

Microsoft SAM Managed Service Program Guide for Partners

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Additional terms and conditions are set forth in the Program Agreement located at <https://aka.ms/sammanagedserviceagreement>, which may be updated from time to time.

All materials and information presented should be treated as Microsoft Confidential Information and are subject to the terms of your NDA with Microsoft through your Channel Partner Agreement or Microsoft Partner Network (MPN) Agreement in its current form. The information contained within this Program Guide is subject to change.

Microsoft SAM Managed Service Program Description

Overview

The Microsoft SAM Managed Service Program provides customers high-quality, predictable, and ongoing SAM services through participating Accredited Providers who deliver SAM best practices, tools, and resources to help customers establish and maintain SAM within their organizations.

Customer Benefits

Customers benefit by working with Accredited Providers who have passed a rigorous independent review process and are uniquely qualified to participate in the Program. Services delivered by Accredited Providers include ongoing strategic consultation, SAM maturity tracking, and technology roadmap discussions thereby helping ensure customer IT assets and processes are optimized for their current business needs and are aligned to their future strategy.

Partner Benefits

Approved Accredited Providers receive a level of exclusivity and “stamp of approval” that can be promoted with customers. An “always on” service provides the opportunity to reduce sales cycle time and drive new business thereby helping increase sales through add-on opportunities and annuity revenue streams.

How Partners Participate

Eligibility Criteria

Partners must meet specific eligibility criteria to participate in the Program and must be assessed by third party Independent Evaluators, currently EY and PwC. Eligibility criteria is outlined later in this Program Guide and in the [Partner Agreement](#).

Assessment Process

At their own expense, Partners are required to go through an assessment of their SAM expertise and consultation services. The Independent Evaluator will review the Partner's SAM abilities, identify any gaps, make recommendations for improvement, and provide a final assessment of the Partner's qualifications. The assessment process is outlined later in this Program Guide.

Final Approval

The WW and local Microsoft SAM & Compliance (SAM&C) team will review the final assessment results and make the final determination for entry into the Program as an Accredited Provider within their geography.

Required Partner Deliverables

Partners must agree to provide a minimum of the following SAM managed services to customers as part of the Program:

1. **Ongoing SAM consultation** to drive customers to a higher level of maturity with their SAM policies, procedures, and governance.
2. At least one annual **strategic service / solution assessment**: Cybersecurity, Cloud readiness consultation, Infrastructure Optimization, Server Optimization or other service agreed upon with customer, based on customer need.
3. **End-of-Support guidance** every 6 months at a minimum, highlighting versioning and patching.
4. **IT Asset optimization and SAM maturity roadmap**, every 12 months at a minimum, comparing data over time to highlight risks, recommend improvements and track progress in the desktop and server infrastructure, including related policies and procedures.

High Level Process Overview for Partner enrollment

Partner Qualification



1

Partner notifies local or WW Microsoft SAM&C team of their interest in the Program



2

Partner and local Microsoft SAM&C team determine if eligibility criteria is met



3

Partner agrees to the Program Terms & Conditions

Partner Assessment Process



4

Partner pays Microsoft for the assessment process and selects Independent Evaluator



5

Partner undergoes assessment process with Independent Evaluator



6

Results are evaluated and decision is made. Partners are notified regarding results.

SAM Managed Service Delivery and Maintenance



7

Approved Partners receive welcome emails and Accredited Provider certificate



8

Provider delivers SAM Managed Services to customers



9

Provider undergoes re-assessment process biennially (occurring every 2 years)

Partner Eligibility Criteria

In order to participate, Partner must first accept the Partner Agreement and meet the eligibility criteria set forth in the Partner Agreement, including:

1. An active MPN membership in good standing with a valid MPN Agreement and a valid Channel Partner Agreement.
2. Partner agreement to submit to initial Assessment by an Independent Evaluator selected by Microsoft (currently EY or PwC), as well as biennial re-assessments.
3. SAM Partner eligible for SAM channel incentives.
4. Partner must have an established managed service reasonably acceptable to Microsoft > 2 years with 10+ customers or >5,000 seats for each specified geography in which Partner seeks accreditation.
5. Partner must deliver ten completed Microsoft SAM engagements / Solution Assessments within the last 12 months in each location and be evidenced by the local SAM&C Team. Engagements may be Microsoft Generated Opportunities (MGO) or Partner Generated Opportunities (PGOs) and do not require use of SAM Channel Incentive funding.
6. Partner must operate in the local language.
7. Partner must provide evidence to the local SAM&C Manager of their ability to deliver cloud migration services or that they have established relationships with Microsoft Partner Network cloud competent Partners able to deliver this service to customers.
8. Partner must agree to replace lost resources within 3 months and meet the eligibility criteria with the new resources within an additional 3 months.
9. Partner agreement to follow all applicable Microsoft policies, procedures and guidelines described in this Agreement or on the Program Site or otherwise made available to Partner by Microsoft.

Accreditation by Location

To become accredited for the Microsoft SAM Managed Service Program, partners must meet all eligibility requirements. Consideration may be given to apply the accreditation to an additional country if the Managed Service Provider has a **centralized SAM Service delivery model that is consistently applied across multiple subsidiaries and meets the global standardized eligibility criteria and is approved by WW SAM Team.**

1. There is no default global accreditation for the SAM Managed Service Program.
2. Partners need to be accredited by location for services provided to a customer in that location and must meet all eligibility criteria.
3. WW SAM has discretion to approve a Partner that has been accredited in another location to drive the managed service within (an)other geo/s without additional assessment and associated costs if the Partner demonstrates that the accredited location offers centralized services to that/those geo/s. Centralized services equate to using the same people and process from the accredited location.
4. An accredited SAM Managed Service Provider may provide SAM Managed Services for a global customer, if:
 1. They are accredited in the same country as the customer's headquarters (HQ) location.
 2. They receive approval from WW SAM Team in each instance on a global service for the customer. Close collaboration is needed between the customer, Microsoft, and Partner resources at the HQ and downstream locations.

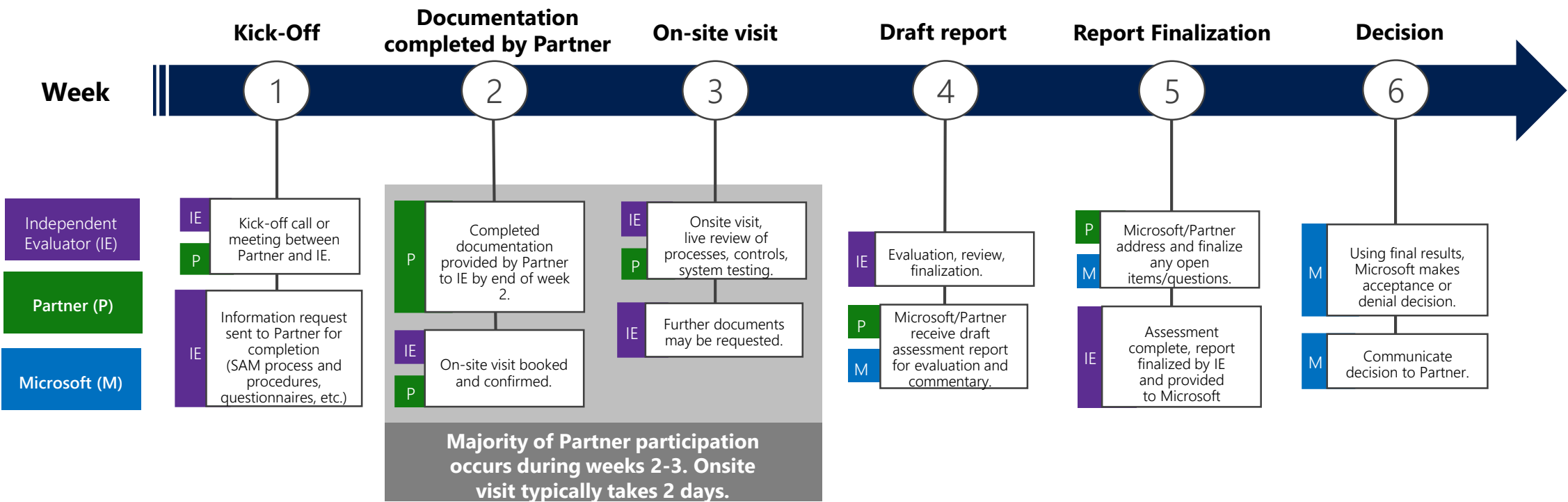
Independent Evaluator Information

- The Independent Evaluators currently available to provide the required SAM assessments and re-assessments are EY and PwC.
- All data and information collected or reviewed by EY and PwC in connection with the assessment and re-assessment will be kept confidential, with only the draft and final assessment reports shared with Microsoft.
- Partner will pay Microsoft directly to go through the assessment process with EY or PwC. The fee will be a set price depending on geography and will be published to the Partners in advance. The payment will be passed through to the Independent Evaluator from Microsoft upon completion of the assessment.
- Partners have their choice of Independent Evaluator, EY or PwC.

Assessment Process

The assessment includes an analysis of the Partner's SAM processes and capabilities and is conducted to inform a final assessment of the Partner's qualifications for review and approval by Microsoft.

With a high level of cooperation between all parties, the assessment process should take no longer than 6 weeks total, assuming timeline milestones and requirements are met.



Partner Payment Method

- Partners will pay the prices indicated in the table to the right directly to Microsoft for their initial Independent Evaluator assessment.
- Biennial re-assessment pricing will be \$7,500 USD
- Billing process – Partner must:
 - Confirm eligibility criteria with local SAM EM/Lead or WW SAM
 - Complete “Microsoft SAM Managed Service Program Invoicing Information” template and return to SAM EM/Lead or WW SAM
 - Receive email with invoice attached as PDF document from “SAP Email Notification Service”
 - Remit payment per instructions*
 - Upon Microsoft receipt of payment, SAM EM/Lead or WW SAM notify Partner and Partner’s chosen Independent Evaluator so assessment may start.
 - For additional information, refer to the [Partner Accreditation Checklist](#) located on MPN

Assessment Fee by Country

Country	Assessment Fee	Country	Assessment Fee
Australia	19,000 USD	Albania	12,500 USD
Austria	19,000 USD	Argentina	12,500 USD
Belgium	19,000 USD	Azerbaijan	12,500 USD
Canada	19,000 USD	Belarus	12,500 USD
Czech Republic	19,000 USD	Brazil	12,500 USD
Denmark	19,000 USD	Bulgaria	12,500 USD
Finland	19,000 USD	Central Asia	12,500 USD
France	19,000 USD	Chile	12,500 USD
Germany	19,000 USD	China	12,500 USD
Gulf (UAE)	19,000 USD	Colombia	12,500 USD
Hong Kong	19,000 USD	Croatia	12,500 USD
Ireland	19,000 USD	Cyprus	12,500 USD
Israel	19,000 USD	Egypt	12,500 USD
Italy	19,000 USD	Estonia	12,500 USD
Japan	19,000 USD	Georgia	12,500 USD
Korea	19,000 USD	Greece	12,500 USD
Luxembourg	19,000 USD	Hungary	12,500 USD
Netherlands	19,000 USD	India	12,500 USD
New Zealand	19,000 USD	Indonesia	12,500 USD
Norway	19,000 USD	Kazakhstan	12,500 USD
Poland	19,000 USD	LATAM New Markets	12,500 USD
Portugal	19,000 USD	Latvia	12,500 USD
Russia	19,000 USD	Lithuania	12,500 USD
Saudi Arabia	19,000 USD	Malaysia	12,500 USD
Singapore	19,000 USD	Malta	12,500 USD
South Africa	19,000 USD	MC CSI	12,500 USD
Spain	19,000 USD	MC Europe	12,500 USD
Sweden	19,000 USD	Mexico	12,500 USD
Switzerland	19,000 USD	NEPA	12,500 USD
Taiwan	19,000 USD	Nigeria	12,500 USD
UK	19,000 USD	Philippines	12,500 USD
Ukraine	19,000 USD	Romania	12,500 USD
United States	19,000 USD	SEA New Markets	12,500 USD
		Serbia & Montevideo	12,500 USD
		Slovakia	12,500 USD
		Slovenia	12,500 USD
		Thailand	12,500 USD
		Turkey	12,500 USD
		Vietnam	12,500 USD

* Payment terms are due within 30 days. Orders will be cancelled if payment not received after 30 days. Invoices are issued in following currencies, depending upon Partner location: USD, CAD, EUR, GBP, INR, JPY. If a Partner receives an ineffective overall rating during the assessment process, the assessment fee will not be refunded.

Biennial Re-assessment and Ongoing Monitoring

Biennial re-assessment process (occurring every 2 years): at their own expense, Partner will be required to go through a biennial re-assessment with their Independent Evaluator. The Independent Evaluator will review the following:

- Continued SAM capabilities
- Existing contracts and work provided to customers through the Microsoft SAM Managed Service Program throughout the past year
- Application of SAM best practices and value-based offerings over the past year
- Potential raw data reviews

Biennial re-assessment recommendation improvements: the local Microsoft SAM&C team will work with the Partner to ensure that recommendations presented by the Independent Evaluator in the final assessment report are being addressed and improvements being made.

Resource monitoring: local Microsoft SAM&C teams will monitor movement of local resources within their geographies to identify if resources are still adequate to support the Microsoft SAM Managed Service Program. Partner will need to notify the local Microsoft SAM&C team of upcoming local resource changes and must satisfy resource requirements on an ongoing basis.

Pricing: Biennial re-assessment pricing fee is \$7,500 USD.

Note: In certain circumstances where Partner has instituted significant process changes, a full assessment may be required per the current pricing schedule. Microsoft will make such determination based on the advice of the Independent Evaluator.

Branding Guidelines

Partners must adhere to the following guidelines when marketing and selling their services through the Microsoft SAM Managed Service Program:

- Program branding: the official Program name is the “Microsoft SAM Managed Service Program.”
- Partner branding:
 - Partners should use their official Microsoft Partner Network branding and follow all MPN branding guidelines. [Microsoft Partner | Gold, Silver, etc.] Find branding information on MPN [here](#).
 - Partners will need to designate the countries in which they are accredited, as per their Program Certificate. There is no global accreditation.
 - Partners will use a descriptor to indicate their accreditation in the Microsoft SAM Managed Service Program. Acceptable descriptors include:
 - [Partner name] is a Microsoft Gold Partner and is an Accredited Provider of the Microsoft SAM Managed Service Program in xx country(ies).
 - [Partner name] is accredited to provide services to customers through the Microsoft SAM Managed Service Program in xx country(ies).
 - [Partner name] is an accredited member of the Microsoft SAM Managed Service Program in xx country.
 - As an Accredited Microsoft SAM Managed Service Provider, [Partner name] offers a continual, governance-based, outsourced service which helps customers more effectively manage their software assets.
- Partners are to avoid the following branding:
 - [Partner name] is a Microsoft SAM Managed Service Program Partner.
 - [Partner name] is an Accredited Microsoft SAM Managed Service Program Partner.
- There will be no Program or Partner logos for the Microsoft SAM Managed Service Program.

Public Relations and Marketing

Microsoft will provide Accredited Providers with the following marketing:

- Listing on [Microsoft SAM website](#), including Partner logo and listing of countries in which they are accredited
- Press release template
- Partner Certificate

Use of these materials must meet MPN guidelines posted [here](#).

Appendix

Independent Evaluator Assessment Criteria

- At their own expense, the Partner must go through the assessment process through Microsoft approved Independent Evaluator to receive assessment that includes a status of Partners' alignment to SAM standards and best practices. Assessment report may provide overall recommendations as well as recommendations for improvement for each SAM process step.
- Local and WW Microsoft SAM team reviews the final assessment report and has final decision making discretion to allow Partner into the Program.
- 5 of the key competencies below will need 80% or higher on assessment report in order for Partner to pass, and the rest will need 60% or higher.

Microsoft SOM Key Competency	Pass
1. Existence of SAM throughout Organization Structure	60%
2: Existence of SAM Competence & Self-Improvement Plan	60%
3: Completeness of Hardware and Software Inventory	80%
4: Accuracy of Hardware and Software Inventory	80%
5: Completeness and Accuracy of License Entitlement Records	80%
6: Existence of Periodic Reporting and Self Evaluation	80%
7: Completeness of Operations Management records and interfaces	80%
8: Effectiveness of Acquisition Process	60%
9: Effectiveness of Deployment Process	60%
10: Effectiveness of Retirement Process	60%

- Local geographies and/or WW SAM may ask for Partners to improve in some areas based on Independent Evaluator's recommendation before onboarding the Partner into the Program.

Independent Evaluator Assessment Criteria

- Based on SAM standards and best practices
- Examples of controls to be tested include (but not limited to):

Domain	Controls	Evidence
Organizational Management	Partner to provide customer with the capability to drive a SAM culture throughout their organization and recommends for improvement	Partner to provide examples of policy recommendations, data protection / security policies, communications with customers highlighting improvement recommendations, comparison reports showing customer improvement over 6-12 months, etc.
SAM Inventory Processes	Partner to conduct a thorough (high coverage), high quality centralized software inventory,	Partner to provide examples of how inventories are conducted, what tools are used and how tool data is analyzed.
SAM Verification Processes	Partner to conduct a thorough (high coverage), high quality processes to record entitlements, reconcile deployments with entitlements, and verify results.	Partner to provide examples of how they conduct the verification processes, and will be tested on the ability to create complete and accurate results .
Operations Management and Interfaces	Partner assists customer with rolling out SAM to entire or relevant parts of the organization (HR, Helpdesk, etc.)	Partner provides documentation on processes for customers to accomplish SAM throughout the organization.
Lifecycle Process Interfaces	Partner reviews and provides improvement plans to customers for acquisition processes, consumption tracking, deployment processes, retirement processes.	Partner provides example documentation on current status and recommendations for each phase of the lifecycle process.

Independent Evaluator Assessment Criteria

The Independent Evaluator will score the assessment based on an effectiveness rating against each SAM key competency (10 total)

The Average Result per SAM competency will be calculated to provide a pass / fail result.

Ex: Total results / total # of controls = Avg. Result

Effectiveness	%	Expanded Description
None	0	There is no evidence provided for the test
Deficient / Ineffective	20	Evidence was presented, but the evidence is either not applicable for or would not be considered to be sufficient.
Marginal	40	Evidence was presented, but the evidence is lacking in substance or contains significant deficiencies.
Qualified	60	Evidence was presented and is considered reasonable enough but would need improvements.
Effective	80	Evidence was presented and is considered sufficient.
Effective High	100	Evidence was presented and exceeds the expectations of the test.

PASS

Partner passes assessment (all competencies)

- Partner receives welcome letter from Microsoft
- Partner enters Program with benefits starting immediately
- Biennial re-assessment occurs in 24 months

FAIL

Partner fails assessment (any competency)

- Partner receives denial letter from Microsoft
- Partner must wait 12 months to retake assessment

Locations and Pricing

This table outlines the locations in which a partner can become an Accredited Provider of the Microsoft SAM Managed Service Program, with related pricing. In some cases, multiple countries have been grouped as one location. Should a partner become accredited in one of these grouped countries, they would be accredited for the entire grouped location.

The eligibility criteria is based on market conditions and is subject to change.

Location	Assessment Fee (USD)	Re-assessment Fee (USD)	Location	Assessment Fee (USD)	Re-assessment Fee (USD)	Location	Assessment Fee (USD)	Re-assessment Fee (USD)
Argentina **	\$ 12,500	\$ 7,500	Gulf **	\$ 19,000	\$ 7,500	Portugal	\$ 19,000	\$ 7,500
Australia **	\$ 19,000	\$ 7,500	Hong Kong **	\$ 19,000	\$ 7,500	Romania	\$ 12,500	\$ 7,500
Austria	\$ 19,000	\$ 7,500	Hungary	\$ 12,500	\$ 7,500	Russia	\$ 19,000	\$ 7,500
Belgium **	\$ 19,000	\$ 7,500	India	\$ 12,500	\$ 7,500	Saudi Arabia	\$ 19,000	\$ 7,500
Brazil	\$ 12,500	\$ 7,500	Indonesia **	\$ 12,500	\$ 7,500	SEA New Markets **	\$ 12,500	\$ 7,500
Canada **	\$ 19,000	\$ 7,500	Ireland	\$ 19,000	\$ 7,500	Singapore	\$ 19,000	\$ 7,500
Caribbean Region LATAM **	\$ 12,500	\$ 7,500	Israel	\$ 19,000	\$ 7,500	Slovakia & Czech Republic **	\$ 19,000	\$ 7,500
CEE MC CIS **	\$ 12,500	\$ 7,500	Italy	\$ 19,000	\$ 7,500	South Africa **	\$ 19,000	\$ 7,500
CEE MC Europe **	\$ 19,000	\$ 7,500	Japan	\$ 19,000	\$ 7,500	South Region LATAM **	\$ 12,500	\$ 7,500
Central Region LATAM **	\$ 12,500	\$ 7,500	Korea	\$ 19,000	\$ 7,500	Spain **	\$ 19,000	\$ 7,500
Chile	\$ 12,500	\$ 7,500	Malaysia	\$ 12,500	\$ 7,500	Sweden	\$ 19,000	\$ 7,500
China	\$ 12,500	\$ 7,500	MEA MCC **	\$ 12,500	\$ 7,500	Switzerland **	\$ 19,000	\$ 7,500
Colombia	\$ 12,500	\$ 7,500	Mexico	\$ 12,500	\$ 7,500	Taiwan	\$ 19,000	\$ 7,500
Denmark **	\$ 19,000	\$ 7,500	Netherlands	\$ 19,000	\$ 7,500	Thailand	\$ 12,500	\$ 7,500
Egypt	\$ 12,500	\$ 7,500	New Zealand **	\$ 19,000	\$ 7,500	Turkey	\$ 12,500	\$ 7,500
Finland	\$ 19,000	\$ 7,500	Norway	\$ 19,000	\$ 7,500	UK **	\$ 19,000	\$ 7,500
France **	\$ 19,000	\$ 7,500	Philippines	\$ 12,500	\$ 7,500	United States **	\$ 19,000	\$ 7,500
Germany	\$ 19,000	\$ 7,500	Poland	\$ 19,000	\$ 7,500	Vietnam	\$ 12,500	\$ 7,500
Greece **	\$ 12,500	\$ 7,500						

** Indicates a grouped location. Please refer to the [Accreditation Locations and Pricing document](#) for detail on included countries.