

# Microsoft Business Applications

Practice Development  
Playbook



[aka.ms/practiceplaybooks](http://aka.ms/practiceplaybooks)

# About this Playbook

This playbook is intended for the business and technical leadership of companies that are exploring or growing a Microsoft Business Applications practice.

## Objectives

The goal of this playbook is to help new or existing Microsoft partners develop offerings around Microsoft Business Applications, whether as a foundation to a new Microsoft Business Applications practice or a way to accelerate the growth of an existing Microsoft Business Applications or Microsoft Dynamics practice. The contents will help you plan for and build a new practice area quickly, using experiences and best practices gathered from Microsoft Business Applications partners of all sizes from around the world.

For the business focused individuals in your organization, this playbook provides valuable resources for driving new

revenue opportunities, developing strategies for marketing, selling, and lead capture, and building deeper and longer-term engagements with your customers through potential new one time and recurring services offerings.

For the technical individuals in your organization, the playbook offers guidance on several topics that range from the skills your technical team members will need, to resources you can use to accelerate learning. It also identifies key opportunities for both your technical delivery and product development teams to focus on to ensure your business practice expands and grows.

## CONTRIBUTING PARTNERS

Avtex	<a href="#">Sable 37 (DXC)</a>
EBECS (DXC)	Sopris
Hitachi	<a href="#">Sunrise</a>
<a href="#">Velrada</a>	Neural Impact
Power Objects (HCL)	

NOTE: Many Microsoft Dynamics partners have assisted in the creation of this playbook, offering practical examples of best practices and recommendations. These are instructive examples and not meant to be exclusive.



## Using the Playbook Effectively

Review the playbook to familiarize yourself with the layout and content. Each section includes an executive summary and key actions for that specific topic. Review these summaries first to decide which areas are of most interest and importance to you. Go over the detailed content several times, if needed, then share with your team.

### TO GET THE MOST VALUE OUT OF THIS PLAYBOOK:

- Get your team together and discuss which pieces of the strategy each team member is responsible for.
- Hold a white board brainstorming session on each of the key chapter areas of the book.
- Share the playbook with your sales, marketing, support, technical, and services teams.
- Leverage the resources available from Microsoft to help maximize your profitability.
- Share feedback on how we can improve this and other playbooks by emailing [playbookfeedback@microsoft.com](mailto:playbookfeedback@microsoft.com).

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# Partner Practice Development Framework

The partner practice development framework defines how to take a business application practice from concept to growth in five stages. It is the foundation of this playbook, and each phase of the framework is covered in a dedicated chapter.



# The Business Applications Market Opportunity

Digital solutions are redefining the way businesses operate. Organizations are discovering new opportunities for market expansion, revenue streams, ways to communicate with customers and suppliers, and even for entirely new business models. Digitalization can drive quantum leaps in organizational performance through improved productivity, risk assessment and decision-making, as well as transforming engagement through the vertical and horizontal business chains.

Organizations embracing digital transformation generate an average of \$100 million (or 8% points) more operating income each year than those who lag behind.

So, it comes as little surprise that 86% of CEOs believe that technology will change their business more than any other trend in the next 5 years ([PWC CEO Survey](#)).

But digital transformation is not simply about technology — it's a business strategy that requires leaders to re-envision existing business models and embrace a different way of bringing together people, data, and processes to create value for their customers and capture new opportunities for their organizations.

Digital transformation means how you:

- Engage your customers with personalized experiences they love.

- Empower your employees for success with a collaborative, anytime-anywhere data-driven culture.
- Optimize your operations with intelligent processes that accelerate responsiveness and reduce costs.
- Transform your products.

Intelligent business applications are the enabler of digital transformation. Gartner reports that through 2022, growth in enterprise IT spending for cloud-based offerings will outpace traditional (non-cloud) IT offerings. As a key driver of IT spending, enterprise software will continue to exhibit strong growth, with worldwide software spending projected to grow 8.5% in 2019. It will grow another 8.2% in 2020 to total \$466 billion. Organizations are expected to increase spending on enterprise application software in 2019, with more of the budget shifting to software as a service. ([Source](#): Gartner, January 2019)



# Data is the new currency

This significant demand for intelligent business applications as the core driver of transformation results from the vast amounts of data relating to people (employees), products (operations and telemetry) and customers (signals) that are available. Data is produced everywhere throughout your customer organizations and is driving a dramatic change to the business environment with three dominant themes emerging:

## CUSTOMER ENGAGEMENT IS EVOLVING

- Everyone is mobile, and they want to access more information, quicker.
- People trust opinions from their friends and peers more than they trust brands.
- It's easier than ever to switch to a competitor.
- 57% of the purchase decision is complete before a customer even calls a vendor. ([CEB](#))
- 67% of the buyer's journey is now done digitally. ([Sirius Decisions](#))

- By 2020, customer experience will overtake price and product as the key brand differentiator. ([Walker Information](#))

## PRODUCTIVITY IS CRITICAL FOR BUSINESSES TO SCALE

- Resources are limited; productivity is the way to scale.
- 40% of a worker's productive time is lost when switching tasks. ([APA.org](#))
- Productivity tools can be embedded directly into business processes to save time and increase productivity.
- IHS predicts 80 billion connected IoT devices in operation by 2025. ([IHS](#))

## A NEW SPEED OF BUSINESS

- New technology is not only enabling new business models, it's at a much faster rate than ever before.
- People and processes need to respond quickly to changes in the market.



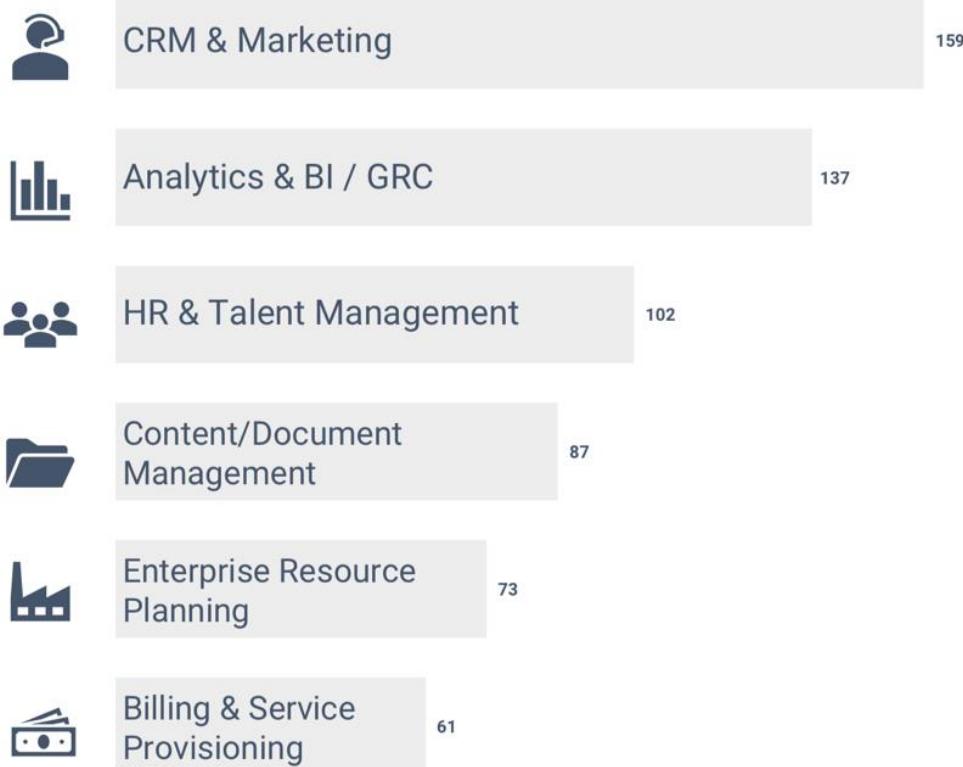
## Business Application Industry Consolidation

Mergers and acquisitions in the business applications market continues to be active, fueled by competition for human resources, rapid growth rates, and increasing customer expectations for industry domain expertise. The shift to an ongoing, recurring revenue base, facilitated by a SaaS model, is significantly increasing company valuations and the value shareholders derive. Buyers are willing to pay a higher price for a lower risk model, and benefit from lenders' willingness to extend credit against recurring revenue.

In most business application markets around the world, ERP focused partners are buying or merging with CRM companies and large traditional VAR's are acquiring or spinning off small ISV firms or divisions. Recent European examples within the Microsoft partner eco-system include: HSO and Dynamics Software, Columbus Global and To Increase, and EPG and Dynaway.

SEG Capital Advisors, a California based M&A firm exclusively focused on the software industry, reported CRM & Marketing continues to lead SaaS mergers and acquisitions deal volume with the category posting 159 transactions in 2018. HR & Talent Management and ERP were also very active with 87 and 73 transactions, respectively ([SEG 2019 Annual Report](#))

**TOP SaaS PRODUCT CATEGORIES BY NUMBER OF DEALS  
(2018)**



# The Opportunity by Functional Process

Globalization is driving digital transformation across every key business function, workflow and process. Your clients must continuously reinvent their business models and strategic imperatives – enabled by technology – or risk being displaced. While the transformation opportunity may be unique to each industry, the business application opportunity applies to them all.

This relentless desire and need to innovate and evolve represents an incredible revenue opportunity for Microsoft Dynamics 365 partners. A recent Forrester Research report determined that existing Microsoft Dynamics 365 partners are generating \$10 of service revenue for every \$1 of Microsoft Business Applications licensing margin.

## CRM Opportunity

According to Gartner Inc, at the end of 2017, worldwide customer relationship management (CRM) software revenue reached \$39.5 billion, making CRM the largest of all business applications markets. Gartner also suggests CRM software revenue will continue to lead all business applications markets with a growth rate of 16%. ([Gartner](#), 2018).

This growth rate is predominantly driven by lead management, customer engagement and acquisition, and field service management, each of which is growing by more than 20% ([Gartner](#), 2018). Client organizations want accessibility to customer data in real-time to provide a more personalized experience, with mobile and cloud solutions in the forefront.

Companies are investing in CRM to ensure compliance with the European General Data Protection Regulation (GDPR) and other consumer privacy laws. It is expected that budgets for information security, CRM and CX, marketing technology, data loss prevention, security information, event management, and security consulting will continue to grow at an accelerated rate.

GDPR non-compliance—due to outdated, vulnerable legacy systems and incomplete data—is also preventing a real-time 360-degree view of the customer. Combined, these two business challenges, often compounded by disconnected systems and siloed information, result in declining customer engagement and lost revenue opportunities.

## ERP Opportunity

According to Statistics MRC, the Global Enterprise Resource Planning (ERP) Software market is expected to grow from \$34.10 billion in 2017 to \$74.20 billion by 2026. This represents a compound annual growth rate (CAGR) of 9.0% ([Statistics MRC](#)). Gartner estimates that by 2020, at least 35% of new product-centric ERP deployments in large enterprises will be consumed as software as a service (SaaS) ([Gartner](#)).

Key factors driving growth are improving operational efficiency, maintaining real-time data transparency, and a strong desire for cloud-based ERP deployments. Rising demand for ERP solutions from SMBs is another contributing factor as SaaS licensing enables small and medium sized business to leverage industry-specific business applications that were once solely the domain of the enterprise. Product and services quality improvements, the increasing maturity and accuracy of data analytics, intelligent business applications, and the need for greater workforce mobility are also driving significant ERP projects. Buyer purchase triggers include:

- Outdated, slow, inflexible legacy systems that hamper the organization's ability to respond rapidly to market opportunities and customer demands
- GDPR non-compliance due to outdated, vulnerable legacy systems
- The desire to integrate smart sensors and IoT devices that support new business models
- Inability to scale to address business complexity and growth

## Human Capital Management (HCM): Talent and Core HR Opportunity

The overall HCM applications market is expected to reach \$23.5 billion by 2022, up from \$20.3 billion in 2017, which represents a CAGR of 3%. Within HCM, the core HR applications market was \$12.2 billion in 2017 with a forecast growth rate of 3.1%. The Talent Acquisition business applications market was \$4.8 billion, expanding at a CAGR of 3.4%.

Top of mind for HR leaders ...



*Strategy that drives high-impact corporate culture, diversity, inclusion and equality*

Investment in HR applications is being driven by several key factors, including:

- Increasing employee demands
- Competitive labor markets
- Need for more agile recruitment and hiring
- Acute competition for key skills
- Rising social media and video recruiting
- High-volume recruitment efforts directed at a primarily mobile workforce
- Need for enhanced communication capabilities

Buyer purchase triggers include:

- Inability to quickly attract and recruit high quality talent to fill open positions
- Outdated, manual and/or inefficient systems that undermine HR productivity and employee performance
- Increasing hiring costs
- Need to accelerate new hire onboarding to reduce time to productivity and employee turnover

## Customer Experience Opportunity

According to the Walker 2020 Customers report, customer experience is on track to overtake both price and product as the key brand differentiator by 2020.

The global customer experience management market (including both customer and field services) is expected to grow from \$5.98 billion USD in 2017 to \$16.91 billion USD by 2022 at a CAGR of 23.1%. ([Markets and Markets](#))

Key trends driving this growth are:

- Heightened customer expectations for real-time service delivery
- Omni-channel service enquiry and resolution including mobile, email, call center, social media and chat
- Customer demand for personalized experiences
- Increased global competitiveness driving customer retention and brand loyalty through superior customer service delivery

Buyer purchase triggers include:

- Inability to access a single, accurate and complete customer view
- Declining first call resolution and first-time fix rates
- Productivity issues around remote fixes
- Resource schedule optimization
- Declining customer satisfaction ratings
- Surging customer churn

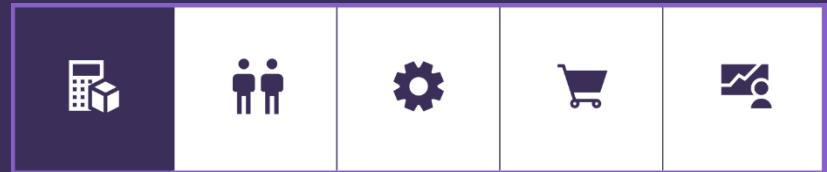
The screenshot shows a website for PowerObjects, an HCL Technologies Company. At the top, there's a navigation bar with links for Home, Products, Services, Support, Education, Add-Ons, Events, Blog, Videos, About Us, and a search icon. The main banner features a man and a woman smiling. Below the banner, there's a section titled "EXPLORE RESOURCES" with a button labeled "LEARN MORE". Another section below it is titled "Is Your Customer Experience Strategy Ready?" with a sub-section "THE CRM BOOK" and a link "Bookmark our free, online comprehensive guide to Microsoft Dynamics CRM.". To the right, there's a section titled "DYNAMICS 365 SERVICES" with a link "Learn about Dynamics 365". The footer contains small text about Microsoft and PowerObjects.

Sample customer service-oriented marketing landing page from [PowerObjects](#).

# Define Your Strategy

Business Applications

[aka.ms/practiceplaybooks](http://aka.ms/practiceplaybooks)



# Executive Summary

With a clear understanding of the Microsoft Dynamics 365 practice opportunity, the first step is to define the strategy you will use to build yours. Like the foundation of a house, thinking through your strategy is critical to the long-term success of your practice.

This section of the playbook will review the steps required to define your business applications practice strategy.

Today's business buyers increasingly expect a high level of industry knowledge and/or domain expertise. The following section will guide you through the process of analyzing, identifying and defining your core practice focus in terms of industry, vertical workload or market specialization, to create defendable differentiation.

It is important to understand the common trigger events of your target market and how they lead to business application projects. We will then outline the critical elements to consider to successfully define, design, and review your solution development options with regards to building, buying, or partnering.

Next, we will review the four core cloud business application revenue streams (subscription resale, project

services, managed services, and intellectual property), their respective margin contributions, and their impact on profitability and differentiation.

Following that, we will also explore your solution pricing options. An effective pricing strategy will increase lead generation, accelerate customer acquisition and improve profitability. It also helps clearly communicate your value proposition.

Lastly, we'll conclude this section by reviewing the benefits of partnering, both with Microsoft and complimentary partners in the broader ecosystem, that can help you efficiently and effectively bring your own unique Microsoft Dynamics 365 solution to market.

Now, let's start with defining your practice strategy.

## Top 5 things to do

Here are the top 5 things you should consider when defining your business applications practice strategy.

- Define your practice focus
- Understand the Dynamics 365 opportunity
- Identify customer trigger events
- Define and design your solution offer
- Define your pricing strategy

# Define Your Practice Focus

Your Dynamics 365 business application practice will enable you to create and deploy innovative business solutions that help your customers reduce costs, streamline business processes, scale and grow, meet customer demands, attract and retain talent, deliver high quality services and secure sustainable competitive advantage in their chosen industries.

The business applications market is both mature and highly competitive, and the barriers to entry, in terms of skills and expertise, are high. Customers expect their vendors to possess a deep understanding of both technology and industry, as well as expertise and experience resolving their specific business challenges. Domain expertise is a critical success factor.

To effectively compete, you will need to focus on a defined industry, vertical, market or specialization to develop credible domain expertise. Developing this expertise requires discipline.

In the Microsoft Dynamics Playbook survey conducted by MDC Research, partners reported that becoming specialized in an offering is a critical key to success when moving to a cloud model.

## Keys to Success When Building a Cloud Practice

		Total (n=823)	Sell Dynamics (n=162)	Does Not Sell Dynamics (n=661)
1 <sup>st</sup>	Becoming specialized in our offering	46%	46%	46%
2 <sup>nd</sup>	Building the right cloud product	41%	34%	43%
3 <sup>rd</sup>	Having the right team	36%	36%	36%
	Changing our sales process	32%	34%	31%
	Packaging up our products and services	26%	31%	25%
	Fix pricing our services	22%	9%	25%
	Having capital to fund the transition	21%	24%	20%
	Building marketing capabilities	17%	24%	15%
	Accelerating deployment timeframes	13%	18%	12%
	Having executive buy in to drive the change	11%	12%	11%
	Market demand/customer attitude	1%	1%	<1%



Highest success area rating



Second highest success area rating



Third highest success area rating

Source: Microsoft Dynamics Playbook Survey, MDC Research, February 2018

# Choose a Specialization

Focus on an industry, market segment or solution specialization to drive competitive advantage.

Business applications have been widely available since the 1980s. As a result, most solutions contain more functionality than customers can realistically consume. They have effectively become commodities. Building a business application practice today requires specialization, differentiation, and the ability to deliver measurable customer business value quickly.

Increasingly, customers are searching for pre-configured, purpose-built industry solutions they can deploy quickly, with limited risk, at a relatively low cost.

Business buyers are also selecting business application based on platform and, most importantly, the degree to which it is customized for their specific needs. They are reluctant to take on the risk of working with a partner who does not understand their business model, processes, and requirements.

They are no longer willing to invest their time and resources educating vendors. Instead they are seeking and rewarding technology providers that offer pre-configured industry/vertical solution sets, who have successfully implemented similar solutions with industry peers.

Historically, most business application partners adopted a horizontal customer acquisition strategy, mistakenly believing that casting the net wide, targeting all industries and all market segments, was the most effective way to grow their business and keep their bench empty.

Partners that still pursue that strategy today unfortunately experience some of the lowest win rates in the Microsoft ecosystem. They suffer from high sales cost, long sales cycles and low win rates. Their lack of differentiation inevitably drives them into pricing and discounting discussions.

Building a business application practice in a mature, market requires specialization, differentiation, and the ability to

deliver measurable business value to your customers. This is almost impossible without deep domain knowledge.

We highly recommend focusing your business applications practice on a limited number of industries (maximum of three), a vertical solution specialization or a key market segment like SMB.

This approach allows you to build domain expertise, which eventually culminates in a deep technical and business understanding of the unique challenges, pains and dynamics of the industries you serve. Focusing on a defined market segment also enables you to precisely tailor your service offerings, configure more compelling solution sets and develop your own high-margin IP.

Most of the partners who contributed to the development of this playbook pursue three or fewer industries, while some focus exclusively on one. Limiting the breadth of your initial market enables you to hire resources with domain expertise who then quickly develop a strong working knowledge of your target customers' business challenges and underlying business processes. This approach also reduces the risks and write-offs associated with scoping and estimating your initial customer projects. Most importantly, it enables your organization to begin the process of developing and monetizing your own IP, which reinforces your differentiation narrative and drives a more profitable business model.

Business applications partners that adopt a horizontal, non-specialized customer acquisition strategy should be prepared for lower win rates, higher sales costs, longer sales cycles, and lower revenue per customer. At risk of overstating the obvious, a lack of defendable differentiation will increase your requirement to compete on primarily on price.

## Industry Focus

So, where should you focus? First, your preferred industry must be accessible to you and have a clear need for business process improvement and better controls (reporting/BI). To begin, analyze your potential focus areas across multiple dimensions, including market opportunity, market size, established competitors, affordability and growth potential.

One of the most important factors to consider in selecting your focus area, is the degree of industry disruption. The greater the disruption (and requirement for change), the greater the need to explore new technology solutions. Disruption inevitably creates a sense of fear, risk, opportunity and urgency (and new business models), which often results in a need for improved automation, new capabilities, greater control and optimization.

Common industry disruptors include:

- Regulatory change (i.e. GDPR)
- New competitive entrants or substitute products
- Significant currency fluctuations
- Supply constraints or raw materials
- Product or service commoditization
- Industry consolidation
- Economic factors such as interest rate fluctuations
- Changing buyer demands or behaviors
- Trade disputes

If you would like some additional help determining your optimal industry focus, use the Industry Competitiveness Assessment tool below to help identify your strongest focus areas: <https://neuralimpact.ca/industryassessment/>

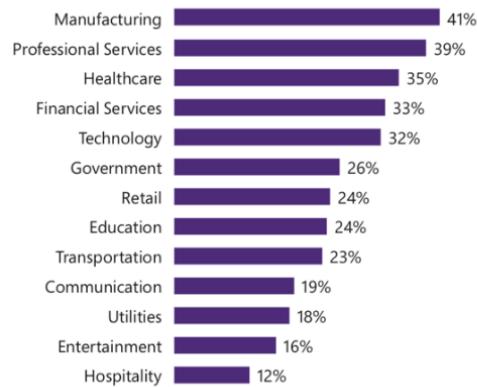
## Industry Competitiveness Assessment

Many business to business companies try to keep their sales and marketing strategy as general and broad as possible in order to reach as many prospective customers as they can. They fear that if they limit their market to a few segments they will miss out on potential revenue. We however have repeatedly seen evidence that it is the companies that focus on competing in only 3 or less verticals that have the highest win rates, shortest sales cycles, lowest costs of selling, highest revenue per customer and lowest customer churn rates. In order to be relevant, add value to your client's business and sustain a long term competitive differentiation you must become an expert, gain efficiencies and know how to solve your client's specific business problems better than they can. You can only succeed in doing that if you are repeatedly solving the problem over and over and over again. Take 7 minutes to answer the following questions and we will send you a quick assessment of how competitive you are in your target vertical at this point and provide you with recommendations as to how to be more competitive.

If you currently sell to more than one vertical industry, you may complete the assessment form multiple times, each time answering the questions with that particular industry in mind. You can then determine which industries you scored the highest or lowest in terms of industry competitiveness.

We know about this industry and understand their unique challenges better than our competitors do.\*

The Dynamics 365 partners we surveyed predominantly focus on the following industries:



Source: Microsoft Business Application Practice Development Study, MDC Research, March 2018

20-30% of the potential customers in any industry will be early adopters who view technology investments as a strategic advantage, an opportunity to improve operations, accelerate product development, improve service delivery, increase margins, and grow market share.

Another 20-30% will be laggards. They will resist new technologies and likely delay the adoption of cloud solutions. Laggards are often emotionally attached to investments in their existing, familiar, on-premise legacy systems.

After choosing a target industry or vertical, focus your marketing efforts on the innovators who are legitimately open to the benefits of a cloud offering. Avoid those who resist new technology as they often view technology vendors as free consultants.

## Solution Specialization

Another way to specialize, is to focus on a specific workload or subset of critical customer business processes. Almost 40% of Dynamics 365 partners pursue this workload strategy, through which they sell a defined solution into multiple industries. Importantly, they typically focus on three or fewer core business problem areas. For example, many specialize on improving targeted business process or workflows such as talent acquisition, supply chain optimization, distribution and logistics, invoicing, leasing, warranty management, opportunity management, event management, member management, call center automation, field service, etc.

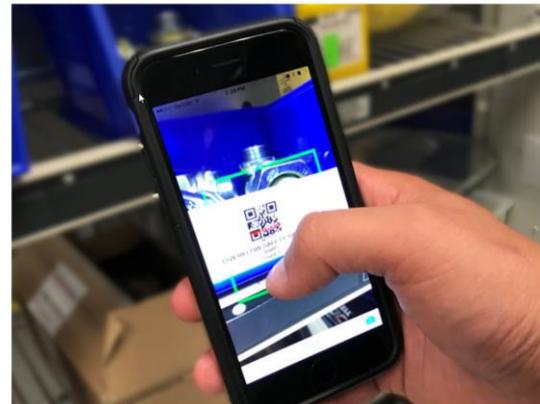
The challenges they address across multiple industries are often similar and repeatable, which allows them to differentiate and develop accelerated deployment methodologies, strategic functionality and repeatable IP. Solving similar business process challenges across multiple customers, in different industries and environments, allows for both industry diversity and a broader market opportunity.

Additional examples include franchise management, mega event marketing and professional services. Partners that optimize business processes and customer engagement experiences across organizations who share

common business processes and models mitigate the risks associated with an economic downturn in any one defined industry segment. For example, a process manufacturing company focused on the packaging industry (print, fold cut) looks more like a scale printing company than it does a plastics firm that designs and manufactures beverage containers.

A solution specialization, or workload, focus also enables your organization to develop complementary solution elements and IP that strengthen your value proposition, accelerate project delivery, and increase profitability.

[MarginPoint](#), a Microsoft ISV that develops mobile inventory applications, is a great example of this.



## Market Segment

The final specialization option, which casts the widest, net is focusing on a market segment like SMB, or midsize business. SMBs for example typically share similar financial structures (GL, AR, AP) and relatively unsophisticated business processes like invoicing, inventory management, opportunity management and customer service. For clarity, focusing on this segment will require you to pre-configure your solution set to address the core needs of a small, or midsize, business owner, but because of the differences in business processes you will encounter (transportation, retail, professional services, etc.) you'll need to develop an efficient, low-cost delivery team to configure your solution for each client (when required).

# Vertical Industry Opportunities & Case Studies

## The healthcare opportunity

Healthcare is about providing consistent high-quality care to those who need it in a timely fashion. It is about systems that support the wisdom and experience of well-trained practitioners in making better data-driven decisions and taking actions that best support the needs of those they serve. Patients are demanding more control over their healthcare data and to have more insight into their medical histories. Privacy and confidentiality are increasingly critical. The healthcare industry is battling meeting increased demand with escalating costs, labor shortages and the need to innovate. This is an industry fraught with change and disruption and presents a significant opportunity for enterprise resource planning, logistics management, scheduling, process improvements, patient monitoring and data collection, and more.

### HEALTHCARE BUSINESS DRIVERS



### PERSONALIZED PATIENT EXPERIENCES

Silverchain needed a solution to help them provide independent care, dignity and independence to over

94,000 clients through the home hospital service who would otherwise be in hospital. Dynamics365 combined with Field Service was used to provide nurses with real time, secure access to patient data out in the field. Missed visits or failure to take medication at a set time could be instantly flagged and dealt with preventing potential catastrophic consequences. The system has eliminated a clerical data entry role for nurses too, allowing them to be out in the field rather than working behind a desk.

### TURNING CUSTOMER FEEDBACK INTO NEW SERVICE OFFERINGS

BUPA, Australia's largest health insurer, implemented Dynamics 365 Customer Service to replace its inbound call center complaint handling operation with an omni-channel service experience. This has enabled the business to proactively identify both opportunities to improve customer service as well as create new service offerings from the feedback collected through multiple touch point including customer sentiment from social media platforms. This has seen an increase in both customer satisfaction and staff now feeling more empowered and engaged in their jobs.

As partner [Mazik Global identified with Pinnacle Hospital in Crown Point, Indiana](#), scheduling an operation in most hospitals today involves a dozen or more people, takes hours or days, involves a lot of duplicated work, and presents a frightening amount of room for error.

# The financial services opportunity

With the introduction of PayPal, crypto currencies and other technological innovations, the financial services and insurance services industries are being disrupted. Savvy financial institutions are investing in customer relationship management systems to win the hearts and wallets of their customers. Old, outdated legacy ERP systems are holding back their ability to respond to changing customer demands and the needs of their millennial customers. With high customer acquisition costs, dropping margins, and less customer loyalty the financial services industry is a prime target to leverage business applications to gain a competitive sustainable advantage and compact incumbents. Industry leaders are investing in leveraging data, advanced analytics and predictive models to offer better and more personalized products and prices based on customer behaviors and needs.

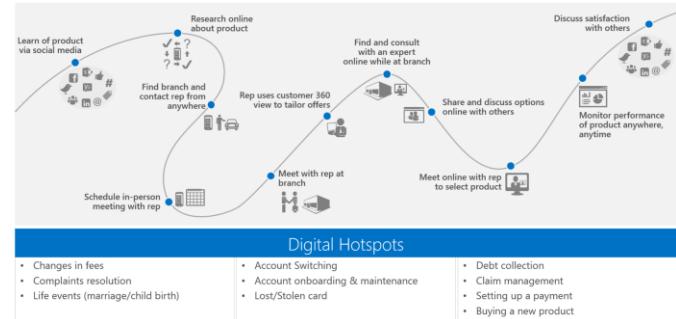
Increased online shopping, travel, fraud, identify theft and more have created fear and opportunities for secure business processes.

Significant opportunities reside in providing financial services organizations with solutions that can help them engage their customers in new, interactive ways, empower their employees to innovate the customer experience, optimize their operations to drive efficiencies across their business and transform their products and services so they become a trusted advisor.

## EMPOWERING EMPLOYEES TO DELIVER ON THE SERVICE PROMISE

As a small fish in a big pond, Beyond Bank has its sights set on market differentiation and growth. As a mutual bank, the focus is always on the needs of customers and the business owners. Staff members were having to sift through 14 or 15 different tabs and screens to identify the information needed to take a single customer call, which created significant inefficiencies in customer service.

## Customer Experience Journey



## IDENTIFYING THE NEXT BEST ACTION FOR THE CUSTOMER

Sentiment analysis can help financial services organizations assess the likelihood of a deal closing or the level of a customer's loyalty.... . Additionally, financial services employees can generate cross-sell and upsell opportunities with a higher likelihood of acceptance, resulting in increased wallet share.

Metro Bank is using Dynamics365 for Customer Service to reinvent the customer experience by eliminating the all-too-familiar pain-points experienced at a bank – the long waits, complex rules, confusing processes, and barrage of marketing offers. They are leveraging this technology to give people what they want, and they're doing it faster, making it easier, and delivering it via the communication channel that's most convenient to the customer. With nearly 100% year-on-year growth, Metro Bank is succeeding – but not by serving customers, by creating "fans."

The bank is now using Dynamics 365 to draw out real-time data from core banking processes and applications and provide a 360-degree view of each customer to its consultants. It is also looking at real-time sentiment analyses of customers across multiple touch points, including social media. Investment in new technology will create value by allowing the bank to know, understand and connect with customers and deliver an exceptional customer experience.

## CUSTOMER CENTRIC BANKING

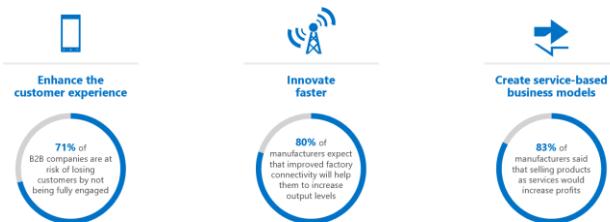
Bank of Ireland needed a solution that could provide a customer centric banking experience and make their bank easier to do business with for their 1.6 million customers. Hitachi used Dynamics365 customer service to deliver an omni channel platform that provides a single customer view across phone, online and branch touchpoints.

Real time information helps guide staff through customer interactions improving the flow of meetings leading to increased sales, revenues as well as higher staff and customer satisfaction scores.



## The manufacturing opportunity

Unlimited computing capacity in the cloud and real-time analytics capabilities enables manufacturers to access new insights and build systems of intelligence like never before. Forward-thinking manufacturers are looking to use these capabilities to optimize their supply chain and production operations, engage their customers in powerful new ways, transform their services and products, and empower their employees through customer insights. Partners should pay attention to the opportunities this creates.



**Predicting maintenance needs** to streamline operations and boost efficiency Sodexo one of the largest facilities management companies worldwide has replaced a series of standalone and siloed computing systems with Azure and Dynamics 365. The integrated cloud-based solution ensures that Sodexo personnel and clients have secure,

anytime, anywhere access to information and real-time decision-making support.

Instead of sending staff out to make routine checks on client assets, personnel are now only deployed when an anomaly is identified or forecasted. Power BI visualizes data pulled from Dynamics365 and IOT sensors. Using predicitive analytics, operational managers can identify a potential leak with for example a water filter. Once captured in Azure IOT hub a work order is created in Dynamics365 and rich data such as time to fix, actual tasks to be done as well as the precise location of the potentially affected pipe is provided. A technician is then dispatched and on completion of the service a follow up survey is sent to the client.

This has allowed Sodexo to pass on savings of between 15-20% to its clients.

**Transforming service delivery.** Innoware helped Metinvest, one of the largest Eastern European producers of Iron Ore raw materials, to 'transform the way they delivered IT' and deliver world class project and account tracking capabilities to service internal line of business manager's needs. The new Dynamics based system equips IT account managers to deliver better services, enhanced collaboration, greater visibility into business processes and excellent project delivery across the business.

**Increasing sales, customer acquisition, retention and service.** Service after the sale and the role that technicians play in bridging the gap between the end customer has become a key differentiator for manufacturing companies. Dynamics365 Field Service is helping NOV identify new sales and commercial opportunities, efficiently plan and resource tasks and enable technicians to execute more effectively out in the field. The Field Service mobile app provides real time data relating to customer's service history, site location, site specific equipment to be worked on, as well as tools needed while the service calendar optimizes technician resource utilization.

Michelin wanted to enable their technicians to provide premium customer service while on-site. Dynamics 365 lets them automate the process from customer to technician, monitoring technician and inventory availability to ensure their time is the most important

thing a company can do to provide good service. By centralizing their data sources, Michelin is able to route technicians efficiently and ensure that they arrive to customers when promised and with the correct tools to get the job done on-site.

HP Inc. handles more than 600 million technical support contacts each year, to improve both self-service and contact center support delivery, HP built a virtual agent using the Microsoft Dynamics 365 AI solution for customer service. Customers can now interact conversationally with the assistant to solve common problems, support staff use the Microsoft AI solution for instant access to a wealth of troubleshooting information, and the company gains deeper insights into common customer issues.

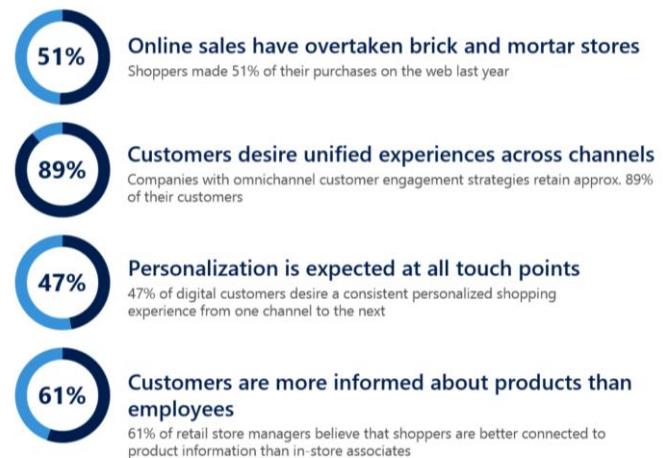
#### **Increased design and engineering productivity.**

Siemens technicians are now able to remotely service long haul trucks using a mixed reality solution that combines capabilities of Dynamics365 for Field Service and HoloLens. Service check lists, repair diagrams as well as the ability to remotely consult with HQ based experts are just some of the tasks which can be completed with hands free efficiency. This leads to faster completion of maintenance jobs, less human errors and the immediate recording of service reports in Dynamics 365 for Field Service.

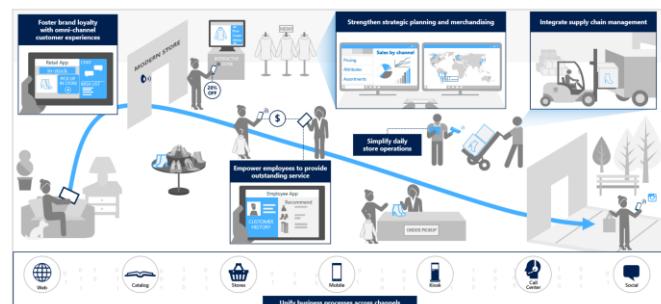
## The retail opportunity

In the modern retail environment, consumers are well-informed and expect intuitive, engaging, and informative experiences when they shop. Retailers need solutions that can help them delight their customers with personalized experiences, empower their workforce to provide differentiated customer experiences, optimize their supply chain with intelligent operations, and transform their products and services. All of these are opportunities for partners to bring business solutions.

### THE PRESSURE ON RETAIL LEADERS IS GROWING



### DELIVERING THE MODERN RETAIL EXPERIENCE



There are a large number of problem scenarios covering a variety of stakeholders that partners can solve with innovative solutions:

- **CMOs** need analytic tools to provide personalized, seamless experiences across channels – whether customers are in the store, online, on mobile or social, or browsing a catalog.

- **VPs of Stores** need to arm employees with up-to-date customer info and business intelligence in order to facilitate outstanding service
- **Store Managers** want to make it easier for in-store teams to accomplish daily tasks. In an industry with higher than average employee turnover, retailers
- **COOs** need to keep the lights on by meeting demand on all channels, managing inventory efficiently, and preventing out of stocks

## EXCEPTIONAL CUSTOMER SERVICE

Today's retail customers want rapid service and access to personalized information and service. Thanks to Retail37 a scalable and agile customer experience platform built on Dynamics365 for Operations, Michael Hill Jeweler can now maintain its personal touch while freeing front line staff from mundane tasks and admin across its 350 retail stores.

Driven by an insights engine using the POS feature of Dynamics365 for Operations running on Azure, the "clientelling" solution delivers employees with deeper customer insights as well as tools and back end systems that inject efficiency. This has enabled relevant, faster and more effective customer-staff interactions that are critical for high ticket, life event-based purchases.

The platform is core to realizing Michael Hill's international expansion plans and future e-retailing and e-marketing strategy.

## IMMERSIVE SHOPPING EXPERIENCES

Macy's recognizes that shoppers are increasingly turning to online and mobile channels to browse for merchandise

need to give employees tools that make their jobs easier

- **Merchandising Directors** need to keep up with rapidly changing customer preferences. Retailers have large volumes of data about customer behavior and product performance, but they don't necessarily have the right tools to act on that data.
- Finally, **CIOs** need an easier way to measure business performance across all channels and gain a holistic understanding of channel performance and customer activity.

and make purchases. To optimize the shopping experience, Macy's enhanced its website with a virtual agent based on the Microsoft Dynamics 365 AI solution for customer service. With deep connections to back-end systems, the virtual agent can take action to solve customer issues and transfer customers seamlessly to a live agent if necessary. The virtual agent is already answering more than one quarter of customer queries and Macy's plans to expand it to additional shopping channels.

Within just a month of being deployed, the virtual agent is already answering more than one quarter of customer inquiries in its current implementation, freeing up call center agents to handle more difficult questions

## PERSONALIZED SALES AND MARKETING

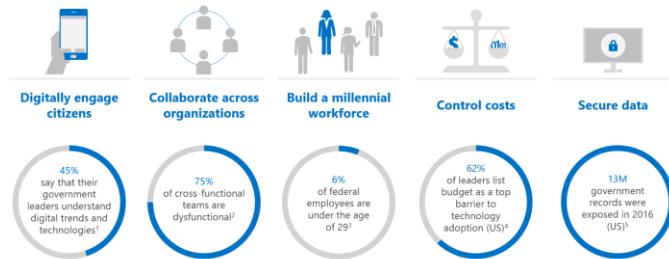
Successful Ukrainian retailer MOYO is gaining even more market traction via a new Customer Relationship Management (CRM) platform built on Microsoft Dynamics 365 and Azure. The solution, provided by trusted Microsoft partner E-consulting, has deepened customer loyalty and raised MOYO's brand appeal by making possible highly-targeted and relevant marketing and sales promotion campaigns, leading to increased sales and better employee engagement.

## The public sector opportunity

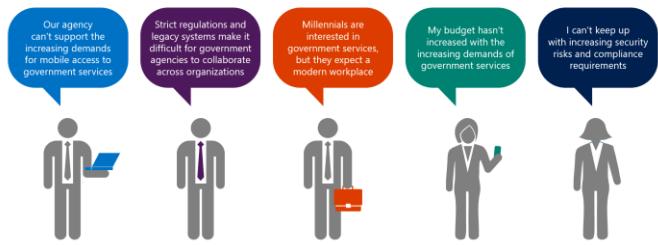
Governments are under pressure to keep up with things like digitally engaging citizens, collaborating across organizations, building a millennial workforce, and controlling costs.

Worryingly while there are now more mobile devices than there are people on this planet and virtually everyone, everywhere has mobile access to the Internet, social media and the masses of data behind them only 45% (of citizens) say that their government leaders understand digital trends and technologies.

Government organizations are under pressure



Meeting today's demands is a challenge



## BUILD CITIZEN TRUST WITH SUPERIOR CUSTOMER SERVICE

Mecklenburg County North Carolina has a population of over a million people and 6,500 employees and contractors hired to serve them. To enable their vision to be the "best local government services provider in the world," they implemented technology that provides them a 360-degree view of their citizens to enable better, more data-driven decisions on their behalf.

For instance, 20% of their citizens receive some sort of government assistance, and this visibility allows them to deliver this assistance in the right way at the right time in the right place.

### OPTIMIZING LONG TERM PLANNING AND CONTROL COSTS

King County, Washington, is committed to changing the traditional view from notoriously bureaucratic and unresponsive to offering residents the "best-run government" with every interaction.

The agency implemented Microsoft Dynamics 365 as a rapid application development engine to re-platform these legacy applications and create new information systems. Their new Public Record Request tracking system has helped them remain compliant with state-mandated deadlines, reduces risk, helps improve customer service.

### GIVING CITIZENS SECURE, EASY WAYS TO CONNECT

The US City of Grand Rapids, Michigan, created a convenient, efficient, and scalable solution to provide excellent customer service to citizens. Their customer service center, known as Grand Rapids 311, is a single point of contact for non-emergency services – citizens can access it in person, online, by phone, or via mobile app. Built using Microsoft Dynamics CRM, one of the benefits from the new processes and tools was they were able to bring their average speed to answer down from 6 minutes to 22 seconds, with 85% of customer questions answered with a single call.

### DIGITALLY ENGAGE CITIZENS

The city of Tel Aviv has undergone a transformation to become a "smart city" that uses technology to improve the operation of city government and the lives of its citizens. With programs such as the DigiTel Residents Club and the DigiTel mobile app, Tel Aviv is offering innovative electronic services to the public and finding ways to make citizens into stakeholders in the running of the city. Throughout the process, Tel Aviv has worked together with Microsoft to find the best ways to realize its smart city vision.

# Identify Customer Trigger Events

Business leaders do not window shop for new technology solutions. While most could benefit from improved business processes and more automation, few will proactively initiate, augment, upgrade, or replace their unified operations, opportunity management, customer experience, or talent systems without a significant business reason. Changing business systems can be difficult, expensive and risky, so most business leaders will only act when there is a compelling and measurable benefit to doing so, or a significant business risk to be mitigated.

Most organizations will develop workarounds to functionality or capability gaps in their business applications. But at some point, these stop-gap, often manual, processes will fail. The organization will experience a material impact that forces leadership to upgrade or replace their existing systems. These moments of truth, "trigger events" are specific business events that clearly demonstrate (often painfully) that an organization can no longer rely upon its existing business technology infrastructure and meet its business objectives.

The easiest and most effective way to engage prospects is to identify the trigger events in your target vertical/industry that compel its business leaders to make changes, as well as the underlying business processes that are impacted.

To quote Steve Jobs: "You've got to start with the experience and work back towards the technology, not the other way around."

Ground your solution design journey in an industry rather than a technology or product perspective.

For clarity, trigger events are not pedestrian, common business challenges. While they present themselves in many forms, each inevitably fall into one of the four "change driver" buckets: growth, fear, risk or control.

Some examples include:

**Growth:** merger or acquisition; large/complex new project; new business model

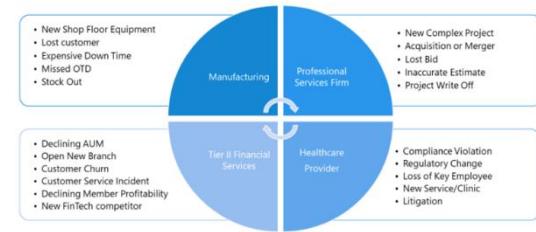
**Fear:** loss of a key customer; significant inventory write-off, lost a strategic bid; signed a bad/high risk contract, project overrun or missed milestone; project write-off, key metric violation (utilization < 70%)

**Risk:** System failure/obsolescence; compliance violation; litigation, regulatory change

**Control:** Poor decision (due to bad data); change in leadership,

While some trigger events span across multiple industries, many will be industry specific, as shown in the figure below:

## Trigger Events



Understanding the business trigger events that will occur most often in your target market is critical to designing a differentiating and impactful business solution. While not all trigger events will, or can, be fully addressed with new technology, the majority are often rooted in a business process breakdowns or system limitation that inhibits the organization's ability to generate revenue and/or profit.

Partner organizations that truly understand the root causes and trigger events that lead to business change and investment will be able to develop solution offerings, marketing messages and sales motions that truly resonate with their buyers.

# Leverage the Microsoft Cloud

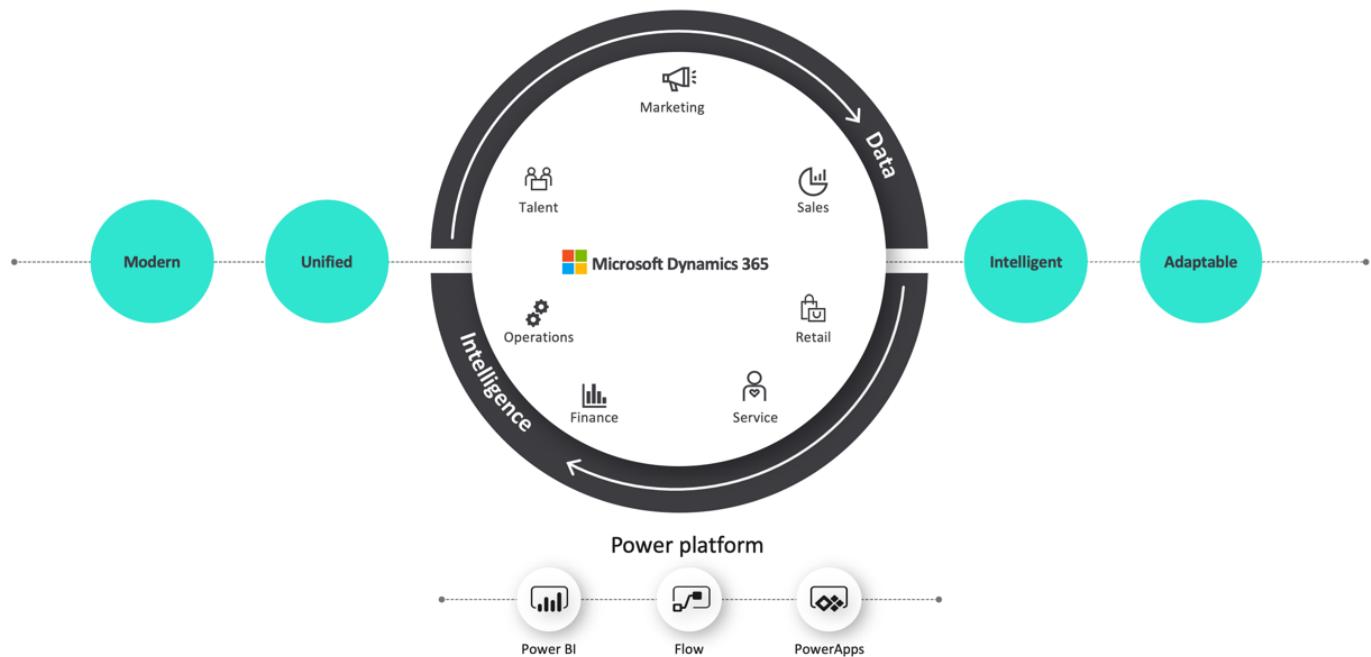
"Digital transformation requires systems of intelligence that are tailored to each industry, each company, each micro-task performed by each person. Systems that can learn, expand and evolve with agility as the world and business changes." Satya Nadella, CEO Microsoft

Cloud Business Applications from Microsoft give you the power, autonomy, flexibility, and agility to respond to your customer demands for adaptable, scalable solutions that can truly transform their business processes. With Dynamics 365, Microsoft has removed the complexity of disparate CRM and ERP systems by creating modern, modular business applications that work together on a single platform, giving customer organizations the flexibility to adopt technology when they need it to improve business outcomes. Sales, service, talent,

operations, or financial workloads can be bundled or offered a-la-carte, so you can easily align your offering to the needs of your customer.

Dynamics 365 Cloud Business Applications are connected by Microsoft's Common Data Model (CDM) which allows for simpler integrations, cross-platform BI and workflows, easier purpose-built application builds, and a robust marketplace and ecosystem. Partners, businesses, developers and end users will all be able to build industry specific apps directly from the CDM.

## Microsoft Business Applications ecosystem



## Why Microsoft?

Dynamics 365 offers your practice valuable solution differentiation that is meaningful to your target market and includes:

- **Integration with existing Microsoft Cloud applications:** Makes it easier to enter new markets using Microsoft development and management tools that you and your customers already know – including products in the Microsoft Business Applications ecosystem, Office, Cortana, Azure, and more.
- **Extensibility:** Modular, highly customizable apps built on a unified platform of common data services, AI, and business intelligence help you differentiate your offerings and allows for multiple entry points without requiring your client to fully replace existing systems. Additionally, the breadth and flexibility of the Microsoft platform – spanning workplace productivity and business intelligence solutions as well as IoT, AI, data and cloud platforms, enables them to address complex, customized business scenarios better than off-the-shelf applications.
- **Increased revenue opportunity:** Such flexible and customizable offerings can translate to higher customer satisfaction and a “stickier” solution that offers the potential of a longer-term relationship with the customer. It also means a broader range of revenue opportunities in deployment services, custom IP development, and managed services than a practice focused on deploying off-the-shelf solutions typically provides
- **Power of the Microsoft cloud:** The industry’s most trusted cloud, with more than 70 security compliance certifications, and more regions than any other cloud provider.

## Microsoft Dynamics 365 Business Applications Summary

<b>Dynamics 365 Business Central</b>	Take your SMB clients beyond the basics of accounting software with an all-in-one, easy-to-use business management solution that helps connect their business and enables smarter decision-making.
<b>Dynamics 365 for Customer Service</b>	Help your clients earn customers for life with built-in intelligence that delivers faster, more personalized service and adds value to every interaction across all channels.
<b>Dynamics 365 for Field Service</b>	Empower your clients to deliver seamless, end-to-end service experiences. Use built-in intelligence to resolve service issues before they occur, reduce operational costs, and deliver positive on-site experiences.
<b>Dynamics 365 for Finance and Operations</b>	Enable clients to adapt quickly to changing market demands and drive business growth by unifying global financials and operations for faster, more informed decisions.
<b>Dynamics 365 for Marketing</b>	Transform the way clients find and nurture more sales-ready leads by moving beyond basic email marketing. Connect sales and marketing, automate processes, and make smarter decisions to maximize their marketing ROI.
<b>Dynamics 365 for Retail</b>	Empower retail clients to create exceptional, insightful shopping experiences with unified digital, in-store, and back office operations that personalize customer engagement and increase employee productivity.
<b>Dynamics 365 for Sales</b>	Move clients beyond sales force automation (SFA) to better understand customer needs, engage more effectively, and win more deals.
<b>Dynamics 365 for Talent</b>	Give HR teams and people managers the tools they need to land, develop, and retain top candidates.
<b>Microsoft Power Platform</b>	Empower customers to build innovative and visually stunning apps that drive business results using one connected app platform.

# Determine Your Business Model

With an understanding of the Microsoft business applications market opportunity combined with how your vertical approach can be leveraged using the Microsoft platform, you must now define your core business model. This will be the underlying foundation that drives all your decisions and investments moving forward. It is important to understand that not all revenue streams are equal.

## THERE ARE FOUR WAYS TO MAKE MONEY

### SELLING CLOUD:

- Resale
- Project Services
- Managed Services
- Packaged IP

## Core Revenue Model

Microsoft partners that focus primarily on reselling business applications typically see margins in the 5–20% range (and dropping). With little to differentiate one vendor from the next, customer will inevitably select the cheapest option, resulting in unsustainable margins.

System Integrators, who focus primarily on project services, typically drive gross service margins of approximately 35%. That said, there is growing downward pressure on rates associated with undifferentiated service delivery capabilities. Traditional customization, configuration, data migration, integrational, and other deployment related project services are becoming

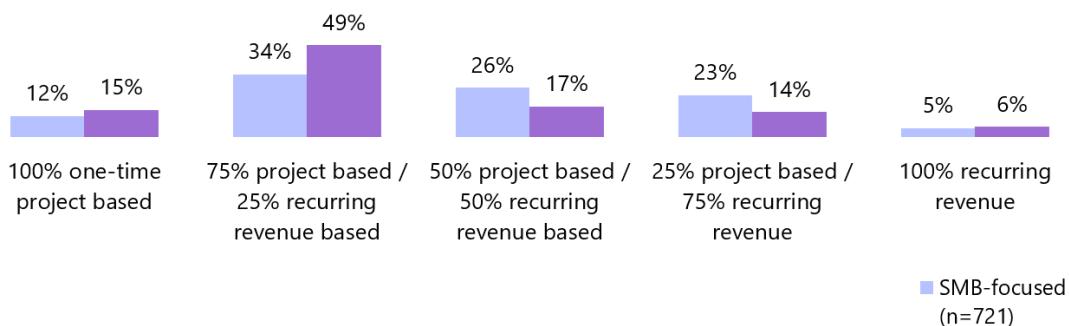
increasingly commoditized. This has caused billable price points to hold steady over the past several years, while increasing salary and benefit costs of consultants and inflation are increasing, which has chipped away at profitability.

As a result, forward thinking partners are developing and selling higher-margin managed services opportunities, which typically generate gross margins in the 40%–45% range

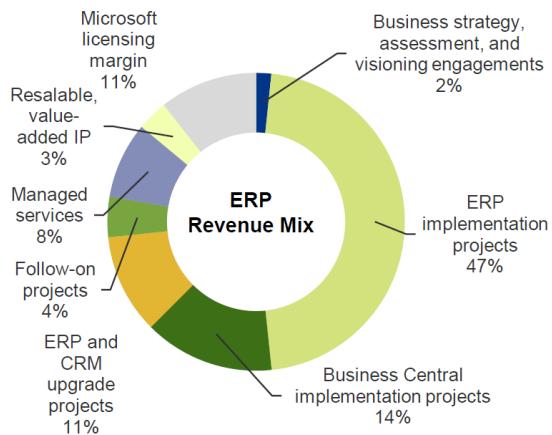
The most profitable, and often most successful partners are increasingly monetizing their domain expertise and industry experience in the form of packaged IP, which drives the highest gross margins, often exceeding 70%.

Microsoft partners are also racing to shift their business models from an on-premise, lumpy, perpetual license revenue model to a more predictable, recurring cloud license revenue model. Some are also shifting their one-time, project services approach to a value-add, recurring services model. Currently, over 30% of Microsoft partners see 25% of their revenue coming from recurring rather than one-time, project-based services. Both these shifts contribute to healthy, predictable revenue growth and increased business valuations.

**Business Application Revenue Distribution in Past Year**



## ERP Practice Economics



## CRM Practice Economics



## Transforming your business to the cloud

Moving from an on-premise to a cloud-based business practice requires change, and investments, to develop new technical skills, competencies, resources and solutions. The good news is that over 70% of Dynamics 365 partners surveyed indicated that it took them less than 2 years to reach profitability within their new cloud practice, which is quicker than many other partner profiles.

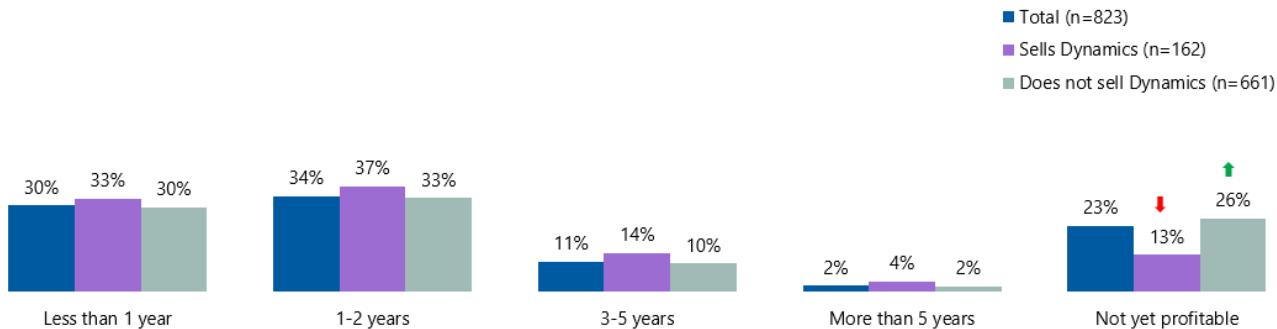
It should be noted that if you are currently selling on-premises solutions or in the early stages of migrating to a software as a services (SaaS) revenue model, you will likely

experience a decrease in overall license revenue as your up-front perpetual licenses shift to recurring subscription.

45% of partners selling the Dynamics 365 product line who have completed their transition to a SaaS model have seen their revenue return to their pre-SaaS revenue levels within 24 months or less. More importantly, over 60% of surveyed partners saw an accompanying increase in services revenue.

50% of partners who have completed the transition also reported experiencing a 5%-50% increase in the number of licenses sold per customer following their shift to the cloud.

**Duration Until Profitability Reached on Newly Added Cloud Practice**



# Define your Practice Starting Point

In the early days of your Microsoft Dynamics 365 practice, you may not have all the skills and knowledge required to develop your own Intellectual Property or to pre-configure a comprehensive industry solution. To overcome this challenge, the easiest, and most efficient approach is to leverage Microsoft's out-of-the-box, industry-specific offerings. As you will have limited industry experience, your value proposition will likely be anchored in low-risk, relatively quick project implementations with accelerated value realization.

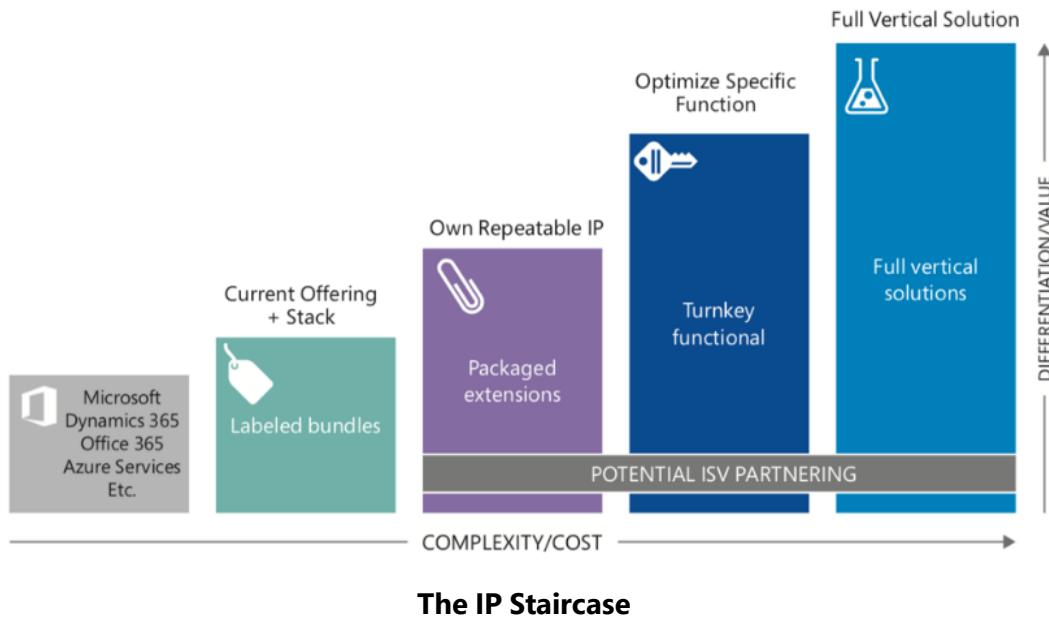
The next step in the journey is to focus your marketing efforts on one or more of your target industries to begin attracting prospects with similar needs. This can be achieved by developing industry, vertical, or workload-specific landing pages that speak to common business challenges and pains.

After deploying a handful of relatively simple projects to very similar customers, your team will quickly understand the common needs, challenges, and business processes of your chosen specialization. Domain expertise grows as you add more customers, which provides the insights

required to determine how to leverage key learnings to develop your own "light" IP (dashboards, integrations, workflows, etc.).

Most partners report that it takes approximately twelve months to build a new Dynamics 365 practice. The most challenging aspect of building a new business applications practice is learning your prospects' primary business and project drivers, as well as their underlying core business processes. The partners interviewed for this playbook highly recommend recruiting individuals from within your target industry or vertical, who already possess the domain expertise and understanding of the business processes, workflows, challenges, needs, and industry trends. This strategy has proven very effective in securing initial customers and managing risk during early projects.

The IP Staircase (described in more detail below) demonstrates the five potential starting points for your business application practice. For clarity, each of these options drives a corresponding business model, the requirements of which will materially impact your staffing requirements, certifications and solution offerings.



## RESELLING MICROSOFT DYNAMICS 365

Building a horizontal, undifferentiated Microsoft Dynamics 365 practice based on license resale is not a viable business model. Without a clear value proposition anchored in domain knowledge and business value, marketing content will not resonate with prospects, sales presentations will miss their mark and project estimates will be either too high, or unrealistic. Selling everything to everybody results in limited lead flow, extremely low win-rates and high project write-offs. When it comes to business applications, the day of the generalist has passed.

### LABELLED BUNDLES

Partners who pursue a labelled bundle business strategy are committed to a defined customer segment (industry/ vertical or workload). They've developed online messaging, marketing assets, and sales tools that clearly demonstrate a solid understanding of their key focus area. Partners offering labeled bundles often source and support incremental industry/vertical ISV products to augment and complement their core Microsoft Dynamics 365 offer. However, they have not committed the time, energy, and resources to integrate all the individual solution elements. This is instead repeated with each new project. Focusing on a defined market segment will drive greater lead flow, higher conversion rates, and ultimately a higher win rate. The overall project revenue will have a broader licensing footprint and will often (but not always) drive significant project services.

### PACKAGED EXTENSIONS

Partners taking a packaged extension approach must invest in the technical resources required to develop their own (re-sellable) IP. Packed extension partners create integrations between each of the commercial cloud applications as well as build out simple, re-usable IP elements like reports, workflows, standardized charts of accounts, and integration templates. These partners are clearly focused on a defined market and have substantially configured their Microsoft Dynamics 365 cloud solution to address well-defined business challenges. This approach drives some high-margin IP revenue, with fewer project services (because of the pre-configuration), and a strong potential for creative, managed services. It often requires some form of product management and light product marketing.

### TURNKEY FUNCTIONAL INFRASTRUCTURE

Moving from packaged extensions to turnkey functional infrastructure is a significant leap. It involves a deep commitment to developing cross-industry workload functionality, and/or a deep investment in one or more third-party ISV cloud solution. Examples include proposal management, real-time remote asset monitoring and management, call center optimization, field force automation, and predictive maintenance, distribution, supply chain optimization, and human capital management. Pre-configured functionality cannibalizes some project services, but opens opportunities for more business-focused, higher-margin managed services. Overall project profitability increases due to broader cloud licensing and higher IP gross margins.

### FULL VERTICAL SOLUTIONS & SPECIALIZATION

The most mature partners in the business applications ecosystem have acquired highly specialized, deep industry knowledge and expertise. They are experts in their target industry, can challenge prospects during the buying cycle, and have a long list of credible, referenceable customers that lend social proof to their reputations. They offer feature-rich, industry-specific business solutions that integrate with other systems and leverage ISV solutions or their own IP to fill gaps or immediately satisfy prospect requirements. Most importantly, these partners can confidently communicate and deliver measurable performance outcomes and business impacts. Partners at this level of maturity possess technical sophistication as well as deep industry domain expertise. While still generating a healthy volume of project services, most of their revenue derives from cloud service licensing (software) and value-added managed services.

# Define Your Solution Offer

## Build, Buy, or Both?

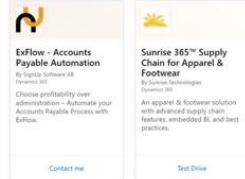
After landing on a desired IP staircase option, one of your first and most important decisions is choosing whether to build or buy key components of the solution you will bring to market.

Building your offering with Microsoft's pre-configured business applications (Labelled Bundles) is an effective and relatively low risk strategy for quickly launching your new practice if you have limited experience business applications experience.

As your practice grows and matures, you can then leverage some of the industry, vertical and workload-specific ISV solutions available on AppSource and the Azure Marketplace to offer a broader and deeper solution set. There are thousands of them. Leveraging these ISV

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offerings enables you to further develop your domain knowledge, deepen your understanding of your target customers' business processes and bring a differentiated solution to market.

Customers will inevitably ask you to extend the Dynamics 365 out-of-the-box capabilities and integrate into other strategic business applications and tools. When this occurs (rest assured it will), you will have to choose between developing custom functionality for your client, leveraging purpose-built ISV solutions created by a Microsoft partners, or develop your own repeatable IP. While custom development will increase the project scope and services revenue, you do not want to lose one of your early opportunities to a competitor due to a high estimate. Partners are increasingly forming P2P (partner to partner) agreements to work on complex customer implementations in order to compete against rivals offering more complete industry solutions.

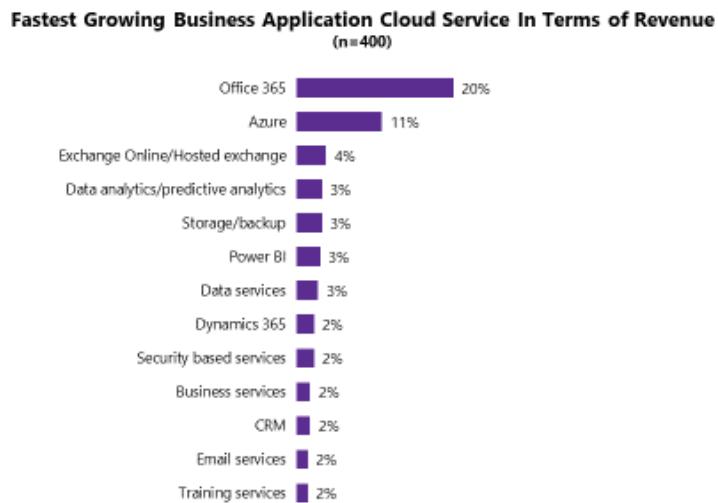
With multiple implementations and successful engagements in your focused vertical, you may choose to develop your own intellectual property (IP), which could be comprised of customized templates, extensions, or value-add business applications. If you go that direction, you may need resources to build your own proprietary solution to extend functionality to your offering.

## Leverage your existing capabilities

Regardless of the Microsoft Dynamics 365 product family you choose to build your initial business applications practice on, you will need to consider all the relevant business processes within an industry or workload to determine which ones will be addressed by the scope of your practice. If you have an existing Microsoft practice, leverage your current capabilities (and industry clusters) to find the intersection between your strengths, capabilities annex experience and the Dynamics 365

opportunity. For example, if you are an MSP focused primarily on Office 365, the logical Dynamics business practice may be Talent, Sales, or even Business Central. Given the tight integration between Dynamics 365 Business Central and Office 365 (customer data, invoices, SMB target customer profile, etc.), many of your existing clients may immediately benefit from a more fully integrated ERP solution.

In terms of revenue, Office 365 is considered the fastest growing new cloud service in business application practice



13 C20 In your business application practice, which new cloud services are growing the fastest in terms of revenue?

## Start with a low risk “extension” approach

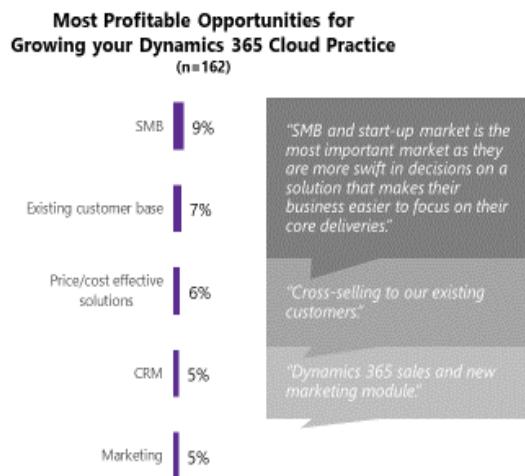
Most early cloud adopters were small or mid-size businesses, primarily because SaaS solutions were relatively low risk, easy to consume and purpose-built to optimize specific business processes, like opportunity management, invoicing and basic accounting. Basically, easy applications that deliver immediate business value that are easy to adopt/deploy.

SaaS allowed smaller organizations to take advantage of significant license and maintenance savings and avoid purchasing their own infrastructure. If SaaS customers discovered the solutions did not work as expected, they simply defaulted back to their old software procurement model or switched to another SaaS vendor. As a result, moving to the cloud was easier, quicker and less

complicated for small or medium sized businesses than it was for large enterprises with complex infrastructures, huge quantities of data, and significant investments in customized legacy applications. For clarity, this does not mean SMB is the only or best market segment to launch a new Dynamics 365 business applications practice, only that it has a lower risk profile. Focusing solely on the SMB community also has some inherent risks to consider, such as:

- Smaller average deal size
- Limited project services
- Higher customer churn rate
- Potentially lower utilization rates.
- More competitors

SMB, existing customers, and marketing related activities are the top suggestions to grow a Dynamics 365 practice



# Project Services Considerations

A Dynamics 365 project delivery team has four core responsibilities: define the project vision and scope, deliver the project, build on the core and identify IP development opportunities.

## Vision & Scope Definition (Planning)

Far too often, business application partners jump right into projects without truly understanding their client's business priorities, challenges and underlying systems. To reduce the risk of missing the mark (project write-offs, client conflict, etc.) it is critical that you develop a small inventory of packaged consulting engagements that are delivered either during the sales cycle or as the first step of the project engagement.

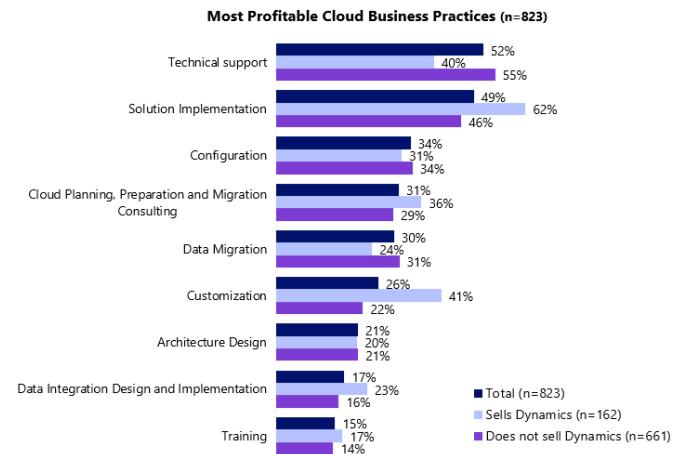
These packaged offerings take many forms. They include business impact assessments, cloud strategy workshops, scope clarification session, envisioning workshops, Cloud readiness assessments, change management risk assessments, etc. Condensed, accelerated business consulting engagements serve as a safe entry point for partners looking to establish strong business relationships, reduce project risk (for both the customer and the partner). They also serve to accelerate the understanding of a target market. These projects result in clearly defined, phased road maps for the balance of the larger initiative. For clarity, you should define and develop these "wedge" offerings irrespective of your anticipated average deal size and scope.

## Project Delivery (Enablement)

Successful business strategy, assessment, and visioning projects almost always convert into much larger implementation and system integration projects. Implementation projects encompass both technical consulting — including data, security, development, configuration, and system integration work — and business consulting — including business process reengineering, training, and change management. Based on a recent Forrester study of Microsoft Dynamics 365 system integrators, ERP and CRM implementation projects collectively bring in 46% of the composite partner's gross profit.

The top five most profitable services reported by Dynamics 365 partners surveyed are:

- **Solution Implementation:** 62%
- **Customization:** 41%
- **Technical Support:** 40%
- **Cloud Planning, Preparation and Migration** 36%
- **Consulting:** 36%
- **Configuration:** 31%



## Build on the Core (Enablement)

The Microsoft business applications business opportunity for partners goes well beyond implementation services. Follow-on, or next-phase, project work will provide incremental projects services opportunities anchored in business intelligence, reporting, training, and business process change. Phase II projects are discussed toward the end of the initial implementation when you take what was learned in phase I to make recommendations on how to further modernize and transform antiquated business workflows, or solve additional business challenges, with automation or incremental Microsoft cloud (or ISV) solutions. Forrester found follow-on project rates were as high as 75% for some partners, with most partners averaging at least 40% to 50%.

## Identify IP Development Opportunities

As your project delivery team refines and deepens its understanding of your target market's needs, pain points, systems, cloud migration challenges, integration scenarios, strategic business processes, and key operating metrics, they will inevitably identify opportunities to develop reusable code, or develop incremental functionality that can then be resold to other clients.



### PLANNING

- Help your customer envision scenarios that drive measurable and impactful positive outcomes.
- Identify the “low-hanging fruit” opportunities that can be used to build confidence in your capabilities, services and the solution.
- Build a roadmap that outlines a path from the success of smaller, low risk, near term projects to larger initiatives that deliver greater value.



### ENABLEMENT

- Design and implement your initial business application solution with a lighthouse customer.
- Engage the domain expertise of the customer throughout the process to capture insights and validate solution/offer design assumptions.



### SUPPORT OPERATIONS

- Offer incremental support (proactive vs. reactive) while delivering on SLAs and uptime guarantees.
- Operate, optimize the client solution.
- Monitor application performance measurable customer impacts and benefits.

# Managed Services Considerations

Managed services enable your organization to engage with your customers on a regular basis by offering white-glove services wrapped around business application solutions. Managed services offerings should consider optimization, planning and enablement, as well as day-to-day operations and support.

Managed services have been delivered to medium and large enterprises for over 20 years, with many MSPs managing their client's IT assets on their behalf. Service providers have been managing their customers' workloads — either in their own data centers or those operated by their customers for decades. With business applications, managed service requirements create opportunities for partners to build new lines of business by providing a white glove support experience for their clients regardless of whether the business application solution is running on-premise, in the cloud or in a hybrid scenario.

Business applications managed service offerings typically include the following

**User Support:** Provide support for frequently asked questions, setup and usage, best practices, questions around billing and invoicing, and break-fix support.

**System Support:** Provide customers with information on service interruptions, and relay expectations on when the system will be back.

**Product Support:** Provide support when the Microsoft Dynamics product is not working as expected, or when the cloud service stops working. Escalation to Microsoft if/when the issue cannot be resolved with existing documentation and/or training.

That said, most partners are now evolving their business models focused on traditional support and maintenance agreements to include more robust managed services, including application and incident management, managed update services, security management, and ongoing development and system integration support, which provide lucrative recurring revenue streams.

Interviewed Microsoft Dynamics 365 partners are experiencing average managed services attach rates of 50% (Forrester, 2019).

Customers need to continually assess and optimize solutions based on:

- actual adoption and usage patterns
- actual business results compared to plan
- effectiveness of training approaches and tools for existing and future employees
- keeping up with the customer's evolving business processes
- understanding opportunities and impact of future Microsoft and ISV updates

Managed services can be offered as extensions of a partner's change management engagements or through customer success managers. They also provide your

	Total (n=823)	Sell Dynamics (n=162)	Does Not Sell Dynamics (n=661)
<b>1<sup>st</sup></b>	<b>Customer/Application Support and Troubleshooting</b>	40%	43%
<b>2<sup>nd</sup></b>	<b>Business Intelligence and Data Analytics as a Service</b>	33%	<b>47%</b>
<b>3<sup>rd</sup></b>	<b>Domain/Industry Specific Services</b>	26%	28%
	Visualizations, Dashboards, and Reports Creation/Maintenance	24%	28%
	Performance Monitoring and Optimization	22%	15%
	Hosting	20%	10%
	Assessment and Planning	19%	21%
	Predictive Analytics and Monitoring	16%	17%
	Digital Marketing and E-Commerce	12%	15%
	Tuning and Re-Training	11%	11%

organization with an alternative to selling reactive issue resolution services and time and materials (T&M) projects. They can also be designed around proactive activities like customer success, change management, and ongoing business advisory services where you help customers accelerate value on an ongoing basis. The people and process parts of digital transformations aren't one-time occurrences.

## Managed services drive recurring revenue

No matter how well you plan, provision, operate, and monitor your cloud or hybrid business applications solution, problems will inevitably arise while you build out your domain and technical knowledge (and afterwards). Few customers have the time, resources, or the capabilities and staff required to monitor every aspect of their solution and deployment.

Customers are increasingly searching for, and demanding, additional strategic support services that are consumed on subscription basis. They want to ensure their business application solutions will continue to deliver the value and performance that compelled them to implement them in the first place.

Consider the research findings from a recent global survey of Dynamics 365 partners (see results in the table below), which calls out specific opportunities to expand beyond traditional reactive recurring services offerings.

**BI and Analytics as a service:** If your organization has the in-house talent to deliver advanced analytics solutions (e.g., using business application and PowerBI to drive business insights), a strong, profitable long-term partnership could be in the making – either by providing access to your experts through a managed service or through a packaged IP solution offered via subscription.

**Visualizations, dashboarding, report creation and maintenance:** Without being able to concretely demonstrate and defend the value that your solution delivers on an on-going basis, it can be difficult for customers to justify their commitment to ongoing license and managed services subscriptions. It is critical to consistently remind them of the value you and the

applications are delivering and the most effective is with business focused visualizations, dashboards and reports. Additionally, once your business application solution is embedded in your customer's routine, they will be able to identify new visualizations, dashboards, and reports because your service offering will enable and encourage them to ask new questions. Properly positioned and implemented, this approach becomes a predictable and rhythmic cycle that continuously optimizes the decision-making tools.

**Assessment and planning:** Developing industry or vertical assessment solutions (often packaged services) is an excellent mechanism for project services partners to leverage their business and planning competencies into an ongoing revenue stream. As customers expand the use and scope of their Dynamics 365 solutions, they will increasingly need a trusted advisor who assists with tasks such as application and business audits, identification of sub-optimal business application performance, business process improvement and optimization assessments. Customers will also need help, developing industry best practices related to business processes, data collection and protections as well as aligning business objectives to technology infrastructure capabilities.

## Defining your Model

The Microsoft Cloud Solution Provider (CSP) program enables partners to directly manage their entire Microsoft cloud customer lifecycle.

Partners in the CSP program utilize in-product tools to directly provision, manage, and support their customer subscriptions. Partners can easily package their own tools, products, and services, and combine them into one monthly or annual customer bill.



### CSP DIRECT

The CSP Direct model is great for partners who have the infrastructure in place to do it all. If your business meets these requirements and you are ready to go, [enroll today](#).

### CSP DIRECT REQUIREMENT CHECKLIST

- Services business model
- Customer support infrastructure
- Customer billing and invoicing capabilities
- Ability to scale

### KEY SERVICES FOR THIS OFFERING

- You are the first point of contact for your customers' needs.
- You own and control the billing cycle.
- You sell integrated offers and services — one sales motion to drive services, attach, and upsell.
- You receive in-product tools to directly provision, manage, and support your customers.

### CSP INDIRECT

Spend more time with your customers and provide specialized service offerings. If you're not interested in building an infrastructure to provide customer support and billing, [get connected with an Indirect Provider](#).

# Intellectual Property Considerations

Developing intellectual property (IP) is not as risky, expensive, or challenging as you may think.

Developing resalable, packaged IP to complement or accelerate your Microsoft Business Applications service offerings is the most effective way to increase margins and win more deals. Focusing on a specific industry vertical or line of business allows you build on top of the core Microsoft Dynamics 365 solution set. Actual partner examples include a revenue recognition module for Microsoft Dynamics 365 for Finance and Operations, a data warehouse solution for Unified Operations or a supply chain solution for the life sciences industry.

Mature Dynamics 365 partners often achieve gross margins in excess of 70% by productizing IP and selling it to their customers on a recurring revenue basis.

Alternatively, you can develop IP that accelerates the deployment process with data migration and project management tools that can be packaged with implementation projects. More importantly, resalable IP brings relatively high gross profit margins

Most partners have more IP than they realize. They simply haven't "packaged" or sold it to customers in a repeatable way. Eventually, all partners will successfully provide some form of custom development to their clients that addresses meaningful business challenges and delivers measurable, positive impact. There are often many more customers (and prospects) who would benefit from the same functionality, solution, or insights.

8% of surveyed Dynamics 365 partners consistently develop value-added products and IP on an ongoing basis. An additional 35% are actively working on doing so. 33% have no intention of developing their own IP and will continue to focus their efforts on reselling core Microsoft Dynamics 365 products and delivering project services.

In addition to driving higher gross margins, productizing IP helps create stickiness with customers and opens opportunities to sell your own IP solutions through the global Dynamics partner channel. If your organization does not have the desire or capability to define, develop and market its own IP, you can still search the partner

ecosystem for incremental solutions that can be bundled with the core Dynamics 365 offerings to round out your total solution.

## CONDUCT AN IP AUDIT

The first step in determining your IP strategy is to facilitate an IP audit. Ask yourself the following questions:

- What are you exceptionally good at doing? (reporting, data transformation, integration, business process monitoring, business process optimization, data visualization, etc.).
- What aspect of your focus industry/domain do you know better than any of your competitors?
- What do you find easy to do today, after many years of figuring it out?
- What are the "difficult" or challenging tasks customers are surprised you can do for them?
- What was the biggest customer challenge that you had to solve?
- What tools, apps, processes, or integrations have you built to streamline and accelerate your deployments?
- What custom development, or projects, have you been asked to do by multiple customers?
- What could you package up and sell to multiple customers?
- What services (project or managed) do your customers repeatedly ask for?

IP can be limited to a simple template, PowerBI dashboard, or report. It could be confined to few lines of code that automate a critical business process, workflow, or function.

## PACKAGE YOUR PROCESSES

Another effective method of creating IP within your business application practices is by packaging services like readiness assessments, business case analysis tools, domain specific discovery processes, accelerated deployment methodologies into proprietary, reusable service components. For example, packaging and

delivering a quarterly optimization audit that measures, key performance indicators and summarizes competitive benchmark data helps clients quantify their business applications project ROI.

### IP GOES BEYOND PRODUCTS AND SERVICES

If you are contemplating a business applications practice, you're probably an expert when it comes to technology and data. You likely have developers, or access to them, who can write code, along with a team of experienced professional services consultants. With this team you can simply leverage the APIs of various data providers and offer bundled monthly services.

For example, Microsoft has partnered with Dun & Bradstreet. There are numerous private and publicly available data sources that your team could leverage to offer your customers valuable new insight-based services or net-new functionality. Imagine offering a ski mountain operator a cloud service that provides their customers with daily safety updates and avalanche warnings. They could use this information to optimize labor scheduling, food and beverage inventory, and retail promotions.

Imagine providing the agriculture industry with hourly/daily fluctuations in commodity prices, weather forecasts and feed or nutrient costs. Or showing mining companies the fluctuations in energy costs, occupational safety incidents, and asset and machine maintenance

schedules. Your IP doesn't have to be complicated, expensive, or take months to develop. Innovation and creativity can yield high-margin services offerings with little investment. The key is understanding your customer needs.

### START SMALL AND GROW

Some partners are not yet ready to invest in IP and are hesitant to remove highly billable resources from client projects to work on internal development. Many Dynamics 365 partners have overcome this challenge by focusing one or two technical resources—one to two days per week for 3 month—with a goal of identifying and optimizing IP that can be packaged and sold to customers within 90 days. Interestingly, not only have partners developed new IP, they often report limited negative impact on their consultants' billable projects (and higher job satisfaction).

### ENGAGE LEGAL COUNSEL

Ensure you legally protect your IP prior to customer contracting and use. When you embark on the IP journey, engage a legal advisor to review and modify your license agreements, contracts and terms of use to ensure you retain the legal rights to the functionality and code you believe can be resold to other customers.

# Join the Microsoft Partner Network

## Partnering with Microsoft

One of the first steps in building your Microsoft Business Applications practice is to join the Microsoft Partner Network. As a partner, you will gain access to valuable resources like training materials, whitepapers, and the marketing materials described in this playbook. It's also where you will go to register your employees for access to Microsoft Partner competencies, as well as your partner benefits.

### TO BECOME A MICROSOFT PARTNER

The Microsoft Partner Network provides [three types of memberships](#). Each type encompasses a set of benefits to help you grow your business. As you achieve your goals, participate in the program at the level that suits your unique needs, so you can access more benefits and develop your relationship with Microsoft and other Microsoft partners.

**Network Member:** Receive a set of no-cost introductory benefits to help you save time and money. Use our resources to help build your business as a new partner and discover your next steps.

**Microsoft Action Pack (MAP):** This affordable yearly subscription is for businesses looking to begin, build, and grow their Microsoft practice in the cloud-first, mobile-first world through a wide range of software and benefits.

**Competency:** Get rewarded for your success with increased support, software, and training.

### PARTNER PROGRAM GO-TO-MARKET BENEFITS

One of the key benefits of partnering with Microsoft is that you will gain access to a rich set of go-to-market services designed to help you increase awareness, generate qualified leads, and expand your business through partnerships. The benefits increase as you attain a competency and publish your solution in AppSource or Azure Marketplace. The table below provides a summary of those services. You can also find more details on [www.microsoftgotomarket.com](http://www.microsoftgotomarket.com).

### SELLING WITH MICROSOFT

There are many ways to sell with Microsoft, like publishing your solution or services to AppSource or Azure Marketplace, pursuing partner-to-partner relationships through cloud solution providers, and selling through Microsoft's inside sales and enterprise field sellers. Co-sell is a selling motion that enables Microsoft and its partners to drive joint revenue and customer success.

To learn more about selling with Microsoft and how to become co-sell ready, visit <https://partner.microsoft.com/reach-customers/selling-with-microsoft>.

# Identify Partnership Opportunities

When building a business application practice, not all partners will, or even should, do everything themselves. It is critical to seek out other partners in the Microsoft ecosystem to fill practice gaps – from specific technology talent to expertise in industry business processes.

It can be tempting to want to do everything related to a customer's business needs, especially with your first few projects. But trying to understand and do everything comes with significant risks. You might lose a new deal due to the fact that competitors offer deeper out of the box functionality in a specific solution area, or you may find your core solution with added customization services significantly exceeds your prospect's budget.

Your timeline may be too long. You may face project and profitability risks going into unfamiliar specialty areas, or significantly underestimate the volume of work required to deliver on your proposal.

Leveraging a partnership model can help to:

- Deliver a more comprehensive solution
- Build prospect credibility within new domain areas
- Offer infrastructure or managed services beyond your current capabilities
- Leverage joint marketing activities (and domain knowledge)
- Generate new leads
- Provide easy, add-on license sales
- Broaden your customer base
- Lower costs and project risks
- Accelerate deployment
- Drive meaningful differentiation
- Offer training in new unfamiliar content
- Offer advanced change management services from certified practitioners
- Efficiently outsource training: whether it's design of virtual training or executing in-person classes

## Partner to Partner

Facilitate growth opportunities and fill solution and talent gaps through partnerships.

Developing successful partnerships within the broader Microsoft Partner ecosystem can drive efficiencies, revenue and profits. Digital transformation is changing the way partners approach their marketplaces. It requires the delivery of integrated solutions to address unique customer needs, the capacity to scale and reduce the cost of selling into new markets.

Successful partnerships begin with defining your business goals and objectives. What's your mission statement regarding partnerships? How will your business partners benefit from and monetize the solutions you provide? What gaps do you have in your offerings that could be filled by strategic partners? What steps do you need to take to engage with partners in a structured way?



## PARTNER-TO-PARTNER SUCCESS FORMULA

To help our partners capture these opportunities, Microsoft has collected the strategies, best practices, and resources for successful partner-to-partner (P2P) collaboration. The partnering success formula is a three-stage framework for establishing and managing effective partnerships:



See the full partnering success formula here: <https://aka.ms/p2pguide>.

- **Ready** – At this stage you are laying the groundwork for P2P success, defining the value of a partner and your value as a strategic partner. This is where you assess your investment, value chain, solution and talent gaps, and go-to-market partnering plan.
- **Connect** – This is where you identify and win strategic partners, go to market together and effectively manage the partnership. You'll get more granular at this stage on how to sell and close deals, with an understanding of how you will review the business.
- **Grow** – Maximizing the partner opportunity means constantly pushing for better results and seeking new and better partnerships to drive deeper penetration in your existing customer base and expand the customer base with joint offerings and investments. You're executing joint marketing strategies to expand market reach, generate leads, and increase customer loyalty and retention.

## THE ISV + CHANNEL-BASED MSP COMBINATION

With a little help from a channel-based MSP, an ISV partner can earn greater reach for its IP solutions. Likewise, a partnership with an ISV can lead to an expanded partner channel for channel-based MSPs. Some partner combinations meld together well to create success. To help you find the right mix, here's a [partner recipe for success](#) we know works.

## ACCELERATING DIGITAL TRANSFORMATION

The pace of change impacts how you partner and add value. New business models, subscription pricing, and resource gaps make partnering essential to scale and respond to these conditions. Microsoft has linked up its network of partners, making it possible to access the greater partner ecosystem, reduce the cost of selling, increase efficiency and solution delivery, and drive profits.

See the [Partner-to-Partner Playbook](#) for more details.

# Define Your Pricing Strategy

## Pricing your business application offer

Your price often defines the value of your offering. It can be as much a factor in a buyer's decision as solution functionality, features, benefits, platform, and brand reputation. As business application and technology investments carry both economic and business risk, customers need to believe that the required investment is more than offset by the anticipated measurable business benefits.

Pricing strategy will affect profit margins, sales volumes, market share and competitive positioning. It can be the single greatest lever you have to improve profitability, especially when selling into SMBs, or your biggest weakness. Pricing sends a message to your buyers about the perceived value of your cloud service offering and solution set.

Pricing business application requires effort. Do your research. Call competitive vendors. Ask your customers about the value and economic impact of your solution. How does it impact their revenue, costs, compliance risk and growth strategies? All these factors need to be evaluated prior to determining your subscription and services pricing structure.

Microsoft has published retail prices, generally based on a per-user per-month structure. However, applying your industry and workload expertise to the core solution, adding specific industry or vertical functionality, such as dashboards and reports, significantly increases your perceived value.

Additionally, while Microsoft charges customers on a per-user/per-month basis, partners have the latitude to

bundle services, support, and ISV solutions into a combination of subscription, one-time, and managed services.

For example, you could charge heavy users of the system (who arguably derive more value) far more than you charge occasional users. There are many creative approaches to packaging and pricing cloud solutions. A payroll solution could be monetized by the payroll transaction or, if bundled with other services, as a flat monthly service fee that is less than what customers are paying to their existing outsourced payroll processing firm.

Pricing should be a dynamic function of your business. It should evolve as your solutions and services evolve. Do not "set and forget" your prices. Stay vigilant about competitive pricing, industry fluctuations and changing buyer needs.

Consider the following pricing models to determine the best approach for your practice.

## Dynamics 365 pricing

Customer Engagement Plan	Unified Operations Plan	Dynamics 365 Plan	Applications and offers
Get full use of applications that help build and support customer relationships.	Get full use of applications that help connect and manage your business operations.	Get full use of all applications in one comprehensive, cost-efficient option.	Start with what you need and upgrade to plans as your business grows.
\$139.80 Per user/month	From \$231.03 Per user/month	From \$255.33 Per user/month	From \$48.60 to \$206.70 Per user/month

# Pricing Model Options

## COMPETITIVE MARKET OR STANDARD PRICING

In this model, pricing is a consequence of the product and aligns with the accepted industry/application standard. Think of this as “reference pricing” — as in customers have seen similar products sold for this amount, so you price your offer to be competitively aligned with other similar solutions. If you charge more, you are breaking from the industry accepted, standard pricing.

## VIRTUOUS PRICING

Virtuous pricing is analogous to using price as a sales weapon. The goal of virtuous pricing is to create a virtuous sales cycle with your customers, where each sale encourages the next sale within the customer organization. It fosters product adoption and proliferation. Let’s begin with a counter example of what is not virtuous pricing — a fixed price per user. For your business application practice, this could be a set fee for each user who consumes your cloud service.

## DIGRESSIVE PRICING

Digressive pricing is when the per-unit price drops with the purchase of more units, think volume-based pricing. Your customers are offered a discount per unit when they buy more. This can help in the sales cycle as the customer is looking for ways to bring their cost per unit (e.g., user, client, etc.) down.

For example, assume one department has already purchased Dynamics 365 for Finance and Operations for 100 users at \$250/month per user per month. Now, there are discussions within the sales department to add another 50 users. If your price per user for 150-300 users is lower than \$250 there is an added incentive for them buy additional users and then lower their costs on more Finance and Operations licenses in the future.

There is a way to adjust digressive pricing slightly to make it significantly more profitable called **“step” pricing**. This method sets the price for each tier step as the top number of users in the range. Instead of offering, for example, a bundle of 6 support hours for the price of 5 (a volume discount) you instead offer up to 5 hours for a fixed price per month. This pricing is advantageous in that not all

customers will use all 5 hours each month and you will earn a higher profit margin.

You can also offer customers a discount by offering a pay-in-advance option. For example, you might offer a discounted monthly price if your customer pre-pays 12 months in advance rather than pay month-to-month. This reduces your risk, eliminates the cash-flow impact, offers them a cost reduction, and allows you to avoid price discounting. Additionally, the customer feels they have more choice and autonomy in their purchase selection.

## FLAT RATE PRICING

This is one of the most powerful and commonly applied business pricing strategies. It is predicated on all users paying the same price despite consumption rate. Think about a monthly gym membership, everyone pays the same monthly fee. While the majority come 2-3 times per week there are a few outliers who never visit and a few who never miss a day. Banks and insurance firms leverage sophisticated versions of this pricing based on significant work by their actuaries, but the model can be implemented in a simple fashion.

The basic idea is to provide a certain quantity of value for a set cost that all customers pay. For example, you offer a “business analytics” as a service for a flat rate which includes updates on key performance indicators, new reports and dashboards. Some customers may extract full value by consuming everything the service has to offer daily. The rest only access the service occasionally. A well-crafted model identifies the average consumption across all of your customers and creates a situation where over 80% of the customers are using less than what they are paying for (and ideally less than the average consumption). The remaining 20% will exceed the average.

You set your price to be above the average consumption. By doing so, clients in the 80%, who use less than what they pay for, generate your profit. The further they are below the average consumption, the more profit they generate.

For the 20% who use more than they pay for, you might take a loss on them individually. However, in the aggregate, the long tail represented by the 80% of

customers who do not fully use what they pay for, more than covers the cost of your heavy consumers. More importantly, these heavy consumers are likely to be your biggest champions, so, there are tangential benefits to supporting their cost. Pricing models built around flat rate pricing have shown between 1.5 and 3 times more profit than traditional models.



## VALUE-BASED PRICING

Sophisticated partners that deliver consistent and extensive metric-based outcomes from their solutions, may want to consider value-based pricing. Increasingly, price is calculated against return on value (ROV). This type of pricing starts with determining the value of what you are offering to the customer. How much would a manufacturing company be willing to pay to achieve 1% downtime? What is measurable benefit of reducing accounts receivables from 100 to 45 days? What is that worth to a customer in terms of improved cashflow, fewer invoice disputes and a reduction in project write-offs?

Some partners have begun to offer their enterprise customers **performance-based pricing**, meaning they take a percentage of the savings they help customers achieve. For example, a manufacturing company likely spends millions of dollars annually on maintenance. Leveraging Dynamics 365 Finance & Operations, together with IoT, a partner can significantly reduce this expense item for the customer, and propose charging, for example, 15% of the first two years of savings.

Value-based pricing reduces the risk to customers and accelerates the decision-making cycle, however you need to feel confident you can achieve the impact and ROI that is promised. With the cloud, you can begin to monitor,

benchmark and measure and quantify usage, business impact and more and move towards value-based pricing.

## Publish packaged pricing offers

As price availability has become ubiquitous in consumer purchasing, business applications buyers now expect a similar level of price transparency for business purchases, especially in the SMB and SMC market segments. While pricing is becoming more common on partner websites, there is often a (misplaced) fear that doing so will provide competitors with an advantage. But rival vendors can already source your pricing if they are motivated to do so. Partners are also concerned that posted prices may scare prospects away from engaging directly. Publishing prices is also a good way to qualify buyers and filter out price-sensitive customers, the ones who are often least loyal and most likely to churn.

Price transparency provides a clearer understanding of your value, lowers buyer uncertainty and promotes trust.

You should strongly consider publishing three packaged product and services offers. They should have different tiers that are clearly differentiated, with easy to understand definitions and criteria for each tier. For example, you might have a small business tier, a mid-size organization priced offer, and at the high end, an enterprise tier. Similarly, if you offer services as part of your practice, consider developing three quick-start implementation packages, based on company size or project complexity, to accelerate the buyer decision making process. You can still use the "contact us for a quote" button you have today. Providing three implementation options provides a quick, easy way for prospects to understand the typical implementation ranges, and they will reach out for more information.



Give prospects what they need (and want) to accelerate their buying journey. Avoid getting eliminated from your prospect's short list because of non-disclosure. Price is a key part of your value proposition and solution offer.

# Pricing Your Services

## FIXED FEE OR TIME AND MATERIALS

When offering services, you have two options. You can agree with your customer on a fixed-fee for a predefined project regardless of how long it takes you to deliver, or you can base the project costs on a time-and-materials basis for a predefined scope of work, where you are paid for each hour worked. Most Dynamics 365 partners have adopted a traditional time-and-materials approach.

While the time-and-materials approach carries a lower risk profile for a partner (you get paid for new requests, change orders and surprises), it increases the risk profile for the customer. With over 50% of large enterprise business application projects going over budget, this creates a significant challenge. This model does not motivate professional services teams to accelerate the completion of a project, and profitability is constrained in that each billed hour is accompanied by an associated hourly labor cost.

Fixed priced business applications projects and deployments carry a higher risk for you as the provider, but much lower risk for the customer. This approach compresses the customer decision-making cycle and gives them more confidence and contributes to increased trust. It also allows for higher margins and profit if your team gets more efficient in delivering the desired outcome using fewer hours. While it is contrary to traditional business applications pricing strategies, we highly recommend taking a packaged, fixed price approach when offering any services.

## TERMS OF PAYMENT

Payment terms are measured in days; for example, 10 days, 15 days, 30 days, or 90 days. These are usually expressed as NET 10, NET 15, NET 30, or NET 90. You might consider offering customers a discount for prompt payment on your shortest payment. For example, NET 2/10/30 is used to describe terms where a 2% discount is provided for payment received within 10 days of invoicing. Otherwise, the full invoice amount is due in 30 days. In interviews with partners we found the most common payment terms used were NET 30, whereas shorter payment terms were preferred for SMB customers.

Microsoft  
Partner  
Network

# Hire & Train

Business Applications

[aka.ms/practiceplaybooks](https://aka.ms/practiceplaybooks)



# Executive Summary



In the previous section, we reviewed the various services offerings your organization can pursue to set up, then build your business application practice. Now that we've identified some of the recommended avenues of success, you may be wondering how to build and train your team.

First, we'll help you define the optimal members of your team and the skills they should bring to the table. If you need to hire to fill gaps, we'll provide you with guidance

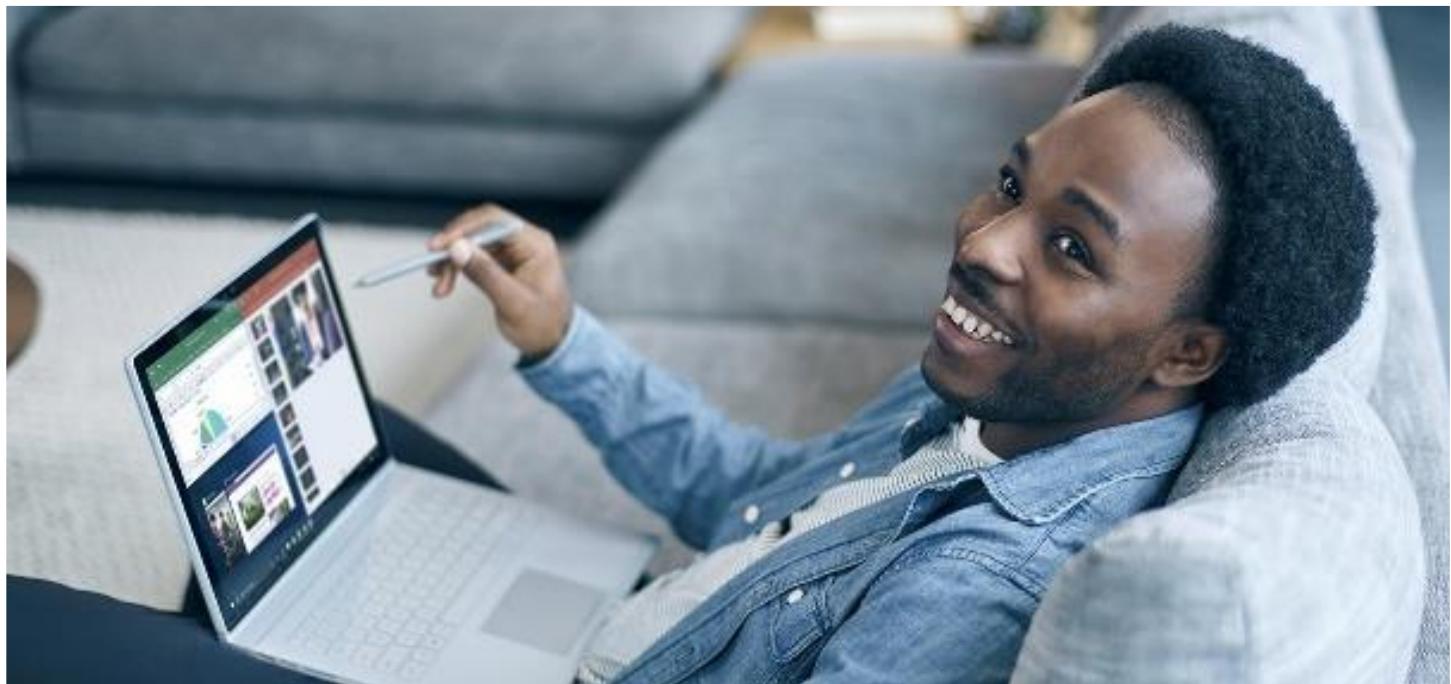
on job descriptions and factors you should consider when reviewing a candidate's skillset.

It is critical that all your business application practice resources are trained and then continue to receive ongoing training. We have provided details on the specific Microsoft certifications your technical resources should be working towards, both for their own professional development, and to earn your organization Microsoft Partner Network competencies.

## Top 5 things to do

You're crafting your game plan to build your team, make sure you nail down these 5 tasks before you move to the next section.

- Define the members and roles required
- Identify capability and skills gaps
- Decide which skills to hire and train
- Hire to fill gaps in your team
- Train and certify your team



## Create a Hiring Plan

Human resources are a critical asset for any services-based practice. Launching a new business applications practice requires you to begin with an evaluation of your existing team members (if any) to determine whether you need to source and hire new employees or upskill your existing team.

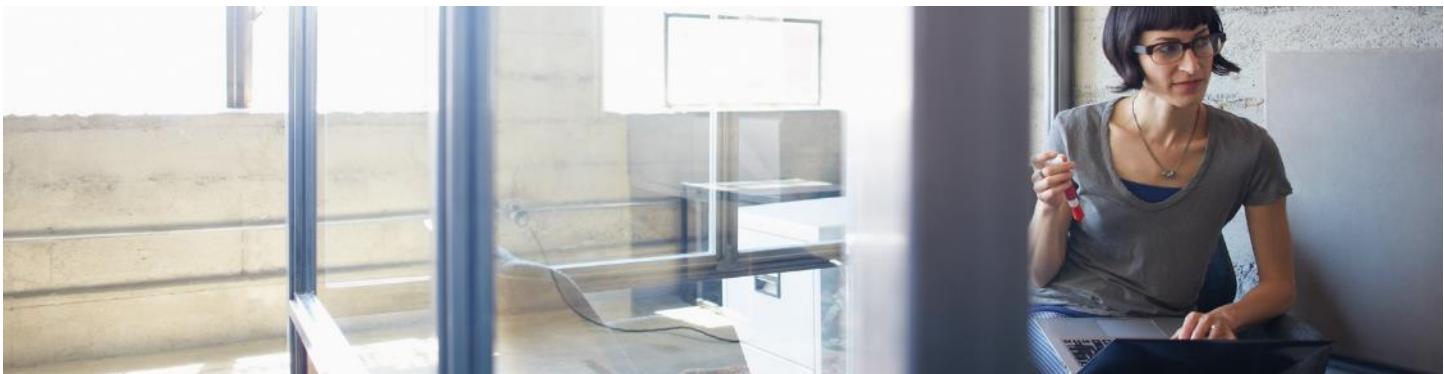
The following sections describe the recommended marketing, sales, technical and support resources that you will likely need to staff your business applications practice. If yours is a new practice, you may not have the time or resources to fill all required roles with your current team members. If this is the case, consider outsourcing some functions at least initially, in order to launch your practice and go to market with a strong offering.

### Partner Skillsets

Referrals and LinkedIn are top sources for identifying skilled labor. Once a candidate is identified, work history, cultural fit, and years of experience become the important considerations.

Roles associated with cloud practices typically have at least 3 years of experience. Furthermore, most companies engage annual (at a minimum) ongoing staff learning efforts like conferences/events and online training. A median of 8.5% of technical resource time is typically spent on training and learning activities.





# Hire, Build, and Train Your Team

## What roles do you need to staff?

The typical Business Applications engagement journey can be divided into Customer Acquisition, Solution Discovery, Solution Delivery, and finally Solution Maintenance and Support. There are various roles aligned with these phases that are critical to your practice. In smaller practices, two or more of the roles can be performed by one person. However, it is important to ensure that all the appropriate skillsets are present in your staff.

## Customer Acquisition

### MARKETING ROLES

Marketing is a critical part of a successful Business Applications practice. Partners who invest in marketing resources succeed to a far greater degree than those who don't. The Marketing team is responsible for defining and bringing the solution to market, as well as developing lead generation activities to create a sales pipeline. The following key roles should be considered for your business applications practice.

The **Marketing Leader** is responsible for driving marketing strategy, tactics, campaigns and programs to produce top-line results that raise brand awareness, recognition, and loyalty for your company and the Microsoft business applications offerings. This position is tasked with demand generation and marketing funnel optimization using brand, advertising, creative, digital, field and channel marketing. The Head of Marketing

shapes and directs the company's go-to-market vision and works cross functionally to ensure the right mix of offerings, positioning and price. This position is also responsible for planning, organizing, staffing, training, and managing all marketing functions to achieve the sales, growth, profits, and visibility objectives while ensuring a consistent marketing message and positioning consistent with the corporate direction.

The **Digital Marketing Manager** plays a major role in enhancing brand awareness within the digital spaces as well as driving online traffic to your website and acquiring leads/customers. This position plans and executes all digital marketing, including SEO/SEM, marketing database, email, mobile, social media and display advertising campaigns. It is also responsible for improving the usability, design, content, ranking and conversion of the company website. They must remain up to-date with the latest trends and best practices in online marketing, analytics and measurement.

The **Content Marketer** is pivotal to generating inbound leads through writing authoritative, thought-leadership content. This position is responsible for content creation and delivery, tracking metrics that influence content strategy and collaborating with both technical and subject matter specialists to produce relevant content that meets the needs of your audiences. They must be an exemplary writer who can communicate your company's tone and mission with clean, concise, well-polished copy and produce blogs, eBooks, whitepapers, infographics, guides,

articles and even audio and video content. This position will also know how to blog and communicate effectively to an online audience.

The **Graphic Designer** is responsible for the creation, maintenance and updating of visual marketing assets in both print and digital media to support your brand and marketing goals. This position manages all phases of the design process including concepting, mock-up production, review and integration, and finished product. The graphic designer is responsible for solving problems when it comes to design aesthetic for presentations, collateral materials, event and trade show graphics, website design, blogs, webinars, demos, emails and digital campaigns, social media assets and more.

## SALES ROLES

You have a vision for developing the next great cloud solution, but even the best products need a sales strategy to gain maximum market traction. Consider hiring for the following sales positions for broad reach.

The **Sales Leader** applies their expertise in selling strategies and methodologies, and execution to achieve defined revenue objectives. This role is responsible for creating, leading and directing a high-performance sales team that achieves revenue, profitability and MRR targets while consistently delivering customer value. The Sales Leader manages the hiring, onboarding and compensation plans of new and existing sales team members, and develops sales strategies that both accelerate new customer acquisition and deepen existing customers relationships. The Sales Leader also works closely with corporate marketing to ensure a seamless end-to-end customer acquisition business process. A bachelor's degree with a business concentration is required. An MBA is preferred for this role, along with seven to ten years of experience in a sales leadership role.

The **Account Executive** (AE) is responsible for proactively identifying target accounts and acquiring new customers. The role accurately qualifies both self- and marketing-generated leads, defines deal strategy, manages and guides all resources supporting the sales pursuit, manages sales costs and accurately forecasts revenue and close dates. The Account Executive establishes executive relationships and actively works with prospects to develop quantifiable project business cases. This role effectively

informs, guides and manages a broader sales pursuit team comprised of pre-sales technical resources, delivery team members and senior leaders.

The **Business Development Representative** (BDR) reports to the Sales Leader and is responsible for the full sales lifecycle, from qualification through closure and renewal. The BDR focuses primarily on acquiring new cloud customers within designated industry verticals, leveraging a repeatable remote sales motion. This role also works closely with corporate marketing resources to execute demand generation programs and continuously improve and refine sales assets and artefacts.

The **Customer Development Representative** (CDR) reports to the Sales Leader and is responsible for upselling and cross-selling new cloud solutions to existing customers, as well as all contract renewals. The CDR works closely with marketing to introduce and sell Next-Best-Offer (NBO) "waves" within a designated industry vertical, through an accelerated remote sales motion. This role also works closely with the support organization to assist in resolving outstanding issues with strategic accounts,

The **Customer Success Manager** is responsible for driving consumption of cloud services and identifying new opportunities for customers to leverage their Microsoft Dynamics investment and the broader Azure cloud platform to derive business value. The CSM orchestrates and drives a proactive selling motion into the existing client base. Primary responsibilities include developing long-term relationships within a portfolio of strategic clients, aligning customer business needs with technology solutions and helping clients bridge the IT/business gap.

## Solution Delivery

The **Pre-Sales Cloud Solution Engineer** supports the Account Executive, Business Development Representative and Customer Development Representative in driving their active sales pursuits. The PCSE reports to the Sales Leader and is responsible for facilitating both remote and onsite prospect discovery sessions, defining cloud solution fit and working with the delivery team to develop cloud solution recommendations, scope clarity, and accurate project services estimates. This role also works closely with

corporate marketing and product management to identify new cloud solution development and packaged services opportunities (IP).

The **Functional Consultant** is at the core of configuring and implementing the system. This person is not necessarily an expert on industry processes but is deeply knowledgeable on the technical aspects of solution implementation. This role is typically trained from graduate or industry hires and experience ranges from 6 months to 10 years. The technical consultant requires deep Dynamics 365 training and should be skilled at the subsequent lifecycle management required to ensure continued use of the service.

The **Solution Architect** sets the high-level direction and blueprint for implementation and is brought in at critical milestones. Typically, a solution architect is a former functional consultant who has since become more technical and tenured. This is a senior role that usually requires 10-20 years of implementation experience.

The **Developer** is brought in if there are extensions to third-party systems to be made or coding is necessary. Developer skills are usually aligned to a specific Dynamics 365 product (for example, Finance & Operations). This role typically requires at least 5 years of developer experience. An effective Business Applications developer knows how to modify systems, do code reviews, has a developer pedigree, and can also talk to clients.

The **Project Manager** ensures deadlines are met, manages the day-to-day workflows and roadmap. This role typically requires PMP certification and experience as a project manager.

The **Change Management Consultant** drives the people and process part of the digital transformation. Accelerated value comes from executive sponsorship, stakeholder engagement, alignment of technology with both the business strategy and processes, and readiness. This role typically has a background in business consulting or business process management, along with Change Management certification, from organizations such as Prosci®.

## ONGOING SUPPORT

If your practice offers ongoing solution maintenance and support, you will need to invest in resources to support this function to ensure that your solution is adopted widely with strong ongoing usage.

The **User Support Specialist** assists customers who are having technical issues with your product, or who need help realizing the full benefit of your solution. They will likely help customers navigate the operational challenges of cloud computing. Thoroughly training them on both your product, and the infrastructure on which it is built, is paramount to their success, and ultimately, your customers' satisfaction. Qualifications include technical support experience and great communication and interpersonal skills (soft skills). Experience with cloud technologies is a major plus.

## SCALING YOUR PROJECT TEAM

Depending on the size and complexity of your customer organizations, these roles can scale up and down by combining roles for the delivery of the solution. Smaller projects can be started with a small team of 1-2 professionals (technical and functional). As the complexity grows, the projects will require role segmentation to drive customer success. Scaling teams up and down has a correlation with the set of skills required for the project, and volume of stakeholders and users. If the scope covers IoT, AI or other integration services the project may call for verticalized technical roles.

Larger projects may also require additional roles than described here. For instance, customers that have a larger user base, or deployment in multiple countries or a heavy customized mobile application might need a Release Manager and different QA/Test professionals on the team.

Customer complexity will drive which skills need prioritization. Consider building your practice following a progressive complexity path. Start with basic projects (single geography, focus on one sales play), evolving to customers that require higher customizations, and then moving onto customers that need to redefine or build complex business processes from the ground up.

Customers add complexity with geographic coverage, and users from different geographies can impact solution

performance and different mobile user requirements. Start with one region/district geography before adding multiple regions/districts or countries. Technical skills requirements to successfully implement a multiple-country customer are higher than single-country implementations.

Another aspect to consider is the focus on functional/industry scope versus the technical scope. There are many partners in the ecosystem that focus only on supporting other partners on the technical configuration/implementation model. Based on that, keeping a strong functional team specialized on vertical industries while outsourcing the technical work is also a practice to be considered.

### TECHNICAL LEADERSHIP ROLES

Consider the following technical management positions if your solution delivery effort will involve eight or more technical staff. In smaller teams, senior-level employees (e.g., lead consultant, lead architect) sometimes take on management duties along with their other responsibilities, removing the need for dedicated managers.

The **Chief Technical Officer** (CTO) manages technical readiness through identification of needs/requirements.

This role works with HR to understand best-fit career paths for their technical staff, sets standards for skills and certifications, and orchestrates the delivery of training to meet those standards. This role also manages internal tools such as Dynamics Lifecycle Services, Visual Studio Team Server, testing tools, and 3rd party ISV approved applications.

The **Chief Operating Officer** (COO) owns the organizational structure and methodology for solution development and delivery. This role is also responsible for management and leadership training across the organization.



# Recruiting Resources

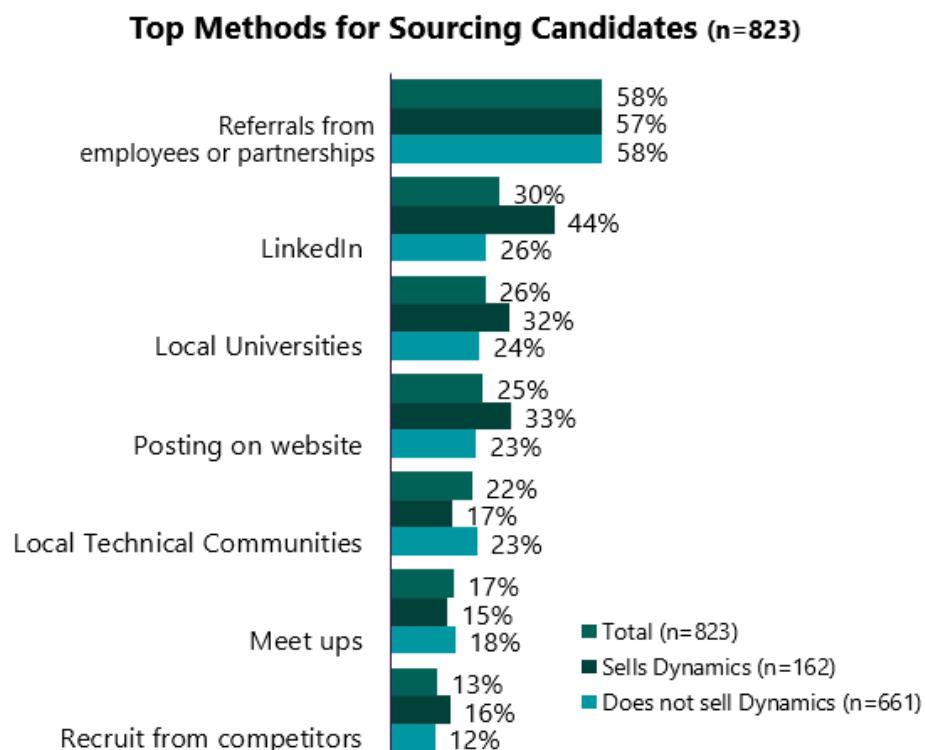
## Top 10 Sources to Find Skilled Labor and What to Look For

Sourcing skilled labor can be a challenge. In the Microsoft Hiring and Onboarding Playbook Study, referrals (63%), website (57%) and LinkedIn (56%) were reported as the top approaches for generating leads.

Top Candidate Lead Sources	Total (n=275)
Referrals from employees or partnerships	63%
Posting on website	57%
<a href="#">LinkedIn</a>	56%
Social media	42%
Former employees	36%
University recruiting	36%
Local technical communities	35%
Recruit from competitors	23%
Meetups	16%
Recruitment agency	4%
Other	4%

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

Among Dynamics partners surveyed, referrals and LinkedIn are top methods for sourcing candidates.



# Training

For technical staff to function as change agents supporting current and emerging cloud technologies, their buy-in for the use and integration of these technologies is needed.

Your team will need the following:

1. An understanding of their roles and any changes to their current position
2. Time and resources to explore the technologies
3. An understanding of the business case for the technologies

Use the following resources as part of your Business Applications onboarding for new and existing staff:

- ❑ [Dynamics Learning Portal](#) provides free, self-paced learning to help you stay current with Dynamics 365. Available to all Microsoft Partner Network members (subscription to the free Training Pack is required).
- ❑ [Microsoft Learning](#) offers a wide variety of official curriculum on-demand, [Dynamics 365 certification preparation](#) courses, as well as [edX](#)

[courses that are taught by Microsoft experts](#), and helps you learn through hands-on experiences with a broad reach of Microsoft technologies.

- ❑ Microsoft Technical Journeys provides technical webinars as well as 1:1 pre-deployment guidance and developer assistance from Microsoft technical consultants to help ensure a successful implementation for your team.
- ❑ The Microsoft Partner Network Training Portal provides a centralized interface with in-person, virtual and online training opportunities and certification options organized by products, competencies, certifications, and job role.

Follow a learning curriculum at your own pace to build the skills you need most to stay relevant. When you're ready, we recommend pursuing [Dynamics 365 Certification](#) to demonstrate competency in this area.

# Competencies and Certifications

## MPN Competencies

One of the next steps is to ensure you align the technical team to the MPN competency for your practice.

The following tables summarize the skills needed in your organization to achieve either a gold or silver Cloud Business Applications competency. In the table below, you only need to meet the requirements of one option to earn the competency.

	SILVER REQUIREMENTS	GOLD REQUIREMENTS
<b>Option 1: Customer Engagement</b>	<p>Your organization should have at least five (5) individuals pass the exam requirements</p> <p>Five (5) individuals should pass one of the functional exams</p> <ul style="list-style-type: none"><li>• MB2-717: Microsoft Dynamics 365 for Sales</li><li>• MB2-718: Microsoft Dynamics 365 for Customer Service</li><li>• MB2-877: Microsoft Dynamics 365 for Field Service</li><li>• MB2-719: Microsoft Dynamics 365 for Marketing</li></ul> <p>and the same five (5) individuals must pass the following technical exam:</p> <ul style="list-style-type: none"><li>• MB2-716: Microsoft Dynamics 365 Customization and Configuration</li></ul> <p>And the same or different five individuals must pass the following technical exam:</p> <ul style="list-style-type: none"><li>• MB2-715: Microsoft Dynamics 365 Customer Engagement Online Deployment</li></ul>	<p>Your organization should have at least fifteen (15) individuals pass the exam requirements</p> <p>Five (5) individuals must pass one of the functional exams:</p> <ul style="list-style-type: none"><li>• MB2-717: Microsoft Dynamics 365 for Sales</li><li>• MB2-718: Microsoft Dynamics 365 for Customer Service</li><li>• MB2-877: Microsoft Dynamics 365 for Field Service</li><li>• MB2-719: Microsoft Dynamics 365 for Marketing</li></ul> <p>and the same five (5) individuals should pass the following technical exam:</p> <ul style="list-style-type: none"><li>• MB2-716: Microsoft Dynamics 365 Customization and Configuration</li></ul> <p>Ten (10) other individuals from the five above must pass one of the functional exams::</p> <ul style="list-style-type: none"><li>• MB2-717: Microsoft Dynamics 365 for Sales</li><li>• MB2-718: Microsoft Dynamics 365 for Customer Service</li><li>• MB2-877: Microsoft Dynamics 365 for Field Service</li><li>• MB2-719: Microsoft Dynamics 365 for Marketing</li></ul> <p>Ten (10) other individuals from the five above should pass the following technical exam:</p> <ul style="list-style-type: none"><li>• MB2-716: Microsoft Dynamics 365 Customization and Configuration</li></ul> <p>And the same or different five individuals must pass the following technical exam:</p> <ul style="list-style-type: none"><li>• MB2-715: Microsoft Dynamics 365 Customer Engagement Online Deployment</li></ul>

	SILVER REQUIREMENTS	GOLD REQUIREMENTS
<b>Option 2: Enterprise Operations</b>	<p>Your organization should have at least five (5) individuals pass the exam requirements.</p> <p>Five (5) individuals must pass one of the functional exams:</p> <ul style="list-style-type: none"> <li>• MB6-895: Financial Management in Microsoft Dynamics 365 for Finance and Operations</li> <li>• MB6-896: Distribution and Trade in Microsoft Dynamics 365 for Finance and Operations</li> <li>• MB6-897: Microsoft Dynamics 365 for Retail</li> <li>• MB6-898: Microsoft Dynamics 365 for Talent</li> </ul> <p>and the same five (5) individuals must pass the following technical exam:</p> <ul style="list-style-type: none"> <li>• MB6-894: Development, Extensions and Deployment for Dynamics 365 Finance and Operations, Enterprise edition</li> </ul> <p>And the same or different five individuals must pass the following technical exam:</p> <ul style="list-style-type: none"> <li>• 70-535: Architecting Microsoft Azure Solutions</li> </ul>	<p>Your organization should have at least fifteen (15) individuals pass the exam requirements.</p> <p>Five (5) individuals must pass one of the functional exams:</p> <ul style="list-style-type: none"> <li>• MB6-894: Development, Extensions and Deployment for Dynamics 365 Finance and Operations, Enterprise edition</li> <li>• 70-535: Architecting Microsoft Azure Solutions</li> </ul> <p>and the same five (5) individuals must pass the following technical exam:</p> <ul style="list-style-type: none"> <li>• MB6-894: Development, Extensions and Deployment for Dynamics 365 Finance and Operations, Enterprise edition</li> </ul> <p>Ten (10) other individuals from the five above must pass one of the following functional exams:</p> <ul style="list-style-type: none"> <li>• MB6-895: Financial Management in Microsoft Dynamics 365 for Finance and Operations</li> <li>• MB6-896: Distribution and Trade in Microsoft Dynamics 365 for Finance and Operations</li> <li>• MB6-897: Microsoft Dynamics 365 for Retail</li> <li>• MB6-898: Microsoft Dynamics 365 for Talent</li> </ul> <p>Ten (10) other individuals from the five above should pass the following technical exam:</p> <ul style="list-style-type: none"> <li>• MB6-894: Development, Extensions and Deployment for Dynamics 365 Finance and Operations, Enterprise edition</li> </ul> <p>And the same or different five individuals must pass the following technical exam:</p> <ul style="list-style-type: none"> <li>• 70-535: Architecting Microsoft Azure Solutions</li> </ul>

There are other requirements, such as performance thresholds, as well as processes, that need to be met. You can find the full list of requirements in the MPN Cloud Business Applications Competency site.

## Certifications

Increase readiness and marketability with MCSA or MCSE certifications.

There are numerous assessments and certifications to consider as motivation for advancing your team's skills, creating proof points for your practice, earning certification badges, and enabling you to achieve Microsoft Partner Network Competencies.

In the table below, you will find the Microsoft certifications for Business Applications.

TITLE	DESCRIPTION	REQUIRED EXAMS
<b>MCSE: BUSINESS APPLICATIONS</b>	<p>This certification validates that you have the expertise to work with and manage Microsoft Dynamics 365 technologies. You'll start with a foundation in Microsoft Dynamics 365 and demonstrate additional expertise in one or more business specific areas.</p>	<p>Select one from the following exams:</p> <ul style="list-style-type: none"><li>• <a href="#">MB2-877: Microsoft Dynamics 365 for Field Service</a></li><li>• <a href="#">MB2-717: Microsoft Dynamics 365 for Sales</a></li><li>• <a href="#">MB2-718: Microsoft Dynamics 365 for Customer Service</a></li><li>• <a href="#">MB2-719: Microsoft Dynamics 365 for Marketing</a></li><li>• <a href="#">MB6-895: Financial Management in Microsoft Dynamics 365 for Finance and Operations</a></li><li>• <a href="#">MB6-896: Distribution and Trade in Microsoft Dynamics 365 for Finance and Operations</a></li><li>• <a href="#">MB6-897: Microsoft Dynamics 365 for Retail</a></li></ul>
<b>MCSA: DYNAMICS 365</b>	<p>This certification demonstrates your expertise in Microsoft Dynamics 365 technologies to upgrade, configure, and customize.</p>	<ul style="list-style-type: none"><li>• <a href="#">MB2-715: Microsoft Dynamics 365 Customer Engagement Online Deployment</a></li><li>• <a href="#">MB2-716: Microsoft Dynamics 365 Customization and Configuration</a></li></ul>
<b>MCSA: DYNAMICS 365 FOR OPERATIONS</b>	<p>This certification demonstrates your expertise in Microsoft Dynamics 365 technologies to implement the basic technical and development tasks required to customize Microsoft Dynamics 365 for Operations. This audience typically includes technical consultants, programmers, and IT personnel.</p>	<ul style="list-style-type: none"><li>• <a href="#">70-764: Administering a Microsoft SQL Database Infrastructure</a></li></ul> <p>Or</p> <ul style="list-style-type: none"><li>• <a href="#">70-765: Provisioning SQL Databases</a></li></ul> <p>And</p> <ul style="list-style-type: none"><li>• <a href="#">MB6-894: Development, Extensions and Deployment for Microsoft Dynamics 365 for Finance and Operations</a></li></ul>

# Job Descriptions

## Sales Leader

The Sales Leader applies their expertise in selling strategies and methodologies, strategic planning and execution to achieve defined revenue objectives. This role is responsible for creating, leading and directing a high-performance sales team that achieves revenue, profitability and MRR targets while consistently delivering customer value. The Sales Leader manages the hiring, onboarding and compensation plans of new and existing sales team members and develops sales strategies that both accelerate new customer acquisition and deepen existing customers relationships. The Sales Leader also works closely with corporate marketing to ensure a seamless end-to-end customer acquisition business process.

- Top Qualities: •Demonstrates strong motivational and leadership skills. Ability to think creatively. Deep understanding of sales best practices.
- Previous Roles: VP Sales, Sales Manager.
- Certifications: Defined / corporate sales methodology.

Strategic Capabilities	<ul style="list-style-type: none"><li>• Define optimized selling motions that align with the Microsoft Dynamics solution set and target market.</li><li>• Understand the key business drivers within the focus vertical/industry.</li><li>• Accurately forecast revenue and close dates.</li><li>• Effectively motivate sales team members.</li><li>• Collaborate with marketing and delivery leaders to execute comprehensive customer acquisition, retention and extension strategies.</li><li>• Strong objection handling and closing skills.</li><li>• Excellent negotiating skills</li></ul>
Execution Skills	<ul style="list-style-type: none"><li>• Develop plans and strategies to meet or exceed the company's revenue target.</li><li>• Develop a scalable sales process and drive sales team compliance.</li><li>• Determine and assign sales quotas, targets, and goals.</li><li>• Support complex sales negotiations, attend sales presentations and help close strategic deals.</li><li>• Directly manage large, high-profile customer accounts, (when appropriate).</li><li>• Work collaboratively with marketing to develop lead and revenue generation programs and create high impact sales collateral.</li><li>• Set targets, performance plans and objective for all sales team members.</li><li>• Review sales team members performance, progress, and targets.</li><li>• Coach sales professionals to drive continuous improvement.</li><li>• Recruit, select, onboard, and train new sales professionals.</li><li>• Create motivating compensation plans and incentives.</li><li>• Monitor competitive and market activity. Provide feedback and recommendations to the executive team.</li><li>• Ensure CRM system accurately reflects all customer and new business opportunities.</li></ul>
Technologies	<ul style="list-style-type: none"><li>• Working knowledge of the Microsoft cloud platform and Microsoft Dynamics (or equivalent ERP/CRM) capabilities.</li><li>• Feature / Function knowledge of relevant Microsoft Dynamics solution set.</li><li>• Working understanding of competitive sales strategies.</li></ul>
Certifications	<ul style="list-style-type: none"><li>• Sales cycle methodology or equivalent training.</li></ul>
Experience Types/Qualities	<ul style="list-style-type: none"><li>• A bachelor's degree with a business concentration is required. An MBA is preferred.</li><li>• Seven to 10 years of experience in a sales leadership role.</li><li>• A minimum of four years of experience in a selling role and at least two years of experience working with sales technology, CRM systems and social media tools.</li><li>• Verifiable track record of quota attainment.</li><li>• Exceptional leadership, communication and interpersonal skills.</li><li>• Strong leadership and decision-making capabilities.</li></ul>

## Account Executive (AE)

The Account Executive is responsible for proactively identifying target accounts and acquiring new customers. The role accurately qualifies both self and marketing generated leads, defines deal strategy, manages and guides all resources supporting the sales pursuit, responsibly manages sales costs and accurately forecasts revenue and close dates. The Account Executive establishes executive relationships and actively works with prospects to develop quantifiable project business cases. This role effectively informs, guides and manages a broader sales pursuit team comprised of pre-sales technical resources, delivery team members and senior leaders.

- **Top Qualities:** Business acumen / understanding of key prospect business drivers and processes. Consistent quota achievement. Strong networking and lead generation.
- **Previous Roles:** Account Executive, Account Manager, Business Development, Pre-Sales Support, relevant role within the target vertical(s).
- **Certifications:** Defined / corporate sales methodology.

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Understand and execute a defined selling methodology: sales cycle planning and execution through closing to project team hand-off.</li><li>• Understand the key business drivers within the focus vertical/industry.</li><li>• Understand the internal and external pressures that affect customer priorities.</li><li>• Understand enterprise fiscal and budgeting cycles, organization structures and capital prioritization processes.</li><li>• Clearly communicate partner differentiation and potential business impact to all stakeholders influencing the decision process.</li><li>• Develop and defend a business case.</li><li>• Strong verbal (telephone), written and presentation communication skills.</li><li>• Develop and execute sales strategies and defined sales plays.</li><li>• Accurately forecast opportunity scope, revenue and close date.</li><li>• Strong collaboration skills: work with internal pre-sales and delivery colleagues to execute a comprehensive win strategy.</li><li>• Strong objection handling and sales closing skills.</li><li>• Ability to determine win probability (knowing when to disengage).</li><li>• Excellent negotiating skills</li></ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Develop a networking and prospecting plan across the defined industry or vertical, relevant groups and associations, industry influencers, and potential technology partners.</li><li>• Plan and execute field-level marketing campaigns.</li><li>• Understand and align with the internal corporate marketing message and marketing plan.</li><li>• Conduct accurate due diligence (discovery) with technical, operational and strategic project stakeholders.</li><li>• Align Microsoft Dynamics solution capabilities and partner IP features / functions with customer business challenges and desired business outcomes.</li><li>• Create and facilitate effective business value discussions, presentations and proposals to prospect business leaders.</li><li>• Clear understanding of common RFI/RFP selection processes (and disruptive techniques).</li><li>• Co-develop customer business cases to support project approval and funding.</li></ul>
<b>Technologies</b>	<ul style="list-style-type: none"><li>• Working knowledge of the Microsoft cloud platform and Microsoft Dynamics (or equivalent ERP/CRM) capabilities.</li><li>• Feature / Function knowledge of relevant Microsoft Dynamics solution set.</li></ul>
<b>Certifications</b>	<ul style="list-style-type: none"><li>• Business degree or equivalent (MBA is desirable).</li><li>• Sales cycle methodology or equivalent training.</li><li>• Executive engagement/communications training.</li><li>• Presentation delivery training.</li></ul>

<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"> <li>• 5+ years B2B sales experience (Account Executive, Business Development, Pre-Sales Support).</li> <li>• Verifiable track record of quota attainment and project success.</li> <li>• Previous focus industry/vertical expertise.</li> <li>• Strong leadership and decision-making capabilities.</li> </ul>
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## Business Development Representative (BDR)

The Business Development Representative (BDR) reports to the Sales Leader and is responsible for the full sales lifecycle, from qualification through to closure, and renewal. The BDR focuses primarily on acquiring new cloud customers within designated industry verticals, leveraging a repeatable remote sales motion. This role also works closely with corporate marketing resources to execute demand generation programs and continuously improve and refine sales assets and artefacts.

- **Top Qualities:** Tenacious. Strong networking and lead generation. Consistent sales process compliance. Consistent quota achievement. Excellent communicator.
- **Previous Roles:** Business Development, Pre-Sales Support, Customer Support, relevant role within the focus industry/vertical.
- **Certifications:** Defined / corporate sales methodology, desktop productivity (with focus on CRM).

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"> <li>• Facilitate an accelerated remote selling motion: from lead qualification through to project team hand-off.</li> <li>• Understand the key business drivers and business processes within the focus vertical/industry.</li> <li>• Clearly communicate partner differentiation and project business impact to all stakeholders influencing the decision process.</li> <li>• Exceptional communication skills (written, verbal, and presentation).</li> <li>• Accurately forecast opportunity scope, revenue and close date.</li> <li>• Strong objection handling and closing skills.</li> <li>• Demonstrate a high level of business acumen and literacy.</li> <li>• Solution demonstration skills (light).</li> <li>• Highly organized and able to stay on target while performing a variety of critical short, medium- and long-term tasks daily.</li> </ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"> <li>• Create differentiation through memorable first impressions.</li> <li>• Develop and maintain a high level of industry competence and knowledge.</li> <li>• Accurately triage, profile and qualify new prospects.</li> <li>• Develop and manage an active pipeline of qualified SMB (small and medium business) opportunities.</li> <li>• Engage with all prospect stakeholder levels (tactical, operational and leadership).</li> <li>• Facilitate business case discovery and ROI/payback discussions with prospect stakeholders.</li> <li>• Leverage intelligent discovery to identify business pains and business process challenges.</li> <li>• Clearly articulate the business and Total Cost of Ownership (TCO) benefits of Cloud, SaaS and subscription-based solutions.</li> <li>• Remotely deliver brief solution demonstrations, presentations and close transactions without physically meeting customers.</li> <li>• Excellent ability to successfully interface remotely with clients and handle multiple priorities concurrently.</li> </ul>
<b>Technologies</b>	<ul style="list-style-type: none"> <li>• Working knowledge of full Office 365 suite and related productivity applications (Teams, Skype, etc.).</li> <li>• Strong working knowledge of CRM and lead generation social selling tools (Hub Spot, LinkedIn, Adobe Marketo, etc.).</li> </ul>

<b>Certifications</b>	<ul style="list-style-type: none"> <li>Bachelor's degree or equivalent expertise and 3+ years sales experience in a business-to-business environment.</li> <li>B2B sales methodology.</li> </ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"> <li>Industry or vertical experience.</li> <li>Self-motivated, ability to work independently.</li> <li>High degree of emotional intelligence.</li> <li>Ability to learn and adapt in a rapidly evolving environment.</li> <li>Desire to make a difference.</li> </ul>

## Customer Development Representative (CDR)

The Customer Development Representative (CDR) reports to the Sales Leader and is responsible for upselling and cross-selling new cloud solutions to existing customers, as well as all contract renewals. The CDR works closely with marketing to introduce and sell Next-Best-Offer (NBO) "waves" within a designated industry vertical, through an accelerated remote sales motion. This role also works closely with the support organization to assist in resolving outstanding issues with strategic accounts.

- Top Qualities:** Tenacious. Strong networking and lead generation. Sales process compliance. Consistent quota achievement. Excellent communicator.
- Previous Roles:** Business Development, Pre-Sales Support, Customer Support, relevant role within the focus industry/vertical.
- Certifications:** Defined / corporate B2B sales methodology.

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"> <li>Establish and extend LOB and executive relationships within the customers' business community.</li> <li>Understand the key business drivers and business processes within the focus vertical/industry.</li> <li>Map business challenges to cloud services and solutions.</li> <li>Exceptional communication skills (written, verbal, and presentation).</li> <li>Accurately forecast opportunity scope, revenue and close date.</li> <li>Strong objection handling and closing skills.</li> <li>Demonstrate a high level of business acumen and literacy.</li> <li>Solution demonstration skills (light).</li> <li>Highly organized and able to stay on target while performing a variety of critical short, medium- and long-term tasks daily.</li> </ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"> <li>Engage existing customers to secure renewals and sell additional cloud services.</li> <li>Develop and maintain a high level of industry competence and knowledge.</li> <li>Proactively propose incremental cloud and managed service offers that build on customers' existing technology and cloud services footprint.</li> <li>Develop and manage an active pipeline of qualified SMB (small and medium business) customer opportunities.</li> <li>Engage with all prospect stakeholder levels (tactical, operational and leadership).</li> <li>Facilitate business case discovery and ROI/payback discussions with prospect stakeholders.</li> <li>Leverage intelligent discovery to identify business pains and business process challenges.</li> <li>Clearly articulate the business and Total Cost of Ownership (TCO) benefits of cloud, SaaS and subscription-based offers.</li> <li>Remotely deliver brief solution demonstrations, presentations and close transactions without physically meeting customers.</li> </ul>
<b>Technologies</b>	<ul style="list-style-type: none"> <li>Working knowledge of full Office 365 suite and related productivity applications (Teams, Skype, etc.).</li> <li>Strong working knowledge of CRM and lead generation social selling tools (Hub Spot, LinkedIn, Adobe Marketo, etc.).</li> </ul>

<b>Certifications</b>	<ul style="list-style-type: none"><li>• Bachelor's degree or equivalent expertise and 3+ years sales experience in a business-to-business environment.</li><li>• B2B sales methodology.</li></ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>• Industry or vertical experience.</li><li>• Self-motivated, ability to work independently.</li><li>• High degree of emotional intelligence.</li><li>• Ability to learn and adapt in a rapidly evolving environment.</li><li>• Desire to make a difference.</li></ul>

## Pre-Sales Cloud Solution Engineer

The Pre-Sales Cloud Solution Engineer supports the Account Executive, Business Development Representative and Customer Development Representative in driving their active sales pursuits. The PCSE reports to the Sales Leader and is responsible for facilitating prospect both remote and onsite prospect discovery sessions, defining cloud solution fit and working with the delivery team to develop accurate cloud solution recommendations, scope clarity and accurate project services estimates. This role also works closely with corporate marketing and product management to identify new cloud solution development and packaged services opportunities (IP).

- **Top Qualities:** Understand customer requirements and business challenges. Effectively communicate solution value. Detail oriented. Analytical, problem-solving orientation.
- **Previous Roles:** Pre-sales support, business analyst, project delivery, customer support and/or relevant role within the focus industry/vertical.
- **Certifications:** Demo2Win or equivalent training. B2B sales methodology.

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Translate technology jargon and technical requirements into business language.</li><li>• Ability to explain complex cloud solutions (and architectures) in simple terms.</li><li>• Establish relationships with both LOB IT stakeholders during active sales cycles. Demonstrate a high level of business acumen and literacy.</li><li>• Develop and maintain a high level of industry competence and knowledge. Understand the key business drivers and business processes within the focus vertical/industry.</li><li>• Map business challenges to cloud services and solutions.</li><li>• Exceptional discovery skills.</li><li>• Strong solution design capabilities</li><li>• Strong solution demonstration skills.</li><li>• Exceptional communication skills (written, verbal, and presentation).</li><li>• Highly organized. Able to prioritize a variety of critical short, medium- and long-term tasks for multiple sales pursuits.</li><li>• Identify and determine impact of both functional gaps, as well as technical gaps and project risks</li></ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Actively support the opportunity profiling and qualification process.</li><li>• Prioritize and manage support activities for an active pipeline of prospect and customer opportunities.</li><li>• Engage with all prospect stakeholder levels (tactical, operational and leadership).</li><li>• Accurately identify business case and ROI elements.</li><li>• Leverage intelligent discovery to identify business pains and business process challenges.</li><li>• Collaborate with project delivery to define customer solutions.</li><li>• Prepare and deliver cloud solution demonstrations, both onsite and remotely.</li><li>• Continually refresh and update Dynamics and Microsoft cloud service solution knowledge.</li><li>• Support the development of RFI/RFP submissions.</li><li>• Actively support prospect cloud solution trials, pilots and POCs.</li></ul>
<b>Technologies</b>	<ul style="list-style-type: none"><li>• Working knowledge of full Office 365 suite and related productivity applications (Teams, Skype, etc.).</li><li>• Strong working knowledge of CRM and lead generation social selling tools (Hub Spot, LinkedIn, Adobe Marketo).</li><li>• Microsoft Dynamics or equivalent certifications.</li></ul>
<b>Certifications</b>	<ul style="list-style-type: none"><li>• Bachelor's degree in computer science, engineer or computer security or equivalent expertise and 3+ years of sales or customer support experience in a business-to-business environment.</li><li>• Demo2Win or equivalent solution demonstration training.</li></ul>

<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>• 5+ years industry or vertical experience.</li><li>• Self-motivated, ability to work independently.</li><li>• High degree of emotional intelligence.</li><li>• Ability to facilitate/whiteboard solution discovery and design sessions.</li></ul>
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## Customer Success Manager (CSM)

The Customer Success Manager is responsible for driving successful adoption and expansion of Business Applications workloads within their accounts. Primary responsibilities include developing long-term relationships within a portfolio of strategic clients, aligning customer business needs with Microsoft technology solutions and helping customers bridge the IT/business gap.

This role is also responsible for managing the day-to-day client relationships, and facilitating the development of the appropriate technical, operational and strategic relationships necessary to develop a deep and broad business partnership.

The CSM will collaboratively drive change management and adoption activities with key Business Decision Makers, help reduce implementation risk, drive usage of existing workloads, and identify opportunities in her/his accounts. The CSM is also a key part of our customer facing sales teams and will be called on frequently to leverage their deep knowledge of CRM or ERP to support sales growth.

- **Top Qualities:** Business acumen; compelling people skills; project management skills
- **Previous Roles:** Account Management, Change Management Consulting, Business Consulting
- **Certifications:** Business Degree (BA or MBA), Change Management

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Deep understanding of SaaS customer engagement</li><li>• Understand core business drivers within each customer industry or vertical.</li><li>• Proven ability to map the customer's business process to product capability</li><li>• Experience in driving CRM or ERP transformation in enterprises through effective change management and adoption highly preferred</li><li>• Accurately segments and prioritizes the customer portfolio by opportunity and need.</li><li>• Understand internal and external pressures that affect customer priorities</li><li>• Proactively identifies and surfaces new technology or business solutions that support strategic customer objectives and/or address customer challenges.</li><li>• Collaborates and engages with internal project and delivery colleagues to identify and position ongoing next wave sales opportunities.</li></ul>
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<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Build, maintain and leverage strong relationships with Business Decision Makers (BDMs) and IT Decision Makers (ITDMs) within each customer to influence solution adoption, create strong support for new opportunities and to secure their willingness to advocate on behalf of the solution and project</li><li>• Ability to drive change throughout a customer's organization including managing communications and training for varieties of stakeholder groups</li><li>• Create value for customers by ensuring they clearly define business outcomes and then build a "success plan" with the appropriately identified objectives, stakeholders, milestones, risks and metrics needed to achieve them</li><li>• Facilitate strategic planning workshops with customers</li><li>• Proactively identify new workloads and expansion opportunities in each account to drive value both for the customer and partner</li><li>• Connect features / functions to customers' desired business outcomes.</li><li>• Co-develop customer business cases to support project approval and funding.</li><li>• Build/maintain rapid channel of communication to customer in case of online service-related issues and events</li><li>• Create, maintain and execute strategic account plans for each customer account:<ul style="list-style-type: none"><li>◦ plans contemplate customers' value chain, eco-system, internal/external business drivers, key customers and suppliers.</li><li>◦ plans contemplate a staged or wave approach to identifying and recommending the "next-best project."</li><li>◦ plans reflect account-based marketing approach across prioritized customer accounts.</li></ul></li></ul>
<b>Technologies</b>	<ul style="list-style-type: none"><li>• Working knowledge of the Microsoft cloud platform and Microsoft Dynamics (or equivalent ERP/CRM) capabilities.</li><li>• Feature / Function knowledge of relevant Microsoft Dynamics solution set.</li></ul>
<b>Certifications</b>	<ul style="list-style-type: none"><li>• Business degree or equivalent (MBA desirable).</li><li>• Certification in Organizational Change Management.</li><li>• Executive engagement/communications training.</li><li>• Presentation delivery training.</li></ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>• 3+ years B2B sales experience (Account Executive, Business Development, Pre-Sales Support, Project Delivery).</li><li>• Previous industry/vertical expertise.</li><li>• Strong orchestration and relationship development skills.</li></ul>

## Change Management Consultant

As a Change Management Consultant, you will be a key leader in working with our customers to drive the people and process side of digital transformations. Accelerating value realization for customers requires a deep understanding of not only business strategy and process, but also how organizations respond to and adapt to change.

The Change Consultant will work with executives and business leaders at large organizations in a variety of industries to drive effective change programs aligned with our business solutions. You will secure executive sponsorship, engage with key stakeholders and ensure that the solution is developed in ways that effectively meet business strategy and stakeholders needs, while overcoming inertia and delivering sustainable results.

Your contributions will include strategic engagement with executives, business process management, and stakeholder alignment, communications and readiness.

- **Top Qualities:** Business acumen; compelling people skills; project management skills
- **Previous Roles:** Change Management Consulting, Business Consulting, Business Process Management
- **Certifications:** Change Management, Business Degree (BA or MBA)

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Understand core business drivers within each customer industry or vertical.</li><li>• Understand internal and external pressures that affect customer priorities</li><li>• Strong verbal (telephone), written and presentation communication skills.</li></ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Experience in leading change management frameworks and methods</li><li>• Ability to network within and across customer accounts to broaden the contact base, specifically within LOB and senior leadership.</li><li>• Facilitates strategic planning workshops with customers</li><li>• Conducts accurate due diligence (discovery) with technical, operational and strategic project stakeholders.</li><li>• Connects features / functions to customers' desired business outcomes.</li><li>• Experience driving change throughout a customer's organization including managing communications and training for varieties of stakeholder groups</li><li>• Project management</li><li>• Excellent written and verbal presentation skills</li></ul>
<b>Technologies</b>	<ul style="list-style-type: none"><li>• Working knowledge of the Microsoft cloud platform and Microsoft Dynamics (or equivalent ERP/CRM) capabilities.</li><li>• Feature / Function knowledge of relevant Microsoft Dynamics solution set.</li></ul>
<b>Certifications</b>	<ul style="list-style-type: none"><li>• Business degree or equivalent (MBA desirable).</li><li>• Certification in Organizational Change Management.</li><li>• Executive engagement/communications training.</li><li>• Presentation delivery training.</li></ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>• 3+ years of experience in change management and business consulting</li><li>• Experience with c-level, stakeholder management, communications, and training programs</li><li>• Previous industry/vertical expertise.</li><li>• Strong orchestration and relationship development skills.</li></ul>

## Marketing Leader

The Marketing Leader is responsible for driving marketing strategy, tactics, campaigns and programs to produce top-line results that raise brand awareness, recognition, and loyalty for the company and the broader Microsoft Dynamics offerings. This position is tasked with demand generation and marketing funnel optimization using brand, advertising, creative, digital, field and channel marketing. The Marketing Leader shapes and directs the company's go-to-market vision and works cross functionally to ensure the right mix of offerings, positioning and price. This position is also responsible for planning, organizing, staffing, training, and managing all marketing functions to achieve the company's sales, growth and profitability objectives, while ensuring consistent global marketing messaging and positioning that is consistent with the corporate direction.

- **Top Qualities:** Excellent strategic, analytical and leadership skills. Creative and entrepreneurial spirit.
- **Previous Roles:** Vice President of Marketing, Director of Marketing, Head of Marketing
- **Certifications:** Bachelor's degree in Business, Arts, Engineering and/or Sciences. An advanced degree in marketing or business (MBA) is preferred.

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Spearhead the planning, development and execution of the organization's marketing strategy and go-to-market vision.</li><li>• Oversee the implementation of all marketing strategies over the full marketing lifecycle: inclusive of campaign and program design, execution, monitoring, optimization and analysis.</li><li>• Deep demand generation focus to strategically grow a customer base and maximizing online revenue generation opportunities across multiple channels.</li><li>• Increase sales revenue through traditional and digital marketing activities including creative design, content creation and management, marketing automation, customer and campaign analytics, e-commerce, and web, search, email, social and mobile marketing.</li><li>• Manage the "voice of the customer"</li><li>• Ability to monitor and interpret competitive research to inform product and services adjustments, as well as opportunity identification.</li><li>• Ensure marketing KPIs align with and support both organizational and operational objectives.</li><li>• Prioritize and manage marketing budgets to ensure maximum ROI.</li><li>• Lead and mentor a high-performing, highly collaborative marketing team across multiple functions: brand, digital, social media and creative, channel and field marketing, advertising and PR.</li></ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Successful track record building and managing multi-functional marketing teams. Ability to motivate and inspire marketing team members.</li><li>• Possesses exceptional verbal and written communication skills as well as strong and persuasive presentation abilities.</li><li>• Ability to network and effectively leverage professional contacts.</li><li>• Drives the daily execution and enhancement of the company's overall marketing strategy. Delivers measurable results within a defined budget.</li></ul>
<b>Technologies</b>	<ul style="list-style-type: none"><li>• Exceptional knowledge of marketing principles, techniques, technologies and platforms.</li><li>• Working knowledge of marketing automation, SEO, social and content management tools.</li><li>• Deep understanding of CRM and lead management tools (HubSpot, Pardot, Adobe Marketo, etc.).</li></ul>
<b>Certifications</b>	<ul style="list-style-type: none"><li>• 8+ plus years B2B marketing experience; previous senior management or executive positions in technology and/or related industries.</li><li>• Highly collaborative leader with 5+ years people management experience.</li><li>• International marketing experience is preferred.</li></ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>• Industry/vertical marketing expertise.</li><li>• Action-orientation, with the desire and ability to get things done. Strong sense of urgency.</li><li>• Effective collaboration and influencing capabilities.</li></ul>

## Digital Marketing Manager

The Digital Marketing Manager plans and executes all digital marketing activities, including SEO/SEM, marketing technology, email, mobile, social media and display advertising campaigns. This position plays a major role in enhancing brand awareness within the digital arenas and drives online traffic to your website that lead to best-in-class customer acquisition. The Digital Marketing Manager is also responsible for improving the usability, design, content, ranking and conversion of the company website. Additionally, they oversee and influence the social media strategy by creating and managing the social profile and presence, monitoring online conversations and sentiment and creating content for social channels. This role must relentlessly stay current with the latest trends and best practices in online marketing, analytics and measurement.

- **Top Qualities:** Strategic **and** analytical thinker. Innovative and adaptable.
- **Previous Roles:** Digital Marketer, Digital Marketing Manager, Social Media Manager/Specialist, SEO Manager/Specialist
- **Certifications:** Bachelor's degree in Business, Arts, Engineering and/or Sciences; Certifications: Google Analytics and AdWords, HubSpot and Hootsuite.

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Proven track record managing an organization's digital presence, creating content for digital, social and mobile channels, engaging in social listening and monitoring online conversation and brand mention that drive an enhanced customer experience.</li><li>• Deep experience generating new leads, specifically marketing qualified leads (MQL), by converting site traffic through calls-to-action, landing pages, and lead generation content (including offers).</li><li>• Excellent verbal and digital communication skills. Proficiency in all social channels, as well as experience with public relations or public brand management.</li><li>• Optimization of marketing automation and lead nurturing processes through email, content, and social channels.</li><li>• Establish closed-loop analytics with sales to understand how inbound marketing activities convert into customers. Continuously refine the customer engagement and conversion process.</li><li>• Experience with improving organic and paid search rankings and results (SERP and SEM), conducting keyword research, making technical SEO recommendations, designing site architecture, and analyzing and applying metrics on website and keyword performance.</li><li>• Deep experience driving reach, engagement, and advocacy in social media via organic content, paid ads, and influencers to acquire more followers on social channels.</li><li>• Collaborate with inbound marketing and blog contributors to maximize joint content development efforts</li></ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Strategic results orientation with a proven track record of strong tactical execution.</li><li>• Meaningful experience with data-driven SEO analysis and optimization; as well as hands on knowledge of SEO tools, email marketing, lead nurturing, marketing automation, and/or web analytics.</li><li>• Possesses an active and well-rounded personal presence on social media, with a command of each network and their best practices.</li><li>• Highly analytical with an ability to use both data and intuition to inform decisions; can derive meaning from data through A/B testing and email optimization.</li><li>• Strong written, oral and visual communication skills.</li><li>• Proven ability to manage projects involving both internal staff and external agencies.</li></ul>
<b>Technologies</b>	<ul style="list-style-type: none"><li>• Thorough knowledge of search ranking, optimization factors and key algorithm updates.</li><li>• Deep proficiency in SEO optimization tools, Google and other web analytics, and keyword tools</li><li>• Experience with content and email management tools, and marketing automation technology</li><li>• Working knowledge of Office 365 and related productivity apps, with deep knowledge of CRM and Lead Management tools (HubSpot, Pardot, Adobe Marketo, etc.).</li></ul>

<b>Certifications</b>	<ul style="list-style-type: none"><li>• BA/BS degree or equivalent work experience.</li><li>• 3-5 years' digital marketing experience at an agency or B2B technology brand with proven examples of digital / social strategies and execution.</li></ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>• Industry/vertical experience</li><li>• Analytical ability and can use data to inform all decisions</li><li>• Innovative and adaptable</li></ul>

## Content Marketer

The Content Marketer is pivotal to generating inbound leads through writing authoritative, thought-leadership content. This position is responsible for strategizing and executing content creation and delivery, tracking metrics that influence content strategy, and collaborating with both technical and subject matter specialists to produce relevant content that engages the emotions of your target audiences. They must be an exemplary writer who can clearly communicate your company's tone and mission with clean, concise copy. The Content Marketer is responsible for producing blogs, eBooks, whitepapers, infographics, guides and articles, as well as audio and video content. This position must also know how to blog and effectively communicate to an online audience.

- **Top Qualities:** Excellent communicator and storyteller. Experimental and curious. Analytical and precise. Results driven.
- **Previous Roles:** Content Marketer, Copywriter, Editor, Corporate Communications, Inbound Marketing.
- **Certifications:** Bachelor's degree in Business, Arts, Engineering and/or Sciences.

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Deep understanding of, and ability to, strategize and execute content creation and delivery.</li><li>• Channel management of digital content hubs and all supporting social channels, including email / newsletter distribution.</li><li>• Knowledge of inbound content best practices and all business relevant social media channels and/or platforms.</li><li>• Experience driving inbound traffic, prospect/customer engagement and qualified lead generation</li><li>• Ability to work with, and produce compelling content for, sales to improve lead quality and with support to improve customer retention.</li><li>• Ability to drive collaboration, planning and measurement of inbound campaigns and programs across internal stakeholder groups.</li><li>• Ability to build and manage a rich content/editorial calendar that attracts a qualified audience to defined digital properties (inclusive of blog posts, whitepapers, eBooks, reports, webinars, infographics, etc.).</li><li>• Ability to optimize marketing automation and lead nurture processes across digital and social channels.</li><li>• Clear understanding of, and experience tracking, metrics that influence content strategy to ensure optimal ROI.</li><li>• Excellent writing and editing skills. Experience with editorial governance over brand voice, style and tone.</li></ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Collaborate across functions and silos to deliver an effective content marketing strategy and editorial plan that addresses primary business objectives at the lowest possible cost.</li><li>• Strong project management skills. Ability to lead all stages of content development from ideation through execution and implementation.</li><li>• Ability to deliver measurable results across multiple channels relating to increased engagement, lead generation and sales execution.</li><li>• Strong understanding of SEO and Google Analytics to optimize content creation.</li><li>• Ability to engage and maintain connections with social audiences.</li><li>• Editorial mindset with an ability to predict audience preferences and buyer behaviors.</li></ul>

<b>Technologies</b>	<ul style="list-style-type: none"><li>Expertise in marketing and social media automation platforms and content management tools such as WordPress, as well as email marketing tools such as Constant Contact, MailChimp etc.</li><li>Understanding of SEO, keywords and Google analytics.</li><li>Working knowledge of Microsoft Office365 and related productivity apps, with deep knowledge of CRM and Lead Management tools (HubSpot, Pardot, Adobe Marketo, etc.).</li></ul>
<b>Certifications</b>	<ul style="list-style-type: none"><li>BA/BS or equivalent working experience.</li><li>3+ plus years B2B marketing experience preferably in technology and/or related industries.</li><li>Best practices around digital, social, inbound and supporting mar-tech, as well as content creation and consumption patterns.</li></ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>Industry/vertical experience.</li><li>Excellent communicator, storyteller extraordinaire and creative thinker.</li><li>Digital expertise.</li></ul>

## Graphic Designer

The Graphic Designer is responsible for the creation, maintenance and updating of visual print and digital media marketing assets to support your brand and marketing goals. This position manages all phases of the design process including concept definition, mock-up production, content review and integration, as well as finished product. The graphic designer is responsible for the design aesthetic for all marketing and sales collateral materials, inclusive of presentations, event and trade show graphics, website design, blog templates, webinars, demos, emails and digital campaigns as well as all video and social media assets.

- **Top Qualities:** Creative. Clear communicator. Strong time/project management skills.
- **Previous Roles:** Graphic Designer, Art Director, Multimedia Content Creator
- **Certifications:** BA/BS or recognized design certification and/or equivalent working experience.

<b>Strategic Capabilities</b>	<ul style="list-style-type: none"><li>• Ability to create and champion the visual brand identity across all marketing channels.</li><li>• Ability to develop a clear understanding of the product/services brand positioning and messaging.</li><li>• Experience in articulating designs with a business-driven and brand experience mindset.</li><li>• Excellent verbal and visual communications skills.</li><li>• Understanding of the design and production of graphics for digital, website, social media, display ads, and email, as well as traditional print media – including page and microsite layout, animation, infographics, illustrations, graphics, banners and email templates, for both internal and external use.</li><li>• Manage all design requirements including presentations, signage, and trade show collateral.</li><li>• Ability to review web applications and visuals, including user interfaces created by both internal stakeholders and external vendors, to ensure alignment to brand standards.</li><li>• Ability to bring new design and content creation ideas to the broader marketing.</li><li>• Proficient with new media. Possesses a strong understanding of the integration and use of animation and video to drive prospect and client engagement.</li></ul>
<b>Execution Skills</b>	<ul style="list-style-type: none"><li>• Ability to generate high-level concepts, from strategic brief through to final execution.</li><li>• Experience managing all phases of the design process, including conceptualizing, mock-up production, copy creation, review and integration, and finished product review.</li><li>• Ability to work collaboratively within multiple stakeholder groups that include sales and product development, to identify and address visual requirements for projects and campaigns.</li><li>• Maintain quality control and responsibility for the integrity of the final deliverables.</li><li>• Manage the creative process across multiple project priorities and timelines.</li><li>• Ability to present concepts, communicate ideas, defend ideas to cross-functional project stakeholders.</li></ul>
<b>Technologies</b>	<ul style="list-style-type: none"><li>• Proficiency in graphic design programs such as Photoshop, Illustrator, and InDesign.</li><li>• Working knowledge of full O365 suite with an emphasis on PowerPoint.</li><li>• Video editing (Adobe Premiere Pro) a plus.</li><li>• Knowledge of HTML, CSS, and JavaScript a major plus.</li></ul>
<b>Certifications</b>	<ul style="list-style-type: none"><li>• BA/BS or recognized design certification and/ or 2+ years equivalent working experience.</li><li>• Previous experience working as an in-house designer or at a marketing agency.</li><li>• End user proficiency in Adobe Creative Suite or similar technologies.</li></ul>
<b>Experience Types/Qualities</b>	<ul style="list-style-type: none"><li>• Expert grasp of design fundamentals and trends.</li><li>• Strong organizational and communication skills.</li><li>• Digital expertise.</li><li>• Acute attention to detail.</li></ul>

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# Operationalize

## Business Applications

[aka.ms/practiceplaybooks](http://aka.ms/practiceplaybooks)



# Executive Summary



In the previous section, we reviewed how you should hire, train, and equip your staff. In this section, we will guide you through the steps to operationalize your practice.

We'll walk you through the options for leveraging your internal use benefits that provide you complimentary software licenses and subscriptions for use within your organization. We'll show you how to deepen relationships with your customer by re-selling Dynamics 365 as an overall package along with your software, creating a new revenue stream for your business.

This section also provides guidance on how to operate your business, from the infrastructure considerations of sales and marketing operations to the key contracts you will want to put in place.

Whether you're building products, providing managed services, or performing project work for customers, your success may be impacted by your ability to manage your customer records, your projects, and your support trouble tickets. We provide guidance on what tools and systems you should consider implementing.

## Top 5 things to do

Get your practice off the ground by putting your plan into action. These are the top 5 things you should do to get the momentum going.

- Implement standardized processes
- Decide on technology infrastructure
- Claim your internal use benefits
- Set up key contracts and tools
- Establish the customer support process

# Marketing Infrastructure

After developing an overarching corporate strategy for your business applications practice, marketing must develop an annual marketing plan to support the goals defined by the leadership team. Marketing will then turn strategy into action by operationalizing people and processes.

## MARKETING TECHNOLOGY

Your marketing team will absolutely need supporting technology to execute, analyze and improve their activities across the customer lifecycle. This includes brand awareness, lead generation and management, prospect engagement and nurture, customer acquisition and customer expansion. Marketing must also report outcome metrics and measure tactical efforts such as campaign performance and lead sourcing. These responsibilities require the right technologies to be in place, and the right people and processes to be deployed to optimize these investments. No matter what your practice size, you should consider building a well configured marketing technology stack that can scale to your forecasted growth objectives.

The key tools to consider should include:

**CRM:** As the foundation of your marketing stack, your CRM will house the data and business processes required to develop, improve, and extend your prospect and customer relationships. It must be configured to track your marketing attribution to sales and provide insights on how campaigns influence sales pipeline and customer growth.

**Marketing Automation:** a single in a single integrated solution that automates key marketing processes such as email marketing, drip and nurture campaigns, lead management and lead scoring.

**Content Management System:** information powers your website, blog and other web properties you can leverage to market your business online. It allows you to create, publish, store, edit and collaborate on website content. For clarity, if you have a website, you have a CMS.

**Social Media:** includes technology to accelerate audience growth, monitor activity, make social engagement easier, automate content distribution and measure channel performance.

**SEO:** helps you drive organic (unpaid) traffic to your website. This category includes many tools that help with keyword research, content analysis, link and citation building, keyword tracking and other SEO initiatives.

**Web Analytics:** tools designed to measure digital marketing activity, as well as analyze your website and web properties to identify both traffic sources and their actions and behaviours in terms of engagement and conversion.

## INSOURCE OR OUTSOURCE THE MARKETING FUNCTION

A key operational decision you will need to make regards whether to insource or outsource part or all your marketing functions. It is important to emphasize that there is no right or wrong model as much depends upon your organization's objectives, existing competencies, GTM timelines and budget.

**The advantages of in-house resources include:**

**Business, Industry and Brand Expertise:** With daily immersion into your business application practice, culture and values of your organization, this approach helps to ensure accurate and consistent brand messaging across all marketing messaging and deliverables.

**On-Demand Production:** As most business applications practices are fast paced, with changes in target market drivers and customer demands, and frequent changes in internal business operations, it can be challenging to efficiently and effectively communicate changes in positioning and strategy to an outsourced team. Internal marketers can quickly respond to time-sensitive projects, internal priorities and market changes. They can also liaison easily with cross functional resources within the business and key customers.

**Consistency:** Marketing messaging and deliverables require a consistent brand voice and clear definition. With

activities that require constant monitoring and fluency (email marketing and nurture campaigns) it is almost always more cost effective to assign these tasks to dedicated inhouse resources.

Common in-house marketing responsibilities include strategy, workflow process development, inbound lead generation and nurturing, including campaign planning, and data integrations, analytics and tracking

Given the focus of most successful business application practices, (which requires specialized knowledge of your customer's industry or niche and its intersection with your technology solution. Strategy ownership is always an inhouse function.

#### **The advantages of outsourced resources include:**

**Flexibility:** If you are testing a new approach, experimenting with a "one-off" project or need to scale quickly to meet a market opportunity, outsourcing enables you to execute quickly and effectively.

**Cost Efficiency:** It can be extremely costly to recruit and retain talent for marketing positions that are in demand. Retaining an inhouse resource may not be affordable, especially for smaller partner organizations.

**Specialized skills:** Often there is a lack of expertise or experience around key marketing activities that require

special skills, such as search engine optimization or video production. Typically, external agencies or specialists can provide resources with expertise across multiple clients, industries and domains. Consequently, they often bring many best practices to your team that would not otherwise have been possible.

Commonly outsourced Dynamics practice marketing activities include website development, graphic design, video production, content development (specifically copywriting), as well as marketing automation setup and consultation. SEO is a key capability that may require external assistance as SEO mistakes are often very costly. If you outsource this function, secure a resource that is aware of algorithm changes and knows the evolving best practices and most current techniques

A hybrid approach may possibly be the most effective and impactful in the early days of your business applications practice. You benefit from internal marketing professionals who are focused on your marketing outcomes daily, while simultaneously leveraging outsourced resources to fill in the gaps by bringing specialized skills to activities that are periodically required, but without the need for a full-time investment.

# Sales Infrastructure

After developing an overarching corporate strategy for your business applications practice, sales must develop a strategic sales plan to support the goals defined by the leadership team. The strategic sales plan describes the target market business environment, opportunities, strategic priorities, revenue goals, sales team structure, budget and action plan.

## SALES TECHNOLOGY

**CRM:** Configuring and implementing a CRM system that reflects the core elements of your target prospect profile is critical to understanding buyer behavior, effectively facilitating deal reviews, coaching sales team members and delivering an accurate forecast. At minimum the CRM system must support the collection of information regarding prospect and opportunity requirements, key stakeholders, project drivers, the selection process, key milestones, decision criteria, competitors and close dates. The CRM must also support the execution of your defined Accelerated, Depth, Disruptive and Existing Customer sales motions.

**Social Selling:** Equipping your sales team with a social selling "stack" is critical to driving impact, efficiency and prospect engagement. The minimum stack should include LinkedIn Navigator <https://www.linkedin.com> a social scheduling tool like Hootsuite <https://hootsuite.com/>, social listening tools and personality profiling tools like Crystal Knows [www.crystalknows.com](http://www.crystalknows.com).

**Industry Content Services:** Providing your sales team with access to industry content, insights, trends, and news events ensures they can facilitate domain specific conversations with prospects and customers. Subscriptions to industry tools like First Research [www.firstresearch.com](http://www.firstresearch.com), D&B Hoovers <http://www.hoovers.com>, and Industry Intelligence [www.industryintel.com](http://www.industryintel.com) help your sales professionals remain relevant and informed.

## NEW HIRE ONBOARDING

A well-designed onboarding process harnesses the excitement, enthusiasm and desire to make an immediate impact that all sales professionals bring to a new job. They are motivated to 'hit the ground running', open to learning new sales strategies, and eager to

engage with your prospects. Unfortunately, this initial burst of energy is often undermined by a disorganized onboarding process. It is critical that you put as much structure and energy into onboarding new sales employees as you do into sourcing and interviewing them.

## Structure an Effective Onboarding Process

Sales professionals will be exposed to a substantial amount of new content during their onboarding cycle. To ensure this information is absorbed, hiring managers must consistently evaluate new sales hires to determine if they fully understand and can demonstrate the skills they need to succeed in role.

To reduce the risk of losing a new employee during the onboarding process (or not identifying a hiring mistake early), managers should:

1. Clearly communicate the company vision
2. Align organizational and employee objectives
3. Set clear expectation and objectives
4. Ensure pre-onboard housekeeping is complete
5. Design a comprehensive onboarding roadmap with defined activities for key timeline milestones:
  - a. first day
  - b. first week
  - c. first month
  - d. 90-day confirmation

	Week 1	Objectives	Partner Task	New Hire Task
Sales Orientation		<input type="checkbox"/> Sales Technology Training <input type="checkbox"/> CRM System Training <input type="checkbox"/> Peer Shadowing <input type="checkbox"/> Industry Knowledge Trends <input type="checkbox"/> Solution Knowledge Trends <input type="checkbox"/> Core Product Training	Hiring manager will have an overview of the sales methodology, sales cycle, and how to engage with internal stakeholders. Review user management system (activity/relationship performance reviewed and CRM system).	Bring a sample account in for the new hire to review and analyze opportunity profile and set of requirements. Develop an account plan. Consider at least two half-day over shadowing sessions.
				Review and call three B2B clients.
				Review all customer case studies, new company website and all other assets.
				Complete all week 1 tasks by end of week 1. Deliver a summary report and presentation to the leadership team.

	Month Three	Objectives
Communication Skills		<input type="checkbox"/> Strong team synergy and alignment with corporate culture <input type="checkbox"/> Accurately qualifies new marketing leads (active vs. nurturing) <input type="checkbox"/> Consistently facilitates effective and accurate discovery calls
Technical Training, Industry Knowledge & Business Acumen		<input type="checkbox"/> Develops professional network (internal and external) and maintains regular communication with them. <input type="checkbox"/> Accurately identifies client business challenges <input type="checkbox"/> Consistently identifies proposed business case elements <input type="checkbox"/> Consistently identifies and executes sales enablement programs <input type="checkbox"/> Consistently demonstrates an understanding of their prospective vocabulary
Sales Skills		<input type="checkbox"/> Sets sales plan aligned for industry <input type="checkbox"/> Closes at least three new opportunities <input type="checkbox"/> Accurately qualifies leads <input type="checkbox"/> Minimum of ten self-generated prospects <input type="checkbox"/> Minimum of ten self-generated opportunities <input type="checkbox"/> Consistently prepares for client meetings
		<input type="checkbox"/> Minimum of ten closed sales opportunities <input type="checkbox"/> Minimum of ten self-generated opportunities <input type="checkbox"/> Minimum of ten self-generated prospects <input type="checkbox"/> Minimum of ten self-generated opportunities <input type="checkbox"/> Consistently prepares for client meetings
		<input type="checkbox"/> Minimum of ten closed sales opportunities <input type="checkbox"/> Minimum of ten self-generated opportunities <input type="checkbox"/> Minimum of ten self-generated prospects <input type="checkbox"/> Minimum of ten self-generated opportunities <input type="checkbox"/> Consistently prepares for client meetings
		<input type="checkbox"/> Minimum of ten closed sales opportunities <input type="checkbox"/> Minimum of ten self-generated opportunities <input type="checkbox"/> Minimum of ten self-generated prospects <input type="checkbox"/> Minimum of ten self-generated opportunities <input type="checkbox"/> Consistently prepares for client meetings

6. Structure an experiential learning process
7. Continuously evaluate, coach & confirm

8. Make a clear retain or replace decision at the end of the 90-day probation period

## SALES METHODOLOGY

### Create Repeatable Processes

Cloud business application buying processes are increasingly leaving sales professionals with fewer and fewer prospect engagement opportunities. Every interaction counts. Every prospect communication has to have a purpose and sales processes have to be optimized to drive consistent outcomes. The cloud business application solution you bring to market will effectively dictate whether the sales team drives a three phase **Accelerated** process, a four phase **Depth** approach or a five phase **Disruptive** strategy. If you pursue multiple buying profiles within your focus industry or vertical (SMB repeatable and ISV mid-market) your sales team will have to define and drive two separate opportunity pursuit streams. You will also have to define a wave-based **Customer** sales motion to drive activation and consumption of both existing and new cloud, project and managed services (up/x-sell).

**Repeatable Sales Assets:** Preconfiguring industry or vertical specific sales assets drives sales process compliance, improved message consistency, increased deal velocity and accelerated prospect engagement. It also forces your organization to clearly define and validate critical project drivers, business case elements and key milestones. Core repeatable sales assets include:

- Engagement communication (e/v-mails)
- Alignment plan
- Engagement plan
- Credentialing meeting agenda
- Demonstration Plan
- Selection service proposal
- Optimization workshop summary report
- Proposal presentation
- Solution proposal

These repeatable sales assets, which underpin all three cloud sales motions, need to be updated and enhanced on an ongoing basis to ensure they accurately reflect the business environment and realities of your target market.

It's also important to ensure that sellers and customers clearly understand your differentiated services, such as

change management or managed services, that accelerate value realization and reduce project risk.

For more information on how to configure and execute repeatable sales assets that align with your focus industry or vertical, please review:

- Microsoft Dynamics Business Central Prospect Engagement Guide
- Microsoft Dynamics Business Central Emotional Discovery Guide
- Microsoft Dynamics Business Central Engagement Plan
- Microsoft Dynamics Business Central Industry Insights Guide
- Microsoft Dynamics Business Central Alignment Email Guide
- Microsoft Dynamics Business Central Demonstration Plan Guide
- Microsoft Dynamics Business Central Proposal Presentation Guide
- Microsoft Dynamics Business Central Solution Proposal Guide

## SALES OPERATIONS

**Management Rhythm:** Sales leadership must schedule and facilitate consistent opportunity/deal, pipeline and forecast reviews. This disciplined rhythm drives sales process compliance, active coaching and forecast accuracy.

**Proposal Management:** All estimates, proposals, NDAs, and contracts need to be vetted by the appropriate leadership team members prior to release to prospects or customers.

**Compensation and Incentives:** The cloud, SaaS and a focus on monthly recurring revenue have effectively rendered most traditional compensation models obsolete. Licensing revenue, which was historically collected upon contract execution and used to fund sales and marketing costs, is now recognized over a much longer period. Time and materials project services are increasingly being replaced with 3rd party and partner-developed IP or being converted into recurring monthly fees. Simultaneously, customer demand is shifting towards solution sets that include multiple Microsoft and partner developed components (ERP, CRM, ISV, Office365,

PowerBI, SharePoint, Azure, managed services, IP, etc.). Combined, these changes are driving the need for new compensation models. Sales operations is responsible for designing balanced sales compensation plans that attract skilled talent, incent the right behaviors and mitigate overall business risk.

For more information on how to design cloud sales compensation plans, please review the Microsoft Dynamics Business Central Sales Compensation Guide.



## Implement a Solution Delivery Process

The process you follow in delivering your solution to your customer is just as important as the technologies you use to deliver it.

When Dynamics 365 SaaS projects fail, it is most often due to basics like a lack of cloud technical skills, inadequate Fit/Gap analysis, poor project governance, or team churn. These issues are associated with not having the right people on the team and an underdeveloped methodology for delivery.

Many business solution failures are also driven by poor alignment of strategy, executive sponsors, stakeholders, or business processes. Solution delivery processes that include modern change management best practices reduce these risks and accelerate value to customers.

Investing in proper time estimation methods and delivery processes is critical for success, partner profitability, and customer satisfaction. Independent of the methodology choices, partners must always drive a short time to value, which translates to fewer customizations, better use of standardized business processes, and fast delivery of solution modules to users.

When it comes to delivering solutions for your business applications practice, incorporate the processes that best fit your needs and your team.

### Scrum Process

The [Scrum](#) process works well if you want to track product backlog items (PBIs) and bugs on the Kanban board, or break PBIs and bugs down into tasks on a task board. This process supports the Scrum methodology as defined by the [Scrum organization](#). Tasks in this process support tracking remaining work only.

### Agile Process

Choose [Agile](#) when your team uses Agile planning methods, including Scrum, and tracks development and test activities separately. This process works well if you want to track user stories and bugs on the Kanban board, or track bugs and tasks on the task board. You can learn more about Agile methodologies at the [Agile Alliance](#). Tasks support tracking Original Estimate, Remaining Work, and Completed Work.

## Create Repeatable Processes

Repeatable processes make for profitable practices. Use the following example checklist to build your own checklist to use when executing a new engagement.

- Hold initial requirements meeting
- Identify product owner/manager(s)
- Identify executive sponsors of the project
- Ensure the project has clear strategic goals and success metrics
- Identify key business process owners and stakeholders
- Ensure that business processes are aligned with business strategy and stakeholder needs
- Bind customer's organization and their business processes owners into the QA process
- Reduce the volume of customizations, as they have a high impact on mobile extensibility
- Follow-up meeting to clarify and establish next steps
- Discuss MVP (minimal viable product) criteria
- Establish development process (Agile, Scrum, etc.)
- Identify milestones and tasks; share with customer
- Identify Mobile usage scenarios and mobile devices requirements as early as possible

- Provide cost estimates for development, cloud services, and ongoing maintenance/support
- Address customer objections to proposed technology and services
- Acquire data (or sample of data) for initial data assessment and proof of concept development
- Host project artifacts (issues, code, etc.) to share with internal team and customer (e.g. Visual Studio Team Services)
- Follow up with customer and provide status/demos on a regular basis (e.g. 2-week sprint)
- Ensure customer has communications and readiness plan to address the needs of each stakeholder team
- Coordinate a final handoff to customer
- Conduct project debrief with customer
- Organize internal project post-mortem
- Customer conducts acceptance test
- Execute a progressive deployment strategy, i.e. one region, several regions, one country, two countries, several countries
- Ensure customer has a plan to track progress against success metrics and adoption targets

# Implement Intellectual Property Offerings

Consider these tips to if you are going to invest in developing IP and begin to monetize your domain expertise.

## DEFINE YOUR SOLUTION

When we asked partners how they determined what IP they were going to build, we often got the same answer: they realized most of their customers were asking for the same thing or something very similar. Rather than continuing to do high-cost, custom work for every customer, they decided to productize what their customers were asking for. Bring your sales, marketing, technical, and delivery teams together to brainstorm and define what patterns of challenges you are seeing across your customer base.

## DETERMINE WHAT WILL DIFFERENTIATE YOUR SOLUTION FROM OTHERS IN THE MARKET

It is important to think about your differentiation strategy. What is going to make your solution better than other similar solutions in the industry?

## MAINTAIN RIGHTS TO THE IP

As you make the transition from project-based or custom services to packaged IP, it is critical to revise your customer agreements, so you can maintain the IP rights to the solutions you build.

As we mentioned in Considerations for Building Intellectual Property, you should engage legal counsel to help you protect and maintain ownership of the IP you create. Key to success with IP is effectively defining licenses, contracts and terms of use, and acquiring patents if applicable.

## CONSIDER YOUR CHANNEL STRATEGY

One of the advantages of productizing your IP is it opens the possibility of selling your solution on AppSource or through the Microsoft channel of partners.

## RESOURCES

- Building IP to Drive Margins
- Create Stickiness with IP

# Microsoft Licensing Options

There are several ways you can purchase the Microsoft cloud services needed to support your customers and your practice.

## MICROSOFT CLOUD AGREEMENT VIA THE CLOUD SERVICE PROVIDER PROGRAM

Microsoft Cloud Agreement (MCA) is a transactional licensing agreement for commercial and government organizations seeking to fully outsource management of their cloud services through the Cloud Solution Provider (CSP) program.

In combination with the value-added services offered by a systems integrator, hosting partner, or born-in-the-cloud reseller partner, the CSP program offers an easy way to license the cloud services your customers need. On-premises software and Software Assurance are not available through CSP partners.

The CSP model keeps partners at the center of the customer relationship by providing them with direct management of billing, provisioning, and support.

## MICROSOFT ISV ROYALTY LICENSING PROGRAM

Microsoft ISV Royalty Licensing Program is for ISVs who want a convenient way to license Microsoft products and integrate them into a unified solution. ISVs can then replicate the business solution and distribute a fully-licensed solution to their end users. ISV Royalty (ISVR) agreements are for a three-year term and payment is made monthly through an authorized ISV Royalty Licensing Program distributor.

## MICROSOFT SERVICES PROVIDER LICENSE AGREEMENT

Microsoft Services Provider License Agreement (SPLA) is for service providers and ISVs who want to license eligible Microsoft products to host software services and applications to end customers. SPLA provides the license rights to host specific Microsoft products monthly for a three-year term, as outlined in the Microsoft Service Provider Use Rights (SPUR) with pricing based on use rights.

## MICROSOFT ONLINE SUBSCRIPTION AGREEMENT

Microsoft Online Subscription Agreement (MOSA) is a transactional licensing agreement for commercial, government, and academic organizations with one or more users/devices. MOSA works best for organizations that want to subscribe to, activate, provision, and maintain cloud services seamlessly and directly via the web through the Microsoft Online Subscription Program (MOSP). On-premises software and Software Assurance are not available through MOSA.

For more details on these licensing programs please visit <https://partner.microsoft.com/licensing/licensing-agreements>.

# Create your Presales Environment

Defining your presales environment strategy is necessary to drive repeatability, increase win-rates, and accelerate decision making. Although there are several options for hosting the presales environment, we recommend that you make an early investment in localized demo data and industry-oriented data to help you reduce cost of sales and accelerate the purchase cycle.

## SOLUTION DEMONSTRATION VS. TRIAL ENVIRONMENTS

Solution demonstrations and trials can both be leveraged during your sales cycle, but they each serve very different purposes. Trials are better suited to pre-configured solutions that are consumed with very little (if any) configuration. The trial must already contain the industry or vertical best practices, and these best or optimized business processes must be obvious to the prospect. Trials are ideally suited for marketing or self-serve driven buying cycles.

Solution demonstrations are best suited for sales scenarios in which the recommended solution set is significantly different from what the prospect is currently uses, and/or there are multiple ways to configure the Microsoft Dynamics solution.

Trials can be an effective sales asset if you are driving a highly prescriptive sales cycle and have a solution that has been developed for a very specific industry or vertical. Solution demonstrations are more effective for sales scenarios where you need to limit or control what you want your prospect to see.

Microsoft's Live Drive Application Launcher simplifies the creation of complex demonstrations, and can be found here: <https://demos.microsoft.com/livedriveapplauncher>

Keep in mind, some product features are add-ons not available in trial mode. If you are going to market with solutions that leverages add-on features in Field Service, Talent, Sales, or other products, you might need to invest in your own pre-sales environment.

There are three licensing options for supporting the pre-sale process.

## TRIAL ENVIRONMENTS

You can set up a trial for each unique presales engagement via the <https://trials.dynamics.com/> website.

PROS	CONS
<ul style="list-style-type: none"><li>• No direct cost associated to the environments</li><li>• Demo data and demo guidance embedded into each trial</li><li>• Environment comes with other relevant Microsoft technologies like Office 365 and Azure</li><li>• You can migrate a customer trial into their final instance if the customer decides to buy</li></ul>	<ul style="list-style-type: none"><li>• Temporary solution. Trials expires in 30 days although they can be renewed by request.</li><li>• Trial are not designed for repeatability in mind, usually requiring fake emails and credentials to be created all the time.</li><li>• English only.</li><li>• Not all features and functionalities are available in trials.</li><li>• Labor costs. Each trial requires a considered amount of work to setup integrations, customize scenarios for each customer, and deploy your solution IP.</li></ul>

## IUR (INTERNAL USER RIGHTS)

Internal User Rights (IURs) are Dynamics 365 licensing your partner organization have access to as part of the benefits of different competency levels in the Microsoft Partner Network. To be eligible, your organization needs to be at the Silver or Gold competency level. Each competency level has [different IURs](#).

Some partners use their IURs for internal operations, but other partners use the IURs for presales. The IURs environments have full feature and functionality coverage, and they don't expire if you keep your competency requirements updated.

PROS	CONS
<ul style="list-style-type: none"> <li>• No direct cost associated to the environments</li> <li>• Environments don't expire as long you keep your competency level updated</li> <li>• Integrated to your organization's tenant, so you can use business emails and credentials for access</li> <li>• Interface can be localized</li> </ul>	<ul style="list-style-type: none"> <li>• No demo data or demo guidance embedded. You need to invest initially to build the data and demo scenarios</li> <li>• Add-ons not included in most IURs</li> <li>• Limited number of user licenses</li> <li>• For global partners, the IURs can be already in use by other subsidiaries</li> <li>• Other Microsoft technologies are not part of the environment</li> </ul>

## COMMERCIAL SOFTWARE LICENSED ENVIRONMENT

In this modality, your organization will license the environment, just like a customer would, to support presales. The environment access can be controlled in a granular way and all the labor involved in building demo data and customer scenarios can be reused from one customer to the next. Most industry-oriented partners prefer to license their own presales environments as a productive way to drive repeatability and manage their vertical IP.

PROS	CONS
<ul style="list-style-type: none"> <li>• Full features and functionality, you license what you need in alignment with your go to market strategy</li> <li>• Environments don't expire as long you keep subscription</li> <li>• Integrated to your organization's tenant, so you can use business emails and credentials for access</li> <li>• Interface and data can be localized</li> <li>• You can apply a different security model and restrict access to the environments</li> <li>• You can host your IP and use the environment as part of your IP release process</li> </ul>	<ul style="list-style-type: none"> <li>• Subscription costs</li> <li>• Separated administrative process to manage instance, features, updates, security</li> </ul>



# Key Contracts and Practice Tools

You'll require a complete set of legal documents to drive compliance, protect your IP, and produce consistent engagement deliverables. You also need a documented process to monitor project progress, in terms of both the project plan and budget.

## KEY CONTRACTS

Leverage the [Key Contracts for Your Practice guide](#) to learn more about developing service level agreements, master services agreements, a statement of work, and a mutual non-disclosure agreement.

## MICROSOFT PROJECT ONLINE

[Microsoft Project Online](#) is a flexible online solution for project portfolio management (PPM) and everyday work. Project Online provides powerful project management capabilities for planning, prioritizing, and managing projects and project portfolio investments — from almost anywhere on almost any device. Project Online can be used by administrators, portfolio managers and viewers, project and resource managers, and team leads and members.

## VISUAL STUDIO TEAM SERVICES

[Visual Studio Team Services](#) provides various tools for tasks like running agile teams, providing support for

Kanban boards, handling work item backlogs, scrum boards, source control, continuous integration, and release management. Source control functionality provides Git support, which enables integration with GitHub if such integration is desired.

While Visual Studio Team Services will help you manage the technical aspects of your project, cost-containment requires a different set of tools.

## MICROSOFT DYNAMICS 365 FOR PROJECT SERVICE AUTOMATION

[Microsoft Dynamics 365 for Project Service Automation](#) provides users with the capabilities required for setting up a project organization, engaging with customers, project scheduling and costing, managing and approving time and expenses, and closing projects. It is specially targeted to address the needs of a project services-based practice, as it is designed for professionals who manage projects and the associated customer engagement process end-to-end.

## GITHUB

[GitHub](#) provides the hosted environment for the business application implementation team to version control and share their source code, notebooks and other artifacts both privately (e.g., internally to a team) and publicly (e.g., an open source project), and collaborate on development projects.

# Collaboration Tools and File Sharing

Collaborating with customers through the lifecycle of a project or the duration of a managed services agreement is critical. There are several services that can help you share project plans or set up lists for shared data.

## MICROSOFT TEAMS

[Microsoft Teams](#) is the latest collaboration tool from Microsoft and is designed to make your content, tools, people, and conversations available in a single location.

## YAMMER

[Yammer](#) is an enterprise social network collaboration offering to help teams collaborate and share files with each other.

## ONEDRIVE FOR BUSINESS

[OneDrive for Business](#) is an enterprise file sharing service that is designed for automatic synchronization of files between

your computer and the cloud. OneDrive makes it easy to share files with your customers or partners.

## SKYPE FOR BUSINESS

[Skype for Business](#) is an enterprise online meeting and conference service designed for business communications.

## SURFACE HUB

[Microsoft Surface Hub](#) is a Skype Online-integrated collaborations device, or “meeting room in a box.” In addition to the built-in team experiences like Skype for Business, Microsoft Office, and Whiteboard, Microsoft Surface Hub is customizable with a wide array of applications. Universal apps built for Windows 10 shine on Microsoft Surface Hub, and scale to the large screen. You can also connect apps from your personal device and drive them from Microsoft Surface Hub.



# Using CRM to Grow Your Business

CRM solutions streamline processes and increase profitability in your sales, marketing, and service divisions.

A strong CRM solution is a multifaceted platform where everything crucial to developing, improving, and retaining your customer relationships is stored. Without the support of an integrated CRM solution, you may miss growth opportunities and lose revenue because you're not maximizing your business relationships. Imagine misplacing customer contact information, only to learn your delay pushed your client into the arms of a competitor. Or, picture your top two salespeople pursuing the same prospect, resulting in an annoyed potential customer and some unfriendly, in-house competition. Without a centralized program where your people can log and track customer interactions, you will lose out on valuable sales opportunities.

## THE FUNDAMENTALS OF CUSTOMER RELATIONSHIP MANAGEMENT

CRM tools make the customer-facing functions of business easier. They help you:

- Centralize customer information
- Automate marketing interactions
- Provide business intelligence
- Facilitate communications
- Track sales opportunities
- Analyze data
- Enable responsive customer service

Running a successful business is no simple task. When marketing campaigns, data analysis, meetings, customer care, and more, all happen simultaneously, you need a powerful CRM solution to bring all these functions together in one place. Using Microsoft Dynamics 365 for Sales and Marketing you will practice what you preach and can seamlessly integrate all your outlook communications with prospects and clients and your LinkedIn contacts all in one place.

Your sales team will be working with the following types of records:

**ACCOUNTS:** Account records contain information about the companies you do business with.

**CONTACTS:** Contact records contain information about the people you know and work with. Usually, multiple contacts are associated with one account. Contacts could include people responsible for making purchasing decisions or paying invoices, support technicians, or anyone you work with at the company.

**LEADS:** Leads are potential sales, and you or your company can get leads from many different sources. For example, you can generate sales leads from marketing campaigns, inquiries from your website, mailing lists, social media posts, or in person at a conference or trades convention.

**OPPORTUNITIES:** When you qualify a lead, it becomes an opportunity, or a deal that you're getting ready to close.

[Microsoft Dynamics 365](#) can be customized, so you can also work with records relevant to your team and the way your organization does business, including [sales](#), [customer service](#), [field service](#), [project service automation](#), and [marketing](#).



# Define Customer Support Program and Processes

## Support Overview

It has been said an unhappy customer represents an opportunity to make a customer for life. Studies have found when a customer gets to the point of complaining, they are very emotionally engaged. If you can switch that negative to a positive, you may just have a customer for life.

When it comes to support, there are two perspectives you should consider. First, how will you support your customers when they have engaged you for project services, are using your software, or are utilizing your intellectual property? Second, where do you go for support for a solution you are building or because you need assistance on behalf of your customer?

### YOU WILL NEED TO:

- Define your support model
- Provision your support infrastructure
- Define and implement your escalation process
- Select and enable your support options

### SUPPORTING YOUR CUSTOMERS

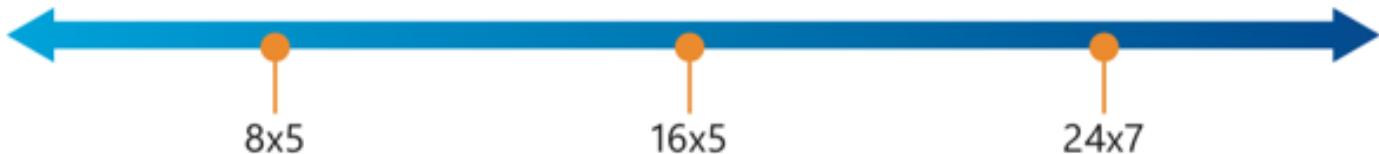
Let's begin with the first scenario in which you support your customers directly. It should go without saying that one of the most important functions for your MSP practice is to support your customer once their applications and data are firmly in the cloud or in a hybrid deployment. No matter how well a cloud or hybrid environment is planned, provisioned, operated, or monitored, problems will arise — and those problems will need to be remediated. It's your job as an MSP to offer support to your customers to deal with outages, breaches, inefficiencies, and disaster scenarios. MSPs need to consider the level of support that makes sense for their practice — in terms of resources and revenue — as well as what makes sense to the customers they serve.

### SUPPORT MODEL

How do you package and sell your support? We recommend bundling different levels of support with your monthly license fee. Try to move away from a typical fee per hour, where the customer pays a fee every time they utilize your support. This is not outcome based and creates a negative feeling every time the customer has to pay extra just to speak with you. You could also offer up to a specific number of hours per month for a flat monthly fee. Rather than calling it "customer support" consider creative new names which imply more value add, for example a "customer success program. You must also define your support availability, so your customers have a realistic expectation of when they can access your service. Perhaps online, self-serve and 24-hour response time via email questions is offered free, with same day phone support being a little more vs a premium package which included 2-hour response time, 24x7.

## SUPPORT AVAILABILITY

The more support you, as an MSP, offer, the more valuable your practice is to customers.



## SUPPORT INFRASTRUCTURE

How will you manage customer support requests and track them to closure? Many MSPs offer premium support offerings such as a Technical Account Manager who is responsible for tracking, reporting, and escalating an issue.

## ESCALATION PROCESS

How does a customer get help at the right technical level? For your support process to make economic sense, avoid having your most skilled and most expensive resources (e.g., architects, senior developers, etc.) answer every support call. Consider implementing tiered support with junior-level resources equipped to handle common issues. These resources should understand how to escalate a customer support case to a more senior-level resource once the common issues have been ruled out. You will need to decide how many levels of tiered support to offer, but two or three tiers are most common. When defining your escalation process, do not forget about the basics. For example, how do customers get in touch with you for support in the first place? This could be a dedicated support telephone number, forum or chat room, Twitter handle, email address, etc.

## LEVEL OF SUPPORT

Determine what level of support expertise you provide in your service offerings.



## Support Options from Microsoft

How do you receive support for your implementation efforts or on behalf of your customer?

### PARTNER ADVISORY HOURS

Partner advisory hours are used as currency for technical presales and advisory services offered by the Microsoft Partner Services team.

As part of your company's [Microsoft Partner Network](#) membership, your organization receives partner advisory hours for attaining a Microsoft competency, membership in Microsoft Cloud Accelerate, and subscribing to Microsoft Action Pack Develop and Design.

PARTNER LEVEL	NETWORK MEMBER	ACTION PACK	SILVER	GOLD	THESE HOURS CAN BE USED FOR
	0 hours	5 hours (after first cloud sale)	20 hours	50 hours	<ul style="list-style-type: none"><li>Onboarding assistance to maximize your partner program benefits</li><li>1:1 pre-deployment best practices consultation, based on your implementation scenario</li><li>1:1 developer consultation for ISVs</li></ul>

### SIGNATURE CLOUD SUPPORT

[Microsoft Signature Cloud Support](#) is provided as a benefit to Silver and Gold Partners. It primarily provides support for issues occurring in Azure subscriptions you own or on which you are a co-admin. It is not intended for supporting issues in subscriptions owned by your customers.

### MICROSOFT ADVANCED SUPPORT FOR PARTNERS

[Microsoft Advanced Support for Partners](#) is the ideal solution for partners who are growing their cloud business. Not quite ready for Premier Support, but need a higher level of service than the Microsoft Partner Network core benefits provide? The Advanced Support program delivers the right level of support to meet you in the middle while your business grows. With Advanced Support for Partners, you get cloud support at an accessible price point, which helps you be a great ally to your customers and grow your business faster. The program includes valuable proactive and reactive services delivered by experienced Services Account Managers and Partner Technical Consultants. Advanced Support for Partners enables you to provide support on behalf of your end customers, in addition to providing support on subscriptions you own directly. Designed from the feedback of over 1,500 partners like you, Microsoft Advanced Support for Partners addresses the specific needs of Cloud Solutions Providers (CSPs), born-in-the-cloud partners, and all other partners selling Microsoft cloud services.

## MICROSOFT PREMIER SUPPORT FOR PARTNERS

[Microsoft Premier Support for Partners](#) delivers a managed support offering for you and your customers — proactive support services for developing, deploying, and supporting Microsoft technology, whether on-premises, hybrid, or in the cloud. As the only partner program with complete, end-to-end managed support across the full Microsoft platform, Premier Support for Partners also provides a powerful marketing tool to gain competitive advantage in the marketplace.

Microsoft offers a range of paid [Azure support plan](#) options for customers — from developers starting their journey in the cloud to enterprises deploying business-critical, strategic applications on Microsoft Azure. These options are available in tiers — **Premier, Professional Direct, Standard and Developer Support Plans** — that are available for purchase directly by those who are not Microsoft Partners. In addition to these paid plans, Azure offers **core support**, which is free. It provides support via forums and help with account billing or management questions.

## SUBMITTING AZURE SUPPORT REQUESTS

Support requests need to be submitted using the Azure Portal. First you must log in to the subscription for which you want to receive support. Next, submit a support request. Once submitted, you can manage the incident from the Azure Portal.

## SUPPORT OPTIONS

PARTNER-FACING OPTIONS	RESPONSE TIME
Signature Cloud Support	Less than 2 hours
Microsoft Advanced Support for Partners	Less than 1 hour
Microsoft Premier Support for Partners	Less than 1 hour
Partner Advisory Hours	N/A

CUSTOMER-FACING OPTIONS	RESPONSE TIME
Premier	Less than 1 hour
Professional-Direct	Less than 1 hour
Standard	Less than 2 hours
Developer	Less than 8 hours
Core	N/A

# Support Tracking

## CUSTOMER SUPPORT

Setting up tickets, tracking issue resolution, and managing customer success are fundamentals of your practice.

Providing support to your customers from your practice is a non-trivial, omni-channel effort. Consider using Azure Machine Learning to monitor the performance of production deployed models. Also, practice what you preach and use the [Microsoft Dynamics 365 for Customer Service](#) solution in your own business to help you quickly set up and start managing your overall customer support efforts.

Microsoft Dynamics 365 for Customer Service is designed to manage the efforts of your customer support teams. It provides licensed users with access to core customer service capabilities for a significantly lower price than comparable offerings from other vendors. These capabilities include enterprise case management, Interactive Service Hub, Unified Service Desk, SLAs and entitlements, and other service group management functionality.



## MICROSOFT DYNAMICS 365 FOR CUSTOMER SERVICE

### Create Consistency and Loyalty

Provide the seamless service your customers expect by meeting them where they are with the information they need, every time.

- Give customers great service on their channel of choice.
- Make help easy by providing relevant, personalized service.
- Proactively address issues by detecting customers' intent and social sentiment.

### Make your Agents' Jobs Easier

Give your agents complete information — in a single customer service software app — to make smart decisions and provide great service.

- Reveal customers' case histories, preferences, and feedback.
- Provide guidance on entitlements and service-level agreements.
- Display it all in a single interface tailored to their job and skillset.

### Get an Adaptive Engine

Respond quickly to customer and market changes within an agile, cloud-based environment that has digital intelligence built in.

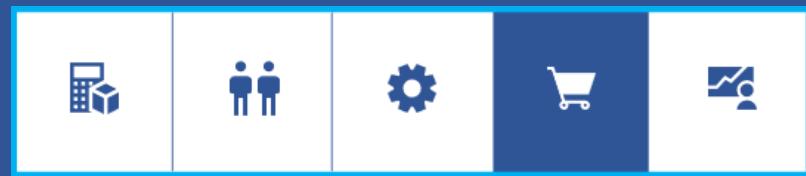
- Adapt and customize easily using configuration, not code.
- Extend your functionality through a single interface.
- Rely on advanced analytics and a trusted cloud platform.

Microsoft  
Partner  
Network

# Sales & Marketing Readiness

Business Applications

[aka.ms/practiceplaybooks](http://aka.ms/practiceplaybooks)



# Executive Summary

Once you have identified your market opportunity, determined your vertical focus, created your Business Applications offering and built the teams, systems and processes required to launch, sell and support an offer, what are your next steps to successfully go to market? We recommend you build your marketing readiness by developing strategies that support brand awareness, lead generation and accelerate nurture to commitment motions in your buyer's journey.

You need to align your marketing plans and activities to your Business Applications practice goals. A strong, strategic marketing foundation is critical, including a well-defined target market, differentiated positioning, and a compelling value proposition. You will need to determine your ideal customer profile and develop buyer personas and messaging that captures their attention, entices engagement and triggers consumption behaviours.

It is important that you map your buyer journey so you can align the right messaging, content and assets required by each persona at the ideal point in their purchase cycle. You will also need to identify the range of inbound, digital and social media activities including content and collaterals, that you will need to develop. Finally, we outline the ways you can organize and implement a cohesive integrated campaign and nurture program organized in a 12-month calendar.

We will also include a consolidated vertical industry go-to-market approach, offering step-by-step actions of importance. Finally, don't miss the Microsoft resources available in the [Go-to-Market and Close Deals guide](#), which you can leverage to help build your marketing materials and campaigns. The guide also has resources to help your sales team close deals.

# Define Your Buyer

## The Business Applications Buyer

According to IDC research, most technology purchasing is made by Line of Business (LOB) buyers. In 2018, business functions funded 70% of all application investments. LOB owns the business pain and problems and are increasingly empowered to purchase solutions. IT remains active in the buying process, as their expertise and experience is valued but you will also need to speak the language of business and understand the different levels of business buyer in your target market.

The LOB buyer today expects to deal with a partner who understands their industry, unique business needs and processes. It is critical that you not only have vertical competencies but can articulate the business impact and results possible from your solution rather than the technical implications or details of your solution's features and functionality.

## Persona Development

Messaging needs to be relevant to the recipient - the more specific the better. Developing buyer personas will help you engage your key buyer with a message that will resonate, build trust and accelerate the acquisition cycle.

We recommend you develop three different personas, called "How", "Why" and "What" personas, that typically map to different levels and generalized functions within a business. The Why represents the executive, How represents the line- of-business manager and What represents IT or the end user.

The Why persona is usually the owner, CEO, or part of the C-suite, and asks the question of why invest in a new technology system or asset in terms of high-level benefits and value add to their business. They are concerned about

profitability, competitive position, market share, revenues, and margins. They are typically driven by risk, control and revenue and need to know how your solution relates to these business issues

The How persona owns the operational problem or broken business process. They could be a Plant Manager, or Financial Manager, Sales Director or Head of Human Resources. They speak the language of productivity, efficiency, lower costs of selling, less downtime or better customer service. They consume content that is industry specific and business function centric including best practices and peer cases. They don't care as much about the features and functionality at the granular level as they do about how you can help them solve their operational problems.

The What persona cares about the product features and functionality, and what the product looks like, ease-of-use, security, scalability agility, and all the technical information. The product and technology story is important to the IT buyer who will invest significant time digesting your content.

Defining personas for the first time isn't easy. We have created a free online tool to help you draft your persona definition. <https://neuralimpact.ca/buyerpersonaprofile/>

## Buyer Persona Profile Generator Tool

Welcome to the Neural Impact Buyer Persona Profile generator tool. Taking time to define buyer personas is not only helpful to your sales enablement and content marketing, but also helps guide Cloud solution development.



# Clarify Your Value Proposition

Once you have determined your focus and target buyers, you next need to define a strong value proposition. This is a statement of the promise of value you will deliver to your customer and will underpin all your sales and marketing material including your website, content and campaigns.

A strong value proposition needs to articulate how you solve your customer's problem and specify the concrete benefits that they will receive. It must include how you do this differently from your competitors, in a way that your customer values, and it must communicate what you do best in terms of domain expertise and competency.

When you craft this, pay special attention to the language and try to infuse it with as much emotional impact as you can. Contrary to long-held beliefs, the latest neuro-scientific research shows buying decisions are based on

emotions more than logic, so imbue your language with emotional triggers.

To help you articulate your value proposition, use this free online tool to take that first difficult step.

<https://neuralimpact.ca/valueproposition/>

Need help articulating your value proposition?

You likely already know the value you deliver to customers with your products or services. The challenge is communicating that value in less than 10 seconds or in one succinct written sentence on your website and marketing assets. We have helped hundreds of companies through this process and have created this free tool to save you hours of work.

Knowing how to get started on defining a succinct value proposition statement is the hardest part. We have used our 30+ years of expertise to specifically formulate a series of questions which are intentionally designed to extract your value proposition from you.

Using as few words as possible, take the time to reflect on the questions provided and answer them as accurately as you can. When you have completed answering each question, and click "Generate," we will immediately email you an ugly, long winded rough draft of your value proposition which you and your team can then expand upon, fine tune, wordsmith and to develop a compelling and powerful value proposition for your company, products or services which you can leverage in your communications.

What is the product(s) or service(s) you are selling? Describe them in 3-5 words. \*

cloud sales and marketing acceleration works!

How would you and your customers define your product/service category? 1-3 words. \*

# Understand your Buyer's Journey

## The Modern Buyer

Today's business applications buyer is highly informed and demanding. They use their personal networks and publicly available information via digital and social media channels to research and self-educate. They wish to remain as anonymous and autonomous as possible and often delay vendor contact until more than halfway through their buying process. By this point, they have already made decisions and have strong beliefs and biases. And, they expect you to have a high level of competency in their specific industry and workload.

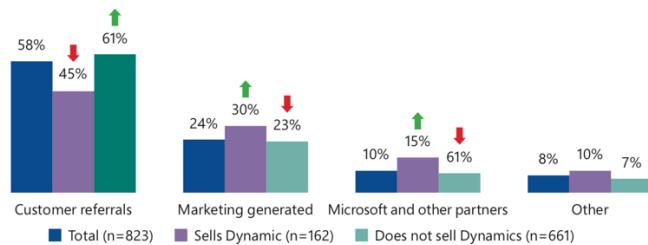
Your buyer more frequently purchases a SaaS-based solution which means your revenue model will shift from large one-time payments to smaller recurring ones. You'll need a higher volume of transactions from new customers which, in turn, requires proportionately more leads generated. This is the top challenge facing Dynamics partners today. To support this motion, you should increase marketing investment and leverage new modern digital methods.

### Top Challenges Experienced Moving Dynamics 365 Business to the Cloud

	Total (n=162)	SMB-focused (n=132)	Ent.-focused (n=30)
1st    Generating Leads	33%	36%	20%

In addition, a recurring revenue model will require an increase focus on marketing to your existing installed base of customers and upselling and cross selling products.

Marketing is not an option, but a critical necessity in a cloud world. You can no longer rely solely on referrals, even if word of mouth is still the best form of marketing.



## Digital Buying Journey

You need to align your digital buying journey with your persona profile and understand the most impactful ways to engage customers along their buying journey. There are six stages in the customer experience loop (see figure below). Design marketing content that addresses each stage of the buying journey to accelerate your buyer through as quickly and efficiently as possible while ensuring that they receive relevant and valuable answers at each stage. The table below outlines the key assets needed during each stage.

### Content for Each Stage of the Buying Journey

EXPLORE	EVALUATE	PURCHASE	EXPAND	RENEW	ADVOCACY
Website SEO and content	Social media including blogs	Sales presentations	Website content	Social media	Social media
Social media - including blogs	Email Campaigns	ROI tools	Social media - including blogs	Email marketing	Case studies
White papers	Telemarketing	Case studies	Case studies	Telemarketing	Public relations
Web content syndication	Events- online or in person	Offers and incentives	Proof of concepts	Newsletters	Referrals
Social Selling	Videos	Proof of Concepts	ROI tools	Account management	
Educational Videos	Product trials and demos	Account management	Account management		

The first 3 phases - **Explore, Evaluate and Purchase** focus on the prospective buyer prior to purchase. It is important to remember that your personas may differ in their requirements for each stage. Try to understand and map their behaviors and interest from one stage to the next. Perhaps your How persona is more heavily vested in the exploration step while the IT or end user persona is more involved in the evaluation period, and your Why executive persona's attention is heightened during the purchase phase. Whatever the cycle for your particular situation, map the marketing and sales content and assets required by persona and by buying phase so you can determine the right mix, the composition within that mix, the right medium, delivery mechanism, length and so forth.

Content for early interest should be educational and align with the business challenges that usually bring the prospect to your site in the first place. You may have blogs, customer video testimonials, infographics, followed by white papers for deeper exploration and engagement

once trust and credibility have been established. Through well thought out value exchange to earn trust, you can lead the customer to further levels of interest such as signing up for webinars and exchanging their information for proprietary content like e-books or evaluations/trials and demos. This content should be very directive - with offers and incentives, proof of concepts and more.

The latter 3 phases, **Expand, Renew and Advocacy**, focus on the buyer journey post purchase. This is especially important in the cloud business model as the economics underlying this depend on retaining buyer commitment on an ongoing basis over the long term. So ongoing marketing to the current WHAT persona may mean investing in educational content for the end user persona that ensures optimal usage. The HOW persona can be targeted to identify further upsell opportunities and don't neglect the WHY persona; they should be targeted for

social proof pieces from peer advocates that speak to ROI and success.

Content should focus on nurturing a strong and profitable long-term relationship with clients to increase penetration, consumption and usage and help ensure more stickiness long-term. In a world where churn rates now matter, effort should be directed at building customer case studies and getting happy customers to provide quotes and references. Host user groups or customer focused events that build a community of customers, teach them best practices, new tips and ways to optimize their solution. Marketing does not end at the point of initial purchase.

# Core Marketing Activities

## Importance of Inbound Marketing

Your buyer can and does deflect intrusive marketing and they opt to independently seek out information on their own terms and on a timeline that best suits them. Inbound marketing techniques such as search engine optimization, pay-per-click advertising and social media make it easy for prospects to find you. Outbound marketing techniques, such as events, e-mail and telemarketing, enable you to tell prospects about your company's solutions, but are less effective than when the customer finds you or seeks you out.

This is about marketing with a magnet, not a megaphone and attracting customers who are already actively searching for solutions. The cornerstone of your digital inbound marketing is content and should focus on earning trust and respect using educational not promotional content that draws prospects to your site by providing value to their search. Only then will you earn the right to ask them for more information.

### Marketers have increased the quality of their leads



According to research conducted by HubSpot, inbound marketing is considered the most valuable and effective source of high-quality leads for the sales organization, outranking outbound marketing by a factor of three. Inbound marketing close rates are 8-10 times higher compared to outbound efforts.

## Content Development

And at the heart of all inbound strategies is creating **original content** that positions you as an authority,

educator and thought leader in your domain. There are several formats you can employ including blogs, articles, e-books, whitepapers, webinars, podcasts, case studies and more. Through your content, you want your prospect to stop, take notice, think, and take some type of action to further their buying journey with you.

Concentrate on opinion forming authoritative content on current topics or well researched or evidenced content as these content types have a strong positive correlation of shares and links. Long form content of over 1,000 words consistently receive more shares and links than shorter form content. It's about sharing your expertise and giving buyers the answers; they need to make an informed buying decision. For best results, lead with a teach, don't sell approach.

## Digital Tools and Strategies

### Search Engine Optimization

As your buyer controls the search process it is highly likely that they will find you before you find them. Getting found online is vital so you need to have a Search Engine Optimization (SEO) strategy in place.

Take measures to make it easier for search engines to find your site, index it, and understand and classify your content - think of the underlying code and of course, the content. This could include: useful and unique content, smart keyword selection and distribution, easy to navigate website structure, page titles, headlines and descriptions, content compliance with metadata, responsive design including site speed, enticing calls to action, building the right inbound links and social signals and more.

This free SEO optimization tool from The Internet Marketing Ninjas is helpful for analyzing such internal links, your meta information and your page content to help you develop better results.

<https://www.internetmarketingninjas.com/seo-tools/free-optimization/>

### Social Media

Social media is an important component of modern digital marketing. While it can drive web traffic and lead generation, it is especially powerful in building more and

deeper human connections with your builds through community building and two-way interactions.

While your buyer is active on LinkedIn, Twitter, YouTube, Facebook and to a lesser extent Google+ and Instagram, the most important social network for Microsoft partners is LinkedIn as it's focused on generating B2B connections with over 500 million members.

Your buyer wants to receive informative and useful content from you that helps them in business. This could be original content or trending news related to your industry or niche, or even posting company events, or company cultural or status updates. Join and contribute to industry group discussions. Sharing insights, experiences and offering guidance can help build your thought leadership and promote engagement in your communities.

If you have a strong customer track record, then seek out brand advocates that offer endorsements. This type of

social proof sends a strong signal around trust and credibility which is important in a community context.

Encourage employee advocacy so your highly skilled professionals can champion your business to their own connections on LinkedIn. Encourage your employees to connect to your company so that their connections will be drawn to your site. It's a great way to amplify interest and engagement in your page, as people are 16 times more likely to read a post from a friend about a brand than from the brand itself.

Use the Microsoft Digital Benchmark Tool to measure and improve your digital marketing efforts. This tool assesses your performance across three channels – your website, blog and social media platforms – and offers you guidance for improvement.

(<https://aka.ms/marketingbenchmark>).



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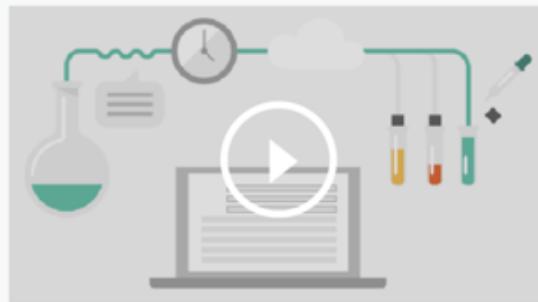
Microsoft Partner Benchmarking Tool

About Contact

Sign In

# Microsoft Partner Benchmarking Tool

Audit your digital channels and get actionable advice on how to improve them. Then compare your score to your competitors to see how you can be ahead of the curve.



Test now and get your free score

URL

Your website

Analyze for free

## Website

Arguably, your website lies at the heart of your digital marketing strategy. It is common practice to direct your prospects to your home page or a specific landing page. While most Microsoft partners have optimized their technical SEO and have good traffic numbers, studies show that they have trouble retaining and engaging visitors with average bounce rates of over 60% compared to the B2B industry average of 40%. And of those visitors that stay, they spend just over 2 minutes and consume only 2 pages.

The latest research shows that, in many cases, your prospect's decision making is based much more heavily on emotions. You need to reflect this behaviour in your website and reframe your messaging and content with a focus on what is emotionally engaging and important to your prospects...the things that they are struggling with and what they care about. And spend less time leading with a list of your solution's features and functionality – which are rational and tangible but less likely to capture interest nor entice further exploration and engagement.

For a Business Applications buyer, they will need to see their industry, workload or niche contextually reflected in your site's imagery and language, they will want personas based content and pathways for quick and effective interaction, they will respond to emotional triggers that align with industry pains and challenges, they will look for evidence of solution efficacy that is anchored in social proof and endorsement, and you will need to communicate trust and transparency throughout your site.

Try this free mini-website audit to assess the effectiveness of your website at emotionally engaging and converting prospects.  
<https://neuralimpact.ca/mini-audit/>

## Mini Audit

Company Who's Website is Being Audited \*

Website URL Being Audited \*

 http://

First Name of Auditor \*

Last Name of Auditor \*

Email of Auditor \*

I consent to my information being collected and stored for purposes of bettering my experience  
on this website and receiving further communication

Give your website a rating based on: 1 (does not follow this criteria), 2(moderately follows this criteria), 3  
(follows this criteria very well). Once complete, click "Get My Results" at the bottom of the page to receive  
your results straight to your inbox!

## Tribal Engagement

Immediate Tribal Identification and Resonance \*

# Create Campaigns and Nurture Programs

While lead generation is of primary importance, you must move beyond just building a marketing funnel, to also nurturing these leads on an ongoing basis to provide relevant information at each stage of the buyer journey. Random acts of marketing rarely yield profitable outcomes, so consider how to appropriately analyze, score and direct these leads into appropriate campaigns and programs.

On average, 50% of the leads in any system are not yet ready to buy and almost 80% of new leads never become sales. It is vitally important to establish lead scoring parameters to develop campaigns and nurture programs to pinpoint where a lead is within your organization's buying model. You will need to establish triggers that escalate a general lead to a marketing qualified lead and then to a sales qualified lead. Each buyer stream will be matched to an appropriate and meaningful message,

campaign and program. Additionally, you will need to plan nurture programs post-sale and implementation to ensure that your customer realizes your solution value, to support the annual renewal process and to identify expansion opportunities.

When planning campaigns and developing your nurture rhythm, a useful approach is to prioritize the pains and challenges you have identified for each buyer persona and choose some consolidated themes you can use as the pillars to anchor your content around. The focus should be on building out educational content and assets to help address those specific areas. Then organize this into a 12-month nurture content calendar with quarterly themes that trigger action, have vertical specificity and are emotionally compelling, such as growth, loss, risk/compliance, and control.



# Leverage the Microsoft Marketplace

AppSource and Azure Marketplace are two Microsoft-owned storefronts that enable you to offer your solutions to customers around the world. Within a single, unified platform, customers can easily search and try your solution with just a few clicks.

In recent years, many business leaders have turned to online marketplaces to find new corporate technology solutions. Microsoft has made digital marketplaces such as **AppSource** (for the business buyer) and **Azure Marketplace** (for the technology buyer) available to its community of customers and partners. Be sure to get your Business Applications solution listed on AppSource so potential customers can find, try, and buy your applications and services and to enable other partners and

or Microsoft team members to easily share your application with others.

An optimized Marketplace listing can help you accelerate your customer acquisition growth, thereby playing a central role in your cloud business applications practice success. Get ready to list offers, provide customer trials, and connect with Microsoft customers and the partner community.

You can find more information about publishing your app or promoting your professional services via the AppSource and Azure Marketplace here:

<https://partner.microsoft.com/en-us/isv-resource-hub/publish-your-app>

## 10 benefits of optimizing your marketplace listing

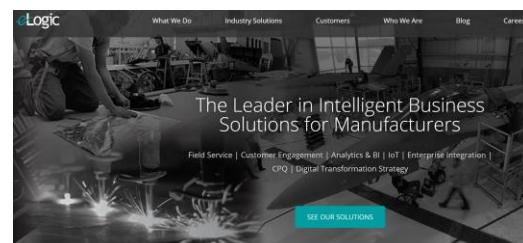
1. Gain new leads
2. Provide free trials during the buying cycle
3. Convert prospects to buyer faster
4. Lower cost of selling
5. Reach a global market
6. Leverage Microsoft's investment in marketing and brand recognition
7. Make it easy for Microsoft team members to share your solutions with others
8. Showcase your core competencies and vertical domain expertise
9. Gain increased credibility
10. Test and validate new product or service market opportunities

# 10 Critical Industry/Vertical Go-to-Market Steps

In the business application space, a horizontal go to market approach is not the most effective.

You will often be facing significant competition from other competitors with deep industry features and functionality. Here is a list of quick actions you can take to focus your sales, marketing and product development efforts to be more vertical.

1. Know more than your competitors do about your focus industry and its unique challenges. Conduct research, visit customers, create case studies, attend industry events, and be selective as to which RFP's you respond to or which projects you take on.
2. Update your website and marketing materials so they speak to the unique pains this industry is experiencing and needs they have. Use industry specific language, terminology and images in all your marketing.
3. Instead of hiring people with technology industry expertise, hire people from your customers' industry who understand the industry issues, language and business challenges. You want to have several employees who have worked in this vertical industry prior to working with who have years of industry specific domain knowledge and expertise.
4. Provide concrete evidence on your website and in sales and marketing assets that you have made a positive impact on companies in this specific vertical industry. Demonstrate that you can deliver results with specific quantifiable data, case studies, and testimonials.
5. Show you have earned industry awards, spoken at conferences, or that you belong to industry-relevant organizations and attend events.
6. Have at least one dedicated sales or presales person (or even marketing) focused on selling to this specific industry.
7. Measure your win rate and work towards having a minimum close rate of 50% or more on any deals that you pursue. If you have lower close rates, do more work to further focus and define your differentiation and core competency.
8. Ensure your professional services team isn't delivering custom projects for single customers. Confirm that every project is repeatable across multiple customers, so you can begin to monetize this investment and build industry specific, relevant workflow knowledge and domain expertise.
9. Review and measure how many customers you have in each vertical. You should target having more than 30% of your revenue from each of your target verticals.
10. Develop intellectual property or a customized product or offer unique services which are specifically developed to meet the needs of this specific industry. This should be something a competitor would have a significant challenge replicating due to the long learning curve, experience needed, and investment required to do so.



Realize your Digital Transformation  
with IoT and Connected Field Service  
[Video]

By gaining domain expertise, hiring people from your customer's industry, and creating value-added industry specific functionality, you begin to be a trusted advisor and industry expert that your clients can't live without. Successful cloud partners don't build net new solutions for every client engagement, but instead look for repeatable opportunities.

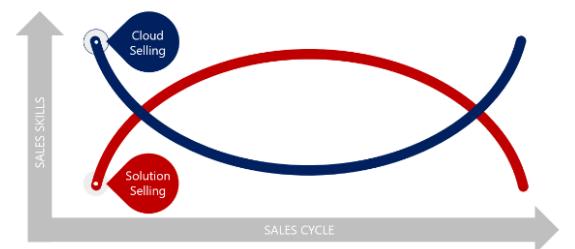
# Selling Cloud Business Applications

Selecting and buying business applications has changed significantly over the past 5-7 years. Historically, prospects demanded custom solutions that met their very specific requirements. These solutions were almost always highly customized and expensive to define, configure and maintain. Increasingly, today's prospects are looking for solutions that deliver immediate value. Building out a Microsoft Dynamics sales organization first requires a clear vision of the modern business applications buyer and their expectations.

Cloud business application buyers typically

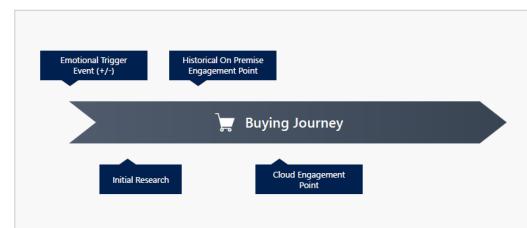
Shift from solution to prescriptive selling

Today's business applications buyers are self-educated, highly informed and risk averse. Most have already experienced one or more challenging business application projects in the past and want to remain firmly in control of their buying journey and project implementation approach. This seismic shift has disrupted the traditional solution selling approach that has served successful sales professionals for decades. Modern business application buyers expect to start with a purpose or industry-built business solution. They now expect sales professionals to understand their industry drivers, business process challenges and underlying technology platforms. As a result, there are four new selling realities in the cloud that need to be considered.



Today's buyers complete much of their research online.

Project researchers and buying committees often know as much, if not more, than the sales professionals they engage with. Many engage third-party consulting firms to help them define their project scope and selection criteria long before they create a vendor shortlist. This shift now leaves sales professionals with a shorter window of time to influence the decision criteria and engage with all project stakeholders.

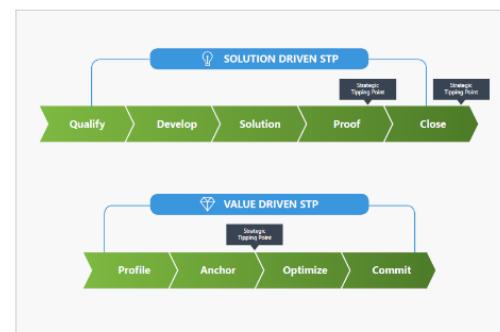


"Core" solution parity undermines differentiation.

Mainstream business applications have matured to the point that SMB, mid-market and enterprise buying teams often have a difficult time differentiating one vendor or solution from the next based solely on product functionality, project methodology or price. Solution parity, coupled with a desire for limited customization, accelerated deployment and subscription licensing, has radically changed traditional selection criteria. Today's buying teams want solutions that can be implemented rapidly (relative to traditional project timelines) that deliver accelerated time to value, with limited risk.

Product demonstrations no longer drive decision making.

The “**Strategic Tipping Point**,” the key moment during the buying cycle that a prospect develops a strong bias towards a single vendor, has shifted from the end of the sales process; during the demonstration, to the beginning. Sales professionals now need to “front-end-load” their sales activities in order to create a STP early in the prospect engagement cycle. Demonstrations may still be required, but they are now more of confirmation exercise that validates, rather than informs, the selection decision.



Specialization (industry or workload) is the new differentiator.

“Tell us what you want, we’ll build it for you” selling strategies no longer resonate with today’s business applications buying community. Buyers increasingly expect on-demand, industry-specific technology solutions that address well-defined business challenges. Yesterday’s differentiators: comprehensive product functionality, experienced resources, local presence,

proven implementation methodology and lower price are today’s minimum requirements. Without them there is little hope of being selected. Meaningful differentiation has sharply pivoted to industry expertise, which promises accelerated value realization and lower project risk. Sales professionals must teach prospects something new, provide industry specific insights that lead to project

change (scope, business case, approach, risk profile). The primary goal of the enlightened sales professional is to be accepted as a member of their prospect’s tribe.



Tactical  
Differentiation

Product Functionality Pricing Advantage  
Geographical Proximity Experienced  
Resources Proven Methodology



Strategic  
Differentiation

Industry/Vertical Experience Knowledge  
Advantage Industry Specific IP Accelerated  
Value Realization Lower Risk Profile

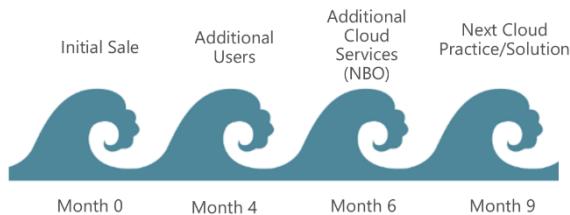
Consistently driving predictable 50%+ business application win rates can only be accomplished with a deep understanding of a focus industry or vertical’s challenges, business processes and key operating metrics. Regardless of whether you are contemplating a Dynamics practice focused on SMB, mid-market or the enterprise, focus and specialization is critical, not only to driving high win-rates, but also lower sales costs, larger average deal sizes, higher project services margins and fewer write-offs. Focus enables you to shift from a reactive **Solution Selling** approach to a proactive **Prescriptive Selling** approach. This shift ensures you avoid the traditional resource-intensive, demo-oriented sales process that inevitably leads to highly customized product demonstrations, complex sales cycles and (at best) a 20% win-rate.

Modern business application buyers want to work with sales professionals who acknowledge they have already completed a significant amount of research and are reasonably well informed. More importantly, they will only engage with vendors who understand their industry challenges and requirements and can bring additional insights and ideas to the project that increases business value and/or reduces risk.

To align with the modern business application buyer, Microsoft Dynamics sales professionals must develop a deep understanding of their target industry/workload, and develop conversational competence at the project lead, subject matter expert and business decision maker levels (what, how and why). Most importantly they must be able to execute a prescriptive, sales engagement process that aligns with one of the three primary cloud sales motions.

# Sell in Waves

Cloud business application buyers are more likely to step into smaller solution footprints or departmental solutions than into large organizational commitments. They then expand the project, expand user activation and increase consumption after business value is proven out or realized. This shift in buying behavior means you must contemplate selling in waves, completing a larger number of smaller transactions (even within the enterprise segment) rather than a smaller number of large projects.



To successfully sell in waves, your teams need to ensure that customers are using and seeing value in each successive wave. The change management and customer success approaches should be applied to these early deployments to ensure that key scenarios are well defined, aligned to motivated and trained stakeholders, and driving the desired business outcomes. With average SaaS CAC (cost of customer acquisition) payback period ranging between twelve (12) and forty-eight (48) months, it is critical that your sales and marketing teams develop an ongoing customer engagement framework to sell incremental cloud services and licenses in perpetuity. This approach also inoculates your customer base against unnecessary churn and increased total customer lifetime value. (*CLV = average annual customer revenue contribution multiplied by the average length of customer relationship*).

# Define Your Sales Engagement Process

## One Size Does Not Fit All

Almost all business applications and IT sales professionals have been trained in some form of solution selling methodology. This approach was extremely effective when software publishers could relatively easily develop incremental functionality that clearly differentiated their solution from competitors. It also played well in buying scenarios where prospects expected to spend significantly on project services to customize the core application set to meet their specific business process requirements. For clarity, there are still many organizations prepared to invest significantly to configure a solution to meet their unique needs. But this group is no longer the majority.

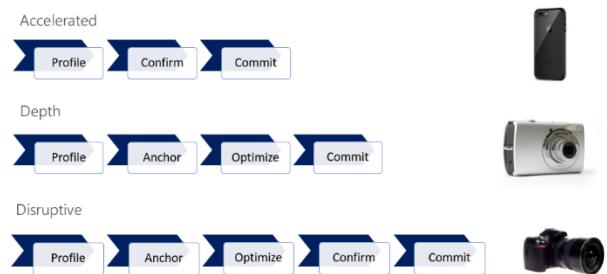
Solution selling is fundamentally anchored in a belief that your organization can bring a unique solution set to market. While this is still true for ISVs and Dynamics partners that have developed their own industry or business process specific intellectual property, solution parity across much of the "core" offerings (CRM/ERP/SCM/MRP, etc.) has made it challenging to point to an out-of-the-box functional capability as a differentiator. The truth is, most cloud business application buyers are presented with more functionality than they can conceivable consume in a realistic time horizon. This shifts differentiation away from core product capabilities, and towards industry knowledge, and increasingly, the value that is delivered by the underlying technology platform (Azure, IoT, AI, etc.).

Asking prospects what they want, and then building an extensive statement of work and project plan around it that required significant customization (project services) is now only effective in a small percentage of opportunities. Large enterprises, or smaller ones with unique/strategic business processes will continue to respond well to a traditional solution selling approach. But the balance will not. The majority would prefer to give up some of their unique functional requirements in return for implementing a pre-configured solution set that addresses most of their business processes faster, with limited risk, that contain best/optimized business practices. Even the largest of "unique" enterprises will expect to start with an industry specific solution on which they can then build.

# Three Cloud Sales Motions

As a result of this change in buyer expectations, you will need to consider one of three cloud sales motions when designing and launching your business applications solution and cloud practice. These three cloud sales motions align specifically to three consistent buying profiles. For clarity, these buying profiles do not always align to company size. They align to the degree of business process complexity. Large enterprises often drive relatively simple business processes (professional service), and SMB organization can drive extremely complicated business processes (discrete manufacturing).

The three selling/buying motions are: Accelerated, Depth, and Disruptive:



## Accelerated

Accelerated, or repeatable, selling/buying motions are ideally suited for organizations that are prepared to consume your cloud solution as it is designed, with very limited configuration, and typically no customization. These projects typically drive limited project services but generally pull through higher margin managed services. There are three core sales engagement phases:

The **Profile phase** focuses on determining if the prospects' requirements can be satisfied by the pre-configured out-of-the-box capabilities. If yes, the next phase, **Confirm**, validates the prospect requirements and demonstrates the core cloud solution capabilities. The last phase, **Commit**, focuses on overcoming objections, quantifying the business case (if required) and closing the transaction. This motion is facilitated remotely and relies heavily on preconfigured sales assets to scale a higher volume of transaction. Accelerated buying processes are typically driven by a single business decision maker and an operational or technical project lead.

## Depth

The depth sales motion mirrors much of the Accelerated selling/buying motion, with one significant exception: The deal size is large enough, or the project contains sufficient risk, that your sales professional will be required to physically meet the client onsite; and ideally sell a brief value-oriented consulting engagement that is subsequently facilitated within the sales cycle.

The depth sales motion is a highly prescriptive sales approach, ideally suited for ISV cloud solutions, and/or Dynamics partners with significant and strategic intellectual property. The Depth value proposition is like the Accelerated in that the overall cloud solution offer is anchored in:

- Pre-configuration: for industry (retail, distribution, food manufacturing, etc.) or specific business processes (call center, procurement, talent acquisition/onboarding)
- Limited project services (more than accelerated due to deal size/project scope, but primarily configuration, not customization)
- Strong emphasis on higher-value managed services to drive consumption and value realization

The primary execution differences occur in the Anchor phase, when your sales professional engages with the prospect onsite; and the Optimize phase, where the sales/project team facilitates a collaborative workshop designed to increase value delivery and business case expansion.

Given that most (but not all) Depth sales opportunities will have a larger average deal size, the Commit phase has a heavier emphasis on business case development, project risk assessment and executive engagement. Most of the Depth sales cycles will be facilitated remotely, with either two or three strategic onsite prospect engagements.

Depth buying processes are typically driven by a single business decision maker, an experienced project lead, and a broader (2-4) operational/technical selection team.

## Disruptive

The Disruptive sales motion is designed for prospects driving large projects that inflict a significant amount of disruption to their existing business processes and employee behaviors. As these opportunities almost always involve displacing an incumbent business applications provider, your sales team will need to drive a disruptive sales strategy to counter the status quo bias that prospects unconsciously infuse into their decision-making criteria and selection process. While there are clearly exceptions, these are primarily upper mid-market and enterprise opportunities. Lots of moving parts that require a large pursuit team.

The Disruptive sales motion is still a very prescriptive sales approach, ideally suited for ISV cloud solutions, and/or Dynamics partners with significant and strategic intellectual property, but with a substantial project services requirement to configure and customize the core offering to meet the specific needs of a business with complex business processes and comprehensive reporting needs.

Given the disruption to existing processes, it's critical that change management and customer success be positioned effectively during and after the sale. The focus should be on using your change methodologies to drive effective people and process transformation which accelerates value and reduces risk from natural inertia or resistance to change. Workshops during the sale can help define change needs and demonstrate your capabilities to foresee needs and drive change. It's also important to use these workshops and the selling process to effectively position your value-added services including change management, managed services, and customer success managers.

The Disruptive value proposition is like the Depth in that the overall cloud solution offer is anchored in:

- Pre-configuration: for industry (retail, distribution, food manufacturing, etc.) or specific business processes (call center, procurement, talent acquisition/onboarding)
- Strong emphasis on higher-value managed services to drive consumption and value realization

The primary execution differences are:

Profile phase:

- Deeper research and preparation (2-4 hours)
- Multiple profiling/discovery call in advance of meeting the prospect (2-3)

Anchor phase:

- Proactive and deliberate "teaching" moments
- Whiteboard engagement rather than PowerPoint
- Project and business risk identification
- Business case identification/confirmation
- Positioning and selling an accelerated consulting engagement within the selection process (diagnostic, business impact assessment, risk assessment, change management strategy, etc.)

Optimize phase:

- Facilitate an accelerated consulting engagement within the selection process (diagnostic, business impact assessment, risk assessment, change management strategy, etc.). The engagement must include the BDM and other strategic/influential stakeholders.

Confirm phase:

- Minimal solution demonstration

Commit phase:

- Business case and/or business risk confirmation with BDM

Disruptive buying processes are typically driven by a single senior business decision maker (CEO/COO, SVP LOB), 2-3 strategic business stakeholders (VP Sales, VP Finance, CIO) and a broad (4-10 person) operational/technical selection committee. This team is often supported by an external, third party selection consultant.

It's important that the sales pursuit team and the ultimate delivery team understand the role of each of the customer stakeholders, how their goals fit into the organization's strategic goals, and how they view and value the proposed solution (the "what's in it for me"). This will help not only close the sales – but to also accelerate buy-in to the project after sale to accelerate user activation, consumption and business value realization.

Whether you choose to design and execute an Accelerated (scale), Depth (ISV) or Disruptive (complex) sales motion, the key to high win rates and low sales costs is making a clear shift from a solution to a prescriptive approach. And to do that effectively and put yourself in a position to teach your prospects something new, you will need to engage with your prospects as specialists and/or experts.

# Configure Industry/Vertical Sales Assets

Focusing on a specialization, vertical or industry allows you to pre-configure sales assets to drive maximum impact, consistency and scale, even for large enterprise opportunities. Industry/vertical optimized sales assets drive two key outcomes: They streamline and accelerate sales process velocity, but more important, they consistently communicate to all project stakeholders that you deeply understand their industry, business drivers and challenges, what they're trying to accomplish through the business applications project, and how they plan to move from vendor engagement to an informed decision. Most important, the sales assets clearly communicate that you understand their unique industry/vertical vocabulary, and that you are a "member of the tribe".

While industry/vertical/business process specific sales assets will have a meaningful impact on all three sales motions, they will have the greatest impact on Accelerated and Depth given most prospect interactions are remote.

Horizontal business applications partners cannot effectively develop repeatable sales assets simply because the effort required to research, configure and update multiple sets of sales assets is simply too time consuming. Horizontally oriented partners will also struggle to populate the sales assets because they do not have enough experience implementing Dynamics in any one industry to move beyond the broad product capabilities and standard business processes. Focus is everything.

From the first **engagement email**, to the final **solution proposal**, you want to continuously remind your prospects that you deeply understand their unique industry drivers, business challenges and projects risks.

## Sample Alignment Email

Dear <BDM>  
Cc <PL, SME>

Thank you again for taking the time to share your business objectives and project goals with me today. Based on our discussion, and those of our project team, I believe that I have a good understanding of your company's needs. I have summarized my understanding of "Prospect Company's" ERP/CRM/EDW project for your team's review:

I understand the primary business challenges behind your initiative are:

- Inaccurate demand forecasts
- Incomplete order management system
- Inaccurate delivery reporting

The above challenges are impacting client relationships, and your ability to properly plan production resources, maximize plant capacity and capitalize on your recent expansion/acquisition. While nothing has been documented, the economic impact of the above challenges is significant and could result in a loss of market share and revenue.

To address these challenges, you stated that "company name" is looking for these new capabilities:

- Improved visibility into scheduling and capacity availability
- Improved inventory management
- Improved financial management
- Materials and finished goods inventory consumption reports

With these new capabilities in place, I understand the anticipated impact to be:

- Improved capacity utilization (capacity improvement target)
- Greater efficiency in project and customer delivery
- Improved estimate compliance and accuracy
- Reduction of unnecessary unscheduled overtime (ROI target)

Based on our project timeline, we will be working together over the next 18 weeks to ensure "Partner Industry Solution" addresses each of these project requirements. The next steps in this process are:

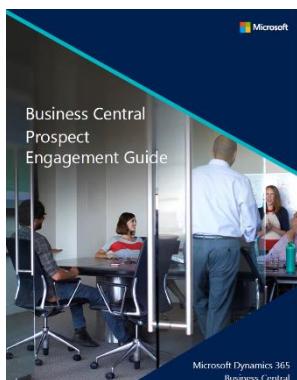
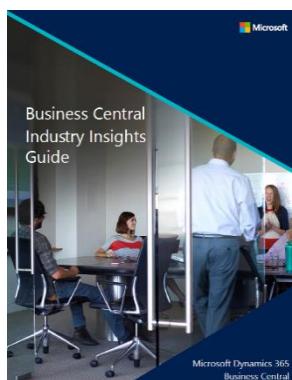
- February 24<sup>th</sup> - on-site meeting with "partner" and "customer" to review the project objectives, business case elements, anticipated project risks, key milestones and overall timeline. "Partner" will provide a summary of current state operational and technical landscape, and "Customer" will provide a summary of current state business needs. We would also like to share our experience implementing Microsoft Dynamics Business Central in similar discrete manufacturing organizations.
- March 1<sup>st</sup> - on-site meeting with "OIC" to discuss Contoso's cloud strategy, integration framework and data transformation strategy.
- March 15<sup>th</sup> - on-site meeting with "OIC" to discuss project related business risks, data sovereignty and financial considerations as well as compliance reporting requirements.
- March 22<sup>nd</sup> - on-site meeting with "OIC" to discuss business case expectations, long-term business direction/change events, requirements prioritization and the shop-floor change management strategy.

Please confirm the above captures the purpose, scope and objectives of your ERP upgrade project. Additionally, please forward any information you feel would best prepare my team for our onsite meeting with you and your project team next week.

Best Regards,  
Luisa Kehler  
MFG Industry Specialist

## Sample Engagement Plan

Contoso Engagement Plan				
Activity	A. Datum Team	Contoso Project Team	Completion Date	Objective
Subject matter expert (2) discovery calls:	MFG Sales Specialist	Project SME(s)	12-Jan-18	Discovery calls with supply chain manager, warehouse manager, production scheduler and controller to explore current business process challenges.
Business sponsor discovery call:	MFG Sales Specialist	BDM	19-Jan-18	Discovery call with Chief Operating Officer to discuss project business drivers, project objectives, business case expectations, reporting requirements and leadership priorities.
Configure and forward project requirements survey:	MFG Sales Specialist	Project Lead	22-Jan-18	A. Datum configures Contoso's discrete manufacturing specific operational survey for distribution to PL and SMEs.
Complete and return requirements survey:	MFG Sales Specialist	Project Lead	25-Jan-18	PL and SMEs complete the online survey to provide a deeper understanding of the current state operational and technical landscape.
Project review meeting:	MFG Sales Specialist MFG Solutions Consultant	PL, Controller, SMEs, IT	27-Jan-18	Two-hour mutual project discovery session. Project stakeholders from both A. Datum and Contoso clarify project drivers and objectives, core requirements, selection process strategy, high-level decision criteria and implementation partner alignment.
Core business process review session - functional deep-dive workshop:	MFG Sales Specialist MFG Solutions Consultant	PL, SME(s), BDM	03-Feb-18	One day session with Contoso Functional SMEs and BDM to document current state business processes and challenges, desired future capability set and demonstration scope.



Each sales motion will require its own set of sales assets, with the volume and variability of the assets increasing as you shift from Accelerated to Disruptive motions.

## Accelerated Sales Assets



Profile: 10 Days



Confirm: 14 Days



Commit: 7 Days

## Depth Sales Assets



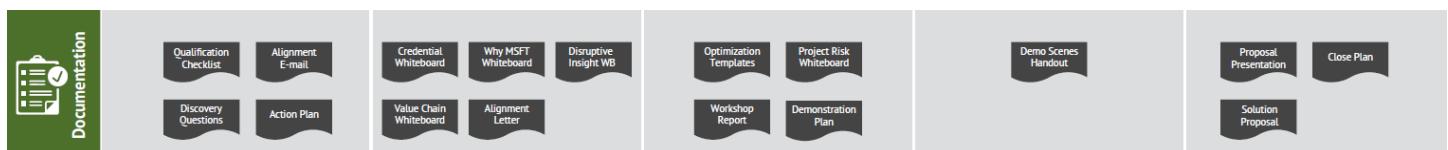
Profile: 14 Days

Anchor: 21 Days

Optimize: 21 Days

Commit: 14 Days

## Disruptive Sales Assets



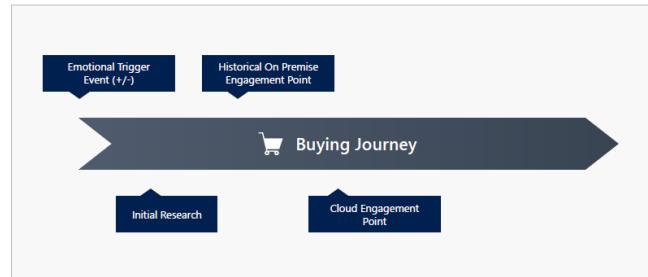
# Hiring & Onboarding Sales Professionals

With all prospect buying profiles (**Accelerated, Depth & Disruptive**) completing much of their primary research online, strong biases and judgements are now formed long before they engage with sales professionals. This shift has led to the need for a more streamlined sales engagement model, and more importantly, a **more efficient and prescriptive sales professional**.

Relationships and trust are no longer developed over "coffee meetings" and functional discovery sessions; they are increasingly built on a shared understanding of a defined set of industry, vertical and/or business process challenges. They are further developed by challenging prospect assumptions, uncovering business benefits that they had not previously considered and teaching them how to reduce project and business risk. More specifically, business application sales professionals must do their best work at the beginning, rather than at the end of their sales cycles.

## The Hiring Profile Has Changed

As outlined in the chart on the right, modern business application buyer characteristics have changed significantly. Cloud buyers are looking for pre-configured solution sets that deliver relatively immediate business value. They want to work with vendors who understand their business challenges and business processes. Most importantly, they want limited project risk. The sales strategies, tactics, skills and resources that align with today's cloud buyer are very different from those of the past: industry awareness and business acumen have replaced technical knowledge and product demonstrations as the new differentiators. As a result, the "ideal" sales candidate has evolved from a "relationship builder" into an "industry educator".

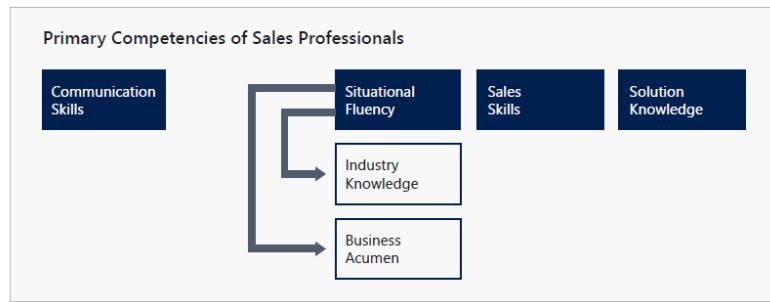


Buyer/Seller Alignment - Historical		Buyer/Seller Alignment - Cloud	
Buyer Characteristics	Required Sales Skills	Buyer Characteristics	Required Sales Skills
Large Project Scope/Complexity	Wide/Shallow Solution Knowledge	Defined Business Problem/Simplicity	Deep/Narrow Solution Knowledge
Custom Projects	Project Scoping	Industry Solutions	Industry Knowledge
Buyer is the Expert	Process Compliance	Vendor is the Expert	Industry Knowledge/Teaching
Functionality Focused	Solution Selling	Time-to-Benefits/Value Acceleration	Prescriptive Selling
Scorecard Driven Selective Process	IT Engagement	Outcome Based Decision	Leadership (C-level) Engagement
Value Features/Functions	Product Knowledge	Value Risk Reduction	Objection Handling
Highly Available	Telemarketing	Self Educating/Anonymous	Referral/Social Engineering
RFI/RFP Selection Process	Service Buying Cycle	RFI/RFP Selection Process	No Bid/Disruption
Strategic Tipping Point Demo	Presales Preparation	Strategic Tipping Point New Information	Teaching
Feature Focused	Product Knowledge	Business Processes Focus	Business Acumen
Local Supplier Bias	Territory Management	Geographical Agnostic	Industry Knowledge
Cap-ex Orientation	Perpetual Licensing	Op-ex Orientation	Subscription Licensing

## Hire for Communication Skills and Situational Fluency

Engaging with self-educating business application buyers demands a much higher level of adaptive selling skills than what was required in the past. Historically, product knowledge (ERP/CRM) and solution selling skills were central to the candidate selection process because they ensured new hires could "hit the ground running". However, with cloud solution sets configured for industry/vertical business challenges and sold via prescriptive sales motions, these two competencies are no longer the most important criteria for candidate selection.

Communication skills and situational fluency are now extremely important competencies to test and confirm during the candidate selection process, with industry knowledge and business acumen now equally as important as strong sales skills and solution knowledge.



## Find and Filter Candidates

Proactively driving a prescriptive business applications sales motion is vastly different from the expensive and time-consuming face-to-face approach of the past. So, if traditional sales hiring profiles no longer align with today's self-educating buying community, where will you find their modern-day replacements? It's unlikely you'll find them at an on-premise (non-cloud) competitors or through legacy recruiting agencies. Next generation, high performing business solution sales professionals that can effectively drive an **Accelerated** or **Depth** sales motion will increasingly come from new sources:

- ✓ Recent graduates
- ✓ Non-IT industry sales professionals
- ✓ Operational industry resources
- ✓ Non-IT transactional sales professionals
- ✓ Pre-sales/consulting resources
- ✓ Competitive cloud sales professionals

The following table maps the four primary and two supporting competencies to the above candidate sources. Each has its strengths and weaknesses, but all will produce capable and motivated candidates for **Accelerated** and **Depth** sales motions.

Sourcing Next Generation Sales Candidates						
Competencies	Recent Graduates	Non-IT Industry Sales Professionals	Operational Industry Resources	Non-IT Transactional Sales Professionals	Pre-Sales & Consulting Resources	Competitors' Sales Professionals
Communication Skills	✓	✓	?	✓	✓	✓
Situational Fluency	?	✓	✓	✓	✓	✓
Business Acumen	✓	✓	✓	?	✓	?
Industry Knowledge	✗	✓	✓	✗	✓	✓
Sales Skills	?	✓	✗	✓	?	✓
Product Knowledge	✗	✗	✗	✗	✓	✓

Sales professionals driving a **Disruptive** sales motion will require deep business, functional and technical expertise, supported by a consultative "challenger" mindset. These resources are not easy to source, nor inexpensive to hire. But they are essential to orchestrating and executing complex sales engagements.

## Rigorously Evaluate Candidate

To accurately evaluate candidates, you **must** observe them demonstrating the skills and capabilities they will need to succeed in role. Structuring an evaluation process around interview activities that mirror the sales process quickly identifies leading candidates. This also provides valuable input into onboarding and coaching activities. Below is a recommended candidate selection approach designed to evaluate the core activities that need to be scored during the interview cycle:

- ✓ Review online profile and personal brand
- ✓ Evaluate voicemail messaging
- ✓ Evaluate engagement & credentialing
- ✓ Evaluate discovery capabilities
- ✓ Evaluate sales & interaction skills
- ✓ Test business acumen & writing skills
- ✓ Evaluate remote presentation & closing skills



## Benefits of a Structured Hiring Process

Orchestrating and facilitating a structured hiring process that tests the competencies and skills required to connect with and sell to modern business application buyers will ensure your organization...

- ✓ Minimizes expensive hiring mistakes. Beyond compensation and external training costs, new hires require a significant amount of management and internal subject matter experts' time.
- ✓ Attracts higher caliber candidates. Benchmarking competencies, behavioral traits, communication skills and other key hiring criterion leads to more accurate job descriptions and a more consistent and efficient interview process.
- ✓ Accelerate new hire effectiveness. Sales leaders will have the information required to optimize and adjust the onboarding process and focus their coaching efforts on specific competencies and skills.
- ✓ Builds a long-term candidate funnel. Leveraging social media tools and industry channels to attract top talent on a continuous basis provides a steady flow of promising new applicants.

## Relevant or Redundant?

Modern business application buyers **will engage** with sales professionals who can share insightful industry/vertical specific content that addresses their business challenges. These same buyers will punish sales professionals who focus on product and/or facilitate self-serving interrogations anchored in BANT (**B**udget, **A**uthority, **N**eeds, **T**iming). Sales professionals who understand the industry drivers and market forces which shape their prospects' strategic decisions, who can clearly articulate industry issues, risks and operational challenges, will be rewarded with executive conversations, greater levels of disclosure and ultimately, higher win rates.

For more information on how to improve your sales professional hiring and onboarding processes, review the Business Central Sales Professional Hiring Guide and Business Central Sales Professional Onboarding Guide.

# Define Industry/Vertical Selection Services

Both the **Depth** and **Disruptive** sales motions require you to develop one or more focused selection services, or wedge offerings, that are positioned, sold and facilitated during the prospects' buying cycle. This key sales play is consistent across most of Microsoft Dynamics partners who consistently drive high win rates. For clarity, these same partners are almost always focused on a small number of industries or verticals.

**Depth** selection services should ideally focus on value expansion, whereas **Disruption** selection services more frequently focus on risk reduction. To effectively execute this sales strategy, sales professionals must identify either missing value, or a significant project (or business risk) that can be remedied through a packaged consulting service. These offerings can take many forms, including:

- Scope clarification
- Business case confirmation
- Project scope prioritization
- Business process optimization
- Change management strategy review
- Technical (integration/data transformation) risk assessment
- Business priority alignment
- AI/IoT opportunity prioritization

A risk might be the lack of a compelling business case, missing scope elements, the absence of a change management plan, or the underestimation of the effort required to complete data transformation and/or integration. Identifying risks, bringing them to the awareness of the project business sponsor (BDM), and offering to facilitate a collaborative "optimization" workshop to remove the risk, establishes your differentiation and domain expertise. However, this approach, is only possible with a deep understanding of the prospect's industry or vertical.

Senior executives care deeply about three core topics; money (make more), risk (mitigate or eliminate), and control (enhance). As a result, these three elements become incredibly important criteria in the vendor selection process. Anchoring your **Depth** or **Disruptive** sales motions in a sales play that decreases project and business risk, increases business case benefits and improves or enhances executives' ability to make better decisions (control) creates a competitive advantage.

# Guide: Go-to-Market and Close Deals

Leverage the Microsoft resources available in the [Go-to-Market and Close Deals guide](#), for details on marketing to the cloud buyer, aligning marketing goals with business goals, developing value propositions, and marketing and sales assets, resources, and best practices.



Microsoft  
Partner  
Network

# Optimize and Grow

[aka.ms/practiceplaybooks](http://aka.ms/practiceplaybooks)



# Executive Summary

So far, we've covered strategies for building your business application practice, finding and keeping customers, and providing ongoing support.

In this section, we'll focus on how to optimize your practice, strengthen your relationship with customers, and evaluate your performance to help you continue to delight prospects and customers.

Are your customers delighted by your services and products? Delighted and not just satisfied? In this section, you'll learn why customer lifetime value is so important, and how to create more customers for life. We'll share

how to nurture your customers post sales through nurture, renewal and advocacy programs. We'll also explore the use of a "land and expand" strategy and see how getting to know your customers better can lead to incremental opportunities to provide additional services.

We recommend that you read the [Optimize and Grow guide](#) for more information on developing insights and strategies for growing your customer base.

## Top 5 things to do

Learn from your customer experience to increase Customer Lifetime Value (CLV). These are 5 things you should do to optimize and grow your practice.

- Seek customer feedback
- Nurture existing customers
- Identify and amplify advocates
- Obtain referrals
- Upsell and cross-sell

# Customer Lifetime Value

Customer Lifetime Value (CLV) represents the total potential revenue from a customer over the lifetime of their relationship with you.

As most businesses have experienced within the tech industry, a lifelong customer is of far greater value than any one-off transaction. It is also much less expensive to sell to an existing customer than it is to acquire a new one. It is no longer enough for companies to invest their time and resources to generate one-time customers. Especially in the cloud world, it is critical for businesses to develop relationships and solutions that engage a customer for life.

CLV allows you to step back and look at not just one sale, not just one customer, but your whole customer base. It's about defining the economic value of each customer within that base and using that metric to make data-based decisions. If you don't know what a client is worth, you don't know what you should spend to acquire or keep one.

Knowing the CLV helps you make critical business decisions about sales, marketing, product development, and customer support. For example:

- **Marketing:** What should my acquisition costs be?
- **Sales:** What types of customers should sales reps spend the most time on trying to convert?
- **Product:** How can I tailor my products and services to my best customers?
- **Customer Support:** How much can I afford to spend to provide customer service to my customers?



CLV is also a good way to guide and reward your sales team. Pay them more for bringing in customers with high potential lifetime value. By measuring and monitoring your cloud customer CLV, you can:

- Gain insight into your customers' cloud consumption and usage
- Qualify for MPN cloud competencies that will help you grow your business
- Help your customers reach their desired business outcomes
- Leverage insight for cross-sell/upsell and proactively engage customers for extension opportunities

By increasing your customer adoption rates, you can increase your CLV, particularly with cloud customers. The more employees you can get to use your service or solution, the more likely you are to increase CLV.

## WHAT DO YOU NEED TO DO TO BE SUCCESSFUL?

Digital transformation is more than a technical migration. Realizing the solution's desired value requires transforming business processes and how people work. Resistance to change is a normal human behaviour that needs to be addressed – whether it's simply inertia or teams feeling threatened by change.

Research on successful projects show that:

- **Change doesn't happen automatically.** Most employees don't want to use new technology rolled out by their organization.
- **CEOs matter.** When the CEO was engaged, the transformation project was more successful.
- **Setting targets is key.** A well-defined set of financial and operational targets is a key component to successful transformation.
- **Learn from each other.** Learning from co-workers is one of the most effective ways to adopt new technology.

Technical readiness and user readiness must go hand in hand: it's critical to plan, pilot and deploy both readiness activities together. Your adoption approach can accelerate or impede results. Understanding team member personas is critical to sell the value of the technology to users.

There are a variety of organizational change management methodologies and best practices which are mature and have demonstrated track records of driving effective change. Change Management methodologies, such as Prosci®, can have a big impact when used with the right business solution tools and adoption frameworks. We encourage partners to develop change management practices as incremental service opportunities in addition to applying the methodologies to any project that requires significant people change.

The effectiveness of change management approaches are also reflected in feedback from customers about the key steps for successful adoption:

- **Defining a vision:** Companies were most successful when they had a clearly defined vision and knew how the new technology would be used.
- **Getting leadership support:** Successful projects obtained proactive support from senior leadership to encourage new technology use.
- **Training end-users:** Organizations used multiple training formats to engage with employees across business units.
- **Raising awareness:** Top performers used email, employee portals, posters, teaser videos, and newsletters.

Use the customer-ready [Dynamics 365 Adoption Guide](#) to understand the key steps and best practices for accelerating adoption.

### 1. Envision

**Identify and prioritize scenarios while learning about available resources as you plan for rollout.** This stage is critical to your journey as you're setting business goals to measure success.

- **Assemble Your Team**
  - Include: Executive Sponsors, Success Owners, Champions, Early Adopters
- **Define Business Strategy**
  - Include: Clear goals, clear stakeholder scenarios that map to goals and metrics
- **Determine Readiness**
  - Ensure that it's: aligned by stakeholders, reflects the needs for each team and proactively addresses potential resistance

## 2. Onboard

**Work with your key stakeholders to build and launch your adoption plan.** Prepare your environment and test your adoption approach with Early Adopters. Use feedback to make adjustments before scaling to the business.

- **Build Your Adoption Plan**

- Build a communications plan that answers the "What's in it for me?", fits with company and culture, and leverages Executive Sponsors
- Build a training and readiness plan that meets the needs of each stakeholder team

- **Launch to Early Adopters**

- Build a champions program and leverage champions to ready and support Early Adopters.

- **Adjust Your Plan**

- Get structured feedback from early adopters about the solution, training effectiveness, and general acceptance

## 3. Drive Value

**Full-scale deployment and business success depend on usage and satisfaction.** This requires planning through the Envision and Onboard phases plus ongoing operational excellence.

- **Monitor End User Adoption**

- Build and track KPIs for both the solution's business results and end user adoption

- **Measure and Report Usage**

- Use access and reports and tracking tools to understand usage; supplemented by interviews, focus groups and surveys for deeper understanding

- **Encourage Ongoing Engagement**

- Ensure that end users can learn more on their own through such tools as Microsoft Learning resources and membership in the D365 User Group.

### Key attributes of a successful adoption approach:

Define a vision & identify business scenarios	Prioritize solution & create an adoption plan	Commit resources & execute an adoption plan	Measure, share success, & iterate
A deep understanding of the business goals, as well as people challenges and needs to achieve them.	A solution that people love and that helps them achieve business goals and get things done more effectively.	A strategy to drive adoption including communications, readiness, and community.	Benchmarks, KPIs, and success stories to help demonstrate success internally, improve, & expand.

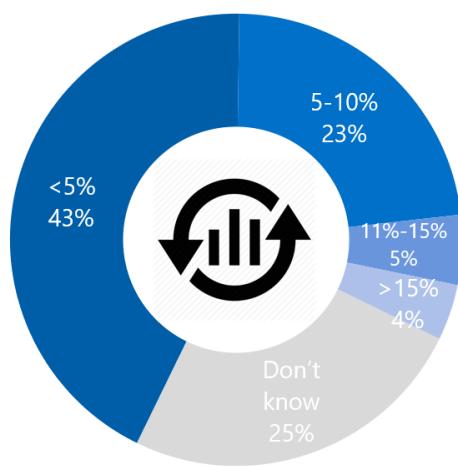
While it's important to define and track your metrics, there are some simple things you can do to increase your CLV.

Your customer strategy must be built on a culture of customer success and tracking customer satisfaction. Critical success factors, when it comes to CLV, are:

- Being sensitive to customer emotions
- Maintaining good communication
- Listening to customer pain points
- Building trust
- Understanding that there are multiple layers to any one concern
- Having empathy for your customer

Understanding each of your customers' CLV enables you to better prioritize support delivery, resource allocation and account management tactics. Combined, these decisions help to drive down your annual churn rate.

**Average Annual Cloud Churn Rate  
(n=823)**



Learn more about CLV in the Modern Microsoft Partner Series eBook, [Deliver Customer Lifetime Value](#). To model CLV as it relates to your business, explore the modeling tool available on the MPN portal.

# Marketing & Sales Activities

Investing in a marketing process that converges with sales is critical to the success of developing relationships and solutions that engage customers for life. Building and nurturing customer outcomes post-deployment is critical to secure recurring and renewal-based revenue streams.

## POST-DEPLOYMENT NURTURE

It's much harder (and more expensive) to attract a new customer than to retain one. Post implementation, you want happy and satisfied clients and you need to ensure that they are generating value from, and fully utilizing, their investment. Customer nurture campaigns can help. You can automate onboarding communications to welcome them, to provide contact and support information and relay key highlights of your offering. They should also include ways to engage/learn from other customers or users who solving similar problems in creatively. Lesson-based nurture can provide educational tips and tricks, use cases or product tutorials that can help them fully adopt your solution.

*Direct Marketing News found that “engagement/relationship strength has 12 times more influence on retention and repeat purchases than satisfaction.”*

## RENEWAL

Pre-renewal communications are important as they can help remove any obstacles at renewal time and minimize the risk of customer churn. Automated outreach communications should include several activities 30, 60, 90 days before renewal date. Your customer success manager will spearhead this program and ensure there's no outstanding issues, the customer is satisfied, that your solution has high levels of utilization and has delivered on the brand promise. You need to ensure exact timeframes in which those activities are measured, evaluated and assessed. You should also highlight any upgrade options and promotional discounts or offers at this time to secure earlier and possibly a larger ongoing commitment.

*Harvard Business School found that “increasing customer retention rates by 5% increases profits by 25% to 95%.”*

## ADVOCACY

Your best customers can become your best promoters, recommending your solutions and services to their industry and peers. We recommend that you identify and recruit your fans to be your spokespeople. They are the customers who are passionate and excited about what they've achieved and accomplished. Remember, the customer is the hero and through this lens you have the best chance of attracting new prospects as they offer credible, relatable, social proof. You can ask them to act as a reference and to contribute to mutually beneficial testimonials, case studies, and social media amplifications.

Additionally, 84% of B2B decision makers start with a referral, so this level of social proof is critical. You might want to consider a referral program that offers some level of incentive or reward for new business.

## LAND AND EXPAND

In order to upsell and cross-sell successfully you need to look for opportunities for incremental offerings. If you have telemetry data or can monitor their usage and consumption, then you can identify areas of deeper and wider usage of your solution. You could also find areas and processes ripe for optimization or more efficiency. You can also identify key customer milestones, such as when significant threshold or performance goals have been reached, which triggers an outreach from you. To be successful at “land-and-expand” takes effort and energy, insight, and a dialogue.

# Guide: Optimize and Grow

Leverage the Microsoft resources available in the [Optimize and Grow guide](#), for details on building customer lifetime value, executing nurture marketing efforts, optimizing and growing from feedback, refining your customer value proposition, growing partnerships, and measuring results.



# Business Applications Playbook Summary

Thank you for taking the time to review this playbook. We trust you have gained new insight on how to successfully grow your business applications practice.

Our hope is that the content in this playbook will stimulate new ideas, validate you are on the right track and help to make some of your decisions easier. We have attempted to organize and provide links to valuable resources which we hope will provide insight that you can use to quickly accelerate and optimize your business application practice. To this end, we shared the business applications market opportunity and provided relevant information on business strategies and technical topics to capitalize on this opportunity. We hope you will share this playbook with your peers and come back and review all five sections in order, or individually again, at any time.

In the first section, **Define Your Strategy**, we helped you define the strategy upon which to build your practice. Here we provided an introduction to Microsoft's approach to business application and the technologies you can leverage from the Microsoft business application platform, and examples of the various project services, managed services, and intellectual property your practice could build or sell. The key actions we prompted you to take are: define your practice focus, identify customer trigger events, understand the Dynamics 365 opportunity, develop your solution offer, and define your pricing strategy.

In the second section, **Hire & Train**, we focused on the importance of hiring the right team and provided details regarding the skills, certifications, and experience you should look for in key roles. In addition, we provided specific guidance for ongoing training and certifications.



In the third section, **Operationalize**, we suggested you put your plan into action and standardize processes across key functional areas. We provided information on sales and marketing infrastructure considerations. In addition, we recommended you leverage your internal use benefits, shared how to organize your support process, and made recommendations on key contracts and tools.

The fourth section, **Go to Market & Close Deals**, explained how to bring your offer to market successfully through sales and marketing activities. We shared strategies that support brand awareness, lead generation to achieve an accelerated sales commitment. We described how to build your foundational marketing messaging and shared the most successful selling motions you need to adopt in a high-caliber practice.

The final section, **Optimize & Grow Your Practice**, stressed the importance of learning from your customers and leveraging your learning and experiences to optimize your practice and expand customer lifetime value. We explored how to nurture customers post-sale through renewal and advocacy programs and land and expand strategies.

## FEEDBACK

Share feedback on how we can improve this and other playbooks by emailing [playbookfeedback@microsoft.com](mailto:playbookfeedback@microsoft.com).