

# Microsoft SAM Managed Service Program

## Customer onboarding checklist



This checklist is designed to guide you through the process of setting your customer up as a member of the Microsoft SAM Managed Service Program. In this document, you will find an overview of the obligations and eligibility criteria that are required to be met by each customer and a step-by-step checklist on how to onboard your customer into the program operations.

## Obligations and eligibility

To participate in the program and receive program benefits the following criteria must be met.

1. A signed agreement with your customer that covers:

- The minimum services and deliverables required for the program
- One year commitment with the intent to renew

2. Share inventory / deployment data with Microsoft and the provider every 6 months, at a minimum

3. Customer is not in breach of an agreement with Microsoft

4. Any audit just beginning or in process must be completed before participating in the program

Minimum ongoing services:

- SAM consultation
- End of support guidance
- At least one value added service using the data such as cybersecurity or cloud readiness consultation
- License optimization and SAM maturity roadmap comparing data over time to show variances

Inventory data must be complete and accurate, without any modification before providing to Microsoft.

## Always on

A SAM Managed Service is an “always on” service, where data should be available to customers real-time. Your agreement with your customer should include this type of service, or have an agreed upon reporting and consultation cadence with the customer (real-time, weekly, monthly, or other) on data reviews, SAM consultation, etc.

As part of the Microsoft SAM Managed Service Program, data and other program deliverables must be shared with Microsoft at specific times.

The table below shows an example of how you, Microsoft, and your customer can visually build out the Program specific deliverables from all three parties based on the minimum expectations of the program.

DELIVERABLE / POE	START	YEAR 1					YEAR 2				YEAR 3			
		MONTH 3	MONTH 6	MONTH 9	MONTH 12	MONTH 15	MONTH 18	MONTH 21	MONTH 24	MONTH 27	MONTH 30	MONTH 33	MONTH 36	MONTH 39
Customer / Partner Contract Signed	✓													
Detailed inventory (EDP) through IAM		✓		✓		✓		✓		✓		✓		✓
SAM Maturity Assessment and Recommendations		✓				✓				✓				✓
Technology and License Optimization Roadmap Discussions		✓				✓				✓				✓
Product End-of-Support Review		✓		✓		✓		✓		✓		✓		✓
Value Added Service:														
Cybersecurity Review		✓		✓		✓		✓		✓		✓		✓
-OR-														
Cloud Productivity Review		✓		✓		✓		✓		✓		✓		✓
-OR-														
Other Value-based Review such as Server Optimization		✓		✓		✓		✓		✓		✓		✓

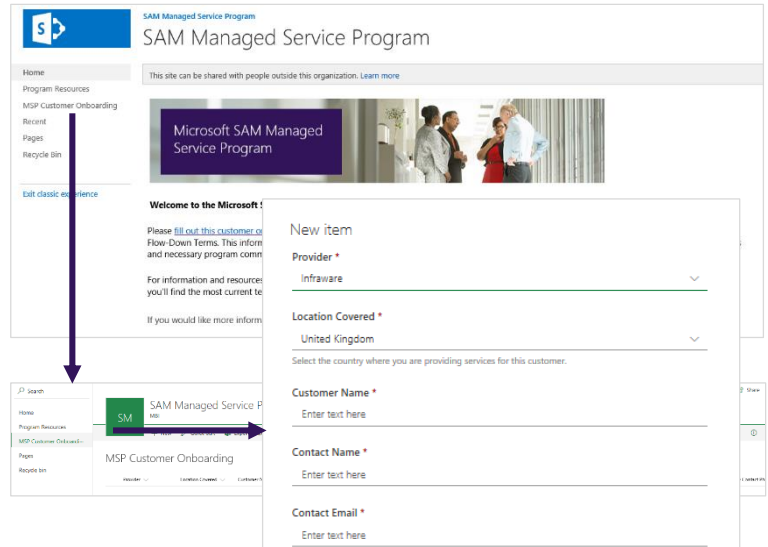
Legend: ✓ = deliverable to customer, shared with Microsoft    ✓ = deliverable between partner and customer only

Example only - Timeline may vary by customer depending on systems and needs.

More detail on the initial eligibility criteria and the assessment process are located in the Program Guide: <https://aka.ms/sammanagedserviceprogramguide>.

# Onboarding checklist

1. Agree to the [Customer Terms and Conditions](#) with your customer.
2. Discuss and agree on the value-added consultation(s) you will be able to offer your customer as a part of this managed service, such as cloud-ready, or cybersecurity.
3. Sign an agreement with your customer that contains the required clauses and program deliverables ([Flow Down Terms](#)).
4. Upon signing an agreement, enter your customer's onboarding information into the Microsoft SAM Managed Service Program [customer onboarding site](#)\* including:
  - Customer name, as it should appear on the customer's certificate
  - Primary customer contact name, email, phone
  - Additional customer contact name, email, phone
  - Customer locations covered (countries)
  - Start date in program (date customer signs agreement with partner)



## Your customer's information

Your customer's information must be uploaded by you, directly into the secure site in order to protect their PII. Having this information enables us to welcome them properly into the Program, notify them of any changes in the Program, and track the status of required milestones and anniversary dates.

Shortly after uploading their information into the above site, your customer will receive their welcome letter.

Upon receiving your customers complete and accurate EDP, through Intelligent Asset Manager they will receive their certificate of participation and can begin receiving program benefits.



\*Your SAM EM/Lead has provided access to up to two individuals within your organization. Please note: Only individuals who initially enter customer information will be able to see and access that information going forward. If you need to change who has access to the share, please contact your SAM EM/Lead.

\*\*To ensure the security of your customers PII, please be sure to enter their information directly into the form. Never share PII via email.