Microsoft Dynamics 365

DELIVERY GUIDE

Low Code Needs Assessment

Pre-sales funded engagement for SMB and SMC customers

Guide overview

The purpose of this guide is to support partners in understanding how to leverage and position the Low Code Needs Assessment, a partner-led, funded engagement for small- and medium-sized businesses (SMB) and small, medium, and corporate (SMC) customers interested in Power Platform (including Copilot Studio) low-code solutions.

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Description and overview

Power Platform Needs Assessment

This two- to four-hour engagement helps partners demonstrate the benefits of Microsoft Power Platform solutions and Microsoft Copilot to SMB and SMC customers. The focus of the workshop is on replacing ad-hoc, manual processes and paper- or Excel-based systems with automated workflows, applications, AI-powered agents, dashboards, reports, and/or webpages for customers that already use Microsoft 365, Microsoft Teams, or Dynamics 365.

To be eligible to offer this service to customers, partners must have low-code expertise with Power Platform. It is also highly recommended that partners have some experience working with Microsoft 365 and/or Dynamics 365.

The Low Code Needs Assessment guides partners through uncovering the most pressing challenges or opportunities for low-code innovation, showcasing the business benefits of Power Platform and Copilot, and proving customer value. The final deliverable for the customer includes three slides that are also required for proof of execution (POE). These three slides capture the workshop participants, recap business challenges or opportunities, and identify the top 3–5 initiatives prioritized by the customer.

To prepare for the workshop, partners need to review the provided content and simulated demos. They will plan how best to complete the workshop based on their existing relationship with the customer, customize the workshop materials provided by Microsoft as needed, and invite the right stakeholders to the conversation.

Support for low-code sales in SMB and SMC accounts

The Low Code Needs Assessment is one step in a multi-step sales cycle that includes pre-sales and post-sales engagement activities, customer offers, and partner incentives. It is specially designed for SMB and SMC customers looking for low-code solutions that complement existing investments in Microsoft 365, Azure, or Dynamics 365.

The engagement is intended for partners to use with SMB and SMC leads that have already been well qualified at the 20% sales stage, but no opportunity ID is required to participate. It was created to be a 1:1 exercise focused on solidifying customers' purchase intent and identifying priority scenarios for a near-future implementation. This engagement is not for use with every prospect or lead. With the new cap per partner, per country, it's important to offer these engagements only to customers who will benefit the greatest, thereby increasing their intent to buy.

This engagement can be combined with other engagements, offers, and incentives to help offset the cost of the sale to both you and your customer. It may also lead to additional partner services, support contracts, and customer sales in the form of complementary workloads.

Structure of the engagement

The Low Code Needs Assessment includes three phases for the partner to work through: plan, conduct, and document. The following sections describe best practices for helping you complete each phase specific to this activity and include links to tools and resources your team can use to ensure a successful engagement.

Be sure to review all sections thoroughly before you start, as you may choose to perform steps in different phases, and you will want to tailor the activity to best meet the needs of your customer.

Complementary download kit

As you read through this delivery guide, open and review the materials in the download kit, available on the Partner Hub.

The Low Code Needs Assessment kit includes:

- **Partner-to-customer email template:** Reach out to customers and encourage their participation through this customizable email invitation.
- **Partner-to-customer flyer template:** Keep the engagement top of mind and help champions encourage other stakeholders to participate by customizing and sharing this flyer.
- **Customer engagement deck:** Use the provided slides and guidance to help structure the engagement when you meet with the customer. Please note that simulated demos are included, which are browser based.
- **POE template:** Capture the essential information that must be submitted to Microsoft for payment.

Phase 1: Plan and prepare for the engagement

During the first phase, you'll vet the customer to ensure they're well qualified for the workshop, assemble your team to deliver the workshop, and confirm they have the right knowledge and skills. Based on what you learn, you will need to customize the workshop materials.

1.1 Confirm customer and partner eligibility

This engagement may only be used with customers that have already been qualified for low-code solutions. It may not be offered initially to build pipeline.

Customer requirements

- Classified as SMB (unmanaged) segment <2,400 employees or SMC customers
- Has a Microsoft Customer ID

Note: In some cases, your customer may show as NOT eligible when you know they are. In that case, please complete the customer add request form: aka.ms/BAPartnerActivitiesCustomerAdd.

Partner requirements

- Joined Microsoft AI Cloud Partner Program (MAICPP)
- Enrolled in MCI
- Attained a Business Applications Solution Partner Designation

Please refer to the MCI Guide (aka.ms/incentivesguide) for the latest qualifications list and additional details about the engagement and payout.

1.2 Determine BANT, sponsor, and invite list

Before you show up for the workshop, you will want to assess whether the customer has the budget, authority, need, and time (BANT) to make the Needs Assessment viable and valuable to your team.

It's also important to make sure you identify a project sponsor who has the authority to make the purchase and to pull the right people into discussions. A best practice is trying to involve team members at both manager and user levels, which will tie system experiences back to business outcomes.

Customer participants

- Project sponsor at executive/ decision-making level, ex. Owner, CEO
- Manager for internal team using the targeted process/system
- Team members that use the targeted systems/processes
- Low-code champion(s) who may sit outside IT

1.3 Review the proposed structure for the engagement

The engagement typically involves three phases. These phases can all be completed in one working session if you include strategic breaks, or it can be spread out over two smaller sessions.

- In the first phase, you'll introduce Power Platform and Copilot capabilities. The goal is to help customers new to low-code solutions start to envision what they can do by sharing use cases and demos provided by Microsoft.
- In the second phase, you'll facilitate a discussion about what use cases and capabilities are most relevant to the customer. The goal here is to identify a low-code solution that you can implement for the customer that will prove value quickly for them.
- In the final phase, you'll recap your findings and recommendations. You're encouraged to develop a business case that estimates the benefits and long-term value of the solution for the customer.

Read through this delivery guide and the customer engagement deck to make sure you understand the suggested approach and resources available to you. Then, customize the agenda based on what you think you can accomplish with your specific customer.

Topic	Time
Kickoff	10 minutes
Power Platform capabilities: Presentation and demos	40 mins
Break	10 mins
Discussion: Business use case	45 mins
Break **or** End of session 1	20 mins
Recommendations: Solution proposal and timeline	20 mins
Closing: Next steps	5 minutes

1.4 Familiarize yourself with demo resources

An objective of the Needs Assessment engagement is to showcase how Power Platform handles key use-case scenarios to help customers envision a better experience for themselves and start to articulate what they want you to build for them. You can either use pre-recorded demos or create your own using these resources: aka.ms/powerplatformsimulateddemos.

Pre-recorded demos: The Power Platform team created the following simulated demos of Copilot Studio, Power Apps, and Power Automate for you to share in the presentation section of the engagement. Watch the short instruction video to learn how to use these demos. Also, review each demo a couple times to make sure you understand what's happening and how you will address any questions that might arise when you share them with your customer.

Copilot Studio	Power Apps and Power Automate
Custom copilot: Product discovery	Execute a site inspection
Custom copilot: Customer return	Onboard new employees
Plug-in: Enhance Copilot for Microsoft 365	Service desk (coming soon!)
	Track inventory

DIY simulations: If the pre-recorded demos don't fit your needs, you can build your own customer scenario by following the partner training simulations that provide step-by-step guidance.

Copilot Studio	Power Apps and Automate
Custom copilot: Product discovery	Execute a site inspection
Custom copilot: Customer return	Onboard new hires
Plug-in: Enhance Copilot for M365	Service desk
	Track inventory

1.5 Assemble your team and refresh your skills

Once you know how you'll conduct the workshop, you can start to assemble your team. Start by thinking through who needs to be involved from your side. You'll likely want to include a sales specialist and a technical resource who can help answer questions and raise potential issues. If someone from your side has experience with the customer's industry, they should be included in the team as well.

> Brush up on the Power Platform in SMB/SMC accounts using the partner skilling resources found in the Partner Hub.

1.6 Customize the activity engagement template (.pptx)

Tailor the customer-facing presentation deck to align with your proposed agenda and approach. The hidden slides that precede customer-facing slides offer guidance on how you can use them. Spend some time thinking about how you will talk about each slide. Remove any slides unnecessary for your engagement.

You can further tailor the engagement and deck by requesting customer artifacts related to the use cases, such as invoice templates, order forms, accounting fields, and industry-specific workflows.

Phase 2: Conduct the engagement with the customer

Conducting an in-person (or virtual) meeting with the customer to work through the customer engagement deck defines the second phase. Whether you customize the deck provided in the download kit or create your own, it's important to lead the customer through the following questions they're likely to have.

2.1 What is low code and how do businesses use it?

Help customers understand the capabilities that low-code solutions can provide by describing the different products that make up the Power Platform and how they work with Microsoft Copilot and the Microsoft Cloud. Give them relevant use cases to envision in their own environment by sharing a handful of pre-recorded demos and getting their feedback and thoughts based on those examples.

2.2 Which opportunity should we pursue first?

Using the demos and use case slides as the basis for your conversation, encourage the customer to identify the most attractive scenarios for their business. This may start as a long list. The goal is to narrow it down to one or two options that will show the fastest time to value and have the biggest impact on your customer's business—whether that impact is financial or related to customer/employee satisfaction.

Leading questions to help start the conversation

- When seeing these use case examples and thinking about your business, what processes and tasks are your employees spending time on?
- Are there core priorities for your business that you wish ran smoother?
- How do you currently sell? Do you sell through a website? In that case, do you see an opportunity to add a custom copilot to support sales and customer service?

2.3 How do we do this today? What's good about that? What could be better?

Once you've selected the key scenario that your customer will pursue for their project, it's time to explore how the process surrounding it works today. Your job is to facilitate conversation between customer stakeholders about how the process runs and ask lots of questions to uncover assumptions, limitations, workarounds, and ideal experiences.

It's important to recognize what stakeholders like about the experience today and why. In some cases, you might want to replicate it exactly. In others, you may be able to propose a better solution or process that accomplishes why they've been working the way they have while dramatically improving how they're doing it.

2.4 How will this impact our business?

Take a few minutes to describe the impact that moving from current processes or systems to the new low-code solution is likely to have on your customer's organization. Talk through impacts with the people affected, as well as potential implications to business KPIs and the bottom line.

This discussion will help customers create a framework for estimating the business value of the solution once it's deployed.

Capture elements that are especially compelling to help you make the business case later when you write the report.

Additional questions to help explore use case scenarios

If the demos are not sparking interest among your stakeholders, you can try some more exploratory questions to help you pinpoint a potential scenario.

- How do you envision generative AI helping your business?
- Where do you store data? How do you capture it? Who can access it?
- What do you do with your data today? What do you wish you could do with it?
- What's the process and culture for sharing data at your organization? What would you change about that process? How would you like it to work? What's blocking you from doing it that way?
- How much time does your team spend on administrative work or repetitive tasks? How much time do they spend answering the same questions over and over for people and/or managing requests? What are the most time-consuming tasks for each team?
- What kinds of activities need approvals? How are those handled today? What makes them go faster or slower?
- How do frontline workers and/or employees in the field get up-to-date information and share it with the office?
- Of these issues, which do you think is most pressing? Why?
- Where do you see the biggest business opportunities for your organization within the next few years? What strategic goals would you like to reach?
- What areas of your business feel like they're holding you back?

> The low-code partner deck offers guidance on how to distinguish and qualify opportunities for low-code solutions.

Phase 3: Document findings and submit your POE

The last phase focuses on documenting findings and submitting the proof of execution (POE) for your MCI claim. This work may happen during the workshop and be shared immediately afterward, or you may decide to write it offsite and share it with the customer later.

3.1 Document your findings in a final report

Clean up the slides that you developed with engagement participants during the session, including summary slides at the end of the engagement deck that recap the biggest challenges and top initiatives you identified for improvement. The slides for challenges and initiatives are required as part of the POE template for payment by MCI.

To continue building momentum and your pipeline, develop a proposal for addressing at least one of the top initiatives. When possible, use the metrics and impact factors you've collected to build a business case for your proposal with the low-code profitability calculator.

For customers that are not ready to invest in a full low-code solution yet, consider suggesting how they can start to grow their digital environment with immediate, mid-range, and long-term options.

As part of the final presentation deck, be sure to include additional information about your company, the proposed solution, and customer references (if available) to help the main stakeholder have meaningful conversations with new internal teams.

3.2 Submit POE for payment from Microsoft

Three elements are required to be completed and submitted as part of the POE, including:

1. **The customer survey**: The customer survey is developed by Microsoft and used to track customer experience and partner participation. The link is sent directly from the POE submission section in MCI when you trigger it.
2. **The partner survey**: The partner survey is developed by Microsoft and used to track your participation. The link can be found in the POE submission section in MCI.
3. **The POE template**: You must download the Power Platform Needs Assessment POE template and complete it in English.

   The template includes three slides from the Needs Assessment deck:

   - List of workshop participants—must include at least 2 customers and customer emails
   - Key challenges identified—must include at least 3 challenges
   - Top initiatives* identified for improvement—must include at least 2 initiatives

   *Suggested, but not required: Initiatives may include recommendations on relevant ISV solutions from AppSource