

# Improving Strategic Partner Collaboration Through Co-selling Process Redesign and Standardisation

# ATEA

We build the future with **IT.**

Project-Oriented Study, VS3

Kikki Liu-Lynghøj

Aalborg University  
Operations and Supply Chain Management



**AALBORG UNIVERSITET**

**Operations and Supply Chain Management**  
Aalborg University

**Title:**

*Improving Strategic Partner Collaboration Through Co-selling Process Redesign and Standardisation*

**Theme:**

Operations Management

**Project period:**

Autumn semester 2025  
(Project-Oriented Study in an External Organisation)

**Author:**

Kikki Liu-Lynghøj

**Supervisor:**

Rasmus Andersen

**Report length:**

74 Pages

**Submission date:**

January 05, 2026

**Abstract:**

Through an analysis conducted during a project-oriented study at Atea Denmark, this project examines organisation's co-selling collaboration with its partner to evaluate the operational challenges that limit a effective partnership performance. The findings indicate that the current process flow remains in an early stage of maturity, and determined constraints on limited visibility and unclear role responsibilities. These challenges increase decision latency and hinder the strategic alignment into valuable operational outcomes.

Evidence-based process improvements were developed to address identified limitations by integrating qualitative insights with quantitative data analysis on collaboration activities. Through mapping of current processes highlighted inconsistent manual handovers, while capacity assessments evaluated the organisation's ability to meet response requirements. The redesigned process is tailored with current collaboration maturity, leverages digital transformation and automation to reduce decision latency, eliminate inefficiencies, and establish process stability.

While the proposed solutions strengthen routing effectiveness and improve operational control through enhanced visibility, these changes specifically aim to ensure decision quality, strengthen the organisation's position as a preferred strategic partner, and enhance long-term collaboration.

*The content of this project report is not freely available and may only be published with the authors' consent.*

# Preface

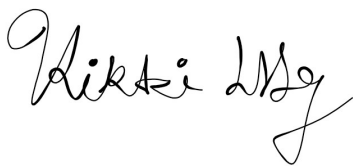
This Project-Oriented Study report has been written by student Kikki Liu-Lynghøj in collaboration with Atea Denmark and during the period 1 September 2025 to 1 January 2026. The project was undertaken during the third semester of the Master of Science program in Operations and Supply Chain Management at Aalborg University. The American Psychological Association style is used throughout the project and all sources are cited in the text and listed alphabetically in the bibliography.

Generative AI tools were employed during the creation of this report to assist with correcting and refining text, generating visualisation code for R, and brainstorming ideas. All AI-generated outputs were critically assessed, verified against empirical data from Atea to maintain the integrity and quality of the work.

The project author would especially like to thank the Executive Partner Manager from Atea, Morten Ovesen. In addition, a thank to the supervisor Rasmus Andersen, for his inspiring guidance, and support throughout the project period. Lastly, special thanks to the Microsoft Partner Management Team, entire Atea Software and Cloud department for their openness, cooperation, and time for providing access to the needed data and insights that made this project possible.

## Signature

Aalborg University, January 5, 2026

A handwritten signature in black ink, appearing to read 'Kikki Lyg', written in a cursive style.

---

Kikki Liu-Lynghøj  
<kliuly24@student.aau.dk>

# Contents

<b>1</b>	<b>Introduction</b>	<b>1</b>
1.1	Company and Department Introduction . . . . .	1
1.1.1	ASC Department and Microsoft Partner Management Team . . . . .	2
1.2	Mircosft Partnership . . . . .	2
1.3	Project Objectives . . . . .	2
1.4	Project Scope . . . . .	3
1.4.1	Delimitations . . . . .	3
1.5	Initial Problem Statement . . . . .	3
<b>2</b>	<b>Methodology</b>	<b>4</b>
2.1	Data Collection . . . . .	4
2.1.1	Interviews and Observations . . . . .	4
2.1.2	Time Studies . . . . .	4
2.2	Business Process Management . . . . .	5
2.2.1	Business Process Redesign . . . . .	5
<b>3</b>	<b>Initial Problem Analysis</b>	<b>6</b>
3.1	Co-selling Process Architecture . . . . .	6
3.1.1	Inbound Co-sells . . . . .	7
3.1.2	Outbound Co-sells . . . . .	9
3.1.3	Co-selling Responsibility Mapping . . . . .	10
3.2	Organisational Analysis . . . . .	12
3.2.1	KAM - Key Account Managers . . . . .	12
3.2.2	CSM - Customer Success Managers . . . . .	12
3.3	Co-selling System Queueing Analyse . . . . .	13
<b>4</b>	<b>Problem Statement</b>	<b>15</b>
4.1	Conclusion of Initial Problem Analysis . . . . .	15
4.2	Problem Diagnostic and Identification . . . . .	15
4.3	Problem Statement . . . . .	16
<b>5</b>	<b>Problem Analysis</b>	<b>17</b>
5.1	FMEA - Failure Mode and Effects Analysis . . . . .	17
5.1.1	Evaluation of 'As-Is' process . . . . .	18
5.2	Single Service Queueing Analysis . . . . .	19
5.2.1	Inbound Co-selling Trend . . . . .	19
5.3	The Human Decision Behaviours and Leadership . . . . .	20
5.4	Conclusion of Problem Analysis . . . . .	21

<b>6 Solution</b>	<b>22</b>
6.1 Solution Design	23
6.1.1 Standardisation	23
6.1.2 Visualisation	24
6.1.3 Digital Automation	24
6.2 Conclusion of Solution Design	24
<b>7 Implementation</b>	<b>25</b>
7.1 Digitalisation and Automation Tools	25
7.1.1 Inbound - Monitoring Dashboard	25
7.1.2 Automation on Outbound	26
7.2 To-Be Co-selling Process	27
7.2.1 To-Be Inbound Process	27
7.2.2 To-Be Outbound Process	27
7.3 Continuous Improvements	28
<b>8 Discussion</b>	<b>29</b>
8.1 Project Objectives and Data discoveries	29
8.2 Further Research	29
<b>9 Conclusion</b>	<b>30</b>
<b>10 Appendix A - Interviews, Observations and Meeting notes</b>	<b>34</b>
10.1 Interviews with CHES	34
10.2 Interview with NIHB	38
10.3 Interview with MAAR	43
10.4 Meeting Key Notes	47
10.5 Observations	53
<b>11 Appendix - Figures and Pictures</b>	<b>56</b>
11.1 Organisation Chart	56
11.2 Problem Based Learning Figure	58
11.3 Co-selling Process	58
11.4 Co-selling As-Is Swimlanes	58
11.5 Co-selling To-Be Swimlanes	58
11.6 RACI Mapping - CSM vs KAM	58
11.7 FMEA Table	58
11.8 Referrals - Opportunity from Microsoft Partner Center	58
11.8.1 Inbound Co-sells	58
11.8.2 Inbound Co-sells- Opportunity Deadline from Microsoft Partner Center	58
11.8.3 Outbound Co-sells	58
11.9 Inbound Handover from PM to Key Account Manager	58
11.10 Outbound Opportunity	58
<b>12 Appendix - Abbreviation List and Year Table</b>	<b>72</b>
12.1 Abbreviation List	72
12.2 Microsoft Fiscal Year - Time Table	73

<b>13 External Appendix</b>	<b>74</b>
13.1 Co_sell Opportunities Data.xlsx . . . . .	74
13.2 Data.xlsx . . . . .	74
13.3 Forecast.Rmd . . . . .	74
13.4 Status.Rmd . . . . .	74
13.5 Outbound.Rmd . . . . .	74

# 1 | Introduction

Strategic partnerships between IT solution providers and technology suppliers create joint customer value, by aligning purpose and realising impactful outcomes. For Atea Denmark, an advance co-selling with Microsoft represents a core partnership in driving growth in software and cloud services business. To achieve measurable results, upcoming business opportunities must be managed strategically and supported by effective coordination across internal stakeholders and partner organisations.

This study examines the operational process of co-selling between Atea Denmark and Microsoft, aims to identify process inefficiencies and coordination limits that hinder the high partner engagement. It proposes a structured and scalable operating model designed to support the co-selling process and strengthen long-term collaboration.

The first chapter provides an introduction of Atea Denmark, and its strategic partnership with Microsoft. It outlines the core values and project objectives to define the scope of this study.

## 1.1 Company and Department Introduction

Atea ASA is a leading supplier of IT infrastructure across the Nordic and Baltic regions [Atea, 2025], and is directed by the Norway-based CEO, Steinar Sønsteby. Atea ASA offering customers in hardware, software, and IT infrastructure services by collaborating with major global technology manufacturers. Established strong partnerships with nine strategic partners, which including Microsoft [Atea, 2025].

Atea Denmark, specialises in provides professional digital transformation services and focuses on efficiently productive IT solutions through a comprehensive understanding of the needs within Danish customer [Atea, 2025]. According to the Annual report in 2024, Atea ASA had revenue of approximately 35 billion NOK [Atea ASA, 2024], while Atea Denmark represented 23% of the Group's gross sales and revenue fell by 4.7% to 5.040 million DKK. In February of 2025, Sønsteby became the new CEO for Atea in Denmark [Horsager, 2025], and focus to leading the Danish organisation with comprehensive emphasis on strengthen partnership strategy, continue digital transformation and aim to enhance profitability in the Danish business.

### 1.1.1 ASC Department and Microsoft Partner Management Team

To focus on partnerships with its nine strategic partners, Atea Denmark, hereafter Atea, has established corresponding departments. However, the Atea Software & Cloud Service department, hereafter ASC, was formed to focus on the software solutions and business [11.1]. The ASC department is ambitious to drive a high value joint and aim to position Atea as Microsoft's preferred software provider in the Western Northern Europe region.

The Microsoft Partner Management team, hereafter PM, within the Software & Cloud Service department, acts as the primary connection to build a solid partnership between Atea and Microsoft. Partner Management aims to create a clear communication channel and strategic alignment between Atea and Microsoft [Lilleskov Traulsen, 2025]. Additionally, operates as a cross- function team at Atea, PM aims to ensure the partner-drive business updates and act as the operational interface to Microsoft. As a support team to participate alignment meetings with Microsoft specialists, and coordinate the business opportunities from Microsoft, effectively transferred to Atea internally.

## 1.2 Microsoft Partnership

Microsoft, one of Atea's nine Strategic Partners, and a leading global technology company. To address global software needs, Microsoft has created several divisions to maintain high standards for different countries. In Denmark, the Microsoft EMEA and Western Europe organisation collaborates with over 3,500 Danish partners [Microsoft, 2025]. Moreover, to understand the working culture from its partnership is essential. Microsoft operates primarily within a standardised and structured sales ecosystem guided by the MCEM cycle[Lilleskov Traulsen, 2025]. Therefore, this strategic sales logic are important to integrate into Atea's alignment strategic, to ensure a streamline partnership and effective communications[Lilleskov Traulsen, 2025].

## 1.3 Project Objectives

Although Atea is recognise Microsoft as its largest strategic partner [Ovesen, 2025], while the internal collaborating process with Microsoft is remains immature and largely manual coordination. The objective of this project aims to strengthen and redesign Atea's co-selling operating process, from simple coordination to a structured operating model. The proposed measurements aim to standardise decision-making routing, advance ownership for incoming opportunities, and improve capacity allocation to administrate co-selling collaborations. Additionally, increase process transparency through documentation and shared visibility of activities status with responsible stakeholders. Further enhance internal coordination with Microsoft, aims to establish strong partner engagement and valuable outcomes for both organisation.

## 1.4 Project Scope

This project focuses on Atea's co-selling operating process, emphasis on managing opportunities from initial incoming decisions to outgoing registration. The scope covers therefore both co-selling flows in **Inbound co-sells** and **Outbound co-sells** within Microsoft's customer agreement models, such as CSP and EA agreements. The analysis is limited to Atea Denmark's process and its interaction with Microsoft's partner system. Empirical evidence is based from Partner Center opportunity logs, internal CRM available documentation, emails, Teams communications, meeting notes, internal interviews and observations conducted during the project-oriented stay at the organisation. Furthermore, the analysis aligns with Microsoft's fiscal year timeline [12.2] for better reflects changes introduced during periodic business strategy updates.

### 1.4.1 Delimitations

To maintain analytical depth within the project time frame, mentioned areas are excluded. Financial evaluation, pricing analysis, revenue attribution and Microsoft Incentive funding due to inconsistent data documentation. Customer decisions within meeting details and evaluation of personal individual performance are out of scope, as the focus is on process redesign. Additionally, due to organisation's governance, full technical architecture and system integration design are excluded, with digital improvement described only at a functional level. These delimitations keep the project focused on process efficiency for improve co-selling performances .

## 1.5 Initial Problem Statement

Collaboration between Atea and Microsoft has developed since the strategic partnership was established. As Microsoft continuously updates its business strategy, Atea must align its business approach to remain a preferred partner. Hence, limited engagement in the current co-selling initiative highlights the need to address underlying challenges. The initial problem analysis aims to identify the key challenges within Atea's co-selling process. the analysis focuses on the process that dependent on manual handovers and single-team responsibility, which limits cross-functional collaboration, pipeline standardisation. Addressing these issues is critical to stabilising processes and enabling effective high-value engagement in new business opportunities.

As described, this has led to the following initial problem statement:

***"How can Atea strengthen the current co-selling operating process with Microsoft by improving the process structure and coordination across both organisations, and what conditions limit the realisation of strategic partnership value?"***

## 2 | Methodology

This chapter presents the methodological approaches applied throughout the project, and provides an overview of the overall framework. Moreover, both quantitative and qualitative data collection, and method used for solution design approach is described. Hence, the project structure follows the principles of the Problem Based Learning (PBL) model [Holgaard, 2020][11.2].

### 2.1 Data Collection

To gain a comprehensive understanding of the co-selling process, both qualitative and quantitative data were collected. Although the process still needs systematic advancement and depends on human decision-making, qualitative data was captured during execution in practice, and through stakeholder interviews. While quantitative data was used to identify inefficiency patterns and time-based performance actions.

#### 2.1.1 Interviews and Observations

During the company stay, semi-structured interviews with relevant stakeholders involved in co-selling activities, provided key insights into responsibilities, decision criteria, and internal collaboration challenges. This method allowed structured preparation while enabling stakeholders to share unexpected perspectives [10]. Combined with the interviews, direct observations validated workflow performance in practice and revealed undocumented handovers, misaligned processes, access limitations, coordination delays, and decision-making challenges caused by unclear responsibilities. Supplier with meeting notes [10.4], structured guides ensured systematic data collection, with supporting materials included in the Appendix [10.5].

#### 2.1.2 Time Studies

To strengthen the analysis with empirical data, time stamp measurements were collected from available action records during the project period. Time studies are an important method, when other data is unavailable or limited, as it provide objective insights into process efficiency [Stevenson, 2021]. In this project, co-selling action dates and internal alignments, based on email digital timestamp, which were used to track stakeholder decision times and response intervals, especially for inbound co-selling opportunities. These studies measured the time between sending a notification from the PM team and

receiving an expert response. Due to limited project periods, actions timestamps from Q4 FY25 to Q2 FY26 were available recorded, other periods remain action undocumented.

## **2.2 Business Process Management**

The analytical work and proposed solution measures are guided by Business Process Management (BPM)[Møller, 2022][Dumas et al., 2018], which evaluates co-selling as an end-to-end workflow across roles, systems, and decision points. Following the BPM lifecycle, this framework enables a structured transition from identifying the current 'As-Is' process and its underlying challenges, to redesigning a 'To-Be' process that tailored to organisational needs and implementation standards.

### **2.2.1 Business Process Redesign**

Following the BPM framework, Business Process Redesign (BPR) provides the practical approach for addressing inefficiencies and coordination gaps in current process[Jarvenpaa and Stoddard, 1998]. In this project, the redesign aims to provide a approach to create an improved operating model with clear handovers, transparency visibility, and reduced dependency on manual coordination. This method supports the enhancements can be tailored into the current process with ensured consistent execution, and maintain improvement in long-term.

## 3 | Initial Problem Analysis

This chapter analysed the current co-selling workflow between Atea and Microsoft, and focused on identifying the internal operation challenges that limit partner collaboration. First, an examination of internal processes was analysed on the actions to handle the new opportunities once received from partner system. Moreover, the responsibilities and ownership among stakeholders was outlined to understand the role relevance and clarification gaps. To gain a insights of Atea's execution capacity to the process, a queueing analysis was conducted. The purpose of the analysis was to establish a comprehensive understanding of the hidden constraints within the existing process, aiming to prevent avoidable expiration then loss of valuable opportunities.

### 3.1 Co-selling Process Architecture

The co-selling activities with Microsoft are executing through Microsoft Partner Center, which is a partner communication system invented by Microsoft. A strong collaboration with Microsoft is crucial to position Atea as a preferred sales partner in Northern Europe. According to Microsoft's Ecosystem Report [Wilson and Storz, 2022], highly engaged partners can generate an average gross margin of 30%. Compared to only 14% of an average gross margin for less-engaged partners. Commitment to an strategic partnership will further enhance Atea's business value, while also unlock partner benefits including funding, specialised programmes, and global recognition.

In 2021, Microsoft introduced massive updates to its digital partner system [Rippey, 2021], aim to provide a more transparent platform for partner initiatives [Bergendorff, 2022]. The Partner Center acts now as the primary operational interface for Partner-to-Partner collaboration system, including functions such as Co-sell Referrals, Partner funding and Customer Record registration. Following the organisation compliance [10.5, access to Partner Centre cannot be granted to all employees at Atea. Hence, Atea's Customer Relationship Management system (CRM) is not integrated with Partner Center either. This lack of live integration limited end-to-end visibility, which makes it invisibility to recognise and act internally on new collaboration opportunities once it arrived at Atea.

The co-selling initiatives with Microsoft are focus on these two separate collaboration motions: **Inbound** and **Outbound** co-sells opportunities. To support partner communication and ensure a smooth process flow, the PM team is function as the process gatekeeper, to monitoring and managing generate opportunities for both motions.

### 3.1.1 Inbound Co-sells

Inbound co-sell refers to co-selling opportunities initiated by Microsoft in Partner Center and directed to Atea [Microsoft Learn, 2025] [11.12]. These co-sell opportunities require timely action to accept or decline the deal within 14 days, because Partner Centre operates a fixed response window with this initiative. If the opportunity is first viewed after this period, the co-sell will be expired [11.13].

Based on the historical Inbound co-sell data shown in Figure 3.1, a high expiration rate was recorded between FY24 and FY25. In FY24, a total of 62 opportunities were received, of which 27 expired. This indicates an expiration rate of approximately 42% during this Fiscal Year. In FY25 Q2, also an high expirations period was observed, with 48 expired opportunities recorded. Although expiration has no directly economic consequence, and valuable opportunities can possibly be regenerated through Microsoft specialists after alignments. Hence, this leads to unnecessarily rework. If Atea fails to respond on time, Microsoft may allocate opportunities to other partners, creating a risk of long-term business loss [10.1].

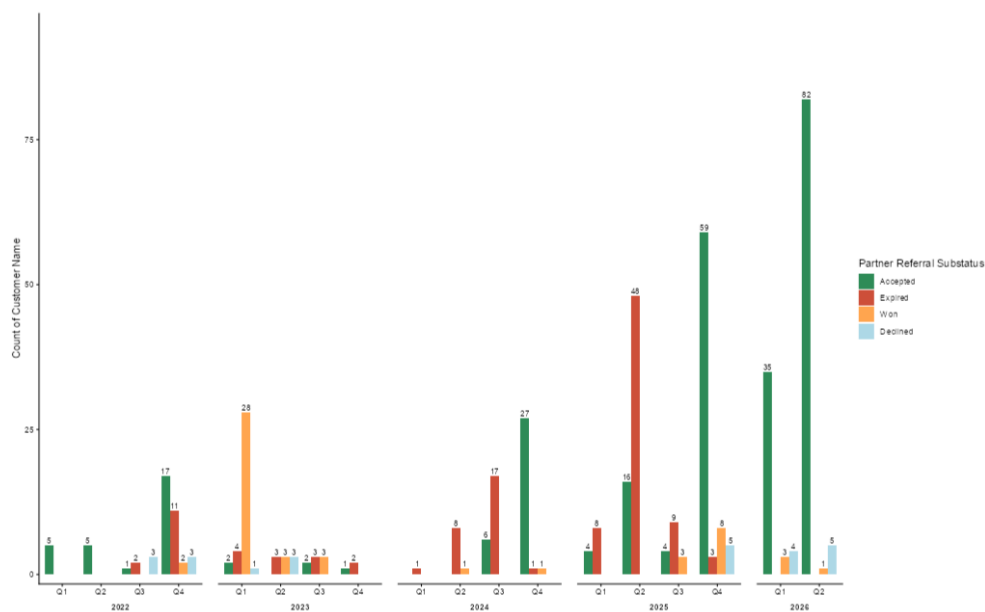


Figure 3.1: Quarterly volume and status of Inbound Co-sell on Partner Center - FY22 to FY26[13.1][13.4]

According to the interview with CHES [10.1] and supplier with the observation from the Introduction-Meeting [10.4], these results were due to a large organisational and strategic changes from Microsoft during Q3 FY 24 and Q2 FY25. The new go-to-market strategies influenced Atea organisational, and affected to a whole execution team was eliminated within ASC departments. During these changes, capacity for acts on these incoming opportunities were reduced. As a result, limited resources faced an excessive workload, making it difficult to prioritise monitoring and registering opportunities decisions on Partner Center.

Following the new go-to-market strategies, Microsoft is now more focusing on gain a joint partner selling value. Therefore, during the Partner Alignment Meeting with Microsoft in Q2 FY25, Microsoft highlighted the status from Partner Center, indicated the inconsistencies in the registration of Inbound co-sells and a lack of timely response behaviour. This feedback determined insufficient partner alignment and indicates a low engagement signals from Atea's side. To address this feedback, the Execution Manager within the PM team began taking ad-hoc actions on inbound co-sells [10.5]. By the end of Q3 FY25, as the ASC department had stabilised, the volume of inbound co-sells also increased [3.1].

To meet Microsoft's collaboration expectations, a semi-structured process was established at Q4 FY25 to manage the Inbound co-sell from Microsoft with aims to reduce expiration. The process flowchart in Figure 3.2 below illustrates, the current 'As-Is' workflow, for the PM team in managing inbound co-sells internally. The PM team monitors Partner Centre randomly, approximately every two to three days in a week.

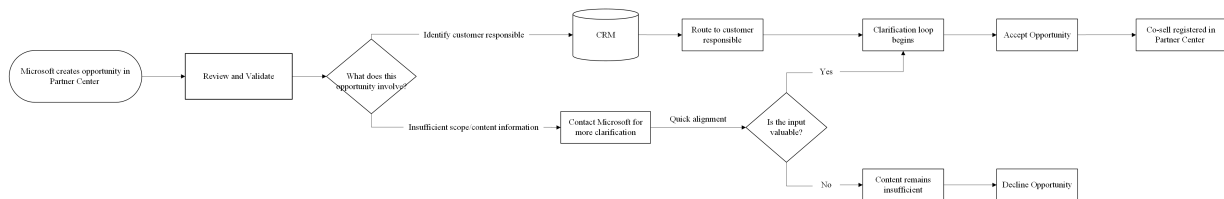


Figure 3.2: Inbound co-selling workflow - managing by the Partner Management team [11.3]

However, the process starts when referrals in Partner Centre shows the new opportunities, which the PM team reviews and validates relevance. If additional clarification is required, the PM team contacts Microsoft for further explanation. Otherwise, opportunities are categorised according to agreement types, and the accountable customer managers are expected to be visible in the CRM system. Once the PM team identifies the responsible specialist, a notification is sent by email, and the response times can vary. The specialist should inform the PM team whether the co-sell is valuable with either a decision on accepts or declines the opportunity. If the specialist does not respond before the expiration period, it becomes the PM team's responsibility to act and evaluate the opportunity. To avoid decisions being made without expert evaluation, the PM team aims to gather a decision on each opportunity prior to actions [10.5].

A structured internal process to support Inbound co-sell decisions is therefore essential [Fernandes et al., 2022]. To ensure the quality of opportunities and prevent expiration, the PM team must structure the process to support the co-sell initiative follow-up, which further increases the internal engagement to collaborate.

### 3.1.2 Outbound Co-sells

Outbound co-sells refers to opportunities identified and registered in Partner Center by Atea[11.14], to engage or get collaboration support with Microsoft specialists. Moreover, Outbound co-sells reflect proactive partner engagements, and support maintain a balanced approach to collaboration through joint partner initiatives[*Microsoft Learn, 2025*].

However, historical data of Outbound shows a low and inconsistent volume of outbound co-sells from Atea. As illustrated in the statistics Figure [3.3] below, there were a total of 29 outbound co-sell registrations in FY24, with the highest record of 21 in Q2, followed by a drop to eight in Q3. In FY25, registration fell further, with only one in Q1 and three in both Q2 and Q3. This pattern suggests that Outbound co-sells are not yet run as a stable operating routine within Atea after the strategic changes in between FY24 to FY25. Another finding indicates that outbound initiatives have been low-prioritised [10.5] partly because this motion do not contain the same fixed deadlines as Inbound co-sells, therefore often perceived as an optional collaboration registration workload. At the beginning of Q2 FY26, Microsoft began to expressed a expectation, that Atea should register collaborative opportunities in Partner Center, particularly as Atea was working on several high-value opportunities with customers collaborate with Microsoft specialists.

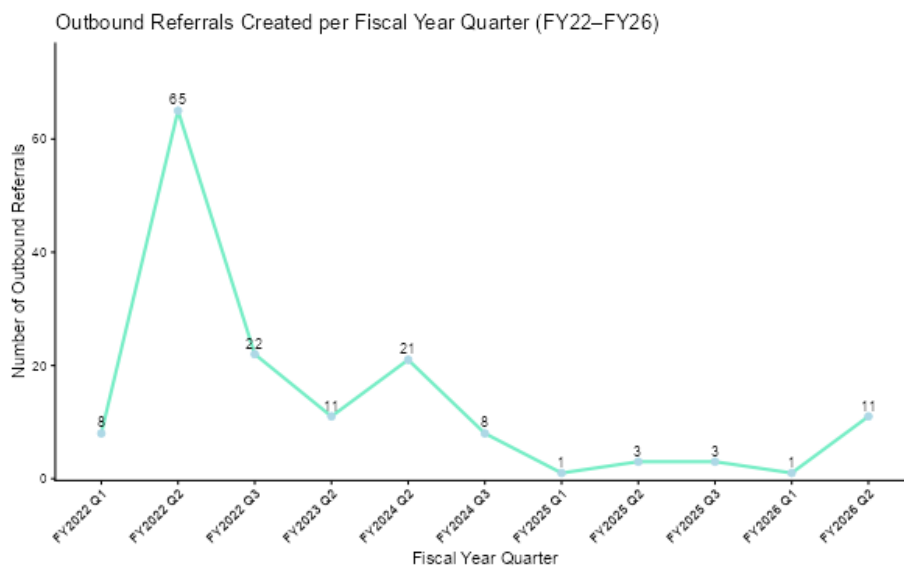


Figure 3.3: Quarterly volume and status of Outbound Co-sell on Partner Center - FY22 to FY26[13.1][13.5]

To support this initiative, the PM team developed a semi-structured process for handling outbound registrations around November 2025, which is Q2 FY26. The Figure 11.4 below illustrates the current Outbound workflow, which is developed by PM within an early-stage approach. Each opportunity is identified within the individual account team, based on details created in the CRM system, then contacted via email to the PM team[11.16]. Once registered on Partner Center, the process awaits a

response from Microsoft. Outbound co-sells do not have a fixed response window functions to require response from Microsoft, which may increase the likelihood of prolonged in pending status. To address this, the PM team has set a manual reminder, with a 14-day follow-up. If Microsoft does not respond within this period, the PM team will contact the Microsoft PDM for clarification.

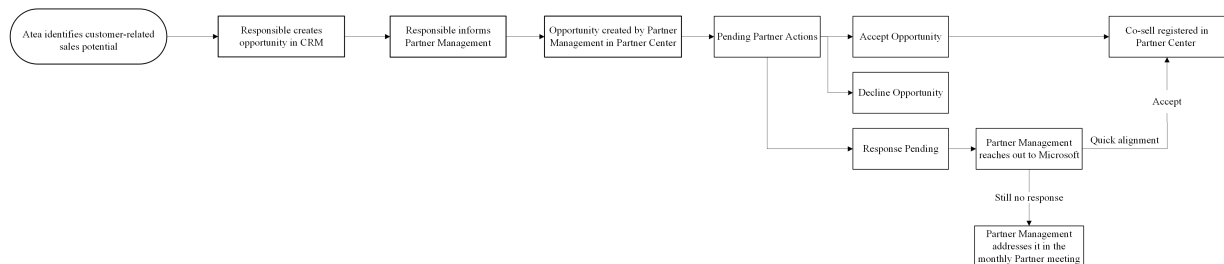


Figure 3.4: Outbound co-selling workflow - managing by the Partner Management team [11.4]

Currently, the outbound co-sell motion appears structurally underdeveloped, reflected in its low volume and weak standardisation, which limits consistent and proactive collaboration. The PM team aims to strengthen this process, which requires further development to establish effective process standards.

### 3.1.3 Co-selling Responsibility Mapping

As the mainly administrator of the co-selling process, the PM team must qualify the context of each opportunity and identify the correct internal responsible managers effectively. To achieve a more standardised process that delivers higher-value co-selling initiatives from Atea to partner.

To qualify the value of opportunities, the PM team must maintain a critical evaluation. Especially, Microsoft is known as an extremely KPI-driven operating organisation[10.5]. Since FY25, Microsoft specialists have been required to create a certain number of co-sells every months. This pressure can lead to an increase in low-value co-sell registrations, which cost to less focus on developing high-impact opportunities and weakening partner trust in co-sell activities. Back in Q4 FY25, the PM team flagged several inbound co-sells marked as “For internal KPIs”, such opportunities are no longer routed internally, and pointed out to Microsoft during alignment meetings [Holm and Lynghøj, 2025].

Moreover, to managing co-selling with Microsoft, observation shows this motions involves primarily two account teams responsible for developing customer opportunities.: *Key Account Managers (KAM)* and *Customer Success Managers (CSM)*. To gain a comprehensive understanding of the roles and involvement, the co-selling swimlane flowcharts has been illustrated [11.5][11.8], to visualise the stakeholders involvements in both inbound and outbound processes.

Hence, to managed Inbound co-sell process, it is essential for the PM team to clearly define responsibilities between these two teams and ensure the process is handled within fixed time bounds. The swimlane flowchart in below Figure 3.5 illustrated the Inbound co-sell is primarily managed by the PM team. Before the notification email is sent, the relevant stakeholders are often unaware of new opportunities. When opportunities created, the role relevance at Atea is uncertain, this lack of visibility can lead to longer decision times for the PM team to registering action status in Partner Center.

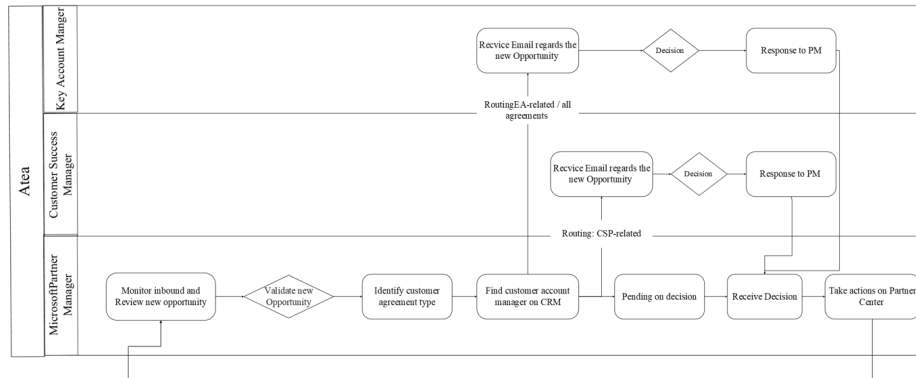


Figure 3.5: As-Is Inbound process at Partner Management team [11.5]

As illustrated in the below Figure [11.6] of Outbound co-sells, the process currently appears ad-hoc action due to its early-stage development and lack of maturity with this co-selling initiative. Internally, there is a limited understanding of how involvement with Microsoft could be beneficial, as a shared partner. According to interviews with NIHB [10.2], CSM expressed concern of Microsoft’s engagement might pressure to the sales dynamic towards a more vendor-led approach, rather than a customer focused consulting dialogue. Meanwhile, KAM stats [10.3], KAM team do not prioritise minimal participation in this initiative, focusing primarily on creating opportunities within the CRM system.

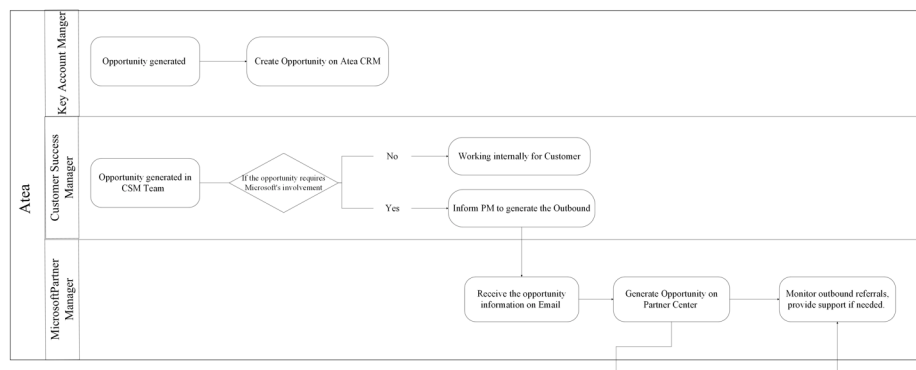


Figure 3.6: As-Is Outbound process at Partner Management team [11.6]

The current responsibility structure with both co-selling process relies heavily on the PM team, and

depends on expert decisions from account teams to maintain high-quality opportunity intake. The challenges as limited visibility and uncertainty decision ownership can cause delays, and reduce the efficiency of collaborative co-sell activities with Microsoft.

## 3.2 Organisational Analysis

To clarify the role responsibilities between the two primary account teams, an organisational analysis was conducted. The PM team categorises opportunities after customer's Microsoft agreement type. To further define this role distribution, especially for Inbound co-sells, two RACI mappings were developed [11.6] [TUNCA and RADULESCU, 2025], following interviews with stakeholders from both teams. These mappings highlight the split in responsibility, and ownership for customer opportunities from Microsoft.

### 3.2.1 KAM - Key Account Managers

The KAM team operates within the Sales & Solutions Sales department [11.1], and maintain primary accountability for customer relationships, managing all agreement types across Atea's nine strategic partners. KAM team typically maintain broad customer consulting responsibilities, and may not having deeply technical discussions in different IT solution areas. Regards Inbound co-sells, when deepen technical decisions are required, KAM team usually delegate to relevant solution specialists within Atea, such as Modern Work Specialist (MWS). However, the PM team are not aware who these specialists are. As a illustrate in the process [11.5], when a notification email is sent to a KAM team, they may forward it to another specialist, to take over the opportunity. Despite this, KAM team involvement in co-selling with Microsoft remains critical, as KAM have organisational ownership of the customer, and have insights of which specialists are most suitable for specific solution areas.

According to the RACI mapping for KAM [11.6], this indicates that the PM team should forward the CSP-related inbound opportunities directly to the CSM team. This is more effective for customers with an active CSP agreement and an assigned CSM. If the PM team follows the standard organisational workflow, which requires notifying KAM first, even when PM team is already aware that the opportunity relates to CSP. To wait for KAM's delegation the task further, this approach will create additional inefficiencies.

### 3.2.2 CSM - Customer Success Managers

The CSM team operate within the ASC department, same as PM team [11.1]. The CSM team primarily focus on managing Microsoft software business related to CSP agreements and renewals. Following the new go-to-market strategies from Microsoft, the large shift is to repositioning the business from

traditional licensing agreements, towards cloud subscription models, which are more CSP-oriented. Microsoft has invested heavily in CSP agreements and aims to drive activities such as CSP renewals and the transfer from EA- to CSP- agreements [Filipsson, 2025]. Consequently, the Inbound co-sell opportunities are highly CSP-related [Dezen, 2025]. The CSM team often maintains more regular collaboration and dialogue with Microsoft than KAM team.

Based on the RACI mapping [11.9] conducted following NIHB's [10.2] statement, opportunities related to CSP customers should be forwarded to the CSM team. However, strategic collaboration with KAM remains important, as CSM cannot always manage these opportunities independently. If the PM team notifies only the CSM team without informing KAM, this creates a lack of transparency regarding activities involving KAM's customers.

As demonstrate in the RACI mapping and stakeholder interviews, there is ambiguity regarding practical roles and variations in the participation of co-selling account responsibilities. Limited shared visibility of co-selling opportunities has led to inconsistencies, causing execution weaknesses within Atea. Nevertheless, both account teams agree that the PM team should continue to serve as the gate-keeper for the co-selling process. This approach can further improves on accountability and ensure sustained engagement in co-selling activities with Microsoft.

### 3.3 Co-selling System Queueing Analyse

Although the co-selling workflow still contains constraints such as role ambiguity and invisibility, the current process in FY26 has introduced a significant structured approach to managing co-selling activities, compares to FY24. Empirical data also indicates that inbound opportunities increased from 63 in FY24 to 179 in FY25, representing a YoY growth of approximately 237% [Holm and Lynghøj, 2025]. While outbound engagement starts to showed an small upward trend in Q2 FY26 [3.3]. The Table 3.1 below presents the numbers of the historical data volumes of opportunities within both co-sell motions.

	FY25	FY24	FY23	FY22
Inbound	179	63	57	48
Outbound	8	28	11	95

Table 3.1: Historical Volume of Inbound and Outbound Co-sell opportunities by Fiscal Year [13.1]

To manage the potential increase volume for Inbound opportunities within a 14 days fixed time window, an queueing analysis was conducted on the arrival pattern of inbound referrals over time. This assessment is particularly critical to determine the PM team's action capacity requirements, when the arrival rate of opportunities exceeds the review capacity, as insufficient action capacity could lead to

an increase in expirations. Especially, the co-selling processes relies heavily on the PM team to monitor and validate.

In this analysis, opportunities from Microsoft on Partner Center are defined as service requests to Atea, with both opportunity arrivals and reviews by the PM team occurring randomly. Therefore, when a new opportunity arrives, while the team is handling ongoing reviews or other work tasks, it is placed in a queue for validation. This process follows a *First Come, First Served (FCFS)* [Anthony, 2016] approach due to limited PM resources to handle co-selling. Given the 14-day expiration period for inbound co-sell opportunities, the team must prioritise handling opportunities in the order the arrive time, which is co-sells created time. This approach can be modelled as an *M/M/1 queue* with *reneging behaviour* [Vasegaard, 2024] [Armero and Bayarri, 2001].

Following this queueing analysis, with arrival rate as  $\lambda$  as Create Date of new Inbound co-sell, and service rate as  $\mu$  as Action Date from PM team. Under a single server mechanism operates by the PM team, the utilise factor is expressed as

$$\rho = \frac{\lambda_{CreateDate}}{\mu_{ActionDate}} \quad (3.1)$$

Based on the queueing calculation of inbound co-sells, Table 3.2 shows the results of FY22 to Q2 F26 Inbound arrived average rate of 0.29 per day, which  $1/0.29 \approx 3.4days$ . Moreover, the PM team processed around 0.22 opportunities per day, this implies  $1/0.22 \approx 4.6days$ . The utilisation factor  $\rho \approx 1.34$  indicates that arrivals exceeded completions is around 34%, suggesting a sustained overload, as  $\rho > 1$ .

Mean interarrival time	Mean Service time	Utilisation
0.2924 arrivals/ per day	0.2195 services /per day	$0.2924/0.2195 \approx 1,34$

Table 3.2: Inbound Co-sell Estimated Arrival rate, Aervice rate, and Utilisation[13.1]

The queueing analysis results and highlight that periods of high workload can increase pressure to act, without sufficient internal validation, particularly when account responses are delayed or routing roles remain unclear. During periods of high workload, the PM team may experience pressure to forward information via email and tends to accept deals, without receiving decisions from account teams. This may indicate a constrains in decision quality for incoming opportunities over the long term. Furthermore, this overload can also increase the risk of creating unrealistic response on Partner Center, which lead potentially to Microsoft specialist use the system as a registration platform for KPI documentations. In the meanwhile, if outbound requirements increase, capacity to handle the co-selling activities will face greater pressure to maintain quality, which emphasise that the process administrate by PM is relies heavily on manual handovers and actions.

## 4 | Problem Statement

This chapter aims to identify the initial problem statement [1.5], and examine the core challenges that constrain the current processes. The objective is to deepen the findings through a structured problem diagnosis, and further develop a problem statement to support gain a in-depth problem analysis.

### 4.1 Conclusion of Initial Problem Analysis

To conclude the initial analysis[3], the findings indicate the current co-selling process is constrained in directly coordinated partner engagement. Activities from Partner Center are not consistently integrated into Atea's operational system, and therefore heavily relies on manual handovers, and a single management mechanism due to limited capacity. Hence, the established process actually performed positively, which increased engagement between Microsoft and Atea which showed a growing volume of Inbound and Outbound co-sells. During peak periods, the high volume of incoming co-sell opportunities are tense to increase the workload pressure on the PM team. Especially with Inbound co-sells within a fixed time windows, which can further increase pressure to handle the co-sells. With current PM's Inbound co-sells processing rate, this may increase the risk of missed deadlines, inconsistent qualification, inconsistent qualification, and further reducing partner engagement. To addressing these challenges, a standard measurement for the co-selling process over the long-term is essential.

### 4.2 Problem Diagnostic and Identification

To diagnostic the findisng, a structured root causes approach was conducted in below Table 4.1, by following the 5 whys method[*Lean Enterprise Institute, 2025*]. The analysis aims to identify the operational underlying challenges and patterns which create low-priority co-sell engagement over time.

Based on the root cause analysis conducted using the 5 Whys method[*Lean Enterprise Institute, 2025*], two primary constraints have been identified. The first problem is unclear ownership and role enablement during the co-sell intake process. Specifically, Inbound routing between KAM and CSM is inconsistent, which can result in invisibility within Partner Centre. This issue creates a critical challenge in limited transparency and visibility across systems. When Partner Centre and the CRM system are not integrated, all partner activities must be managed manually by the PM team. These challenges can significantly restrict future growth in partner co-selling engagement.

Table 4.1: 5 Whys Analysis of Identified Challenges in Atea's co-selling process performance

Why	Identify Areas	Link	Operational Implication
Why 1	Both co-selling flows rely on manual routing and email follow-up, which slows execution during peak periods.	→	Decision latency increases, reducing time available for qualification and increasing expiry risk.
Why 2	Ownership at initial routing is not consistently defined, leading to rework and delayed handovers.	→	Co-selling requires additional clarification and re-routing, creating delays and inconsistent accountability.
Why 3	Account teams do not have consistent visibility of Partner Center activity, making PM the main gatekeeper for status updates.	→	The workflow dependent on PM capacity, increasing processing time when Inbound volume rises or cross-functional input is required.
Why 4	Access is not provisioned by default for relevant roles and CRM is not integrated with Partner Center, increasing manual handovers.	→	Decisions are delayed due to limited visibility and missed awareness of the 14-day response window.
Why 5	The co-selling operating model is not yet stabilised and relies on individual practices rather than common routines.	→	Performance becomes inconsistent across cases, and co-sell activity risks being treated as administrative registration rather than joint execution.

### 4.3 Problem Statement

As identified in above Section 4.2, the root cause analysis from Table4.1 highlights the co-selling is hindered by two issues, role ambiguity and limited visibility across system. These lead to a high dependency of manual follow-ups and bottlenecks to decision delays, especially during high workload periods. The following problem statement is proposed to adressess with a more in-depth problem analysis:

***"How can Atea enhance the standardisation of co-selling process performance with Microsoft to reduce decision delays and role ambiguity, thereby strengthening joint customer outcomes and improving long-term partner engagement?"***

#### Sub-questions

- *"How can the operating model maintain stable performance during peak periods when Inbound volume increases and capacity is constrained? "*
- *"How should decision ownership and role responsibilities be defined to reduce decision latency and improve qualification quality?"*
- *"Which improvements in the current process are required to ensure timely and systematic handling of Inbound opportunities?"*

## 5 | Problem Analysis

In this chapter, an in-depth analysis of the identified problems is presented. As stated in the problem statement in Chapter 4, the focus is on evaluating operational performance with the aim of reducing decision latency and quality, particularly during periods of high workload. To achieve this, the analysis applies a structured approach to identify systemic ineffectiveness and performance gaps that may hinder efficiency and strategic collaboration.

The analysis focuses on answering the sub-questions to the Problem Statement 4:

- *"How can the operating model maintain stable performance during peak periods when Inbound volume increases and capacity is constrained? "*
- *"How should decision ownership and role responsibilities be defined to reduce decision latency and improve qualification quality?"*

To address these sub-questions, this chapter employs a combination of analytical methods. Historical co-sell patterns are reviewed to identify variability, followed by the application of FMEA analysis to evaluate and prioritise potential failure points within the process. In addition, quantitative data is used to perform a queueing analysis to assess current resource capacity. Finally, leadership analysis of this partner initiatives is examined, through interviews and analysis of relevant quantitative data. Overall, these methods provide a detailed analysis of workflow issues that evaluate performance quality, and support the development of strategies with aims to strengthening collaboration between Atea and Microsoft.

### 5.1 FMEA - Failure Mode and Effects Analysis

To evaluate co-selling process risk, an FMEA analysis was conducted to determine the potential failure and the impact on overall both co-selling process performance. Supported the FMEA approach by three failure modes criteria, Severity (S), Occurrence (O), and Detection (D), these values are combined to results a Risk Priority Number (RPN) (source). which can be calculated as the following formula [Nicholas and Steyn, 2022]:

$$RPN = S \cdot O \cdot D \quad (5.1)$$

The RPN scoring results provide an overall prioritisation, enabling comparison across failure modes, and highlighting critical operational weaknesses. These findings indicate the potential performance risk, which can be limit to maintain a stable process performance under real work conditions. As shown in the FMEA analysis Table [11.7], the largest RPN score indicated the highest priority failure mode is on *Decision Delay* , especially indicated to Inbound co-sell process , which scored 392. With

Item or Function	Failure Mode	Failure Effect	Severity Rating (S)	Causes	Occurrence Rating (O)	Controls	Detection Rating (D)	Risk Priority Number, RPN=S*O*D	Recommended Actions
Opportunity decision flow	Decision delay	Single Serve mechanism process and renegein can cause lost of sales opportunities	8	Bottlenecks for slow decision and actions, no escalation, and limited resources to engage with Microsoft	7	Manual follow-ups	7	392	Set automated reminders at 7 days and create a digital dashboard for all to show more visibility on pending oppty.

Figure 5.1: Highest RPN score from the FMEA analysis - Decision delay 392. 11.7

this highest RPN score, Decision Delay results as the most critical failure mode, linked to inconsistent qualification criteria which may increase referral expiry risk, and reduce reliability and engagement in valuable co-selling . Furthermore, delayed decision-making responses can compromise short-term deadline compliance. This further highlights the diagnostic problem in time bound constraints and ownership ambiguity that can reduce process stability over the long term.

### 5.1.1 Evaluation of 'As-Is' process

The 'As-Is' process described in Section 3.1 was developed to replace the earlier ad-hoc handling patterns, aims to structure the timely processing and strengthen internal engagement of co-selling activities. However, the evaluation shows that performance remains highly dependent on PM 's monitoring and manual handovers. Inbound co-sells recorded in Partner Centre are routed manually to relevant specialists, and account managers. However, decision delays may occur under high workloads, this can creates a large dependency on the PM team's responsiveness.

A data observation from Q2 FY26 indicates the challenge, in weeks 47 and 48, there are 88 inbound co-sell referrals were sent directly to Atea [13.1]. To act during the 14 days time bound, PM team managed to take valid action on 44 opportunities in week 48, and still three opportunities lacked feedback from the contacted specialists [13.1]. While the expiry risk may be reduced after the Inbound process was structured, decision quality and ownership remain inconsistent. Despite reducing ambiguity compared to previous ad-hoc handling, the process still relies on constraints such as manual routing, role-dependent responses, and centralised visibility. These constraints reduce stability during peak workloads and lead to time-pressured decisions. In relation of this, the long-term value of co-selling performance may decrease, and further decrease the engagement to manage outbound opportunities requests effectively.

## 5.2 Single Service Queueing Analysis

The Inbound co-selling process operates as a single service mechanism, as described in Section 3.3. With an *M/M/1* queue reneging, PM team also operating the co-selling process following a FCFS - approach [Vasegaard, 2024]. Although this single service mechanism can manage requests effectively, when the volume of Inbound opportunity arrivals remains low.

However, when the inbound volume increases, the PM team as the responsible for visibility and routing coordination of these inbound opportunities internally can especially experienced a high workload pressures, as described in Section 5.1.1. According to data documented [13.1], Inbound co-sell increase arrival volumes from 45 in Q1 to 88 in Q2 in F26. In FY25, with the highest volume recorded in Q4, with totally 83 opportunities, and Q2 FY25 ranking second with in total 64 Inbound co-sells. This pattern suggests potentially a seasonal trend, highlights the need for strategic capacity planning during peak periods.

### 5.2.1 Inbound Co-selling Trend

To analyse the potential seasonal trend, this section aims to provide insight for develop possible capacity planning, aims to maintain a stable Inbound process during peak periods. Hence, a effective planning can also support to mitigate decision delays, as performance often decompose rapidly under high arrivals of opportunities.

The PM is responsible with visualising and sharing information with both the CSM and especially the KAM, who do not have access to Partner Center. If the PM remains unable to manage these opportunities, whether due to high stress, missed deadlines, or simply accepting them to meet the required response time. However, this newly stabilised co-selling initiative within the organisation could fail once again.

To analyse the trend, an ARIMA forecasting method was applied to identify seasonality of intake of Inbound co-selling volume, and predict future patterns [Tableau, 2023]. The below Figure 5.2 illustrates seasonal peaks and forecasts the potential peak periods. The results showed the peak typically can happens in late April, around May, which correspond with the end of Microsoft's fiscal year, typically in Q4. Another peak is observed towards the end of the organisation calendar year, often starts around late November. These fluctuations align with commercial closing cycles, including the close out activities during the fiscal year. This phenomenon typically increase coordination to finalise opportunities, before organisations reporting deadlines. Moreover, the forecasting result, it predicted that the same seasonality will persist in FY26 and FY27. Hence, these results should be considered in future planning, within the positive increased volumes in inbound activity, which can lead to higher volumes of opportunities shared on Partner Centre during the predicted period.

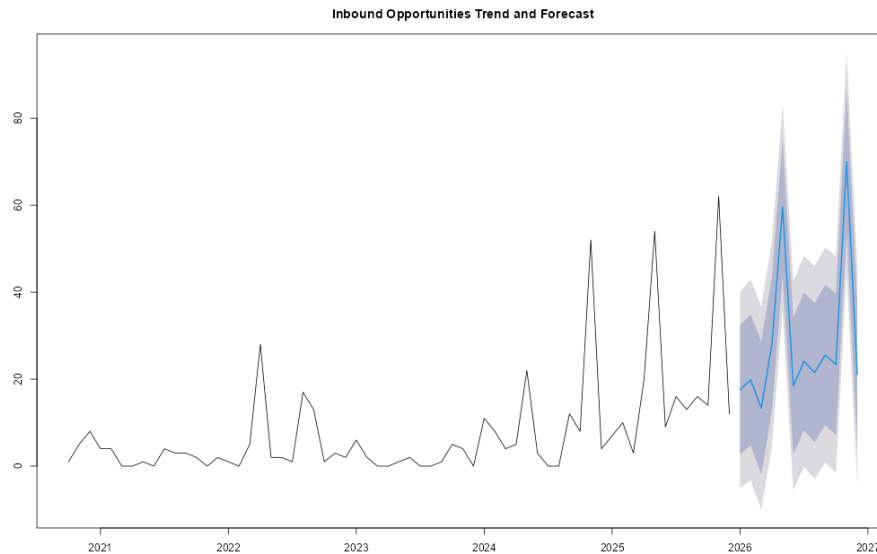


Figure 5.2: ARIMA forecast of monthly Inbound co-sell opportunities [13.3] [rajsiddarth, 2017]

Through above trend analysis, peak periods results may predictable, which indicating that decision delays should be consider to prepare during these periods. Mainly, the current process relies heavily on manual follow-up cycles and internal visibility sharing. When PM has overload capacity, the relevant account managers will lacks on share direct visibility to the relevant account team, it will increase the risk for decision-making delay and further delay collaboration with Microsoft. Therefore, predict the peak periods enables proactive capacity allocation within PM teams, reducing time pressure and supporting timely actions. Despite it, to develop a reliable prediction of Inbound volume in the future, data documentation must be prepared structurally to enable the analysis to show more precisely results.

### 5.3 The Human Decision Behaviours and Leadership

In the current co-selling process, the PM team holds a important responsibility for manage the co-selling process coordination. However, the decisions are still highly depend on account managers. Human behaviour on decision and prioritisation acts a critical factors in this project, this making the leadership also a crucial factors for Atea's investment in strategic collaboration with Microsoft[Popovska, 2025].

According to the CEO Sønsteby, as mentioned during multiple meetings, "Atea is a people company." [10.5], Atea succeed its business with a high understanding of customer needs. For co-selling, KAM team and CSM team can therefore provided essential decision input to assess whether co-sell opportunities deliver real business value. Through the interviews conducted with MAAR from KAM team [10.3, NIHB

from CSM team[10.2], and CHES, the director of CSM team[10.1]. The collaboration with Microsoft were stated as strategically important for the Atea's business growth. According to CSM's director, CHES, co-sells motions are mainly relevant for the CSMs, as Microsoft has increase the CSP agreement into a high priority business area[10.1].

Overall, the leadership acts a influential role in addressing the risk of decision delays. As CHES emphasised[10.1], clear ownership and strong organisational prioritisation, combined with alignment to Microsoft's go-to-market strategy, are essential for successful collaboration. As Kotter stats, "Leadership is the ability to persuade a group of people to move in a certain direction without correction[*Popovska, 2025*]". Leaders must defined a strong vision for the employees, guide teams toward shared initiatives, and still ensure scalability the business to Atea's own business areas.

## 5.4 Conclusion of Problem Analysis

To conclude the problem analysis, the utilised methods reveal thoroughly process patterns and aimed to answer the sub-questions. Through FMEA analysis, identifies the decision delays as the most critical failure mode, while queueing analysis highlights structural delays that linked to seasonality, aims to support a more structure capacity planning during peak periods. Leadership at Atea also acts an important role in influence the prioritisation of co-selling activities. These findings demonstrate the risks should not be occur randomly, and provide a strong foundation for redesign current process standards to ensure long-term process stabilities.

## 6 | Solution

This chapter focus to develops a structured solution design based on the findings from the Chapter 5. This solution will aim to answer the following sub-questions to the Problem Statement 4:

- “Which improvements in the current process are required to ensure timely and systematic handling of Inbound opportunities?”

To focus on process improvement, based on the identified underlying problems. The proposed solution design follows the Business Process Management (BPM) lifecycle[Møller, 2022], as introduced in Section 2.2. After the process issues are identified, the findings serve as the fundament for redesigning the process and improve the it to more tailored and effective. The purpose of the solution design is to adjust current process with an standardised operating model for Atea, and aims to present a scalable framework to further enhances visibility, shared control, and continuous improvement in strategic co-selling.

As illustrated in Figure 6.1, the business process management loop for this project can be tailored as following, using the approach from BPM lifecycle.

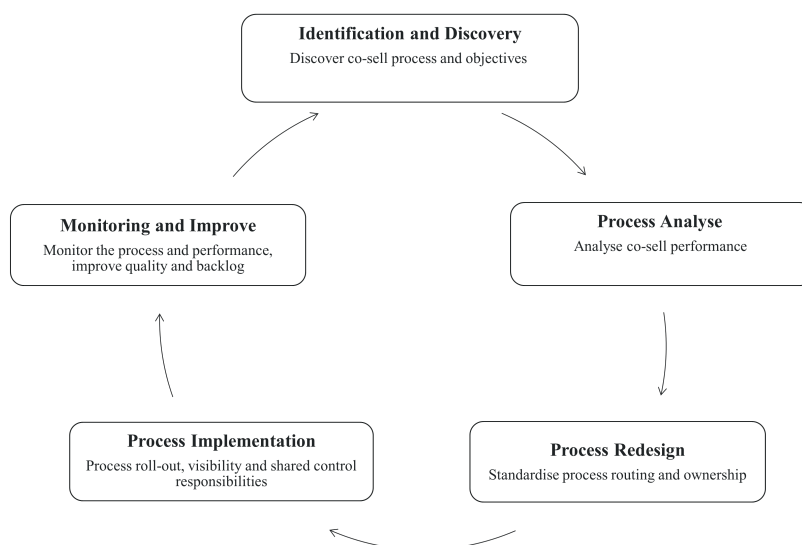


Figure 6.1: Atea–Microsoft co-selling process applied into the BPM Lifecycle Loop

## 6.1 Solution Design

As stated above, the solution design utilised business process redesign principles, based on Hammer and Champy's Business Process Redesign [Hammer and Champy, 1993]. Combines the approach with Deming's PDCA with Plan, Do, Check, Act cycle to support the process performance [Lean Enterprise Institute, 2025]. Moreover, the solution design also follows a maturity-stage approach across three phases. However, the solution design also follows an approach based on organisation maturity with process performance in three phases.

**Phase 1: Standardisation** :Define a structure process with clear routing rules, ownership responsibilities. Establish response standards to reduce decision delays.

**Phase 2: Visualisation** :Provide shared transparency of co-sell activities, to improve collaboration and alignment.

**Phase 3: Digitalisation and Automation**: Apply digital automation to handle low-variance tasks, to ensure a stable workflow and provided process efficiency.

Based on observations during the external company stay [10.5], the co-selling workflow recognised in an early stage of maturity, close to Phase 1. Hence, to achieve a successful process redesign, it should consider Atea's current adoption maturity by evaluate existing process performance.

### 6.1.1 Standardisation

The first Phase is critical for establishing stability through define a standard operating model, for both co-selling motions. Its purpose is to reduce variability, effective decision-making, and minimise dependence on individual follow-ups, thereby creating a more structured and standardise co-selling process.

For inbound activities, the PM team should implement standardised roles supported by clear routing rules at intake. Opportunities must defined to the appropriate accountable owner during the first routing within the first seven days. This approach ensures specialists have sufficient time to review opportunities context and make valuable decisions. A standardised management rules can avoid last-minute decisions. To improve registration of outbound activities, a standardised template should be provided to gather essential information. This enables specialists to quickly complete key fields, while optional details can be added after Outbound co-sell created.

To support continuous improvement, datasets should be well-organised to documented performance monitoring across both inbound and outbound activities. The data should include stakeholder action dates, current ownership, and customer agreement captions. The dataset will enable performance analysis and drive stable management to the co-selling process.

### **6.1.2 Visualisation**

The second phase strengthens transparency and operational control, purpose to reducing information gaps between pending and ongoing co-sells.

For inbound co-selling, a shared overview is required to show the co-sell status, customer details, and created date. This can enable co-sell transparency and deadline monitoring. To support proactive collaboration, notification of high-priority co-sells can be set, to supports prioritisation during peak periods. To highlight Atea's initiated opportunities, the overview of outbound co-sells should focus on internal follow-up collaboration. Visualisation should support clarifies ownership, avoid duplicate opportunities from multiple Atea's specialists. This ensures timely collaboration and maintains balanced co-selling activity. Within visualisation enables earlier prioritisation, clearer accountability, proactive follow-up during peak periods, and strengthens commitment to co-selling with Microsoft.

### **6.1.3 Digital Automation**

The third phase focuses on digital enablement once workflows are sufficiently standardised and visible, and the co-selling approach has reached a mature stage to realise its true process value.

For Inbound co-sells, automatisisation should prioritise timebound critical coordination through automated notifications and reminders. Co-sell can be routed directly to the accountable owner based on CRM. This can reduce delays and support faster and reliable decision-making. To realise Outbound co-sells, automatisisation aims to reduce manual registration and improve consistency. Once specialists create an opportunity in CRM, submission to Partner Center is automatic created. This reduces dependency on the PM team for manual administration, and provides clear accountability from opportunity creation to partner engagement. The overall purpose of digital automation is to reduce repetitive manual administrative effort and enable more effective co-selling actions.

## **6.2 Conclusion of Solution Design**

The solution design outlines the approach to the identified issues [5], aimed to redesign a standard operating model, shared visual management, organised data documentation, and steady for digital implementation. Digitalisation should be sequenced based on the current maturity aligned with Atea's adoption level which to ensure a realistic processing. To achieve a long-term strategic process, standardisation and transparency must be established before automation is introduced. In Chapter 7, the detailed "To-Be" workflow and practical implementation plan will be presented, transfer it into real operational execution.

## 7 | Implementation

This chapter presents the practical implementation of the redesigned co-selling operating model at Atea. Based on the section 6.1, the implementation focuses on improving shared visibility of co-sell status across the organisation, reducing manual administration, and providing clear ownership. To support the redesigned “To-Be” process, digitalisation and automation tools will be introduced to enhance efficiency for both co-selling motions. The implementation is structured to enable cross-functional adoption within Atea, and ensure the “To-Be” process can maintain reliabilities for provide valuable co-selling activities, even during periods of high workloads.

### 7.1 Digitalisation and Automation Tools

To strengthen co-selling engagement, digitalisation and automation tools will be introduced to enhance both co-selling motion collaborations with Microsoft. These implementations aim to reduce manual administration, and increase efficiency in partner collaboration engagements.

#### 7.1.1 Inbound - Monitoring Dashboard

For Inbound co-selling, the limited visibility for account managers without Partner Center access can be a large concern. Based on interviews with MAAR[10.3] and CHES[10.1], there is a strong demand for a platform to simplifies the visualisation of co-sell activities, particularly for account managers who lack Partner Center access. To address this, a monitoring dashboard has been developed in Power BI as shown in Figure7.1, aims to provide a consolidated view of inbound co-sell activities. The overview of the monitoring dashboard supports transparency, prioritisation highlight on 'Pending' opportunities and timely follow-up, especially during peak periods.

The monitoring dashboard uses 1:1 live data and show directly information from Partner Center. However, due to governance and organisational GDPR requirements, raw data access is owned and managed by Atea's Business Intelligence team. This team is responsible for data modelling, including Python based transformations of JSON data. Once access is approved, the refined data is linked to the semantic model and connected to the Atea owned data warehouse, enable dashboard creation.

This digital tool enhances transparency and provides clear visibility, aims to support the development of valuable co-selling. This overview of Inbound activities can also be a strong presentation for leadership to collaborate strategic planning and capacity allocation, to meet the partner co-selling initiatives.

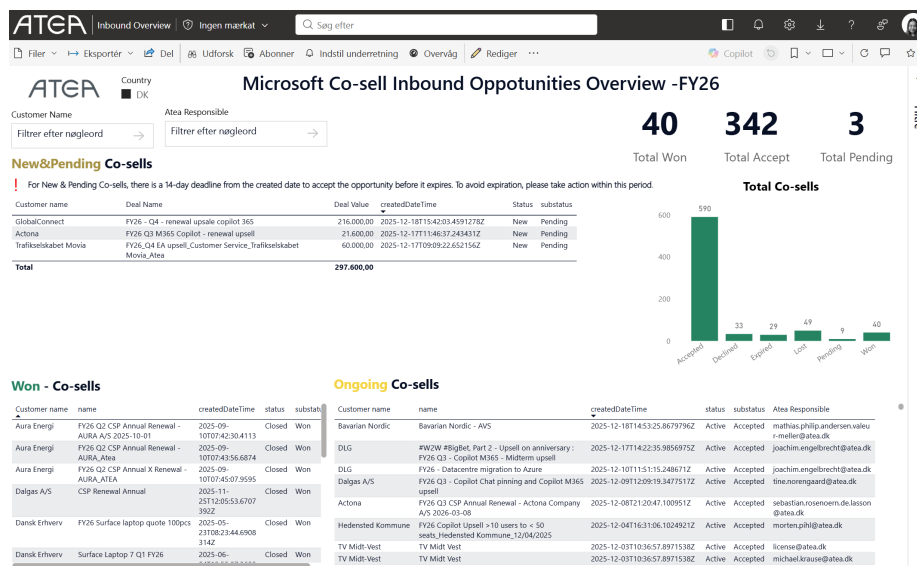


Figure 7.1: Power BI dashboard for Microsoft co-sell inbound opportunities - FY26[10.2]

However, the dashboard currently serves only as a visibility mechanism, rather than a fully automated solution, as it cannot standardise co-selling activities within the CRM system. Although the dashboard improves transparency, it does not replace decision-making or action handling in Partner Center by the Partner Management team. Acceptance or decline actions still require Partner Center input, and unaccountable customers still need internal leadership decisions to delegation, before collaboration can begin.

### 7.1.2 Automation on Outbound

Outbound Opportunity currently relies heavily on manual administration and generation from the PM team. After the stabilisation and wider adoption of inbound processes across the organisation, the needs of generate more Outbound opportunists starts to spire. To effectiveness the process, the PM team introduced Outbound opportunity initiative [??] and its register- templates to the CSMs as an initial step [10.4].

In addition, a collaboration through a large Azure migration project with Microsoft, the need to stabilise the outbound process became essential. Collaborating with the Transformation Team[11.1], pilot approaches was explored to reduce duplicate registration, by linking CRM created opportunities automatically into Partner Center as Outbound registration10.4. The proposed concept involves Outbound co-sells should include a pre-defined hashtag while created in CRM, which can trigger a standardised submission flow into Partner Centre. The PM team has created a manual guide for outbound creation in Partner Center, to provide an manual generation overview for the Transformation Team, to noticed the adjustable and non-adjustable elements after generate the opportunity. Hence, this pro-

cess requires certain system permissions and testing, which still in an initial phase. Thi is not yet been introduced within the department, while only developed within the Transformation.

The objective of this automation is to reduce manual administration by the PM team while ensuring consistent data quality. The complete implementation feasibility depends on the maturity of routing logic, the reliability of data quality, and technical constraints related to external platform integration.

## 7.2 To-Be Co-selling Process

The redesigned “To-Be” process aims to transfer the redesign principles into real operational actions and improve 'As-Is' process [11.4]. The objective is to ensure the co-selling activities are managed within Partner Center through clear routing, delegation, decision ownership, and effective follow-up actions. The redesign 'To-Be' process are therefore establishes a high-value creation approach to both co-selling, enable more consistent partner engagement across the organisation.

### 7.2.1 To-Be Inbound Process

The “To-Be” inbound process, as illustrated in Figure 7.2, remains position the PM team as the primary administrator to monitor Inbound co-sells in Partner Center. With the introduction of the dashboard, KAM and CSM team can having an overview of pending opportunities. When account managers identify their own customers, then contact the PM team for immediate action. The PM team continues to provide administrative support and follow-up on opportunities, but the process reduces largely manual handovers.

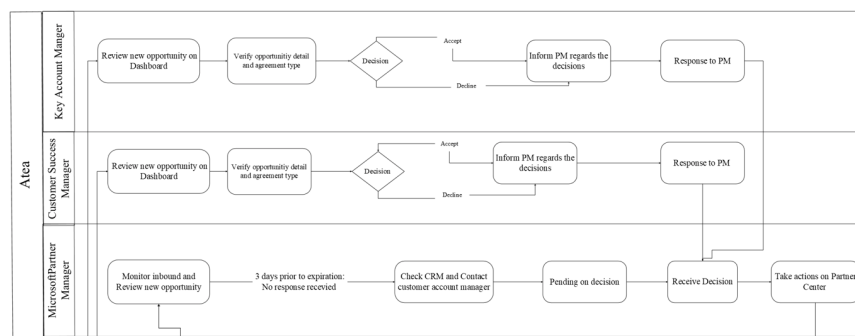


Figure 7.2: Swimlane of 'To-Be' Inbound co-sell workflow [11.7]

### 7.2.2 To-Be Outbound Process

The ‘To-Be’ Outbound Process as illustred in Figure 7.3, with assumption of that automation is available 11.8. Outbound opportunities should be created through the CRM system, and including the

pre-defined hashtag. Once the outbound registration is automatically generated in CRM and existing in the Partner Center, the outbound process is successfully begin. During this 'To-Be' process, the PM team will function as a support administration and monitoring the co-sell status to provide support. If needed, the PM will align with Microsoft and the Nordic PDM to ensure flow collaboration.

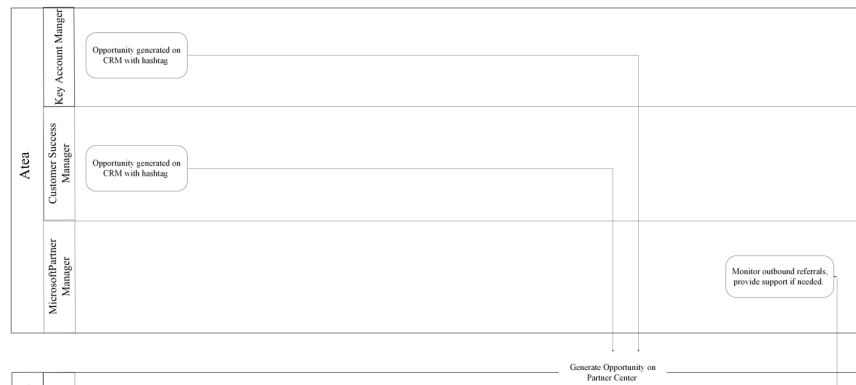


Figure 7.3: Swimlane of 'To-Be' Outbound co-sell workflow [11.8]

In the redesign 'To-Be' process for both co-selling scenarios, the PM's role is intended to be more supportive, manual tasks will be reduce to more concentrate on support the collaboration and delivering additional value.

### 7.3 Continuous Improvements

Continuous improvement routines is essential during the redesigned process beyond the initial roll-out. Following the PDCA cycle [Lean Enterprise Institute, 2025], and it provides a practical approach for maintain the momentums.

**Plan:** Planned the improvement actions by collect feedback after each peak periods. This involves reviews of operational indicators such as expiry rates, decision delay times and potential backlog.

**Do:** Implement adjustments based on findings, such as updating routing rules, clarifying responsibilities, and improving communication.

**Check:** The impact of changes should be assessed against the same indicators to confirm whether performance has improved or if any unintended issues have emerged.

**Act:** The effective changes should be standardised and integrate into the operating model, while any remaining gaps are carried forward into the next improvement cycle for further refinement.

Overall, improvement should be driven by feedback from internal and external sources to ensure smooth operations and stronger process standardisation. Unreliable collaboration should be flagged, within focus on enhance a solid process standardisation.

## 8 | Discussion

This chapter discusses the key aspects of the project which limited process flows both operationally and strategically. With focus on the objectives and data discoveries. Moreover, this chapter also provided insights for further research improvements.

### 8.1 Project Objectives and Data discoveries

This chapter discusses the project approach in relation to challenges within Atea's newly established co-selling workflow. Qualitative data during this project supported problem identification and provided initial diagnostics on issues such as decision delays and indivisible collaboration. Based on these insights, a detailed analysis mapped the co-selling process and clarified the system workflows. Findings indicated heavy reliance on manual handovers and unclear responsibilities, contributed to decision delays. The focus shifted to identifying the core underlying operational issues, supported by empirical data. Findings indicated potential high overload during peak co-sell periods, highlighting the need for strategic capacity planning. These analytical methods had not been applied, which reflected the limited organisational attention to the initiative. While the project accessibility enabled direct experiences and data access. Due to role authorisation, certain information is limited. Consequently, the analysis relied on interviews, practical experience, and available data, which showed a lack of detailed documentation. This underscores the importance of systematic data collection during new process integration can be important to support the future improvements.

### 8.2 Further Research

For future research, a data-driven approach can provide a solid foundation for monitoring co-selling performance and evaluating process maturity under real operating conditions. A key priority to support this approach is maintaining structural measurement and datasets to enable continuous improvement within the BPM lifecycle. In practice, digitalisation and automation should make these processes more systematic, enabling high-level data integration without contributing to low-value manual work. To manage growing volumes effectively and maintain professionalism, Atea should adopt a continuous improvement mindset, prioritise digital documentation over manual methods, and establish a standardised pipeline supported by stronger data integration with Microsoft. This approach will enable better prediction, higher-quality execution, and a more strategic partnership.

## 9 | Conclusion

In conclusion, this project has identified Atea Denmark's co-selling process with Microsoft. The purpose was to understand the current process handled inconsistently and inefficiently. Through a structured analysis of the current process and its operational performance, the project identified the main inefficiencies and underlying causes. The identified conditions increase decision latency, which can raise the risk of inbound referrals expiring and reduce the time to reliable qualification and follow-up. Over time, this issues can also decrease the engagement in Outbound co-selling activities, and limits the real strategic value through the partnership.

Based on the analysis findings, the co-selling performance is primarily challenged by two factors within the Inbound process. This indicated to the unclear responsibility at routing stage, which lead to reliance on manual follow-ups within individual account manger. Moreover, visibility of co-sells is limited for relevant account managers, and further leads to decision delays. Through a queueing analysis and trend prediction to indicate issues during peak period, which showed the need for capacity planning to remain effective under high workload periods.

To address the findings, the report proposed a process redesign approach to examined and structured, mainly focus on process standardisation, visualisation, and digital automation. The redesigned operating model strengthens clarity at intake, through routing rules and response expectations. While shared visibility mechanisms support prioritisation, and reduce information imbalance for account managers without Partner Center access. Digital tools are utilised as a validate digital infrastructure, to support transparency and decision-making, rather than creating a system without continuous follow-up or process improvement.

Overall, the project demonstrates that effective co-selling with Microsoft requires more than manual status updates in Partner Centre, and to show a high acceptance rate. High-value collaboration depends on transparency and a structured operating model to improve partner engagement. Success can build on adoption, solid data collection, and process standardisation, combined with continuous improvement. These conditions must work together to monitor, analyse, and refine the process lifecycle, ensure the long-term value creation and process standardisation.

# Bibliography

- Anthony, Richard John (2016). "The Process View". In: *Systems Programming*. Elsevier, pp. 21–106. DOI: 10.1016/B978-0-12-800729-7.00002-9.
- Armero, C. and M.J. Bayarri (2001). "Queues". In: *International Encyclopedia of the Social & Behavioral Sciences*. Elsevier, pp. 12676–12680. DOI: 10.1016/B0-08-043076-7/00492-7. URL: <https://www.sciencedirect.com/science/chapter/referencework/abs/pii/B0080430767004927>.
- Atea (2025). *Atea - About us*. English. URL: <https://www.atea.com/who-we-are/>.
- Atea ASA (2024). *Atea Annual Report 2024*. Tech. rep.
- Bergendorff, Cecilie (2022). *Microsoft partnerships drive innovation and growth in Europe in times of uncertainty*. URL: <https://pulse.microsoft.com/da-dk/transform-da-dk/na/fa2-idc-partner-profitability-study-europe/>.
- Dezen, Nicole (July 2025). *MCAPS Start for Partners: Accelerating growth and innovation together*.
- Dumas, Marlon. et al. (2018). *Fundamentals of business process management*. Springer, p. 527. ISBN: 9783662565087.
- Fernandes, Kiran Jude et al. (May 2022). "Contextualising the role of external partnerships to innovate the core and enabling processes of an organisation: A resource and knowledge-based view". In: *Journal of Business Research* 144, pp. 146–162. ISSN: 01482963. DOI: 10.1016/j.jbusres.2022.01.091.
- Filipsson, Frederik (June 2025). *Exiting Microsoft EA: Strategy, Licensing Impact, and Transition Paths*.
- Hammer, Michael and James Champy (1993). *Reengineering the Corporation*. Nicholas Brealey Publishing.
- Holgaard, Jette Egelund (2020). *PBL : Problembaseret læring og projektarbejde ved de videregående uddannelser*. 2. udgave. København: Samfundslitteratur, ISBN: 9788759333969.
- Holm, Hannah and Kikki Lynghøj (June 2025). "FY25 Atea X Microsoft Inbound Co-sell".
- Horsager, Jan (Feb. 2025). *Toppedelse på flad fod: Steinar Sønsteby skal udvikle Atea-forretningen i Danmark og er væk om et år*. Danish. URL: <https://itwatch.dk/ITNyt/Strategi/article17944453.ece>.

- Jarvenpaa, Sirkka L. and Donna B. Stoddard (Jan. 1998). "Business process redesign: Radical and evolutionary change". In: *Journal of Business Research* 41.1, pp. 15–27. ISSN: 01482963. DOI: 10.1016/S0148-2963(97)00008-8. URL: <https://www.sciencedirect.com/science/article/abs/pii/S0148296397000088?via%3Dihub>.
- Lean Enterprise Institute (2025a). *5 Whys Introduction*. URL: <https://www.lean.org/lexicon-terms/5-whys/>.
- (2025b). *Plan, Do, Check, Act (PDCA) Introduction*. URL: <https://www.lean.org/lexicon-terms/pdca/>.
- Lilleskov Traulsen, Emma (Nov. 2025). *MS Forretning FY26*. Danish.
- Microsoft (Dec. 2025). *Accelerating Europe's Digital Future: Microsoft Announces Plans for a New Datacenter Region in West Denmark*. URL: <https://news.microsoft.com/source/emea/features/accelerating-europes-digital-future-microsoft-announces-plans-for-a-new-datacenter-region-in-west-denmark/#:~:text=During%20construction%2C%20each%20site%20is%20expected%20to%2C%20expansion%20of%20its%20quantum%20laboratory%20in%20Lyngby..>
- Microsoft Learn (2025a). *Co-sell with Microsoft sales teams and partners overview*.
- (2025b). *Manage co-sell opportunities in Partner Center*. URL: <https://learn.microsoft.com/en-us/partner-center/referrals/manage-co-sell-opportunities>.
- Møller, Charles (2022). *Business Processes And IT Project -Process Automation*.
- Nicholas, John and Herman Steyn (2022). *Project Management for Business, Engineering and Technology-3rd-ed-1*. 3rd ed. Elsevier.
- Ovesen, Morten (2025). "Microsoft\_Atea introduction".
- Popovska, Iskra Dukovska (Apr. 2025). *Leadership and Strategic Planning*.
- rajsiddarth (2017). *Time\_Series\_Forecasting*. URL: [https://github.com/rajsiddarth/Time\\_Series\\_Forecasting/tree/master](https://github.com/rajsiddarth/Time_Series_Forecasting/tree/master).
- Rippey, Dan (Sept. 2021). *The redesigned Partner Center experience is here*. URL: [https://partner.microsoft.com/en-ie/blog/article/the-redesigned-partner-center-experience-is-here#:~:text=The%20new%20experience%20includes:%20\\*%20The%20ability,updated%20based%20on%20user%20data%20and%20feedback..](https://partner.microsoft.com/en-ie/blog/article/the-redesigned-partner-center-experience-is-here#:~:text=The%20new%20experience%20includes:%20*%20The%20ability,updated%20based%20on%20user%20data%20and%20feedback..)
- Stevenson, William J.. (2021). *Operations management*. McGraw-Hill Education, p. 899. ISBN: 1260575713.
- Tableau (2023). *Time Series Analysis: Definition, Types & Techniques*. URL: <https://www.tableau.com/analytics/what-is-time-series-analysis>.
- TUNCA, Manuela Vasilica and Raluca Mihaela RADULESCU (Mar. 2025). "R.A.C.I. AND ORGANIZATIONAL PERFORMANCE UBER CASE STUDY". In: DOI: 10.24818/IMC/2024/02.12.

Vasegaard, Alex (2024). *Queueing theory - AOM*. Tech. rep.

Wilson, Stuart and Andreas Storz (Oct. 2022). *Partner Profitability and Growth*. Tech. rep.

# 10 | Appendix A - Interviews, Observations and Meeting notes

## 10.1 Interviews with CHES

The interview was conducted with CHES, the Director of the Customer Success Team. The primary objective was to understand the value of a collaborate co-selling business and its the co-selling process impact on organisational performance.

The interview was conducted in Danish and is transcribed below.

Table 10.1: CSM co-selling med Microsoft - Interviews med Christian

Kategori	Spørgsmål	Svar
<b>Formål og forventninger</b>	Hvad er dine forventninger til co-selling processen? Og hvorfor synes du, den er vigtig for organisationen?	CHES: Tidligere co-selling med Microsoft bestod af handler, som var Ad Hoc, ustrukturerede og afhængige af enkeltpersoner. Det gav dårlig performance set fra Microsofts side. En formaliseret proces gør, at CSM'erne kan fokusere på de rigtige opportunities og undgå at blive flaskehalse.

Fortsættes på næste side

Table 10.1 – fortsat fra forrige side

Kategori	Spørgsmål	Svar
<b>Process udvikling</b>	Hvordan oplever du forskellen mellem den tidligere og nuværende co-selling-proces samt PM's indsats for at fremdrive co-selling?	CHES: Før var der i praksis ingen proces. Nu er det betydeligt bedre. Der er styr på processen og dokumentationen i forhold til dialogen med Microsoft. Strukturen og det faktum at ting ikke falder i glemmebogen, det viser en store forbedringer. Microsofts feedback er, at CSM'erne nogle gange ikke griber opportunities, men det skyldes manglende forståelse, ikke selve processen.
<b>Håndtering af Co-selling</b>	Hvordan håndterer I nye co-selling-muligheder i dag?	CHES: Vi har brug for at blive sat cc på mails og kontaktet, så snart det er CSP-relateret. Eller hvis KAM ønsker, at vi deltager i samarbejde, så processen kører. Vi opretter manuelt i eget CRM, så det hjælper meget, at PM assisterer med registreringen. Derudover er der etableret flere fælles alignment-møder med Microsoft på Teams for hurtigere eskalering.
	Hvorfor er co-selling vigtigt for fremtidige konsulentprojekter?	CHES: Microsoft udgør ca. 25% af kundernes it-budget, og 20–40% af licensinvesteringer fører til implementeringsprojekter. Hvis vi vil have flere konsulenttimer, skal vi tættere på Microsoft og samarbejde frem for at modarbejde dem.

Fortsættes på næste side

Table 10.1 – fortsat fra forrige side

Kategori	Spørgsmål	Svar
<b>Relationen og samarbejde med Microsoft</b>	Hvordan er samarbejde med Microsoft og har der været ændringer i samarbejden efter processen etableret?	CHES: Microsoft kigger primært på eksekvering: "Hvad kommer der ud af det?". Deres fokus er business impact. PM arbejder godt med at få dem til at forstå, at det at "gribe" en opportunity i sig selv er en stor del af arbejdet.
	Hvordan står vi ift. Microsoft ser deres Partner?	CHES: Microsoft synes, det er lettere at eksekvere med partnere, De tænker kun på sælger Microsoft produkter. såsom KAM tænker bredere, da de har andre partnere også, hvilket både er en styrke og en udfordring i co-selling, især med Microsoft.
	Hvordan vurderer du Microsofts salgsstrategi?	CHES: De er en benhård salgsorganisation. Intentioner betyder intet uden handling. Hvis vi lover noget uden at gøre det, mister vi troværdighed, især som partner.
	Hvad skal der til for at styrke partnerskabet mellem Atea og Microsoft?	CHES: Vi skal fokusere på konkrete handlinger. At levere data, som er register på opportunities, skaber tillid hos Microsoft. Mange i organisationen misforstår Microsoft og er bange for dem, men de fungerer bare som enhver anden sælgerorganisation.

Fortsættes på næste side

Table 10.1 – fortsat fra forrige side

Kategori	Spørgsmål	Svar
	Hvordan ser du i forholdet til kundes ejerskab i mellem Atea og Microsoft?	CHES: "Det er min kunde" er en illusion. Alle aktører, såsom Cisco, Microsoft, Atea, konkurrenter (Crayon), har sælgere på samme kunde. Microsoft kan ikke implementere deres teknologi selv, de behøver en partner.
	Hvad ser du som den største misforståelse internt om Microsoft?	CHES: Nogle tror eller ser Microsoft som en "fjenden". Det er forkert. Der skal være et partnerskab, ikke et magtforhold. Man skal være villig til at "give først". Co-selling er en konkret måde at vise handling og bygge tillid.
<b>Processen Implementering</b>	Hvilke udfordringer ser du i implementeringen af processen?	CHES: Proces er én ting, og implementering er noget andet. Vi er afhængige af at sælgere griber opportunities, og det sker ikke altid endnu hos Software afdeling. Det skyldes også, at processen stadig er ny.
	Hvad synes du, at der kan forbedres i vores interne processer?	CHES: Ift. Outbound, det ville være godt hvis der er hurtigere oprettelse af opportunities i CRM. Det vil aktivere account managers mere effektivt. Det kunne være næste udviklingspunkt. Og jeg synes I (PM team) håndter det rigtig godt med Inbound nu, især med et dashboard, det er virkelig god tilgang.

Fortsættes på næste side

Table 10.1 – fortsat fra forrige side

Kategori	Spørgsmål	Svar
	Hvad er dit samlede vurdering på co-selling-processen?	CHES:Co-selling er et nødvendigt skridt for at dokumentere værdien overfor Microsoft, styrke partnerskabet og sikre, at Atea får sin “fair share” af implementeringsprojekterne. Dokumentation og konkrete handlinger er nøglen.
<b>Ateas Forretningsværdi</b>	Hvilken konkret værdi skaber co-selling for Ateas forretning?	CHES:I min vurdering, så står den til en høj værdi. Der er masser god mulighed for at koordiner bedre med Microsoft, sikre at Microsoft ikke sender muligheder videre til andre partnere, og dokumentere aktivitet. Selv om salgsværdien er én ting, er “prevention” (ikke miste muligheder til konkurrenter) også stor.
	Synes du, at Co-sells på Partner Center, er det kun et registreringsprogram, eller skaber det reel værdi?	CHES: Det skaber reel værdi. Både når vi deler med Microsoft og indtage fra, får vi ting tilbage. Jeg har et eksempel på Frederikssund Kommune, fordi vi delte opportunities, blev vi hevet ind i projektet igen. Microsoft reagerer kun på konkrete data, ikke intentioner.

## 10.2 Interview with NIHB

The interview was conducted with NIHB, the Customer Success Manager employed since team established. The primary objective was to understand the value of a collaborate co-selling business and its the co-selling process impact on organisational performance.

The interview was conducted in Danish and is transcribed below.

Table 10.2: Interview with NIHB

Category	Question	Response
<b>Co-selling med Microsoft</b>	Hvordan har co-selling samarbejdet med Microsoft generelt fungeret for jer?	NIHB:Hvis jeg må helt ærlig, så har det ikke været nogle konkrete opportunities, som gav mening at forfølge. Mange af dem virkede irrelevante, for langt ude i fremtiden eller uden tilstrækkelig kvalitet. Det endte med at føles som "spam" i indbakken frem for reelt forretningspotentiale.
	Hvordan har du/CSM håndteret notifikationer og muligheder i Partner Center?	NIHB:Jeg har ikke aktivt oprettet opportunities. Det har været rart, at PM team har gjort det nemmere at få overblik, så jeg ikke selv skal gennemtrawle Partner Center. I hverdagen glemmer man det nemt uden kontinuerlig reminder.
	Har Microsoft fulgt op, når noget ikke blev håndteret i Partner Center?	NIHB: Indtil videre har ikke været reelle konsekvenser, måske har vi tabt salg, men jeg ved det ikke. Organisationen har manglet governance og klare linjer, så det har været vanskeligt at prioritere co-selling i en travl hverdag.

Continued on next page

Table 10.2 – continued from previous page

Category	Question	Response
	Oplever du reel forretningsværdi i co-selling processerne?	NIHB: Jeg har svært ved at se den konkrete værdi. Det virker i høj grad til at gavne Microsofts rapportering mere end vores forretning. Jeg vil gerne tro på værdien, men jeg har ikke set et resultat, der overbeviser mig. Jeg arbejder stadig på det, fordi det skal vi, især når ledelsen har sagt det, men den reele værdi mangler i co-sells
	Hvordan har co-selling fyldt i din daglig arbejdesdag?	NIHB: Jeg har haft mange andre opgaver. Holde øjen med nye muligheder fra Microsoft fra Partner Cente desværre blev ikke prioriteret, fordi det lå ovenpå en i forvejen travl drift.
<b>Intern perspetiv</b>	Hvordan oplever du rollefordelingen omkring co-selling internt?	NIHB:Der har været uklare linjer i organisationen, især omkring CSM-rollen. Alt der mindede om CSP eller kundesager blev automatisk sendt til Customer Success, selvom det ikke altid var vores ansvar. Det skabte kaos og gjorde det svært at navigere.
<b>Samarbjde med Microsoft</b>	Oplever du opfølgning fra Microsoft, når opportunities er accepteret?	NIHB:Nogle er selvfølgelig er god til at følge ting til dørs, men fra andre hører jeg sjældent noget. Det hele ender ofte som Microsoft-pipeline-snak uden reel handling.

Continued on next page

Table 10.2 – continued from previous page

Category	Question	Response
	Hvordan oplever du Microsofts samarbejdes tilgang?	NIHB: Microsoft fokuserer på egne KPI'er, teknologipush og partnerkrav. Der mangler fokus på kundens konkrete situation og behov. Vi vil ikke fremstå som "mini-Microsoft" overfor kunderne. Det virker alt for maskiner, og vi skal lytte til kunders reelt forretningsbehov som CSM'erne.
	Hvad er din samlede oplevelse på samarbejdet med Microsoft har været indtil videre	NIHB: Jeg kan virkelig mærke, at der er forskel på hvem der skaber reel værdi. Nogle arbejder relationelt og kunde-baseret, andre presser blot løsninger uden forståelse for kundens behov, hvilket skaber frustration.
<b>Kundeperspektiv</b>	Hvordan påvirker co-selling arbejdet med kunderne?	NIHB: Kunder kan blive overvældet af Microsofts pres for opgraderinger. Vores rolle som CSM er at filtrere støjen og hjælpe kunderne med realistiske valg. Co-selling understøtter ikke altid dette, men det kan PM måske hjælpe med gør det bedre i fremtiden, være med til at skabe mere værdifulds co-sell.

Continued on next page

Table 10.2 – continued from previous page

Category	Question	Response
<b>Intern koordinering og problemer</b>	Har du oplevet at interne eller eksterne samarbejdsproblemer i forbindelse med co-selling?	NIHB: Ja. Blandt andet sager hvor for mange forskellige personer fra Microsoft blander sig uden at kende kunden. Det skaber forvirring og dårlig kundeoplevelse. Men nogle fra Microsoft kan også håndtere det godt, mens andre ikke følger op. Specialisters kvalitet kan virkelig være meget forskellen
<b>Fremtidige forbedringer</b>	Hvad kunne gøre co-selling processen bedre ifølg dig?	NIHB: Et dashboard eller opsummering (som det du har lavet) er en stor hjælp. Reminders efter opportunities er accepteret ville også hjælpe, da man ellers glemmer det i travlhed.
	Hvad bør ændres i co-selling processen?	NIHB: Der skal presses mere tilbage på Microsoft; samarbejdet skal ikke kun betinges af deres proces og forventninger. Vi skal kunne sige nej, når noget ikke giver mening for kunden.
	Hvad tror du, at der kan løfte co-selling niveau	NIHB: Der manglende governance, tvivlsom forretningsværdi og manglende opfølgning gør det svært at prioritere. Processen er endnu for umoden til at fungere optimalt. Men jeg vil rigtig gerne hjælpe med forbeder processen.

## 10.3 Interview with MAAR

The interview with MAAR, Key Account Manager for production vertical in South Denmark. Interview aims to gain insights of the perspective of co-selling with Microsoft.

The interview was conducted in Danish and is transcribed below.

Table 10.3: Interview with MAAR

Category	Question	Response
<b>Co-selling med Microsoft</b>	Hvordan forstår du co-selling mellem Atea og Microsoft?	MAAR: Jeg forstår det som, at Co-selling handler om at sælge på tværs af organisationer uden at konkurrere. I stedet samarbejder man om kundesager, så kunden får fuld værdi, og begge parter arbejder mod samme mål.
	Ved du, at Microsoft kan give en opportunity til en anden partner, hvis vi ikke reagerer?	MAAR: Det vidste jeg ikke, men det giver god mening. Det understreger vigtigheden af at reagere hurtigt, ellers kan vi miste kunder og muligheder.
<b>Den tidligere Co-selling processen</b>	Har du oplevet problemer før, hvor opportunities udløb eller blev overset?	MAAR: Ja. Microsoft har spurgt, hvorfor jeg ikke tog en sag op, og jeg fandt ud af, at den aldrig var blevet registreret hos mig. Det var frustrerende og føltes som "bad news". Co-selling gør det nu proaktivt i stedet for reaktivt.

Continued on next page

Table 10.3 – continued from previous page

Category	Question	Response
<b>Inbound Co-selling processen</b>	Er du bekendt med processen for håndtering af opportunities via Partner Center?	MAAR: Ja, jeg er klar over processen, især nu PM team har været så meget ind over det. Før var det uklart, men at få besked fra partner management hjælper rigtig meget, fordi det skaber struktur og gør det muligt at følge med uden at lede efter info i mange systemer.
	Hvordan oplever du PM team's proaktive kommunikation og mail notifikationer?	MAAR: Det fungerer rigtig godt. Det giver transparens, gør det lettere at holde styr på muligheder, og støtter mig i at navigere i de forskellige processer i huset, som ellers er svære at huske pga. stort servicekatalog.
	Hjælper disse notifikationer og oversigter dig i dit daglige arbejde?	MAAR: Ja, det er en stor hjælp. Nu ved jeg nemlig, at hvad der foregår, hvad der er i gang, og hvilke sager der relaterer til mine kunder fra Microsoft. Det gør det lettere at dokumentere, følge op og undgå misforståelser.
	Er inputs eller noter fra Microsoft blevet mere relevante efter processen er etableret?	MAAR: Ja. Noterne fra Microsoft er blevet langt bedre. Der er mere fokus på kundebehov og forretningsmuligheder, fremfor bare "varm luft" fra Microsofts KPI-krav.

Continued on next page

Table 10.3 – continued from previous page

Category	Question	Response
	Hvordan ser du den nuværende organisatorisk proces med inbound?	MAAR: Vi er i en stor overgangsfase, også pga. den store organisation skift blandt alle KAM. Alle skal lige lande på deres nye rutine og lær deres nye kunder at kende. Men ift. den nye struktur med co-selling skaber fælles forståelse og gør arbejdet helt klar nemmere. Det styrker samarbejdet mellem teams og giver bedre grundlag for at eksekvere.
	Hvad tror du det skyldes, at nogle opportunities ikke håndteres indenfor de givende deadline på Partner Center?	MAAR: Ofte pga. uklart ejerskab, manglende information eller travlhed. Nogle leads går direkte til specialister uden ping til mig. Hvis jeg ikke får besked, opdager jeg dem ikke, derfor er processen vigtig.
<b>Outbound co-selling</b>	Kender du processen for at sende opportunities til Microsoft?	MAAR: Ja, lidt, og bruger den ikke så meget endnu. Når jeg har dialoger med PM, får jeg hjælp til at identificere muligheder, der kan sendes til Microsoft for co-selling støtte, funding eller prioritering.
	Hvad tænker du om, at outgoing opportunities automatiseres fra CRM?	MAAR: Det lyder rigtig godt. I dag falder ting mellem to stole, når CRM og Partner Center ikke er synlige på tværs. Automatisering fra CRM til Partner Center vil skabe konsistens og spare tid.

Continued on next page

Table 10.3 – continued from previous page

Category	Question	Response
<b>Internal ejerstruktur</b>	kan du forklar lidt hvordan og hvem ejer kunder?	MAAR: jeg ejer kunden, mens specialisten ejer linjen. Jeg får besked, når noget registreres, så jeg kan følge op, selvom jeg ikke eksekverer opgaven direkte. Det princip bør co-selling følge. På CRM ville det altid være KAM der står som ansvarlige for kunde, hvis du er i tvivl, så finde kunder på CRM og tag fat i KAM eller KAM chef.
	Hvad tænker du den udfordring der er med co-selling	MAAR: Jeg tænker på review på data. Ikke alle har adgang til Partner Center pga. compliance. Derfor er det vigtigt hvis der er et værktøj der kan præsentere disse data, bl.a. som en dashboard, så vi stadig kan se lidt af data uden at have fuld adgang.
<b>Forbedering i co-sell processen</b>	Tænker du, at det ville hjælpe at du selv kigger i dashboardet, eller at få besked direkte fra PM?	MAAR: Jeg foretrækker at få det direkte fra partner management, og faktisk via CRM, så det bliver en del af min egen pipeline og arbejdsmetode. Så kan jeg tage action med det samme og stille spørgsmål, hvis nødvendigt.

Continued on next page

Table 10.3 – continued from previous page

Category	Question	Response
	Hvad tænker du den udfordring der er med co-selling	MAAR: Jeg tænker på review på data. Ikke alle har adgang til Partner Center pga. compliance. Derfor er det vigtigt hvis der er et værktøj der kan præsentere disse data, bl.a. som en dashboard, så vi stadig kan se lidt af data uden at have fuld adgang.
<b>Co-sell forretningsværdi</b>	Ser du eller oplever du, at co-selling som den værdiskabende for Atea?	MAAR: Ja. Der er mere direkte kontakt med Microsoft, flere fællesmøder og bedre vidensdeling. Det skaber bedre koordinering, inspirerer og gør mig bedre klædt på til kundemøde
	Har co-selling gjort dig bedre i kundedi-alogen?	MAAR: Ja. Jeg kan bedre forklare kunden, hvor i processen vi er, give eksempler fra lignende cases og levere mere professionel rådgivning. Det øger troværdigheden.
	Hvad er din samlede vurdering af co-selling initiativet?	MAAR: Det gør faktisk mit arbejde lettere, skaber mere og bedre samarbejde med Microsoft og Atea internt, løfter kundeværdien og gør processen tydelig. Jeg støtter fuldt op om det og ser stor organisatorisk gevinst fremad.

## 10.4 Meeting Key Notes

This appendix section presented the relevant meetings and its key notes documented during the external company stay period regards the co-selling project. The key notes will be wrote in Danish, since

all the meeting is conducted in Danish.

### **Partner Management Meetings:**

#### **Månedlig Partner Catch-Up** (Hvert først tirsdag i måneder)

- Introduktion til Partner Managements rolle som bindeled mellem Atea og Microsoft i co-sell processen. I partner Management Team siger oftes, 'Vi er et ben hos Atea, et ben hos Microsoft', og 'PM team er den togfører der sørger for samarbejder for partnerskab fungerer'. Atea tænker meget på kunderns behov, og ligesom CEO, Steinar Sønsteby sagde tit i møderne, 'We are people company'. Therefore er det også vigtig at aligner Atea's strategi med Microsofts.
- Gennemgang af månedlige ændringer i samarbejde med microsoft, What's New, Alignment med specialister.
- Hver anden tirsdag, Partner Mgmt tage til Microsoft i Lyngby for ydeligere alignment og samarbejde møder. Møde specialister, men manger af de specialist der generater Co-sells er faktisk baseres i Ireland.
- Holde opdater af partner plattform ecosystem. Nye functioner og teknologis, devices annocerer hele tiden i Microsoft's ecosystem.
- Atea får Funding fra Microsoft til at udført Partner Activity. Hvert år få Atea 2 mio, hvert havlår. For at få funding og extra funding, der skal arbejdes i forskellig POE (Proof og Exectuion).
- Partner Management team har ikke en bestemt KPI-måling, men generalt der skal udvikler forreningskoncepter for Microsoft, faciliter dialogen med relevante personer i Microsfot og dermed oversætter det til Ate så sikkert samarbejde md Microsoft gå flow igennem.
- Mission for team består af udvikler en stærk samarbejde og partnerskab mellem Atea og Microsoft. Assistere med at transformere vores tilgang til vores Microsoft forretning ud mod vores kunder. Understøtte vores salg, konsulent- og projektledelsesforretning. Eksekvering og vækst Micorsoft security business for Ateas kunder og hjælper med at drive transformationen af Atea fra forhandler til betroet rådgiver og cloud-tjenesteudbyder.

### **Inbound co-sell Meetings:**

#### **Månedlig Inbound Co-sell Follow-Up** (Hvert først onsdag i måneder)

- Internt opfølgingsmøde

- Overblik over Atea's samlede performance i FY25, med fokus på inbound conversion rate og antal udløber oppty.
- Diskussion af problem og flagger co-sells - Next steps?
- Co-sells der kræver extra bemærkning, der fortsat venter på Atea-respons, og vurdering af hvilke prioriteret handling - hvem skal vi tage fat og hvordan?
- Drøftelse af hvordan Atea's forbedrede co-sell processen. Hvorfor styrker vi Atea's samarbejdsvilje og pipeline-delning.
- Ofte i denne møder, der blevet taler om de samler resumerer af det co-sells der har været bemærkning, og hvad vi skal gøre fremover hvis der kommer lignerer co-sell.

### FY25 Inbound Co-sell (21.07.2025)

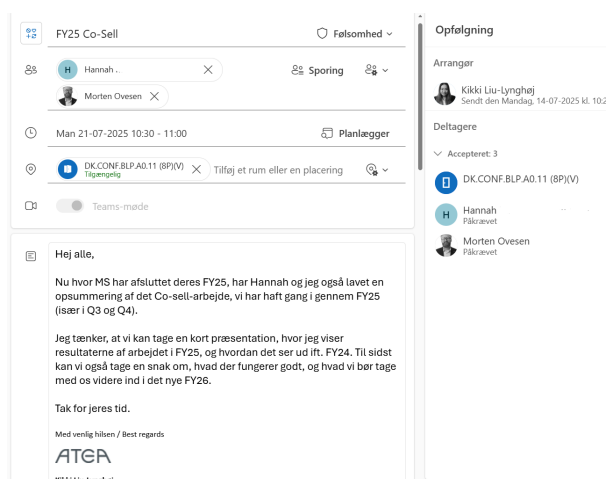


Figure 10.1: FY25 Inbound Co-sell Møde

- Præsenterer performance i FY25
- Overblik over Atea's samlede performance i FY25, med fokus på inbound conversion rate og antal udløbne oppty.
- Drøfter om strategi til forbedring co-sell i FY26

### MS Inbound Co-sell - Power BI-Dashboard for Oppty. Overview (25.11.2025)

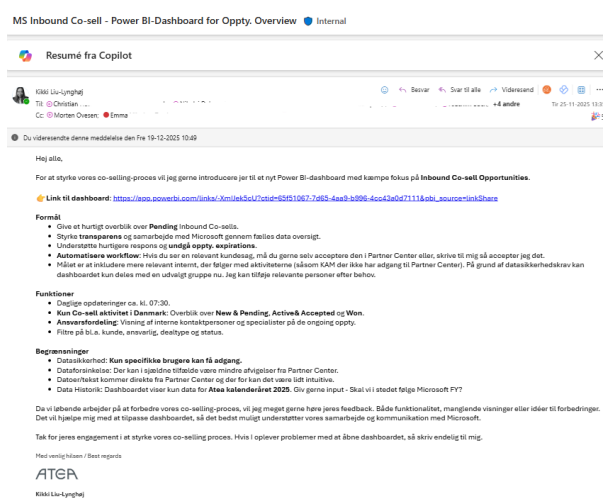


Figure 10.2: MS Inbound Co-sell - Power BI-Dashboard Introduction for Oppty. Overview

- Præsenterer performance i FY25
- Overblik over Atea's samlede performance i FY25, med fokus på inbound conversion rate og antal udløbne oppty.
- Drøfter om strategi til forbedring co-sell i FY26

## Outbound co-sell Meetings:

### FY26 Outbound Co-sell Introduction (13.11.2025):

- Introduction om Outbound Motion
- Hvordan skal vi køre denne process?
- Drøfter om strategi til forbedring outbound processen

## Outbound Co-sell process Introduction og Automatisering

**Opportunities Initiative 2.a Project (17.11.2025):** Ad-hoc Phase - Møde vedrørende håndtering af de store kundeprojekter Initiative 2.a Project og Outbound. Microsoft har informeret Atea om, at hvis Microsoft skal bidrage til projekterne, skal der foreligge dokumentation for Outbound. Derfor blev der afholdt et møde med Camilla fra Transformation Teamet for at drøfte næste skridt.

**Opportunities Initiative 2.a Project (12.12.2025):** I udviklingsfasen, hvor yderligere automatisering af Outbound er undervejs, drevet af Transformation-teamet. Sammen skal forstå både processen og Partner Center-interfacet, og en detaljeret guide er allerede tilgængelig.

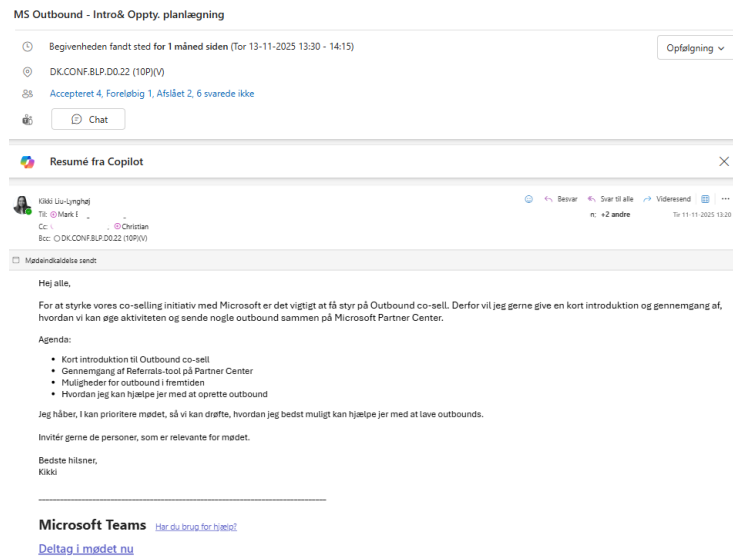


Figure 10.3: Outbound Introduction Mødet

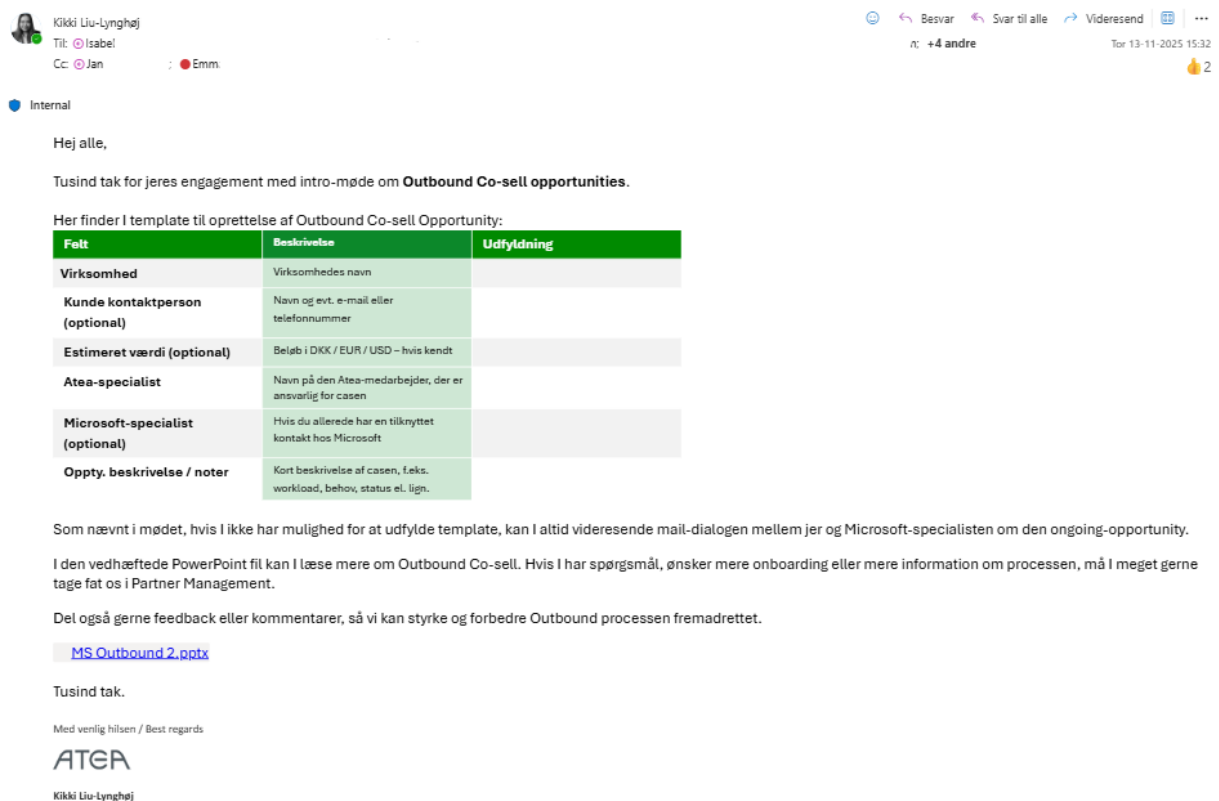


Figure 10.4: Outbound template

**Opportunities Initiative 2.a Project(12.12.2025):** PM har lavet en Outbound guide til Transformation Team

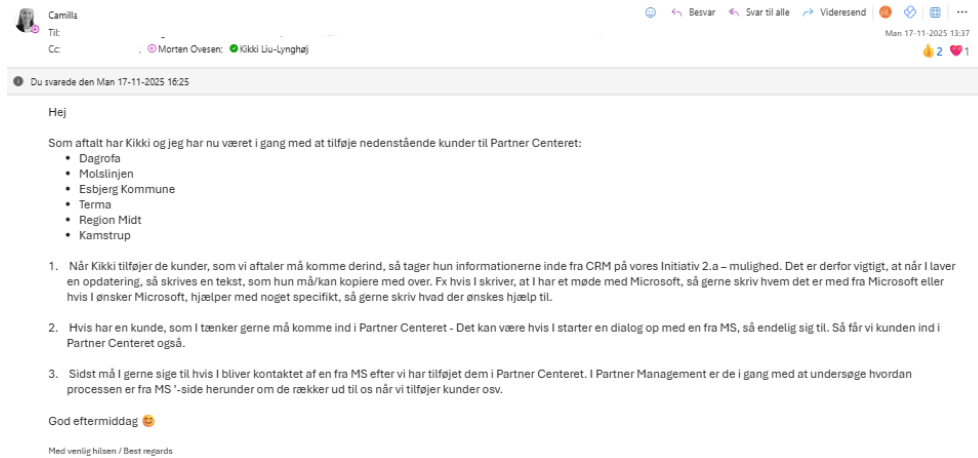


Figure 10.5: Outbound Initiative 2.a

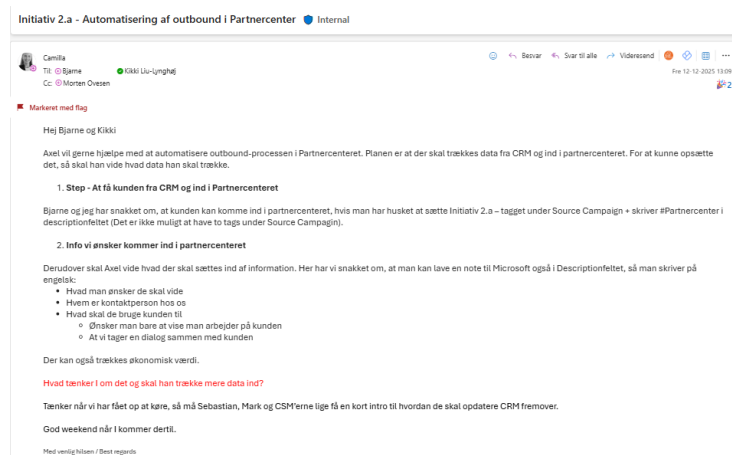


Figure 10.6: Outbound Automatisation Pilot

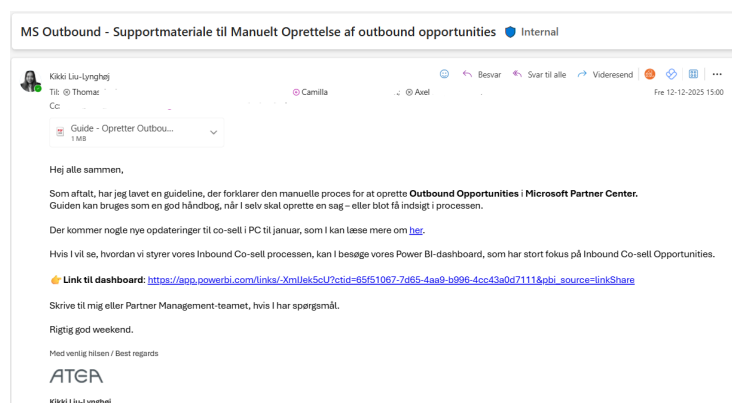


Figure 10.7: Outbound Guide

## 10.5 Observations

The following observations were documented during the external company stay. The observation is documented by author through small conversations, comments from other employees, and experience during the stay. The collected data aligns with research topics and is guided by a structured and relevant research interest designed to facilitate an in-depth analysis of the observations.

Table 10.4: Analysis of Key Aspects at Atea

<b>Research Interest</b>	<b>Observations Guide</b>	<b>Comments</b>
<b>Co-sell structure at Atea</b>	How does inbound co-sell opportunities flows across Atea?	Almost everyday received Atea Inbound opportunities from Microsoft, including in different company sizes. Opportunities for the same company can be sent from different Microsoft account managers because of the different solution areas
	How well is the outbound co-sell process understood in the organisation?	Outbound opportunities was not a known activity until recent around November and December. Outbound processes are still being developed. Currently, Partner Management is solely responsible for creating outbound co-sell opportunities.

Continued on next page

Table 10.4 – continued from previous page

<b>Research Interest</b>	<b>Observations Guide</b>	<b>Comments</b>
<b>Partner Management Functions</b>	What role does Partner Management play when inbound opportunities arrive?	Partner Management Team acts as the central communication channel with Microsoft, doing primary validation and routing function for inbound co-sell opportunities. Ensure and identify proper routing,, inform relevance, and provide communication transparency ownership, and registering opportunities correctly in Partner Center within CSM and KAM's engagement.
	What kind of actions does PM to provide the information from Microsoft	Partner Management Team mostly host meetings with different stakeholders. Mostly Month to month, introduction meetings were host for the relevant stakeholders, coffee talks to ensure the stakeholders gets the messages.
<b>Collaboration with Microsoft</b>	How do Microsoft specialists expect Atea to collaborate on opportunities?	MS specialists mostly request direct alignment with Atea for each inbound opportunity before communicate to customers. The customer account manager contact is invisibility for Microsoft.
<b>Organisation Environment</b>	How has Atea evolved in its approach to co-sell?	Atea has progressed the co-selling in a ad-hoc handling in the beginning. to a structured process.

Continued on next page

Table 10.4 – continued from previous page

Research Interest	Observations Guide	Comments
	How Atea ASC department perform in working digitalisation?	The whole ASC department utilising various of different excel-files to storage and document data, in a very manual way. Always copy the information and insert to one or two excel files. The few existing Power Bi data reports is created by one employee -AMEI who that has a high Power Bi skills. Every time there are needed for data report in a specify area. PM or CSM will ask AMEI to create a relevant dashboard.
	How is employees in Atea's opinion on collaboration with Microsoft	Most emoloyees thinks Microsoft act as a machine. They are very KPI-driven and has no insights of customer's need. They somethings seeing Microsoft as a 'competitor' instead partner.

# 11 | Appendix - Figures and Pictures

## 11.1 Organisation Chart

This is the organisation chart of Atea Denmark. There are total seven head departments. In this project, the relevant teams are including in Software, Cloud & Service and Sales & Solutions.

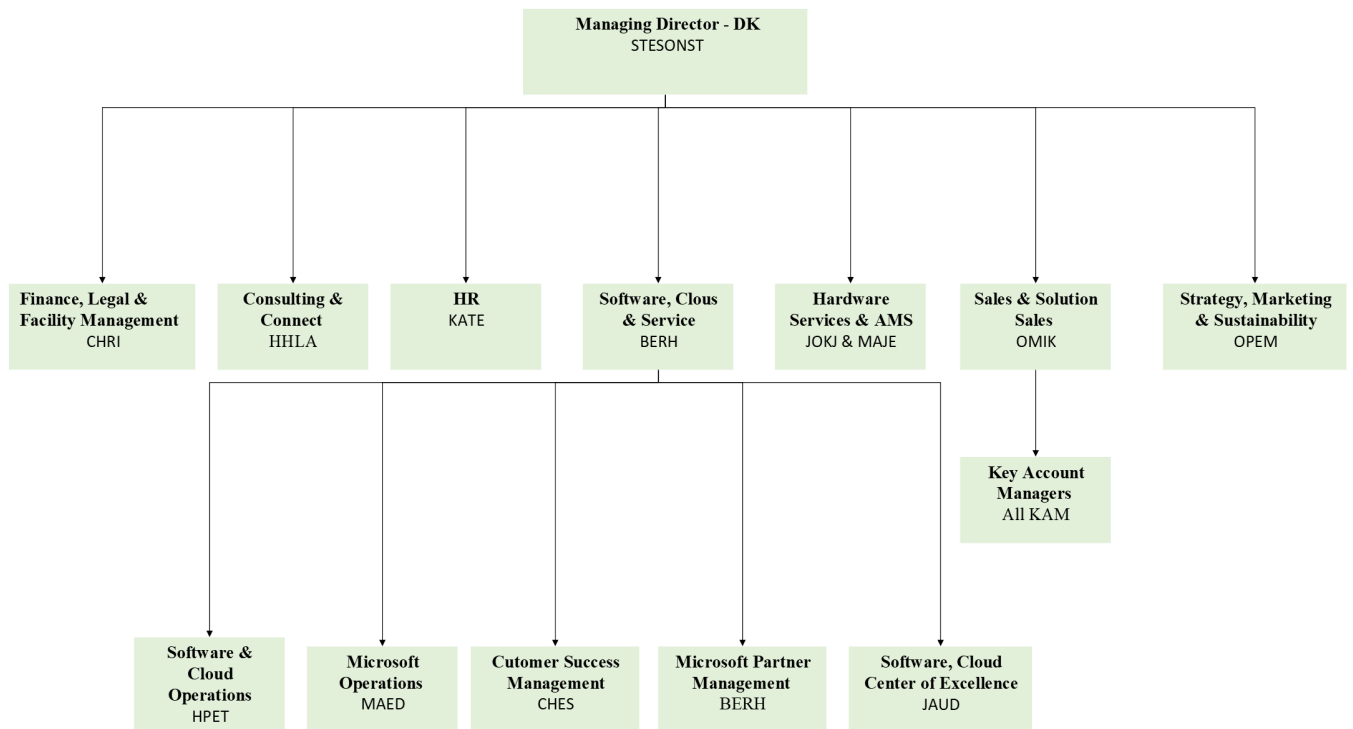


Figure 11.1: Atea Denmark Organisation Chart

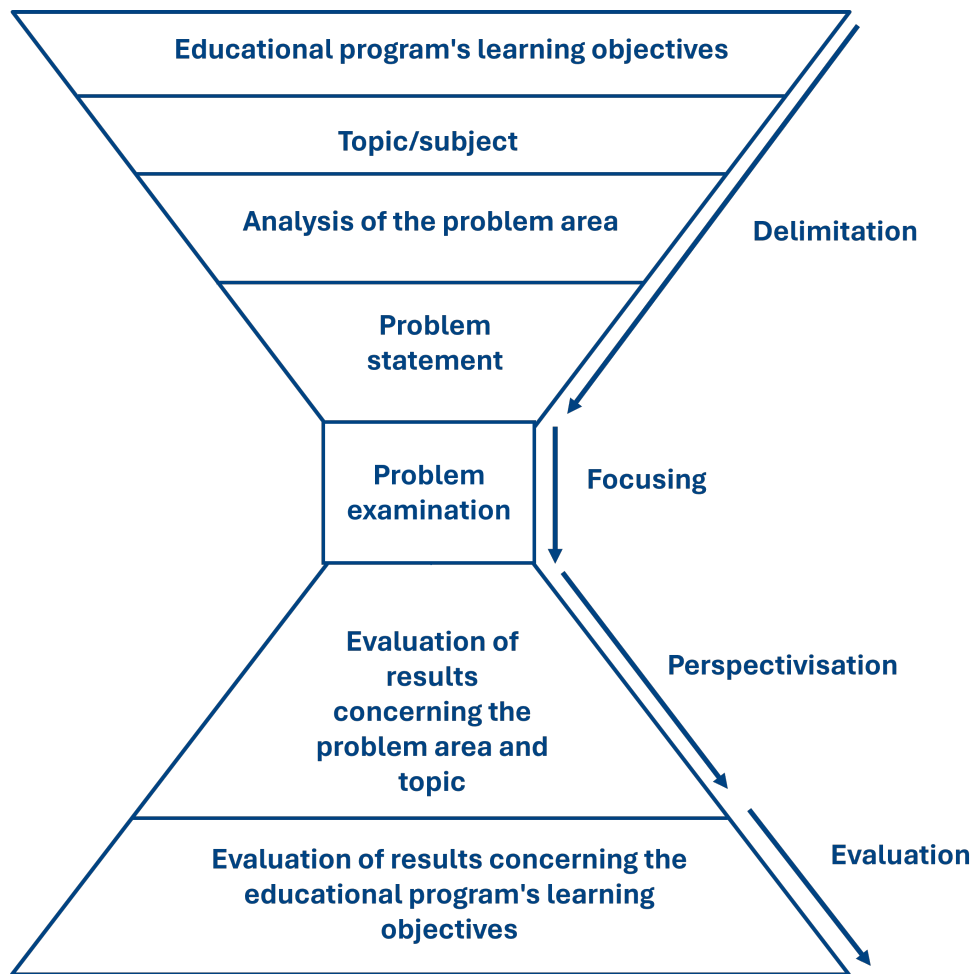


Figure 11.2: Problem Based Learning Figure

## **11.2 Problem Based Learning Figure**

## **11.3 Co-selling Process**

## **11.4 Co-selling As-Is Swimlanes**

## **11.5 Co-selling To-Be Swimlanes**

## **11.6 RACI Mapping - CSM vs KAM**

## **11.7 FMEA Table**

## **11.8 Referrals - Opportunity from Microsoft Partner Center**

### **11.8.1 Inbound Co-sells**

### **11.8.2 Inbound Co-sells- Opportunity Deadline from Microsoft Partner Center**

### **11.8.3 Outbound Co-sells**

## **11.9 Inbound Handover from PM to Key Account Manager**

## **11.10 Outbound Opportunity**

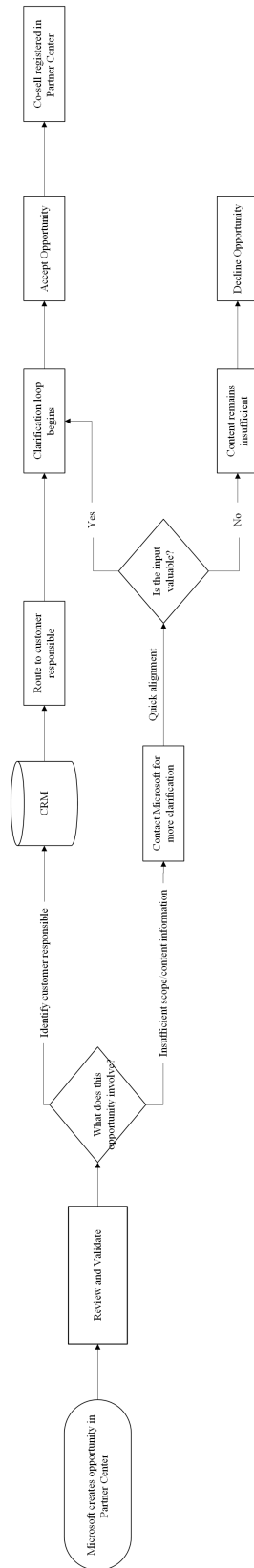


Figure 11.3: Inbound operating process - Partner Management Team

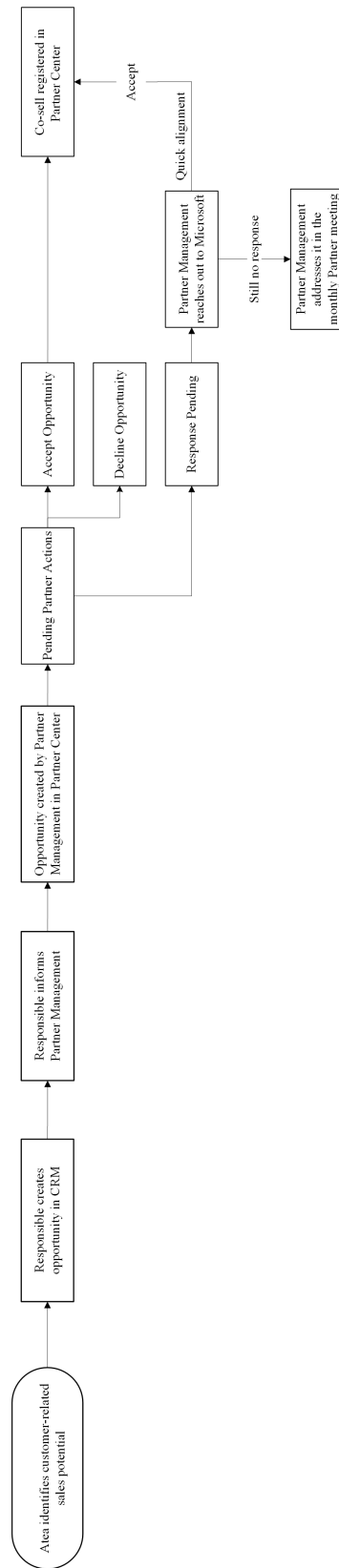


Figure 11.4: Outbound operating process - Partner Management Team

### As-Is Inbound Workflow

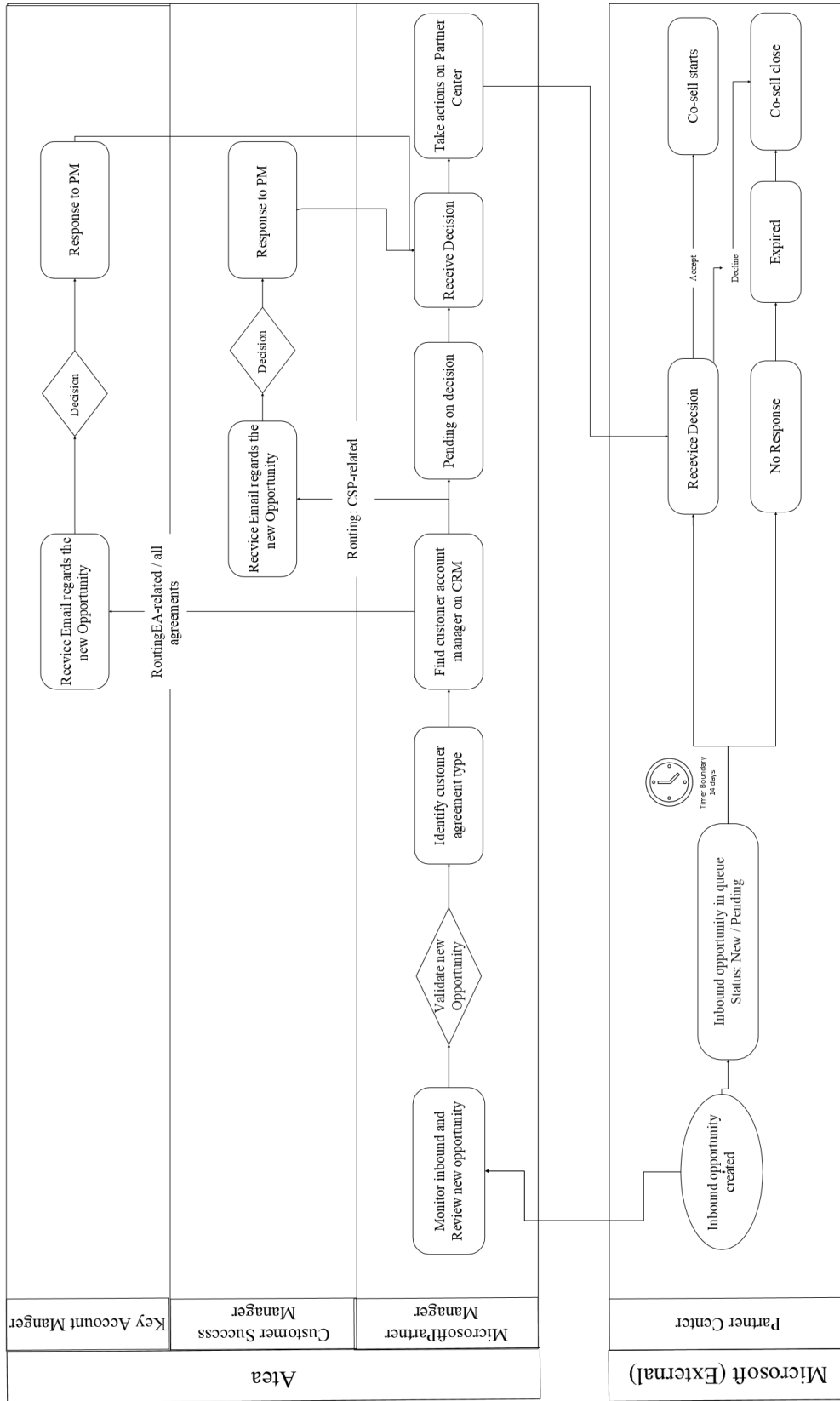


Figure 11.5: As-Is Swimlane Inbound

### As-Is Outbound Workflow

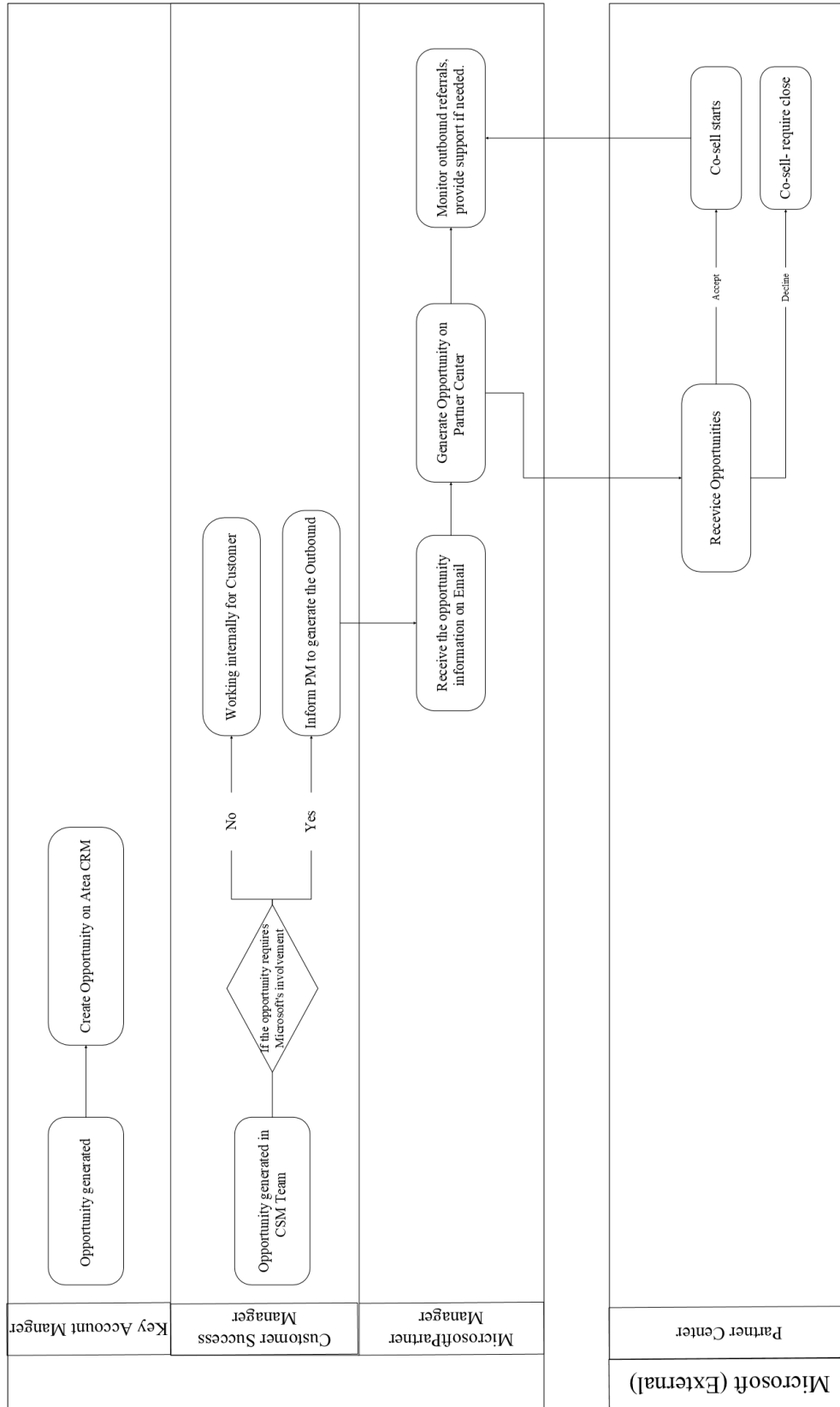


Figure 11.6: As-Is Swimlane Outbound

### To-Be Inbound Workflow

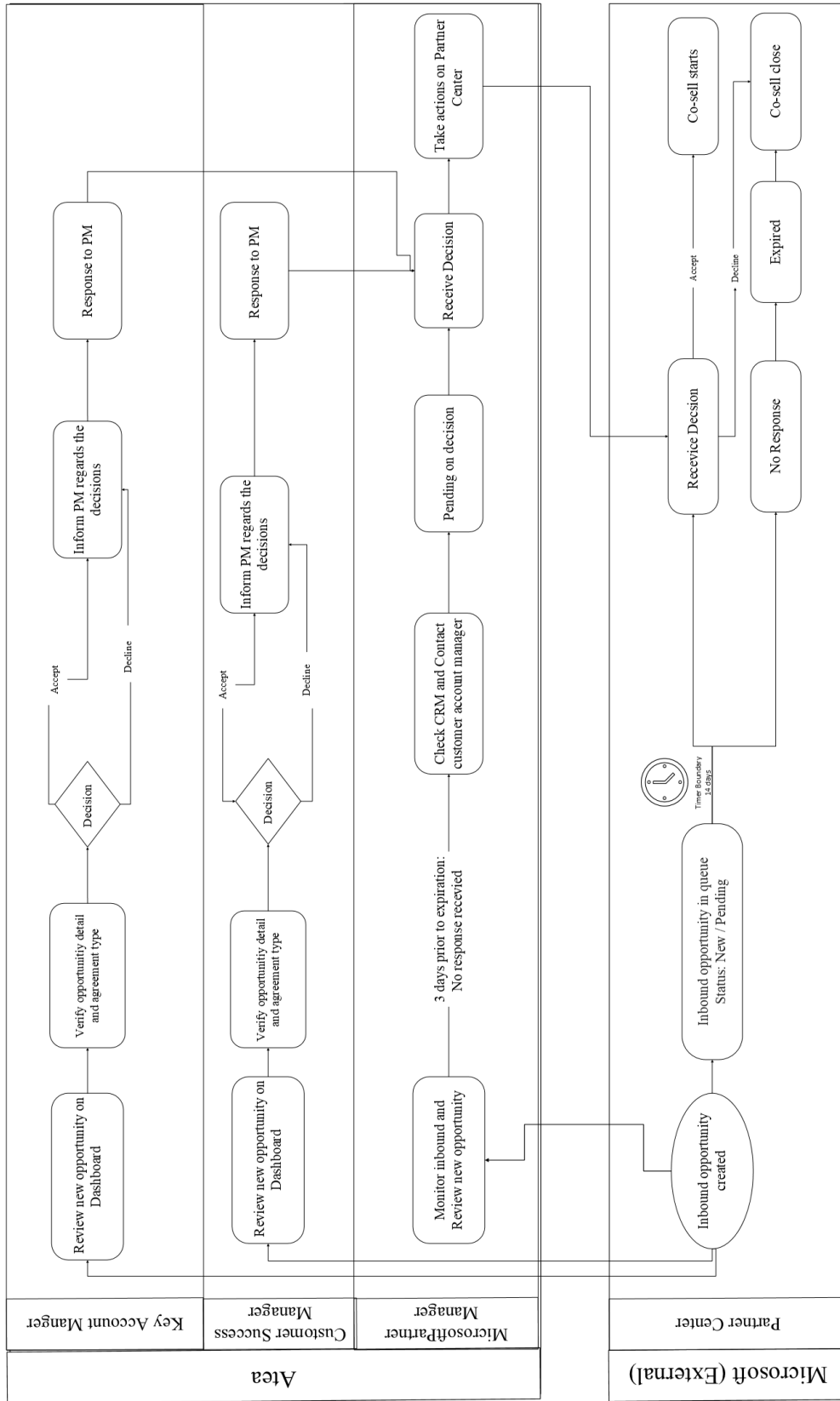


Figure 11.7: To-Be Swimlane Inbound

# To-Be Outbound Workflow

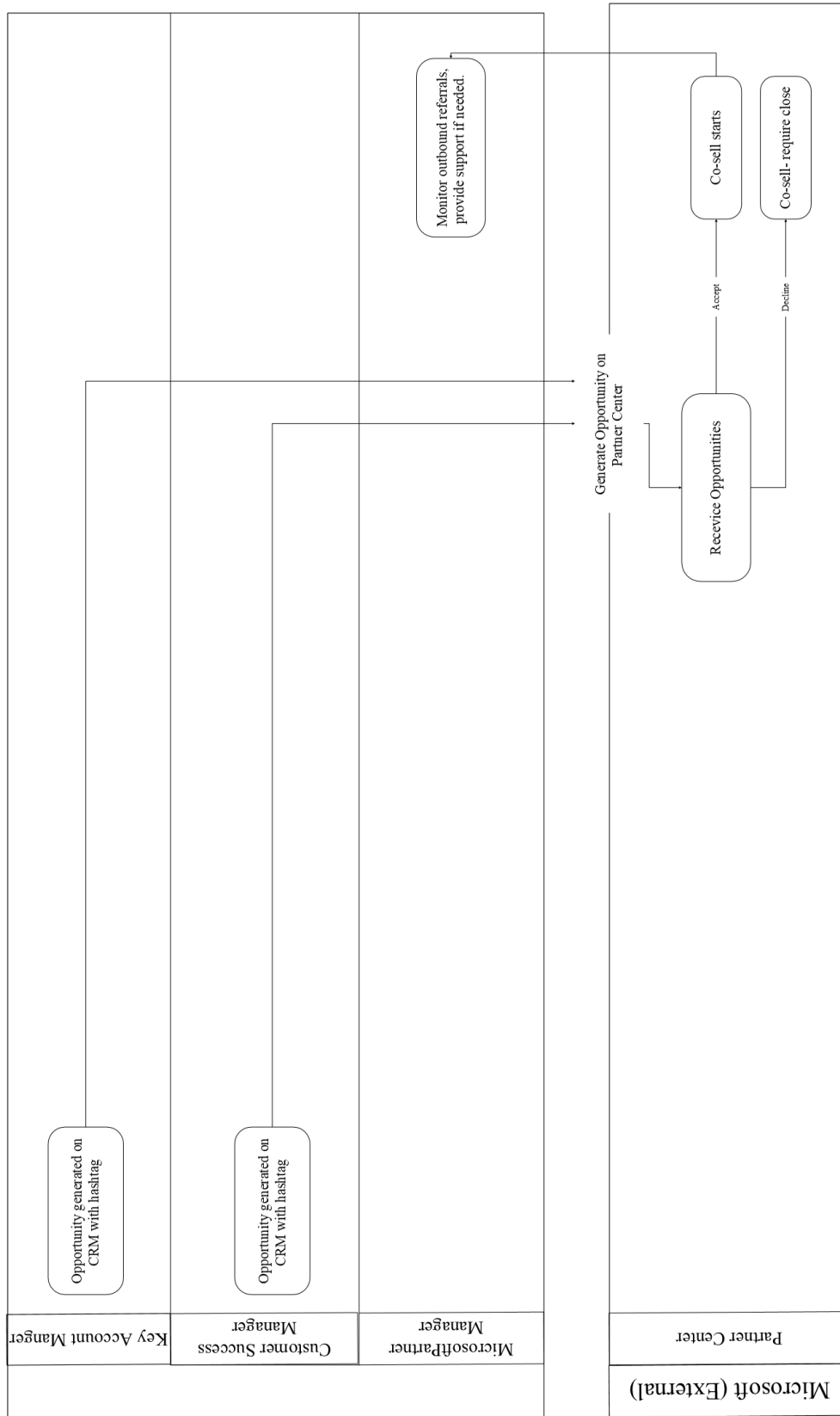


Figure 11.8: To-Be Swimlane Outbound

## RACI Matrix CSM vs KAM

Responsible (R), Accountable (A), Consulted (C), Informed (I)

Roles from relevant team:  
 PM: Partner Management (Atea)  
 KAM: Key Account Manager (Atea)  
 CSM: Customer Success Manager (Atea)

### Perspective Responsibilities - CSM

Activity	PM	KAM	CSM
Monitor updates on Partner Center	R	I	I
Review and quick evaluate	R	C	C
Notify customer responsible manager	R	I	I
Decision action: Accept or Decline?	I	R	C (A, If CSP-related)
Decision and clarification to PM	I	C	C
Register decision or opportunity in Partner Center	R	C	C
Initial alignment with Microsoft	C	C	C (R, If CSP-related)
Collaboration Follow-up	C	A	C (R, If CSP-related)

Figure 11.9: RACI Mapping - CSM

**Perspective Responsibilities - KAM**

Activity	PM	KAM	CSM
Monitor updates on Partner Center	R	I	I
Review and quick evaluate	R	C	C
Notify customer responsible manager	R	I	I
Decision action: Accept or Decline?	I	A	A (R, If CSP-related)
Decision and clarification to PM	I	A	C (R, If CSP-related)
Register decision or opportunity in Partner Center	R	C	C
Initial alignment with Microsoft	I (C, If support needed)	R	C (R, If CSP-related)
Collaboration Follow-up	C	R	I (R, If CSP-related)

Figure 11.10: RACI Mapping - KAM

Item or Function	Failure Mode	Failure Effect	Severity Rating (S)	Causes	Occurrence Rating (O)	Controls	Detection Rating (D)	Risk Priority Number, RPN=S*O*D	Recommended Actions
Role responsibilities	Unclear responsibilities	Misrouting and demotivation	6	Missing assignment info at intake	7	Manual intake review	7	294	Automate routing based on employee role or connect with Atea's CRM
Process transparency	Shadow Process	Lack of visibility and poor follow-up	7	Parallel communication outside system; weak integration	4	Periodic reporting	8	224	Standardise workflow in single platform
Opportunity decision flow	Decision delay	Single Serve mechanism process and reneign can cause lost of sales opportunities	8	Bottlenecks for slow decision and actions, no escalation, and limited resources to engage with Microsoft	7	Manual follow-ups	7	392	Set automated reminders at 7 days and create a digital dashboard for all to show more visibility on pending oppy.
Data Documentation	Clarification unreliable	Inefficient partnership documentation, cause unreliable data	6	14-day expiry gap and unclear qualification rules for organisation	7	Manuel documentation and individual review process	5	210	Implement validation checks in forms and develop a qualification guidelines for improve review quality

Figure 11.11: FEMA Table

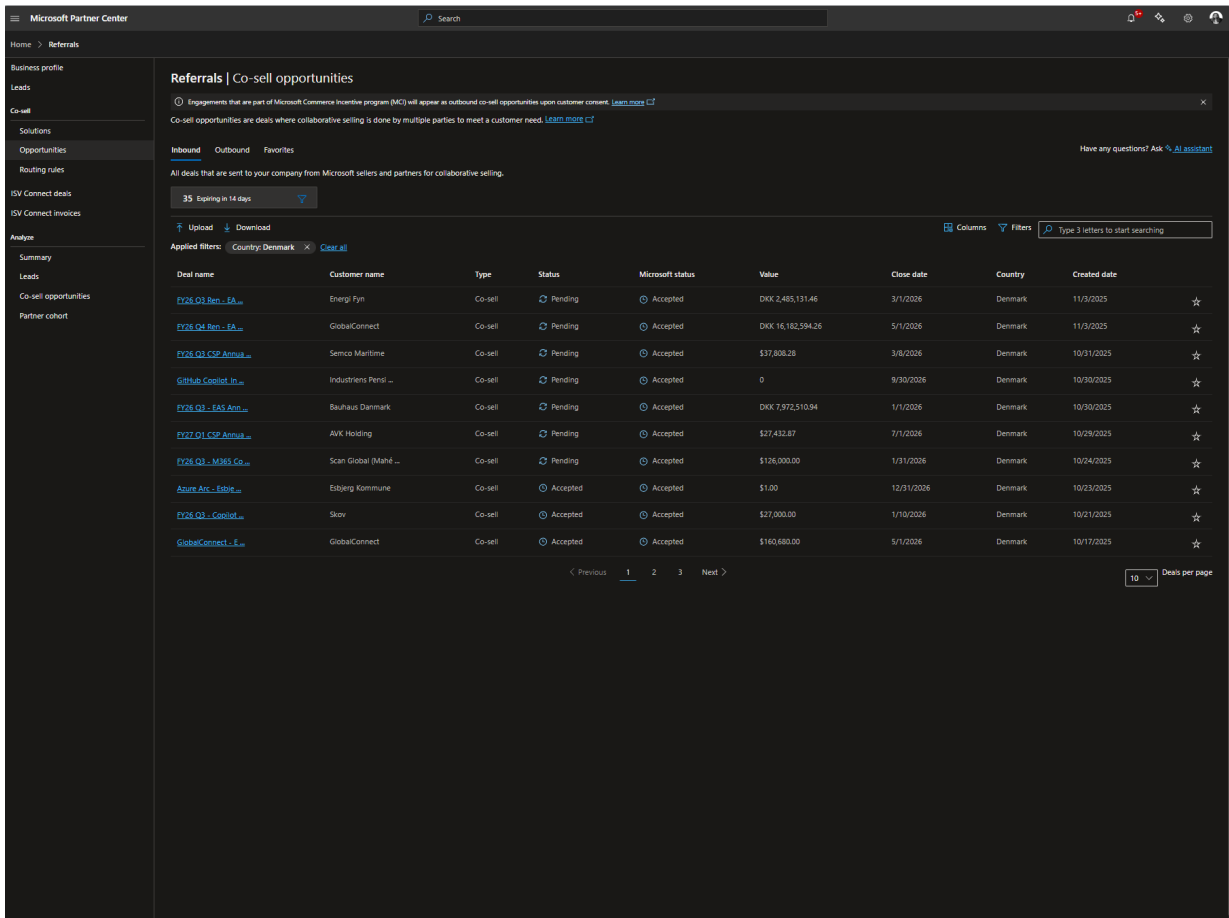


Figure 11.12: Inbound co-sell page- Microsoft Partner Center

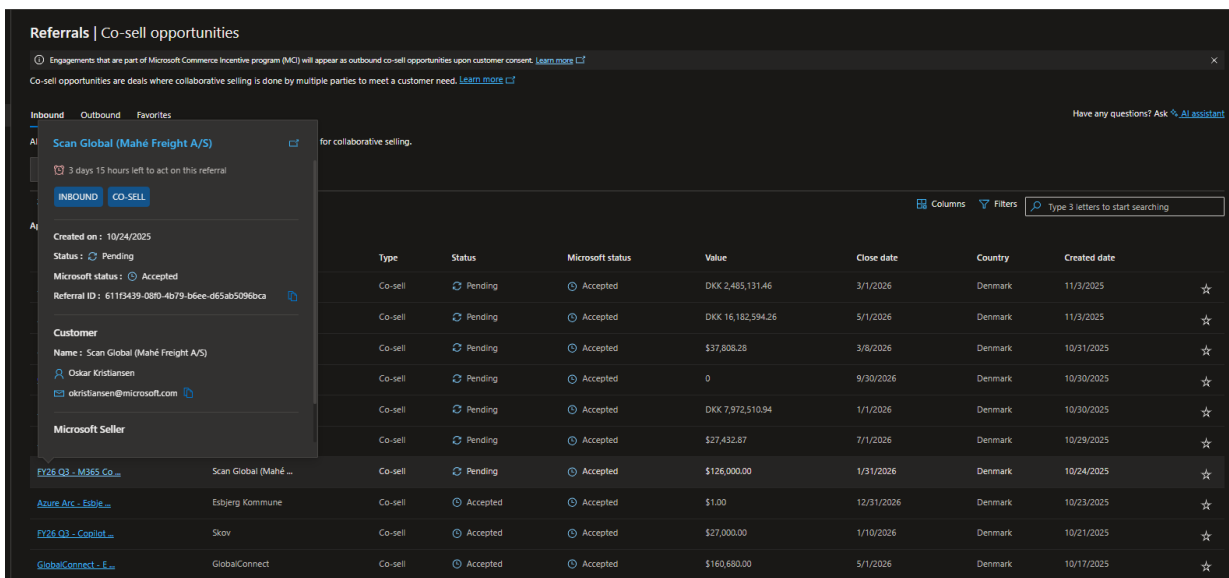


Figure 11.13: Inbound co-sell Site - Fixed Timebound showed in the Microsoft Partner Center

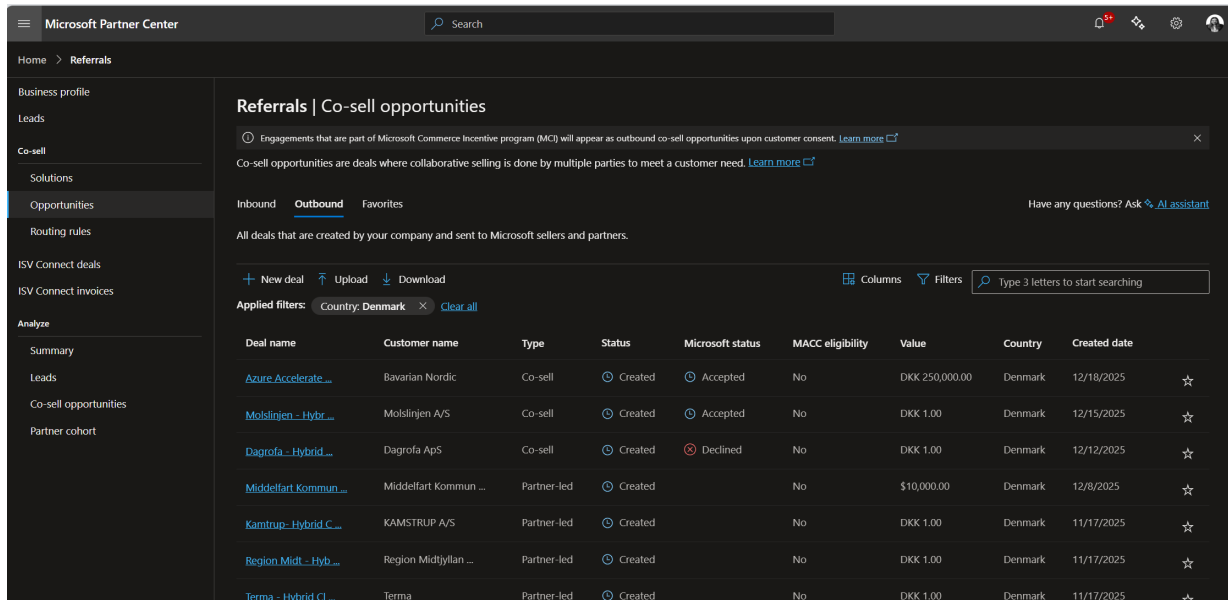


Figure 11.14: Outbound co-sell Site- Microsoft Partner Center

**MS Co-sell Opportunity - AVK Holding - FY26 Q2 - Copilot M365 - EA Renewal upsell** Internal

Kikkli Liu-Lynghej  
 Tit: [Henrik](#)  
 Cc: [Hannah](#), [Morten Ovesen](#)

Tor 11-09-2025 10:06

Kære Henrik,

I følge CRM, ser du ud til at være den kundeansvarlige på **AVK Holding**. Jeg kontakter dig derfor angående en **Co-sell opportunity fra Microsoft** om Copilot M365 i forbindelse med deres EA Renewal upsell.

**Information fra MS Specialist:**  
 Det er en Business Proposal for AVK Holding i FY26 Q2 vedr. Copilot M365.

AVK Holding viser en betydelig vækst med ca. 170 MAU på Copilot Chat, men kun 6 brugere på den fulde Copilot M365. Kunden har stor interesse i at eksperimentere med Copilot Chat, og derfor har MS foreslået en målrettet Masterclass for Copilot Chat og Agents. Desuden vurderer MS også, at Ateas ekspertise og ressourcer kan være en stor fordel for AVK Holding i denne journey. MS søger derfor et tæt samarbejde og drøfte om følgende områder med Atea:

- Microsoft funding partner programmer (Copilot + Power) – hvordan kan vi udnytte dette for AVK?
- Agents og automatisering af forretningsprocesser – kunden har vist klar interesse.
- EA-fornyelse/midterm ved årets udgang – mulighed for at udvide med flere Copilot-licenser?

**Du kan se mere her:**

**FY26 Q2 - Copilot M365 - EA Renewal upsell | Deal Details**

Please add a team member to Accept the inbound deal.

Collaborate with other partners to co-sell solutions. [Learn more](#) >

**\$36,000.00**  
Estimated deal value

INBOUND CO-SELL

**Your company's deal progress** [View history](#)

Received Work/col Closed

**Accept/decline**  
 Pending

- Qualify | MCEM Listen & Consult
- Develop | MCEM Inspire & Design
- Propose | MCEM Empower & Achieve
- Negotiate | MCEM Empower & Achieve

**Customer**

Customer name: AVK Holding [Insights](#)  
 Location: Søndergade 40, Galten, Central Jylland, 8464, Denmark  
 Contacts: [Alexander Amundson](#)  
 MACE eligibility: No

**Details**

Deal name: FY26 Q2 - Copilot M365 - EA Renewal upsell  
 Deal type: Co-sell  
 Partner Role: Presales envisioning  
 Referral ID: ac4b49d3-49ce-4ee2-b7ac-1a25771a2945  
 Location: Partner ID (formerly MPN ID): 1452392  
 Created date: Sep 9, 2025  
 Received at: Sep 9, 2025  
 Estimated close date: Dec 31, 2025  
 Estimated value: \$36,000.00  
 Currency: USD  
 Note: Business Proposal for FY26 Q2 - Copilot M365 - EA Renewal/midterm Upsell Opportunity

Dear Atea team,

I am reaching out to discuss an exciting opportunity with AVK Holding regarding the adoption of Copilot M365. The customer is currently engaged in the Adoption Copilot Chat and has seen significant growth, reaching 170 Monthly Active Users (MAU) on Copilot Chat, however there are still only 6 users on Full Copilot M365. To further drive adoption, we have proposed a tailored Masterclass for Copilot Chat and Agents driven by Microsoft. This workshop is focused on Copilot Chat and Agents.

AVK Holding is keen on experimenting with Copilot Chat to drive the adoption of AI and expects power users to convert to Copilot M365. They are interested in exploring the possibilities of Microsoft Copilot and Chatbot, as discussed in recent customer sync meetings. The customer is open to new ideas and solutions that can enhance their current setup.

We believe that Atea's expertise and resources can greatly benefit AVK Holding in this journey. Your involvement in this opportunity is crucial, and we are looking forward to collaborating with you to ensure the success of this project.

Topics to discuss:

- Microsoft funded partner programs (Copilot+Power), can we leverage this for AVK?
- They are interested in Agents and automation of Business Processes
- EA renewal/midterm at the end of the year – possibility to add more Copilot licenses?

Thank you for your attention, and we look forward to hearing from you soon.

**Hvad er en Microsoft Co-sell Opportunity**[\(link\)](#): Microsoft co-sells inbound opportunities refererer til samarbejdsmuligheder, hvor Microsoft deler leads med partnere som Atea. Disse leads kommer fra Microsofts egne salgrepræsentanter, som identificerer potentielle kunder, der kunne have gavn af Ateas løsninger. Når en sådan mulighed opstår, bliver den registreret i Microsoft Partner Center, hvor Atea kan acceptere eller afvise muligheden.

Er det noget, du evt. kunne være den ansvarlige fra Atea til at håndtere den oppty.? Eller ved du, om der er en anden KAM, jeg kan tage kontakt til?

Tak for hjælpen.

Med venlig hilsen / Best regards

**ATEA**

Kikkli Liu-Lynghej

Figure 11.15: Example of Inbound Handover from PM to Key Account Manager

Ny oppty til deling med Microsoft Public

Mathias  
Tit: Kikki Liu-Lynghøj  
Cc

Tor 18-12-2025 15:00

Du svarede den Tor 18-12-2025 15:44

Hej Kikki

Vi har en ny oppty jeg gerne vil have delt med Microsoft.  
[Opportunity: Opportunity: Azure Accelerate - Cloud Migration Assessment - Dynamics 365](#)

Er det dig, som kan gøre det?


Med venlig hilsen / Best regards

**ATER**

Mathias Philip Andersen Valeur-Møller  
Senior Solution Advisor  
Datacenter & Cloud, East

Mobil: [+45 8138 7850](tel:+4581387850)  
Teams: [+45 7228 1999](tel:+4572281999)  
[mphilas.01@v.ateren.valeur-moller@atera.dk](mailto:mphilas.01@v.ateren.valeur-moller@atera.dk)

Ates A/S  
Laurupvang 6, 2750 Ballerup, Denmark  
Telefon / Phone: [+45 7228 2350](tel:+4572282350)  
[www.atera.dk](http://www.atera.dk)



This e-mail (including any attached documents) is proprietary and confidential, and may contain legally privileged information, it is intended for the named recipient(s) only. If you are not the intended recipient, you may not review, retain, copy or distribute this message, and we kindly ask you to notify the sender by reply e-mail immediately and delete this message from your system.

Kikki Liu-Lynghøj  
Tit: Mathias.  
Cc

Tor 18-12-2025 15:44

Hej Mathias,

Tak for outbound.

Det er klarer. Du kan se mere [her](#).

**Husk: Noter og teammedlemmer kan altid ændres.**

Skrive igen hvis der er mere.

Figure 11.16: Example of emails to generate Outbound - from CSM to PM team

# 12 | Appendix - Abbreviation List and Year Table

## 12.1 Abbreviation List

### **Atea Organisational**

KAM – Key Account Manager

SAM – Sales Account Manager

CSM – Customer Success Manager

PM – Partner Manager / Partner Management

PSS – Product Solution Specialist

MWS – Modern Work Specailist

BDM – Business Development Manager

TAM – Transformation & Upsell Manager

KPI – Key Performance Indicator

### **Microsoft & Co-sell Business**

Co-sell – Collaborative selling engagement between Microsoft and partners.

Inbound Co-sell – Opportunity sent from Microsoft to Atea, incoming Outbound Co-sell – Opportunity created by Atea and shared with Microsoft.

PDM – Microsoft Partner Development Manager

P2P – Partner-to-Partner Co-sell

MCEM – Microsoft Customer Engagement Model

EA – Enterprise Agreement

FY – Fiscal Year

M365 – Microsoft 365

O365 – Office 365

E3/E5 – Microsoft Licensing Tiers

M365 Copilot – AI assistant capabilities for Microsoft 365

Azure – Microsoft cloud platform

## **12.2 Microsoft Fiscal Year - Time Table**

- FY22: July 1, 2021 – June 30, 2022
- FY23: July 1, 2022 – June 30, 2023
- FY24: July 1, 2023 – June 30, 2024
- FY25: July 1, 2024 – June 30, 2025
- FY26: July 1, 2025 – June 30, 2026

## **13 | External Appendix**

### **13.1 Co\_sell Opportunities Data.xlsx**

The Excel sheet including data on Inbound and Outbound co-selling actions and opportunities status.

### **13.2 Data.xlsx**

The same Excel sheet as above, only included Inbound and Outbound sheet for utilised on R.

### **13.3 Forecast.Rmd**

R scrip for applied to the ARIMA forecasting analysis.

### **13.4 Status.Rmd**

R scrip for applied to visualise Inbound Co-sell status data.

### **13.5 Outbound.Rmd**

R script applied to visualise Outbound Co-sell status data.