Partner Business Planning
The New Partner Planning Fiori App

Anja Bernardy-Raab
November, 2016

AGENDA

Intro to Partner Business Planning

- A New Planning App for PE Sell Partners
- Holistic Planning Approach: Numbers AND Activities

The New Planning App

- Key Components
- Notifications & Workflows

New Partner Business Planning App
Key Facts

The new Fiori App for Partner Business Planning:

▶ **Replaces** existing PRM Adobe Form for PE Sell partners

▶ Is **accessible** by partners and internal SAP employees from the SAP PartnerEdge Launchpad

▶ **Combines** financial planning with activity planning for DG/marketing and readiness/enablement – holistic planning approach

▶ Mandatory for all PE Sell partners, **fully launched** in January 2017

Holistic Planning Approach
Combining Financial Plan with Activity Plan

- **Drive a holistic partner business planning approach**

- Create financial plan for the year

- Identify required Demand Generation activities & add them to the partner business plan

- Achieve better linearity of MDF consumption & more impactful use of MDF (no last minute MDF claims for irrelevant stuff)

- Identify required Readiness/Enablement activities & add them to the partner business plan

Partner Business Plan
Access the App via the SAP PartnerEdge Launchpad

– Access the Partner Business Planning App via this direct link: https://pwp.sap.com/businessplanning

– The app is also available on the SAP PartnerEdge Launchpad

Partner Business Plan
Planning Home Screen when you start

- – Lists all partner business plans you are responsible for
- – List will be empty with first log on
- – Click on **Create Plan** and select the plan you want to create from the list

Partner Business Plan
Overview

- Plan header shows core data relating to the plan
  - You can edit header data to assign different contacts to the plan
- Business plan sections can be access directly
- **Overview** consists of
  - Company Strategy
- Enter Strategy summary in text boxes
- Keep Currency on default EUR or other base currency
- Save business plan by clicking on **Save**

Partner Business Plan
Financial Planning

- Access Financial Planning section
  - You can access each section via drop down at the top
  - Or by scrolling down on the page

SAP Partner Business Plan Edit

Test Partner PE Sell

Partner/ERP ID: 11837
Partner Level: Platinum

Partner Contact: sap.s-user
PBM (Main): Reng Vlasman
PSA: Laura Marino

Year: 2017
Plan Status: New
Created By: I008617, On Nov 4, 2016
Last Updated By: I008617, On Nov 4, 2016

Demand Generation Activities: 0
Readiness Activities: 0
On Premises Revenue: 0 EUR
Cloud revenue: 0 EUR

Edit Header

OVERVIEW ⌄   FINANCIAL ⌄   DEMAND GENERATION   READINESS

Company

Market Penetration

Revenue for General Business

Revenue for Large Enterprise

Deal Registration Revenue

Capacity

Business

Marketing Strategy

Package Solution Strategy

Portfolio Strategy

Partner Business Plan
Market Penetration

- Access Financial Planning section
  - You can access each section via drop down at the top
  - Or by scrolling down on the page
- Market Penetration
  - plan for Net New Names &
  - Innovation Adoption
  - Plan number of deals

SAP Partner Business Plan Edit

Test Partner . PE Sell

OVERVIEW ⌄   FINANCIAL ⌄   DEMAND GENERATION   READINESS

New Names

	Q1	Q2	Q3	Q4	Year

Net New Names

	Q1	Q2	Q3	Q4	Year	
Net New Names ⌄	1	2	0	3	6	⊗

Innovation Adoption

	Q1	Q2	Q3	Q4	Year

Number of Deals

	Q1	Q2	Q3	Q4	Year	
Cloud LoB deals ⌄	2	2	1	3	8	⊗
S/4HANA IB migration deals - Oracle ⌄	1	0	0	0	1	⊗
S/4HANA IB migration deals - Other DB ⌄	0	0	0	1	1	⊗
S/4HANA net new deals - OP & Cloud ⌄	1	0	0	2	3	⊗
Total:	**4**	**2**	**1**	**6**	**13**	

Partner Business Plan
Revenue Planning – Planning Template

Revenue for General Business

				Q1	Q2	Q3	Q4	Total
Lower GB (On Prem)	Application	B1						
		BAIO & S/4HANA						
		LoB						
	Platform	SAP Analystics						
		SAP DB & DBM						
		SAP HANA						
Upper GB (On Prem)	Application	B1						
		BAIO & S/4HANA						
		LoB						
	Platform	SAP Analystics						
		SAP DB & DBM						
		SAP HANA						
Lower GB (Cloud)		ByD						
		CEC				●		
		HCM						
		HCP						
		S/4HANA Cloud						
		SRM						
Upper GB (Cloud)		ByD						
		CEC						
		HCM						
		HCP						
		S/4HANA Cloud						
		SRM						

Revenue for Large Enterprise

				Q1	Q2	Q3	Q4	Total
Large Enterprise (On Prem)	Application	B1						
		BAIO & S/4HANA						
		LoB						
	Platform	SAP Analystics						
		SAP DB & DBM						
		SAP HANA						
Large Enterprise (Cloud)		ByD						
		CEC						
		HCM						
		HCP						
		S/4HANA Cloud						
		SRM						

Break down of quarterly figures per Industry

Partner Business Plan
Revenue Plan – General Business

Maintain plan figures for General Business Total OR Lower & Upper GB

- When maintaining Total GB figures
  - Plan figures will be automatically distributed to Lower & Upper GB (65% / 35%)
- When maintaining Lower & Upper GB figures
  - GB Total will be updated automatically and cannot be maintained manually

Industry distribution has to be defined either for Total General Business OR Lower & Upper GB

Revenue for General Business

General Business (Cloud)

	Q1, GBP
Cloud (Subscription, ACV)	
ByD	10,000

⌄ Lower General Business (Cloud)

	Q1, GBP
Cloud (Subscription, ACV)	
ByD	3,500

⌄ Upper General Business (Cloud)

	Q1, GBP
Cloud (Subscription, ACV)	
ByD	6,500

Partner Business Plan
Example: Revenue planning for Lower GB

- Enter plan values per quarter for each solution section
- Click on ➕ to add a line
- Click on ⊗ to delete a line from the plan
- Fill in all relevant sections
  - General Business or plan more granular:
    - Lower GB (Cloud/On-Prem)
    - Upper GB (Cloud/On-Prem)
  - Large Enterprise (Cloud/On-Prem)

Revenue for General Business

General Business (Cloud)

	Q1, GBP	Q2, GBP	Q3, GBP	Q4, GBP	Year, GBP
Cloud (Subscription, ACV)					➕
ByD ⌄	10000	0	0	0	10,000 ⊗

> Lower General Business (Cloud)

> Upper General Business (Cloud)

General Business (On Premise)

	Q1, GBP	Q2, GBP	Q3, GBP	Q4, GBP	Year, GBP
Totals Summary:	**0**	**0**	**0**	**0**	**0**
Application					➕
BAIO & S/4HANA ⌄	0	0	0	0	0 ⊗
Platform					➕

Partner Business Plan
Maintain Industry specific plan figures

- After entering quarterly figures
- Click 🖩 on to break down quarterly figure per industry
  - Select industries from drop down
  - Total needs to add up to quarterly total (if not, quarterly total will be

Drill Down

Industry [+]

		Amount, EUR	
Chemicals	∨		⊗
Banking	∨	500	⊗
Consumer…	∨	5000	⊗
		Total: 5,500	

Update   Cancel

Test Partner . PE Sell

OVERVIEW ∨   **FINANCIAL** ∨   DEMAND GENERATION   READINESS

Revenue for General Business

Lower General Business (On Premise)

	Q1, EUR	Q2, EUR	Q3, EUR	Q4, EUR	Year, EUR
Totals Summary:	0,500	245,000	245,000	245,000	975,500

Application [+]

		Q1		Q2		Q3		Q4		Year	
B1	∨	5500	🖩	10000	🖩	10000	🖩	10000	🖩	35,500	⊗
BAIO & S/4HANA	∨	150000	🖩	150000	🖩	150000	🖩	150000	🖩	600,000	⊗
LoB	∨	75000	🖩	75000	🖩	75000	🖩	75000	🖩	300,000	⊗
Total:		230,500		235,000		235,000		235,000		935,500	

Platform [+]

		Q1		Q2		Q3		Q4		Year	
SAP Analytics	∨	10000	🖩	0	🖩	0	🖩	0	🖩	10,000	⊗
SAP DB & DBM	∨	0	🖩	10000	🖩	0	🖩	0	🖩	10,000	⊗
SAP HANA	∨	0	🖩	0	🖩	10000	🖩	10000	🖩	20,000	⊗
Total:		10,000		10,000		10,000		10,000		40,000	

Partner Business Plan
Plan figures in Display mode

- Plan totals shown in header
- To display header move mouse over top right screen – drop down arrow will show
- Industry break down of quarterly figures can be accessed via hyperlink

Test Partner PE Sell

Submit   Edit   Terminate   Change History

Partner/ERP ID: 11837	Partner Contact: sap.s-user	Year: 2017
Partner Level: Platinum	PBM (Main): Reng Vlasman	Plan Status: In Process
	PSA: Laura Marino	Created By: I008617, On Nov 4, 2016
		Last Updated By: I008617, On Nov 4, 2016

Demand Generation Activities: 2
Readiness Activities: 2
On Premises Revenue: 1,015,500 EUR
Cloud revenue: 60,000 EUR

OVERVIEW ⌄   FINANCIAL ⌄   DEMAND GENERATION   READINESS

Upper General Business (Cloud)

	Q1, EUR	Q2, EUR	Q3, EUR	Q4, EUR	Year, EUR
Cloud (Subscription, ACV)					
ByD	10,000	0	0	0	**10,000**
CEC	0	10,000	0	0	**10,000**
HCM	0	0	10,000	0	**10,000**
HCP	0	0	0	10,000	**10,000**
S/4HANA Cloud	0	0	10,000	0	**10,000**
SRM	0	0	0	10,000	**10,000**
Total:	**10,000**	**10,000**	**20,000**	**20,000**	**60,000**

For internal SAP and partner use only   14

Partner Business Plan
Deal Registration & Capacity

- NEW – plan total target you as a partner commit to deliver via deal registration as a result of your Demand Generation Activities
- Capacity
  - Plan for marketing, sales, presales and consulting resources FTE
  - Available capacity supports revenue and demand generation plan

Test Partner PE Sell

OVERVIEW ∨   FINANCIAL ∨   DEMAND GENERATION   READINESS

Deal Registration Revenue

Deal Registration Target

	Q1, EUR	Q2, EUR	Q3, EUR	Q4, EUR	Year, EUR
Deal Registration Target					
Deal Registration Target ∨	10000	10000	10000	10000	40,000

Capacity

Personnel

	Q1	Q2	Q3	Q4	Year
Personnel					
Marketing ∨	0	0	0	0	0
PreSales ∨	0	0	0	0	0
Sales ∨	0	0	0	0	0
Total:	**0**	**0**	**0**	**0**	**0**

Partner Business Plan
Demand Generation & Readiness Activities

- Add planned activities per quarter
- MDF details to support planning of Demand Generation activities
  - MDF available
  - MDF reimbursed for an activity
- Track status of DG & Readiness activities
- In case the list is long, leverage filter and sort options

Test Partner   PE Sell

Partner/ERP ID: 11837
Partner Level: Platinum

Partner Contact: sap.s-user
PBM (Main): Reng Vlasman
PSA: Laura Marino

Year: 2017
Plan Status: In Process
Created By: I008617, On Nov 4, 2016
Last Updated By: I008617, On Nov 4, 2016

Demand Generation Activities: 2
Readiness Activities: 2
On Premises Revenue: 1,015,500 EUR
Cloud revenue: 60,000 EUR

Edit Header

OVERVIEW ⌄   FINANCIAL ⌄   DEMAND GENERATION   READINESS

+ Add Activity

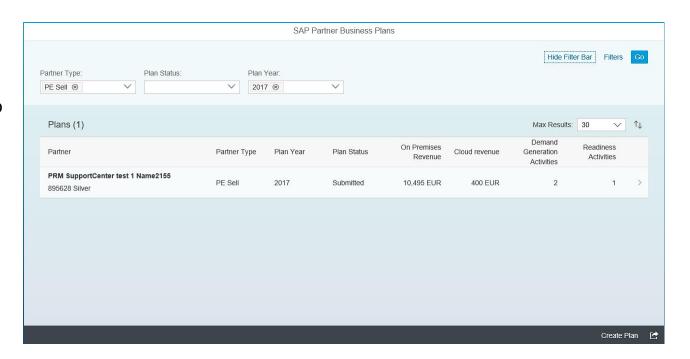| Solution	Industry	Year	Initiative Sub-Type	Catalogue Service	Total Cost, EUR	MDF Available, EUR	Max MDF Reimbursement, EUR	Leads Expected	Revenue Projection, EUR	Completion Status		
B1		2017 Q1	Advertising		1,000	0	0	2	5,000	In Progress	✎	⊗
ByD		2017 Q1	Digital Sales Tools	Virtual Agency	12,000	0	0	2	60,000	Not Started	✎	⊗

Test Partner   PE Sell   Submit   Edit   Terminate   Change History

Partner/ERP ID: 11837
Partner Level: Platinum

Partner Contact: sap.s-user
PBM (Main): Reng Vlasman
PSA: Laura Marino

Year: 2017
Plan Status: In Process
Created By: I008617, On Nov 4, 2016
Last Updated By: I008617, On Nov 4, 2016

Demand Generation Activities: 2
Readiness Activities: 2
On Premises Revenue: 1,015,500 EUR
Cloud revenue: 60,000 EUR

OVERVIEW ⌄   FINANCIAL ⌄   DEMAND GENERATION   READINESS

Solution	Year	Readiness Type	Readiness Activity	Partner Role	Catalogue Service	Completion Status	
B1	2017 Q1	On-Line Enablement	Marketing enablement	Marketing		Not Started	
SAP HANA	2017 Q1	Self-Service Enablement	Hana enablement	Sales		Not Started	

Partner Business Plan
Home screen with plans

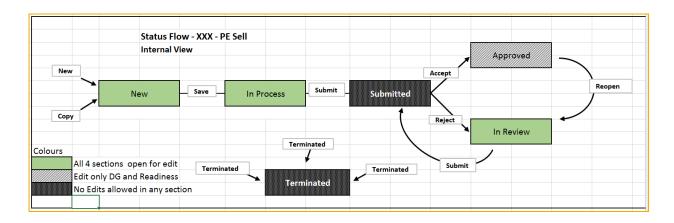– By default all plans you are assigned in PRM are shown

– Filters are available to reduce list if required

SAP Partner Business Plans

Hide Filter Bar   Filters   Go

Partner Type:
PE Sell ⊗ ∨

Plan Status:
∨

Plan Year:
2017 ⊗ ∨

Plans (1)   Max Results: 30 ∨ ↑↓

Partner	Partner Type	Plan Year	Plan Status	On Premises Revenue	Cloud revenue	Demand Generation Activities	Readiness Activities	
PRM SupportCenter test 1 Name2155 895628 Silver	PE Sell	2017	Submitted	10,495 EUR	400 EUR	2	1	>

Create Plan

Partner Business Plan
Notifications & Workflows

The following 4 notifications exist in the new planning app:

- Partner Business Plan was **submitted**

- SAP Partner Manager **approves** Business Plan

- SAP Partner Manager **rejects** Business Plan

- SAP Business Plan for [Partner Name] **re-opened**

Status Flow - XXX - PE Sell
Internal View

New

Copy

New → Save → In Process → Submit → Submitted → Accept → Approved

Submitted → Reject → In Review

In Review → Submit → Submitted

Approved → Reopen → In Review

Terminated

Colours

	All 4 sections open for edit
	Edit only DG and Readiness
	No Edits allowed in any section

Terminated → Terminated ← Terminated

SAP® **Partner**Edge®

Thank you

For internal SAP and partner use only