



# Microsoft Content AI Partner Program





# Content AI Partner Program: Overview for 2023/2024

Updated July 18, 2023

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# Agenda

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Product definition

Offering Areas

Partner Value

Content AI Partner Program

Application Process



**>2 billion  
documents**

a day added to  
Microsoft 365



**200  
petabytes**

Monthly growth  
for Microsoft 365  
content



**1.4 trillion  
files**

in Microsoft 365  
(5.1 EB)

Unlock everyone's potential by streamlining **content management at scale**, with AI-powered solutions in the Microsoft Cloud



# Microsoft Syntex

Content AI integrated in the flow of work



## Enhance the value of your content [BDM]

Get more value from your content when it's enhanced with AI and used in content-centric processes

**Patterns:** Contract management, order processing, EE onboarding, RFP/RFI development and response



## Manage content at scale [ITDM]

Govern, backup, and restore your content while managing storage costs and complying with long-time archive needs

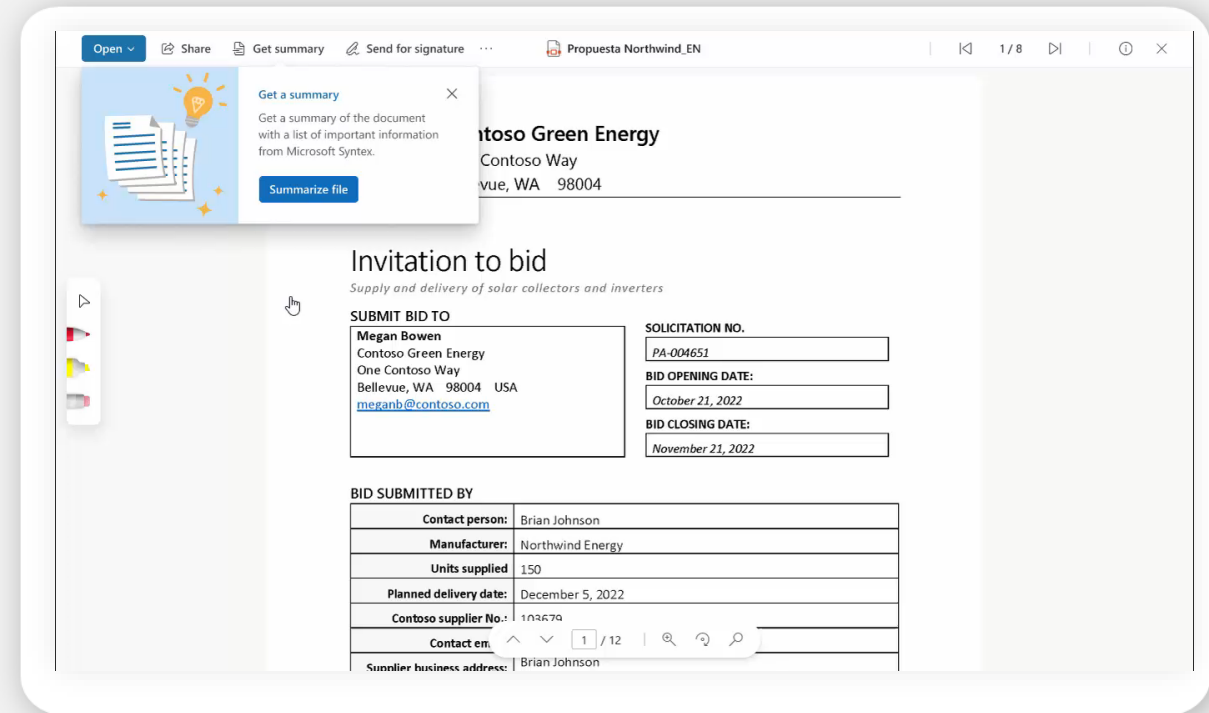
**Patterns:** Storage cost management, ransomware protection, advanced content access governance



## Build content-driven apps [Dev/ISV]

Extend and develop content apps with high performance storage, APIs, and big data analytics

**Patterns:** M&A deal rooms, contract generation, CAD/CAM



# Derive value from Microsoft Syntex and related solutions

## Generate more revenue

- Partners can **generate up to \$8/user/month** when Microsoft Syntex is attached to a deal<sup>1</sup>

## Expand your portfolio of offerings

- Syntex has a wide range of features and capabilities that can help further your content management projects

## Grow your AI practice

- Leveraging the AI capabilities built into Syntex can be a starting point for companies looking to build AI into their business processes



<sup>1</sup>Forrester Consulting, The Partner Opportunity for Microsoft Modern Work: A Total Economic Impact™ Partner Opportunity Analysis, July 2023. A commissioned study conducted by Forrester Consulting on behalf of Microsoft.



# Partner practice areas

We're looking to strategic partners to build offerings around several key scenarios



Contract management



IT cost management



Invoice & order management



Line of business applications



Knowledge capture



Migration



# Contract management

Help customers generate, process, and manage their contract lifecycle with Microsoft solutions



## Scenarios

Enable customers to produce, approve, and manage contracts throughout the lifecycle, with a combination of document processing, taxonomy tagging, and other advanced AI capabilities.



## Partner solution

Potential to include: digitizing electronic records, building workflows to automate tagging and approval process



## Microsoft services

- Microsoft Syntex
  - Unstructured Doc Processing
  - Structured and Freeform Doc Processing
  - Prebuilt Doc Processing
  - Content Assembly
  - Taxonomy Tagging
  - eSignature
  - OCR
- Microsoft 365 Archive

# Invoice & order management

Help customers create, process, and manage invoices and orders with Microsoft solutions



## Scenarios

Help organizations to streamline the invoice and order management system with a combination of advanced AI capabilities including document processing, taxonomy tagging, and eSignature.



## Partner solution

Potential to include: scanning and/or digitization of records, automatic tagging, implementation of automated approval process



## Microsoft services

- Microsoft Syntex
  - Prebuilt Doc Processing
  - Structured and Freeform Doc Processing
  - Unstructured Doc Processing
  - Content Assembly
  - Image Tagging
  - Taxonomy Tagging
  - OCR
  - eSignature
- Microsoft 365 Archive

# Knowledge capture

Help organizations accelerate knowledge capture and discovery with AI-powered search and taxonomy tagging



## Scenarios

Help organizations to turn content into knowledge they can leverage by streamlining knowledge capture and discovery with taxonomy tagging and intelligent, AI-powered search.



## Partner solution

Potential to include: workflow creation/ implementation to gather and process organizational knowledge, implement intelligent search and knowledge management practice



## Microsoft services

- Microsoft Syntex
  - Unstructured Doc Processing
  - Structured and Freeform Doc Processing
  - Prebuilt Doc Processing
  - OCR
  - Image Tagging
  - Taxonomy Tagging
- Microsoft Search

# IT cost management

Help customers reduce cost while maintaining metadata and retention labels by decreasing the number of solutions they need to govern, backup, and restore content.



## Scenarios

Help customers maintain discovery, compliance and content in Microsoft 365 without deleting or moving content outside their trust boundary.



## Microsoft services

- Microsoft 365 Backup
- Microsoft 365 Archive



## Partner solution

Potential to include: backup and recovery solutions

# Migration

Migrate customers from disparate or on-premises systems to Microsoft 365



## Scenarios

Help customers leverage the full power of Microsoft Syntex capabilities by migrating them off disparate or legacy file sharing systems, to Microsoft 365



## Partner solution

Potential to include: auto-classification, content analysis, migration solutions



## Microsoft services

- SharePoint Migration Tool
- Microsoft Syntex
  - Prebuilt Doc Processing
  - Structured and Freeform Doc Processing
  - Unstructured Doc Processing
  - Image tagging
  - Taxonomy tagging
  - OCR

# Build line of business apps

Leverage the power of Syntex to build content-centric apps at scale



## Scenarios/partner solutions

Deliver apps hosted in customer-managed Microsoft 365 storage with rich versioning, metadata, security, search, and management



## Microsoft services

- Microsoft Syntex
  - Repository services
  - Document Processing
  - Content Assembly
  - eSignature
- Microsoft Graph Data Connect for SharePoint
- SharePoint Advanced Management

# Programs to help further your solutions/offerings

## Content AI Partner Program

FastTrack for Microsoft 365

JumpStart – Power Platform

MISA

Solution partner designations

- Modern Work

Learning paths

- Microsoft Syntex



# Content AI Partner Program

Supporting strategic partners delivering solutions that make the transformation of content management practical and attainable

## Key solutions:

- Microsoft Syntex
- Microsoft SharePoint
- SharePoint Advanced Management
- Microsoft 365 Backup
- Microsoft 365 Archive

## Changes from FY23

- More emphasis on Microsoft Syntex and SharePoint
- Less emphasis on Microsoft Viva and Employee Experience

## Program activities:

- Monthly meetings to hear updates, get NDA previews, ask questions, and give feedback
- 2-day Summit (Oct)
- Half-day Summit (April)
- Event meet-ups (April)
- Dev and Content Kitchens (as needed)

## Program communications:

- Monthly newsletter
- Teams channel to engage with the product team and other partners

## Partner readiness:

- Self-service training (coming soon)

## Partner pipeline:

- Bi-monthly pipeline reviews (for select partners)



# Major CAPP activities in 2023/2024

Activity	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept
<b>Application process</b>															
Recruitment	[Light blue bar]														
Selection	[Dark blue bar]														
Onboarding	[Dark grey bar]														
Onboarding calls			○			○			○			○			○
<b>1st party events</b>															
Microsoft	★ Inspire				★ Ignite						★ Build (TBD)		★ Inspire (TBD)		
CAPP educational				★ Content Services Summit						★ Partner Summit					
CAPP social										★ Partner Mixer					
<b>3rd party events</b>			★ 365 Educon Seattle							AIIM24 ★	★ M365 Collab				
Program newsletter	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
Program meetings	◇	◇	◇	◇	◇	◇	◇	◇	◇	◇	◇	◇	◇	◇	◇
All-up	Inspire pre-briefing			CSS KBYG	Ignite pre-briefing								Inspire pre-briefing		2025 program
Enhance		✗			✗			✗			✗			✗	
Manage	✗			✗			✗			✗			✗		
Build			✗			✗			✗			✗			✗
Related solutions		✗		✗			✗			✗				✗	

# Three tiers for partner engagement

CAPP members must have marketable offerings aligned to content management solutions, including Microsoft Syntex, SharePoint, Microsoft 365 Backup, Microsoft 365 Archive, and SharePoint Advanced Mgmt



## Tier: Associate

**Qualified SIs and ISVs with strategic presence:** Presence on strategic accounts in a specific region or industry; Registered Microsoft partner under NDA and in good standing

- ★ **Engagement:** Attend 10% of the partner program events and have 5 deals in the pipeline annually
- Tier size:** No restriction



## Tier: Charter

**Qualified SIs and ISVs with regional presence:** Presence in one or two A14 regions; Managed partner with Microsoft

- ★ **Revenue Threshold:** \$100K
- ★ **Engagement:** Attend 30% of the partner program events and have 10 deals in the pipeline annually
- ★ **Tier size:** At most 80 partners



## Tier: Preferred

**Highly-qualified SIs and ISVs with a global presence:** Presence in multiple A14 regions, high deal capacity; Managed partner with Microsoft

- ★ **Revenue Threshold:** \$250K
- ★ **Engagement:** Attend 70% of the partner program events and have 20 deals in the pipeline annually
- ★ **Tier size:** 20 partners

★ Change from 2022/2023 program

# Partner incentives

★ Change from 2022/2023 program

Incentive	All partners	Associate tier	Charter tier	Preferred tier
Self-service, ungated content	✓	✓	✓	✓
Microsoft 365 partner communities on Viva Engage	✓	✓	✓	✓
Monthly partner newsletter	✓	✓	✓	✓
Monthly program newsletter		✓	✓	✓
Early access to content and training materials		✓	✓	✓
Inclusion in Winwires for qualified deals with the Microsoft field*		Limited	Limited	✓
Monthly program meetings		✓	✓	✓
NDA product and pre-event briefings		✓	✓	✓
NDA meetings and events		✓	✓	✓
CAPP Teams site access		✓	✓	✓
Partner catalog entry			✓	✓
Adoption Hub CAPP partner card			✓	✓
Program logo usage			✓	✓
Letter recognizing program status			✓	✓
Speaking opportunities at events (limited)				✓
Speaking opportunities in product team owned channels, such as podcasts and webinars (limited)				✓
★ Bi-monthly pipeline review meetings (virtual) with Microsoft and your sales team				✓
★ Financial incentives				✓

\*Partner must actively work with the Microsoft field on the deal to be included in the Winwire.

# Partner requirements for the application process

Requirement	Associate tier	Charter tier	Preferred tier
Products and services	Have marketable offerings that align to Advanced Content Management	Have marketable offerings that align to Advanced Content Management	Have marketable offerings and/or practices that increase consumption of Microsoft Syntex and other Advanced Content Management solutions
MPN status	Registered partner, under NDA	Managed partner, under NDA	Managed partner, under NDA
Competency / Solutions partner designation <ul style="list-style-type: none"> <li>• <i>Content &amp; Collaboration</i></li> <li>• <i>Cloud Productivity</i></li> <li>• <i>Security or Enterprise Mobility Management</i></li> <li>• <i>Solutions partner for Modern Work</i></li> <li>• <i>Solutions partner for Security</i></li> </ul>	Silver in at least one competency area  Or Solutions partner designation  Or IP Co-Sell Ready solution	Gold in at least one competency area  Or Solutions partner designation  Or IP Co-Sell Ready solution	Gold in multiple competency areas  Or Solutions partner designation  Or IP Co-Sell Ready solution  Preferably an Advanced Specialization in Teamwork Deployment, Adoption & Change Management, or Security
★ Revenue threshold	NA	Capacity to support \$100K in Microsoft Syntex deals	Capacity to support \$250K in Microsoft Syntex deals or consumption
★ Proven success in FY23	NA	Delivered Syntex workshops Received ECIF for a Syntex project	Delivered Syntex workshops Received ECIF for a Syntex project

★ Change from 2022/2023 program

\*A different set of team members may complete each path or certification. Team member paths or certifications will only count in one A14 area.

# Partner commitments by tier

	Associate tier	Charter tier	Preferred tier
Partner commitments	<ul style="list-style-type: none"> <li>• Have marketable offerings that align to the Content Services vision</li> <li>• Amplify message in market</li> <li>• Maintain applicable MPN status, competencies, and designations for the tier</li> <li>• Maintain certifications and trainings applicable to the tier</li> <li>• Train at least two (2) team members as new self-service training and learning paths become available</li> <li>★ Report quarterly on new Syntex deals and deployments</li> <li>★ Attend 10% of the partner program events and have 5 deals in the pipeline annually</li> </ul>	<ul style="list-style-type: none"> <li>• Elements listed under “Associate partners”</li> <li>• Train at least four (4) team members as new self-service training and learning paths become available</li> <li>• Work toward a Solutions partner designation for Modern Work, if applicable</li> <li>★ Report monthly on new Syntex deals and deployments</li> <li>★ Attend 30% of the partner program events and have 10 deals in the pipeline annually</li> </ul>	<ul style="list-style-type: none"> <li>• Elements listed under “Charter partners”</li> <li>• Create a practice/offering around Syntex</li> <li>★ Train at least eight (8) team members as new self-service training and learning paths become available</li> <li>• Meet with the Microsoft team to discuss Syntex opportunities in your pipeline</li> <li>★ Work with the Microsoft team to identify a customer for a “Winwire” over the course of the program year</li> <li>★ Attend 70% of the partner program events and have 20 deals in the pipeline annually</li> </ul>

★ Change from 2022/2023 program

\*A different set of team members may complete each path or certification. Team member paths or certifications will only count in one A14 area.

# Partner reporting and engagement

## Reporting

Program partners commit to self-report Microsoft ACM activities

- Pilots and POCs
- Deals
- Deployments and revenue
- Marketing investment
- Product development
- Offering/practice development
- Training and learning path completion

## Engagement

Program partners commit to participating in program activities

- Attending monthly meetings
- Attending summits (in person or virtually)
- Completing post-event and other surveys

The CAPP team will track attendance and survey responses

# Customers to target to drive Microsoft Syntex revenue

Organizations with the following qualifications:

- 1,000 seats (or 500 seats in emerging markets) of Microsoft 365
- Potential for \$60,000 (or \$30,000) for Syntex consumption revenue
- At least 25% SharePoint usage

# Apply

Now

Learn more about the partner program

- <https://aka.ms/CAPP>

Between Jul 18  
and Aug 27

Apply for the partner program

- <https://aka.ms/CAPP/Apply>

Sept 30

Receive notification from Microsoft about application status

Oct 15

Complete new partner onboarding