

# FY27 Marketing Tactics POE Requirements



# Agenda

- Tactic Categories Overview
- Universal POE Structure
- Events & Engagement
- Digital Marketing
- Demand Gen & Sales
- Enablement & Support
- Summary Tables

# FY27 Tactic Categories

## EVENTS & ENGAGEMENT

- General Awareness Event/Conference
- Audience Conversion Event
- On-Site / Virtual Champ

## DIGITAL MARKETING

- Campaign Landing Page
  - Display Advertising
- Digital Communication (email/eDM/SMS)
  - Digital Catalog
- Search Engine Marketing
- Social Media Marketing

## DEMAND GEN & SALES

- Telemarketing
  - SPIFF

## ENABLEMENT & SUPPORT

- Partner Recruitment & Readiness
  - Research / Whitepapers

## Proof of Concepts

- Proof of Concept (PoC)

# Universal POE Structure

- **WHAT:** Evidence that MS products/services were promoted via the approved activity
- **WHEN:** Timestamped proof execution occurred within the approved activity period
- **WHERE:** Channel or location matches what was specified in the marketing plan
- **Acceptable Evidence Examples:**
  - Original images of events, printed materials, or merchandise
  - Ad screenshots with URL and date clearly visible
  - System-generated execution reports (Facebook Ads, Google Analytics, PowerBI)
  - Original event invitations and emails with date stamp
  - Third-party invoices or receipts to prove spend
  - Delivery dockets or distribution reports

# Events & Engagement



# General Awareness Event / Conference

- **WHAT:** POE must validate that a General Awareness Event or Conference was held and MS products were promoted, including collaterals. Attendee list must include company names.
- **WHEN:** Created and promoted/conducted within the specified activity period.
- **WHERE:** Occurred in the location or via the channel specified in the marketing plan.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report, Itemized receipts (T&E)
- **Accepted File Formats:** GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint

# Audience Conversion Event

- **WHAT:** POE must validate that an Audience Conversion event was held and MS products were promoted, including collaterals. Attendee list must include company names.
- **WHEN:** Created and promoted/conducted within the specified activity period.
- **WHERE:** Occurred in the location or via the channel specified in the marketing plan.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report, Itemized receipts (T&E)
- **Accepted File Formats:** GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint

# On-Site Champ / Virtual Champ

- **WHAT:** POE must validate champion engagement promoted MS products per plan, including collaterals. Participant list must include company names.
- **WHEN:** Engagement occurred within the specified activity period.
- **WHERE:** On-site or virtual delivery channel as specified in the marketing plan.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report, Itemized receipts (T&E)
- **Accepted File Formats:** GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint

# Proof of Concept (PoC)

- **WHAT:** Work-scope addendum defining deliverables + communication materials. Customer name must be clearly identified in all documentation.
- **WHEN:** Delivery schedule in work-scope addendum + results documentation showing execution timing.
- **WHERE:** Customer delivery context validated via end-customer written attestation (with customer company name) + execution artifacts.
- **Applicable POE Forms:** Work-scope addendum, Communication Materials, End-customer written attestation, Results documentation
- **Accepted File Formats:** PDF, Excel, Word, PowerPoint

# Digital Marketing



# Campaign Landing Page

- **WHAT:** POE must validate MS products were promoted on first- or third-party web page(s) as outlined in the plan, including collaterals.
- **WHEN:** Marketing collaterals were created and promoted (displayed) within the specified activity period.
- **WHERE:** Promotion and creation of collaterals occurred in the location or via the channel specified.
  
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** MHT, MHTML, HTML, URL, PDF, Excel, Word, PowerPoint

# Display Advertising

- **WHAT:** POE must validate MS products were promoted on first- or third-party web pages or mobile apps, including supporting collaterals.
- **WHEN:** Content was created and promoted (displayed) within the specified activity period.
- **WHERE:** Occurred in the location or via the channel specified in the marketing plan.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** GIF, JPEG, PNG, HTML, URL, MP4, PDF, Excel, Word, PowerPoint

# Digital Communication (email/eDM/SMS)

- **WHAT:** POE must validate distribution of promotional content for MS products to customers/partner contacts as planned.
- **WHEN:** Collateral was created and distributed within the specified activity period.
- **WHERE:** Distribution and creation occurred in the specified location/channel.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** MHT, HTML, URL, PDF, Excel, Word, PowerPoint

# Digital Catalog

- **WHAT:** POE must validate digital brochures/catalogs were distributed to customers/partners as planned.
- **WHEN:** Collateral was created and distributed within the specified activity period.
- **WHERE:** Distribution and creation occurred in the specified location/channel.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** PDF, HTML, URL, Excel, Word, PowerPoint

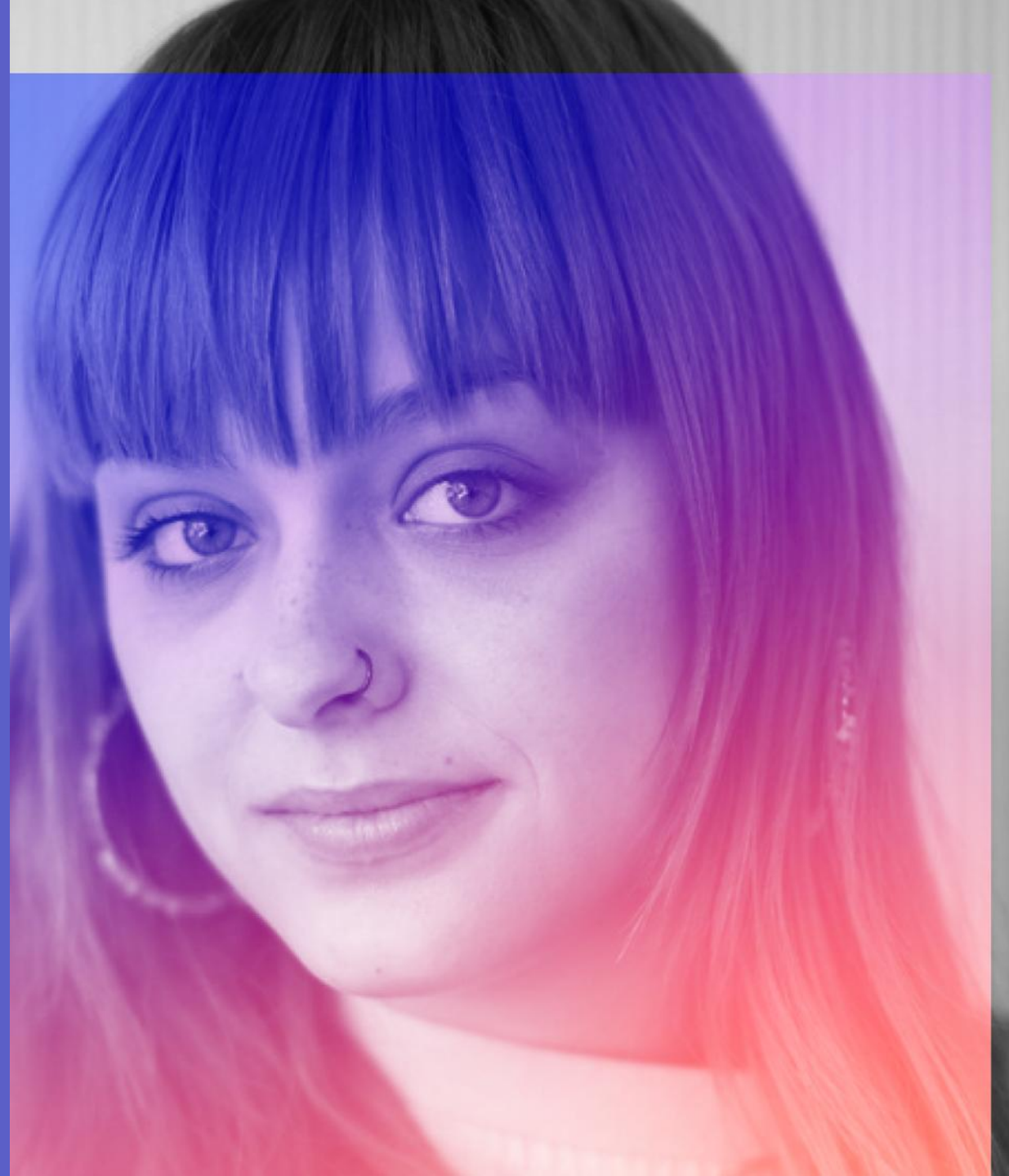
# Search Engine Marketing

- **WHAT:** POE must validate marketing plan and collaterals were created and promoted (executed) for MS products.
- **WHEN:** Created and promoted (executed) within the specified activity period.
- **WHERE:** Occurred in the location or via the channel specified in the marketing plan.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** GIF, JPEG, PNG, HTML, URL, MP4, PDF, Excel, Word, PowerPoint

# Social Media Marketing

- **WHAT:** POE must validate MS products were promoted as specified in the ad campaign plan, including collaterals.
- **WHEN:** Created and promoted (executed) within the specified activity period.
- **WHERE:** Occurred in the location or via the channel specified in the marketing plan.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint

# Demand Gen & Sales



# Telemarketing

- **WHAT:** POE must validate that resource engaged with customers for MS products/services as outlined in the plan.
- **WHEN:** Must validate when the resource engaged with customers.
- **WHERE:** Must validate the channel used (e.g., phone/call center) per the marketing plan.
  
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** PDF, Excel, Word, PowerPoint

# SPIFF

- **WHAT:** POE must validate incentive program promoted MS products/services per plan. Sales Out Report required.
- **WHEN:** Incentive period and payouts validated within activity period.
- **WHERE:** Program ran in specified market/channel per the marketing plan.
- **Applicable POE Forms:** Sales Out Report, Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** PDF, Excel, Word, PowerPoint

# Enablement & Support



# Partner Recruitment & Readiness

- **WHAT:** POE must validate that a Readiness & Training event was held and MS products were promoted or taught, including collaterals.
- **WHEN:** Created and used within the specified activity period.
- **WHERE:** Occurred in the location or via the channel specified in the marketing plan.
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report, Itemized receipts (T&E)
- **Accepted File Formats:** GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint

# Research / Whitepapers

- **WHAT:** POE must validate that MS products were researched and reported on, including collaterals created to support that research.
- **WHEN:** Created and provided (published) within the specified activity period.
- **WHERE:** Research and creation occurred in the location or via the channel specified.
  
- **Applicable POE Forms:** Communication Materials, 3rd Party Invoice, CSR, Execution Report
- **Accepted File Formats:** PDF, Excel, Word, PowerPoint

# POE Focus by Category

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| Category             | Tactics                                                                                                                                       | Typical POE Focus                                                                                                    |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Events & Engagement  | General Awareness Event<br>Audience Conversion Event<br>On-Site / Virtual Champ<br>Proof of Concept (PoC)                                     | Photos, invitations, attendance lists with company names, T&E receipts, customer attestation (PoC)                   |
| Digital Marketing    | Campaign Landing Page<br>Display Advertising<br>Digital Communication<br>Digital Catalog<br>Search Engine Marketing<br>Social Media Marketing | Screenshots with URL + date, analytics/execution reports, platform reports (Google Analytics, Facebook Ads, PowerBI) |
| Demand Gen & Sales   | Telemarketing<br>SPIFF                                                                                                                        | Call logs, engagement reports, Sales Out Reports, payout evidence                                                    |
| Enablement & Support | Partner Recruitment & Readiness<br>Research / Whitepapers                                                                                     | Training materials, published collateral, event proof + receipts                                                     |

# POE Requirements Matrix (1/2)

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| Tactic                    | WHAT                                                                      | WHEN                             | WHERE                               | POE Forms                             |
|---------------------------|---------------------------------------------------------------------------|----------------------------------|-------------------------------------|---------------------------------------|
| General Awareness Event   | Event held, MS products promoted. Attendee list with company names.       | Within activity period           | Location/channel per plan           | Comms, Invoice, CSR, Exec Report, T&E |
| Audience Conversion Event | Conversion event, MS products promoted. Attendee list with company names. | Within activity period           | Location/channel per plan           | Comms, Invoice, CSR, Exec Report, T&E |
| On-Site / Virtual Champ   | Champion engagement, MS products. Participant list with company names.    | Within activity period           | On-site/virtual per plan            | Comms, Invoice, CSR, Exec Report, T&E |
| Proof of Concept (PoC)    | Work-scope addendum + comms. Customer name clearly identified.            | Delivery schedule + results docs | Customer attestation (company name) | Work-scope, Comms, Attestation        |
| Campaign Landing Page     | MS products on web/mobile pages + collaterals                             | Created & displayed in period    | Location/channel per plan           | Comms, Invoice, CSR, Exec Report      |
| Display Advertising       | MS products on web/mobile apps + collaterals                              | Created & displayed in period    | Location/channel per plan           | Comms, Invoice, CSR, Exec Report      |
| Digital Communication     | Promo content distributed to customers/partners                           | Created & distributed in period  | Specified location/channel          | Comms, Invoice, CSR, Exec Report      |

# POE Requirements Matrix (2/2)

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| Tactic                  | WHAT                                                       | WHEN                            | WHERE                        | POE Forms                             |
|-------------------------|------------------------------------------------------------|---------------------------------|------------------------------|---------------------------------------|
| Digital Catalog         | Digital brochures distributed to customers/partners        | Created & distributed in period | Specified location/channel   | Comms, Invoice, CSR, Exec Report      |
| Search Engine Marketing | Marketing plan + collaterals executed for MS products      | Created & executed in period    | Location/channel per plan    | Comms, Invoice, CSR, Exec Report      |
| Social Media Marketing  | MS products promoted per ad campaign plan + collaterals    | Created & executed in period    | Location/channel per plan    | Comms, Invoice, CSR, Exec Report      |
| Telemarketing           | Resource engaged customers for MS products per plan        | When engagement occurred        | Channel (phone/call center)  | Comms, Invoice, CSR, Exec Report      |
| SPIFF                   | Incentive program, MS products. Sales Out Report required. | Incentive period + payouts      | Market/channel per plan      | Sales Out Report, Comms, Invoice, CSR |
| Partner Recruitment     | Training event, MS products promoted/taught + collaterals  | Created & used in period        | Location/channel per plan    | Comms, Invoice, CSR, Exec Report, T&E |
| Research / Whitepapers  | MS products researched & reported + collaterals            | Created & published in period   | Location/channel of research | Comms, Invoice, CSR, Exec Report      |

# Accepted File Formats by Tactic

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| Tactic                                | Accepted Formats                                                       |
|---------------------------------------|------------------------------------------------------------------------|
| General Awareness Event/Conference    | GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint |
| Audience Conversion Event             | GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint |
| On-Site / Virtual Champ               | GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint |
| Proof of Concept (PoC)                | PDF, Excel, Word, PowerPoint                                           |
| Campaign Landing Page                 | MHT, MHTML, HTML, URL, PDF, Excel, Word, PowerPoint                    |
| Display Advertising                   | GIF, JPEG, PNG, HTML, URL, MP4, PDF, Excel, Word, PowerPoint           |
| Digital Communication (email/eDM/SMS) | MHT, HTML, URL, PDF, Excel, Word, PowerPoint                           |
| Digital Catalog                       | PDF, HTML, URL, Excel, Word, PowerPoint                                |
| Search Engine Marketing               | GIF, JPEG, PNG, HTML, URL, MP4, PDF, Excel, Word, PowerPoint           |
| Social Media Marketing                | GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint |
| Telemarketing                         | PDF, Excel, Word, PowerPoint                                           |
| SPIFF                                 | PDF, Excel, Word, PowerPoint                                           |
| Partner Recruitment & Readiness       | GIF, JPEG, PNG, HTML, URL, MP4, WMV, MOV, PDF, Excel, Word, PowerPoint |
| Research / Whitepapers                | PDF, Excel, Word, PowerPoint                                           |

