

Software Assurance Planning Services policies

May 13, 2019

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Microsoft partners and consultants who deliver Planning Services are expected to understand and comply with program policy. The information below examines the three categories of Planning Services policies—engagement, scope, and voucher—and how they govern Planning Services deliveries.

Engagement policies

Delivery

All Planning Services engagements share three common characteristics in their delivery:

1. **Qualified:** Only partners who hold the required Microsoft Partner Network (MPN) competency and have enrolled and been approved to deliver Planning Services engagements, may invoice Microsoft for such deliveries. All qualified partners must maintain an active and compliant MPN competency status if they plan to deliver engagements. Similarly, only consultants holding one or more certifications related to the creation of a competency may deliver a Planning Services engagement.
2. **Onsite:** Planning Services engagements are designed and advertised to customers as onsite consultative services. This means that most of the work will occur at the customer's primary business location. However, Microsoft will allow up to 3 days of off-site delivery in cases where customer resources are distributed across multiple sites or locations.
3. **Interactive:** Planning Services are intended to be collaborative consultative sessions with the customer, resulting in a unique and actionable deliverable every time. Microsoft provides templates to assist partners in preparing their deliverables, but one-size-fits-all, boilerplate deliverables are not considered acceptable outcomes for any Planning Services engagement.

Ensure your competency enables you to deliver the engagement. To avoid payment denials, ensure that your organization meets the eligible criteria for that specific engagement prior to beginning an engagement. Engagement requirements can be found in the related [offering data sheet](#).

Conduct only one engagement, per customer, at a time. You may not conduct multiple maximum service level duration engagements (per engagement type) per customer, unless:

- The engagements address different divisions or associated legal entities and therefore produce unique deliverables, or
- The engagements address different products and therefore produce unique deliverables.

Combining multiple, but not legally connected, customers under one engagement is not permitted.

Length

Engagements are engineered to be delivered within 1, 3, 5, 10, or 15-day durations. The length of the engagement will vary depending on the size of the customer and the complexity of their environment. Engagement length options can be found in the related [offering data sheet](#).

Engagements must be completed within their duration limit. They cannot exceed advertised maximum service level durations. Shorter than advertised service levels may be performed by combining two or more vouchers. This may occur in cases where the customer does not have enough days, or work has been performed ahead of the engagement. The nature and quality of deliverables produced must align with the original advertised duration. For example, a 10-day engagement may be delivered in 9 days (using 3 x 3-day vouchers), but a 10-day deliverable must still be produced.

Planning focus

Engagements must correspond to the featured products for that particular offering.

Planning Services days may only be applied toward advancing server/seat counts of products featured within each representative program. Engagements may include a limited amount of time for a secondary topics or product oriented considerations if the work directly supports the final deploy, migrate, or upgrade plan for the primary product.

Typically, Planning Services allows consultants to spend up to 4-6 hours discussing secondary product planning considerations. For example, in a three- or five-day Exchange deployment planning services engagement, you may need to spend half a day addressing non-Exchange specific planning considerations such as System Center Operations Manager. Anything beyond 4-6 hours covering these topics is considered out of scope.

Planning Services days can be used across multiple offerings or programs, but only in cases where each voucher represents a complete, self-contained planning services engagement and deliverable. For example, a partner may wish to use a customer's Planning Services vouchers to propose a BI solution involving products featured under SDPS and SSDPS, but such an engagement should result in two separate deliverables.

Outcomes

The outcome of any engagement should always produce a vision and scope plan or findings and recommendations deliverable that prescribes a deployment, upgrade, or migration project as the next step. This proposal should focus primarily on the logistics for *how* to deploy and less on *why*.

Complete the required deliverables. Each Planning Services engagement has two required deliverables: 1) the Planning Services Online Completion Report Submission Form, and 2) the customer planning deliverable.

At a minimum, the customer planning deliverable documentation should outline the customer’s unique business goals and requirements along with the consultant’s own findings and recommendations. Refer to the engagement activities section of any program [offering data sheet](#) for guidance on required deliverables.

Tips

The delivery framework table below outlines what is in and out of scope for a Planning Services engagement. Engagements should align with featured Planning Services products. Proofs of concept may only be delivered when coupled with a planning engagement for no more than a total of 15-days per customer origination/division. Stand-alone capability-focused demos delivered without a plan to deploy, upgrade, or migrate are not allowed.

	Focus	Proper use	Improper use
Products and solutions		<ul style="list-style-type: none"> • Planning Services for targeted products • Directly proposes an increase of servers or seats • Promotes deployment of latest product versions • May include up to 4 hours of supplemental topics (i.e., environmental, utilization, and adoption considerations) 	<ul style="list-style-type: none"> • Engagement not focusing on targeted products or outcomes, such as: <ul style="list-style-type: none"> ○ System Center Configuration Manager deployment ○ Skype for Business network performance assessments ○ Building solutions using SharePoint after deployment ○ Office 365 hybrid integration planning ○ Product capability demo or POC as primary focus • Existing Windows server features (AD/Direct Access, etc.) with no Windows Server installation or upgrade plan
Outcome	<ul style="list-style-type: none"> • Deployment plan • Upgrade plan • Migration plan • Vision and scope • Office 365 planning tool output 	<ul style="list-style-type: none"> • Services pre-sales • Engagement resulting in a plan to deploy, upgrade or migrate to the latest version of a Planning Services featured product • Single Planning Services deliverable accompanied 	<ul style="list-style-type: none"> • Product pre-sales • Strategic utilization planning • Staff augmentation • Program management staff augmentation • Production deployments/implementation services • Remediation/optimization services

		with or without a supporting POC <ul style="list-style-type: none"> Office 365 FastTrack 	
Proof of Concept	Optional supplement delivered to confirm, facilitate, or reinforce creation of a plan or vision and scope summary as the primary deliverable	Delivered as a means of proving or reinforcing a primary outcome (a next-steps proposal or plan to deploy, upgrade or migrate)	Stand-alone demo without a plan or proposal to deploy, upgrade, or migrate to the latest version of a Planning Services advertised product
Answers	How to deploy	Logistical pre-deployment phase planning	<ul style="list-style-type: none"> Why deploy Pre-sales or strategic utilization planning How to adopt
Funding	Software Assurance Planning Services vouchers	1-to-15-day vouchers based upon customer eligibility, size, and qualifying license count	<ul style="list-style-type: none"> Extended duration projects exceeding 15-days General, unfocused consulting services Performing out-of-scope activities as defined in Planning Services delivery guidance Travel expenses Other non-planning engagement expenses

Scope policies

Required criteria

The primary purpose of a Planning Services engagement is to help customers create a deployment, upgrade, or migration plan for a given product, service, or technology. To that end, all engagements must meet the following criteria:

- A Planning Services deliverable must be furnished to the customer. The deliverable should reflect some degree of consultative interaction and documentation outlining the customer’s unique business goals, requirements, the consultant’s findings, and recommendations—not a one-size-fits-all documentation. Refer to the engagement activities section of any program [offering data sheet](#) for guidance on required activities and customer deliverables.

- Planning Services days may only be applied toward the creation of the required deliverables and optional elective activities directly associated with creation/presentation of deliverables.
- Deliverables must accurately reflect number of days invoiced to Microsoft.

In-scope

To keep your deliverable in-scope, ensure that:

- It is limited to products and solutions according to engagement focus
- It is limited in outcome (planning for deployment, upgrade or migration)
- It entails 1, 3, 5, 10, or 15 days, depending on engagement and does not exceed its duration limit
- POCs are created only at the 5, 10, and 15-day service levels if work directly complements creation and presentation of plan

Out-of-scope

Examples of commonly encountered out-of-scope activities include:

- Configuration
- Deployment
- Implementation
- Optimization
- Remediation
- Staff augmentation
- Support
- Training (while knowledge transfer is an element of any engagement, engagements cannot be used for general or group training for end-users.
- UAT testing
- Utilization

Always refer to the individual delivery guides for each engagement before executing a statement of work to ensure your plans are in-scope for the engagement.

Tips

As a rule of thumb, always keep the engagement focused on producing a plan to deploy, upgrade, or migrate. Be sure any elective activities are directly associated with proving or promoting that primary deliverable.

Voucher policies

Planning Services partners are compensated for deliveries with vouchers. Vouchers may only be applied to engagements that meet the criteria outlined above: the creation of a plan that directly influences an increase of deployed server or seat counts for the products featured within each Planning Services offering.

Vouchers should never be used as currency. Nor should they be used to offset the cost of work that is not in scope. Furthermore, partner organizations may not charge additional fees to customers for planning performed during the engagement. All costs related to the planning portion (including travel costs) should be covered by the Planning Services vouchers.

Distributed organizations

Vouchers from parent-level organizations can be used at subsidiaries, divisions, or organizations (and vice versa), provided each is legally connected. Combining multiple, not legally connected vouchers is prohibited.

Permission must first be obtained for each customer by the customer's internal SA Benefit Administrator.

Consultant time

Voucher days associated with a Planning Services delivery may only be applied to a single onsite consultant. While you may only bill for one consultant per engagement, you may use your own teams and resources as appropriate.

If you employ a third-party supplier or contractor to deliver any Planning Service on behalf of your organization, you must guarantee that your subcontractors work complies with all program delivery guidelines and policy requirements, including consultant eligibility.

Reserving vouchers

Before beginning an engagement, it is important to:

- **Ensure proper location ID.** Planning Services partners must ensure they have a location ID listed in Partner Center matching the country in which the engagement will take place, as indicated by the customer at the time of voucher creation. Partners must process (i.e., reserve, redeem, and submit for payment) vouchers under a location ID for a country listed in MPN matching the country in which the engagement delivery will take place.
- **Reserve vouchers first.** All vouchers must be reserved before an engagement begins. Anyone who holds a contact role for an approved location ID in MPN will be able to access VVR and reserve vouchers on behalf of that location.

Stacking vouchers, or using multiple vouchers for a single engagement:

- Using multiple vouchers for an engagement is allowed for durations up to 15 days. For these cases, one Online Completion Report Form must be submitted listing all the

vouchers used to conduct the engagement, along with the corresponding customer deliverables.

- In cases where customers have multiple Volume Licensing enrollments, active vouchers can be from the same enrollment or different enrollments.

Voucher expiration

Once a voucher is assigned, it is good for 180 days from the creation date. The primary voucher tool is the Voucher Validation and Redemption (VVR) tool. Note these important details about managing vouchers in VVR:

- Vouchers must be reserved and redeemed in VVR prior to the stated expiration date found on the voucher in VVR by the executing partner. The engagement must be delivered, and the required deliverable(s) must be provided to the customer prior to the voucher redemption.
- Vouchers in the assigned status have a lifespan of 180 days from the voucher creation date, regardless of the expiration date of the customer's EA expiration date.
- If the enrollment is still active when a voucher expires, the days will return to the enrollment's available pool of days.
- If the enrollment has expired when the voucher expires, the days are lost and cannot be restored or applied towards a new enrollment.
- A reserved voucher can only be cancelled or redeemed in VVR by the partner who reserved it.

Redeeming vouchers

Finalize engagements before redeeming vouchers. Before redeeming a voucher, a Planning Services engagement must be fully delivered to the customer, and an Online Completion Report Form should be completed and submitted.

Submit payment requests within 60 days of redeeming vouchers. After redeeming a voucher, you have 60 days in which to submit a payment request in the SAVB Online Payment Tool. Any non-compliance issues with the voucher must also be resolved within this 60-day period. If the 60-day period ends before compliance issues are remediated or a payment request is submitted, the voucher is forfeited, and payment cannot be processed for the engagement delivered under that voucher.