks.

O Let's open U the.

The chat, the conversation, Amy, I think we're ready for Q&A.

 **Matt Gibson** 37:00

Yeah.

 **Amy Jarosky (AG Consulting Partners Inc)** 37:01

Yup, we're all set to go.

 **Patricia O'Rourke** 37:04

Thank you.

If I didn't get to all of you during the time and the chat, please feel free to raise your hand and talk to us.

 **Roberta Paes** 37:16

I have a question if I may.

 **Patricia O'Rourke** 37:19

Mhm.

 **Roberta Paes** 37:20

Patricia, sorry it was I was not clear. I did not clear understand. If we are already the partner eligible, we will not need to sign anything even though the terms changed and the name changed because we are already partners.

Delivering deployment vouchers. We are the Fasttrack partner already, so I don't need to sign anything.

 **Patricia O'Rourke** 37:44

Yeah.

You all need to opt in into the new terms, yes, because the we are republishing terms outside of the FRP scope, meaning you are no longer nested under that FRP umbrella for quick to market programs. Therefore anybody who signed.

 **Roberta Paes** 37:49

OK.

OK.

Perfect.

OK.

 **Patricia O'Rourke** 38:05

Under under that that's not being renewed, meaning we have a new separate terms for the programs that were required to BFRP before.

 **Roberta Paes** 38:11

OK.

Excellent. And they should expect that by July 15.

 **Patricia O'Rourke** 38:16

Yeah, it's business as usual. So basically you just opt in into it. We save it. You know you don't have to do any onboarding, but we need to ensure that you all have your your you opted in because that could impact your ability to redeem vouchers.

 **Roberta Paes** 38:24

Yeah.

Makes sense. No, thank you so much. And also so the same, I will continue submitting the SOW and POE through the same way I've always done. The new thing is only for the new partners, OK.

 **Patricia O'Rourke** 38:41

Nothing is changing. The only thing changing is that you are not required to be FRP to redeem about to to support a voucher under Copilot and M365E3E5 former modern work.

 **Roberta Paes** 38:47

Mhm.

Sounds good. And my last question or actually request is would you guys be able to send us the template, the new template as soon as we finish this call because we are already discussing some deployment vouchers with clients in.

I tried a link and it's not working, so if you guys can e-mail all of us or just put here on the chat.



Patricia O'Rourke 39:17

We're I'm gonna good call out. We're gonna prioritize a submitting an ACA link for you and publish it via the blog. That way you can link it because the terms won't be ready until we send it out to you. But at least I understand what you're saying that you need the SOW and POE for any new voucher.



Roberta Paes 39:25

Mhm.

Yeah.



Patricia O'Rourke 39:37

Engagement that you would get. So let's go ahead and have that available for you as soon as possible. So give us, give me 24 hours please, if that's OK, no words.



Roberta Paes 39:39

Yeah.



Adam Rosenblatt (AG Consulting Partners Inc) 39:40

Yeah.



Roberta Paes 39:42

Thank you so much. I appreciate. Umm



Adam Rosenblatt (AG Consulting Partners Inc) 39:47

And and Patricia, I would just add to that that for the the primary, the what used to be called modern work vouchers, the deployment and migration vouchers, the workloads have not changed between FY25 and FY26, so.

RP Roberta Paes 39:48

No problem. Thank you, Patricia. I appreciate it. Thank you.

Adam Rosenblatt (AG Consulting Partners Inc) 40:04

So you have that information if we're talking about those two batchers while we're spinning up the templates, the new templates.

Patricia O'Rourke 40:13

Yeah.

Got it.

Hey, feel free to come up mute if your hand is up. Don't need to wait.

AK Amim Khan 40:24

Yeah, hi. So Patricia, I have a quick question that I actually submitted a customer voucher two days back and it actually got approved, right? So since the initial request got approved, now if I have to submit the final.

Patricia O'Rourke 40:25

Hi.

AK Amim Khan 40:39

SOW so it it does it have to be on the new template or will it follow the old earlier version of the template and the guidelines as I submitted?

Patricia O'Rourke 40:50

If you already submitted, I'm assuming you submitted an SOW or proof of execution is what you're saying. So if you did it, it it will run its course. Anything that was submitted before yesterday, it's fine. The old was it an SOW, Sir?

AK Amim Khan 41:06

So basically it was the voucher that I submitted on the old template, right? The the old voucher template that was available for submission.

So once you give in the old SOW and everything right? So the template that I use was the earlier one which was provided.



Patricia O'Rourke 41:22

Mm-hmm. Uh-huh.

That's fine. That's fine. We the only we don't want to we're not going to reject anything again any engagement you had. We're just trying to for you to say hey if you're if you submitted the old template with modern work right and you have.



Adam Rosenblatt (AG Consulting Partners Inc) 41:39

Yeah.



Patricia O'Rourke 41:42

You know access to the old links, which you will have access to all the links that's going to be available to you. Use the SOW that had modern work deployment offer. If not, we're not going to kick it back because you submitted the new one. Let's be let's be clear because.



Adam Rosenblatt (AG Consulting Partners Inc) 41:53

And.

2.



Amim Khan 41:57

OK.



Patricia O'Rourke 41:58

Yeah, we're not going to kick it out. It's just make it makes it less difficult for the team to to go over it because you know, the SOW and the POE needs to match. That's it.



Adam Rosenblatt (AG Consulting Partners Inc) 42:10

Patricia.



Amim Khan 42:11

All right.



Patricia O'Rourke 42:11

But for the name change, we're not going to, you know, be rejecting next question.



Adam Rosenblatt (AG Consulting Partners Inc) 42:18

Oh, Patricia.



Patricia O'Rourke 42:20

Yes.



Adam Rosenblatt (AG Consulting Partners Inc) 42:21

So just to follow up on that, so if it was an FY25 voucher, just select the template that has FY25 as the as the year on it. It'll be an obvious choice.



Patricia O'Rourke 42:32

Yeah.

I see Jose Ricardo has a question. If the Microsoft sales team is not clear on how to make the internal request, who can I contact? I kind of want more clarity on contact on on on what meaning on submitting customers nomination for vouchers.

Any questions? No.



SB Samantha Brown 43:02

That's usually my experience. I didn't post that comment, but usually the Microsoft people we work with do not know how to go in and submit it.



Patricia O'Rourke 43:06

Uh-huh.

Uh.

OK. So how to submit a a customer for for a voucher, right? So right now the team that leads these programs is actively engaging with the sellers providing all the information on the renewals of this program. So they do have a dedicated.

Site internal site that they can go to and so partners unfortunately don't have access to that is internal only. But right now our program sponsors are actively engaged with the field and have been engaged with the field to ensure that they one know where to go.

To to make these nominations for customers. OK, so this is a a very mature program. I know that there's a lot of changes also always on the field, but there is the the one thing that is steady is that that site is published for all and we actually publicize it a lot.

And they are being actively leveraging it for CSP for former modern work and for the copilot voucher. So we will take that message back anyway to ensure, but I I can promise you that there is a a strong comms.

That our sponsors are following as we speak to avoid more churn for you.

Any additional questions?

 **Mohammed Sajjad** 44:37

Uh, Hypertricia.

 **Marco Durante** 44:37

Yeah.

 **Patricia O'Rourke** 44:37

Go ahead, if you have your hand up, unmute yourself, yes.

 **Mohammed Sajjad** 44:40

Yeah, see continuation to the same query of the new terms which you are saying is will be released soon. So are you sending it on the e-mail or are you putting it on the Fast Track portal?

The new terms and condition which need to be accepted.

 **Patricia O'Rourke** 44:57

So we always publish #1. You're going to receive it and the team is going to receive it. Whoever is opting in, they're going to get it on their inbox. In addition to that, there will be a blog post.

With the terms published and the ACA links for SOW and Poe, given the urgency that that you will have to have those documents out again, give me 24 hours to at least you won't have the terms immediately available to you.

 **Mohammed Sajjad** 45:22

OK. OK. Thanks.



Patricia O'Rourke 45:27

But you will have the SOW and Poe. Does that make sense?



MS Mohammed Sajjad 45:30

OK, great. Yeah, sure. Thanks.



Patricia O'Rourke 45:33

OK.



MD Marco Durante 45:36

Hi, Patricia.



Patricia O'Rourke 45:37

Next question. Yes, hi.



MD Marco Durante 45:40

Hello. So just a quick question because in FY25, if customers already received any of the engagement like the Co Pilot adoption accelerator or any of the Co pilot accelerate and?

Workshop we're not eligible for the voucher. Can you confirm in FY26 this is going to be the same or there is not going to be any conflict between the copilot voucher and the copilot accelerator?



Patricia O'Rourke 46:13

We are actually confirming that as we speak with our business sponsor, I believe they this will continue as a rule because they have no double dipping rules, but let me come back to you with a confirmation in the chat.

Because we are, we, we, we were hoping our business sponsor was going to be able to join today, but he's a bit delayed and so let's ensure we get that answer for you in a minute. I'll have it in about 10 minutes if that's OK with you.



MD Marco Durante 46:39

Thank.

Yeah, of course. Thank you so much.



Patricia O'Rourke 46:47

And next erson.
I think Theresa.



Heuke, Teresa 46:55

A cap on the partners who can participate in the modern work vouchers would be great if you can elaborate a little bit more. So and also there was a there was a question right in the beginning if there's more partners who can participate now if the budget has been increased as well or if it's all stays the same.



Patricia O'Rourke 46:55

So.



Heuke, Teresa 47:15

And so, so just to have a feeling on who can who, who will be playing in that, what are the requirements of the partners and which requirements are needed. So, so to have a to have a feeling on how many, how many partners are going to play in this field.



Patricia O'Rourke 47:31

So thank you so much. Let's answer the capacity question first. We've maintained the capacity of up to 700 partners that can opt in into this program. Just to give you an idea, we have about 430 partners last year this for this past FY25 that were actively. Engage and a voucher, a modern work deployment offer, right? O we will maintain the 700 capacity.

You would you would assume that there's more engagement, but it's it's it's limited, right. And so the second thing is nothing changes in terms of eligibility. You you are eligible today. We've maintained, we we are not making it harder for you to obtain. It's basically you need to have.



Heuke, Teresa 48:07

Yeah.
Mhm.



Patricia O'Rourke 48:21

One or more specializations that it's the same terms that you you sign up for FY26. We're going to have the same list. You must have one of these. I can post it in the chat if you want, but really I have no concerns on that on that.



Heuke, Teresa 48:24

OK.

Yep.



Patricia O'Rourke 48:37

You do the partners that are currently part of the program FRP, right, will have eligibility to join to opt in actually. Hence why we're making it an opt in, right? We're making it easier. This is just click.



Heuke, Teresa 48:50

OK.



Patricia O'Rourke 48:55

You know, we're pretty sure that you will be eligible.

OK. And and and regards to the incentives, incentives, so.



Heuke, Teresa 48:59

Yeah. OK. Thanks.



Patricia O'Rourke 49:04

I want to say the business sponsors are making it incentive for voucher programs.

We've seen, we've seen, I mean, I want to say more programs.

Being rolled out and we've seen if we can mute please. Thank you. So we are making it. I want to say there's more pilots coming our way, there's more program being invested and quick to market.


And so the commitment is there we have.


I want to say the funding available for this program as you've seen is, is, is, is high.


We are producing a lot of vouchers. I'm happy to to to in the next call probably showcase how many vouchers we've issued through the fiscal year and all of that.


To partners, but understand that you know the investment is there, the commitment is there. We're just removing that the FRP requirement. Now I don't have our business sponsor on the call, but they oh, Ricardo, you're here.

 **Heuke, Teresa** 50:07
OK.

 **Patricia O'Rourke** 50:13
There's a lot of feedback. Can you come off mute?


 **Ricardo Saldivar** 50:15
No. Yes, absolutely. Hey, everybody. I'm so sorry to be late. Life's getting here. We got to have a sick kid, so I'm so sorry.

 **Patricia O'Rourke** 50:22
No, it's a busy time on Microsoft. It's a busy time on Microsoft. So Ricardo, why don't you go ahead and introduce yourself to the to the group?

 **Ricardo Saldivar** 50:32
Yeah, so my name is Ricardo Saldivar. I'm the I'm the one that oversees the deployment voucher. Now we recently rebranded as of today as a what is that ABS plus S So sorry, still getting across the name.

 **CouriAnne Williams (AG Consulting Partners Inc)** 50:48
An M365E3E5.

 **Patricia O'Rourke** 50:48
It is an ME3ME5 but.

 **Ricardo Saldivar** 50:49
Which is AI business. So exact and for you guys, actually for you it is ME3ME5 deployment and migration voucher. Yeah. So as Patricia was saying, we have budget in place. We are very excited to kick off the year. We did a lot of work to kind of.



Patricia O'Rourke 50:58

Yeah.



Ricardo Saldivar 51:08

Like, you know, make those rules a little bit easier for you to be able to submit some of your, you know, nominations and a little bit more straightforward criteria. There wasn't a big change in terms of the payouts at all, so I think you expect to to.

To receive the same level in general like how the payout works and the the also the the the Max limits and things like that. So overall I think it is just more simplification and just to make a little bit easier.

But again, I think like what I caught what Patricia was saying, the funding is there.

We're kicking off the year. We usually just for you to know, we don't really stop the year. So it's something that continues to go. So if you have, if you've seen other programs for example like.

That we had another one that I managed it ended yesterday and then it starts today.

This one was going on from all this month. So so that's that's something to to keep an eye on. But yeah super excited and and and I know there's some questions so I'm going to leave some time for that as well. My apologies for being being a little late.



Patricia O'Rourke 52:15

Oh, yeah. So I'll give you the recap.



Ricardo Saldivar 52:18

I have a sick kid and whatnot, so.



Patricia O'Rourke 52:20

Ricardo is my partner in crime, so I want to say we've been working very closely together for for a year now. And so Ricardo, one of the feedback that I've seen is why did we stop supporting CSP? Why is CSP not being considered? CSP is is is such a big component for for as a strategy now.



Ricardo Saldivar 52:21

Mm.

Ha.
Right.



Patricia O'Rourke 52:40

I did explain that we are continuing to issue vouchers under the CSP program for all the pre-commitments that we have, but but understanding that FY26 that program will sunset in terms of we won't receive after that, we won't issue any more vouchers, right? As per expiration, we're following the voucher expiration date.



Ricardo Saldivar 52:57

Correct.



Patricia O'Rourke 53:00

Care to do you mind if you kind of go over the reasoning behind that?



Ricardo Saldivar 53:01

Yeah, yeah, yeah. Happy to.

Yeah, there's also, there's some stuff that I, as you might understand as well, there's some things that I cannot share. But if I can give you like an overall feeling on why is that if you know that we have an MCI partner, we have a partner LED organization which is.

Which is where your it is called GPS. You're probably familiar with that. What's your PDM lives and it's part of. So that organization at Microsoft, it is called partner LED and it is the one where else aligns to the strategy of the CSP.

From a field LED this is a Microsoft LED we our program, it is a Microsoft LED and our strategy is to support you know certain segments and licensing as well areas in this case enterprise and licensing motions because CSP is a way to buy it right.

So unfortunately, I think the Long story short, it is that CSP does not align to the core of the things that we're driving as a as this program in particular. And I understand that might cause a lot of, you know, because you say, hey, this is Microsoft, I don't care about those things. I care. I care about what the customer say.

And that we totally agree to that. And so we have grabbed that feedback. So take this pilot that we just run as something that we had an exceptionally, we run it to make sure that it works in a way and then we're partnering close to MCI to to support some of those motions, so.

You'll see some of that moving there in the future. I don't know when if they're going to announce or how it's going to come, but basically take that what we did as a just a pilot to understand how the how the behaviors were and then if something was successful, the good thing that it was successful.

So we're passing all those knowledge and the knowledge to the MCI organization to to see how they want to execute on that, but that's basically just a strategic alignment type of thing.



Patricia O'Rourke 55:08

Correct. And then thank you Ricardo for that. I think another question that that that was asked is regarding double dipping, right, what they can combine the copilot voucher with or not. And so I believe in FY25.



Ricardo Saldivar 55:17

Correct.



Patricia O'Rourke 55:23

Let me go back to that comment. There were plenty of restrictions, right, Ricardo? So can you validate and I'm going to read that to you if if you're engaged with copilot adoption, accelerator deployment and adoption, any of the accelerator copilot.



Ricardo Saldivar 55:26

Hey, Dad. It's your dad. It's your dad.

Yes, yes.



Patricia O'Rourke 55:42

Accelerators. That would still be the case that you won't be a you won't that that is considered double dipping and not eligible for a voucher. Is that correct?



Ricardo Saldivar 55:46

Are you going to trial?

So I think the rule of thumb to follow on that if you and and I really I'm going to stress on this. So the reason why we have this double dip rules it is because if we find ourselves paying for an activity twice.

Right. So we say, hey, you know, we have a partner working on this and we have

someone else working on the same thing. We're going to give money to the partner, we're going to give money to someone else, we're going to give money to the customer for the same activities. Then it's just, it's just doubling up and then we lose control of how the investments are being used and things like that.

So that's the background of the double dipping. It's basically we we sorry buddy, we don't want to be paying for the same activity.

Through multiple avenues or to the same partner or the same same delivery method for the same activity. So that is that is what it double dipping and we have all these controls and we have compliance is really keeping a really close eye to that as well and we partner with our compliance team.

So with that we have to every year we have to look left, this is left, this is right. We have to look right and left and right to make sure that what other partners already talked about or partner organizations are doing with their programs to make sure that we align.

And we also we try to avoid from a programmatic perspective that case that potentially can generate that double dipping. So we've been looking really closely to really try to address that from a programmatic perspective just.

Trying to do the criteria, so the criterias do not overlap. So at this point what all I can tell you, although I am unsure if the MCI partnership has already delivered the the rules out yet, but we are keeping an eye to them and we will make the adjustments as needed. I don't have a final answer right now if we say.

Like, hey, don't, you know, it's just going to blank it for now, continue to operate. So if you apply to a MCI, MCI, please do not mix it with the vouchers. But yeah, that's kind of like the reasoning behind it. So I think there's more to come to your bottom line question is there's more to come and stay.

Reveal their criteria. We're really working together with them to make sure that we have those controls in place.



Patricia O'Rourke 58:16

Thank you, Ricardo. And before we we jump off, is there any updates on potential new programs that you want to tease out to this group to to keep it interesting if you will?



Ricardo Saldivar 58:28

Yeah. So we've been working really hard in the back end. I wanted to just give huge

kudos to Patricia here on the team and Kurian and everyone and Adam as well here on the call because we've been, it's been a crazy year, you know and as you know we're moving towards.

You know the AI and like how do we support not only licenses but other motions that come afterwards? Uh, so you probably can read between the lines here, but we are getting ready to announce a new program Uh that will be live in the next.

Week or so and you'll have all the details about it. It is exciting. It is new ground for us. It is I think it's part of the whole transformation and that we continue to see and you know and and bear with us because I think we've been, we've been working to to create you know those bad criteria.

The.

The best we can without really understanding that we're really testing it out. So I think it's gonna be, we call it incubation motion and I think we appreciate your partnership. I think I know some of these companies here on the call and I know the deep knowledge that you guys carry and we appreciate that partnership to understand how things are really. on the ground when we launch it.

 **Andreas Hötzing** 59:41

And I'll think some.

 **Patricia O'Rourke** 59:43

Can we share at least the the the the workloads that will be in scope or no? Are we still tented?

 **Ricardo Saldivar** 59:47

Yeah, we can. We can. I think I think that we can. I was trying to stay away from the number, but the name, but yeah, it is agent. So as we as you know now we do have motion supporting the selling of copilot licenses. But as we know we're moving into Agentic world. We're all excited about it to see what those capabilities can.

And you know, can get us as a humanity, I would say not only for from a business perspective, but I am curious as how the world's going to look like in a couple years. So we will be putting some funds behind that too for the development of those agents.



Patricia O'Rourke 1:00:23

Thank you, Ricardo. And I know I didn't. If we didn't get to all your questions, I'll go over it and try to answer in the next couple of hours. One thing I got to say is that for any new program that we are releasing, we will create an invitation to launch specifically this one. I want to make very clear that this new program that. Will be releasing, will require for you to be jumpstart ready and have a couple of specializations, so we will walk over that when we do the launch session. But I want you to be on the lookout because we're going to be doing that in the next couple of weeks. Usually what happens, we inform the field first because. Because there has to be a pipeline. As you know, these deals don't convert right away and they don't close right away. So basically as we inform the field and we let them know what these vouchers are about and then we will do a launch and ensure to invite the partners based on the eligibility criteria as I just.



Andreas Hötzing 1:01:22

Play some video.



Patricia O'Rourke 1:01:23

Mentioned focus on Jumpstart, Copilot ready, Jumpstart, Copilot ready, Copilot jumpstart ready partners. Sorry, got that backwards. If you don't have any questions for me, we're going to end this session today and I'll get back to you as a reminder the the.

New links have not been released to the SOWPOES and we are taking them down so we can replace and republish. So please allow us 24 hours. I was just going to go into Spanish but Ricardo and say benti cuatroas 24 hours for us to publish the SOW. POE for both programs and then in the meantime, Please wait until we send the terms.

And thank you all for joining us today and thank you for the familiar faces. I miss a lot of you all. So thank you partners for joining us on this FY26 kickoff. Stay tuned for the new program to be announced. Yeah.



Ricardo Saldivar 1:02:20

Patricia and we can work together to finalize some of those questions that are

pending. Again, my big apologies, but it's really nice to see you all. Thank you so much for your support and and and everything you do.



Patricia O'Rourke 1:02:29

Absolutely.

Gracias. Thank you. Talk to you soon.



Ricardo Saldivar 1:02:36

Bye, everybody. Gracias. Ciao.



Amy Jarosky (AG Consulting Partners Inc) stopped transcription