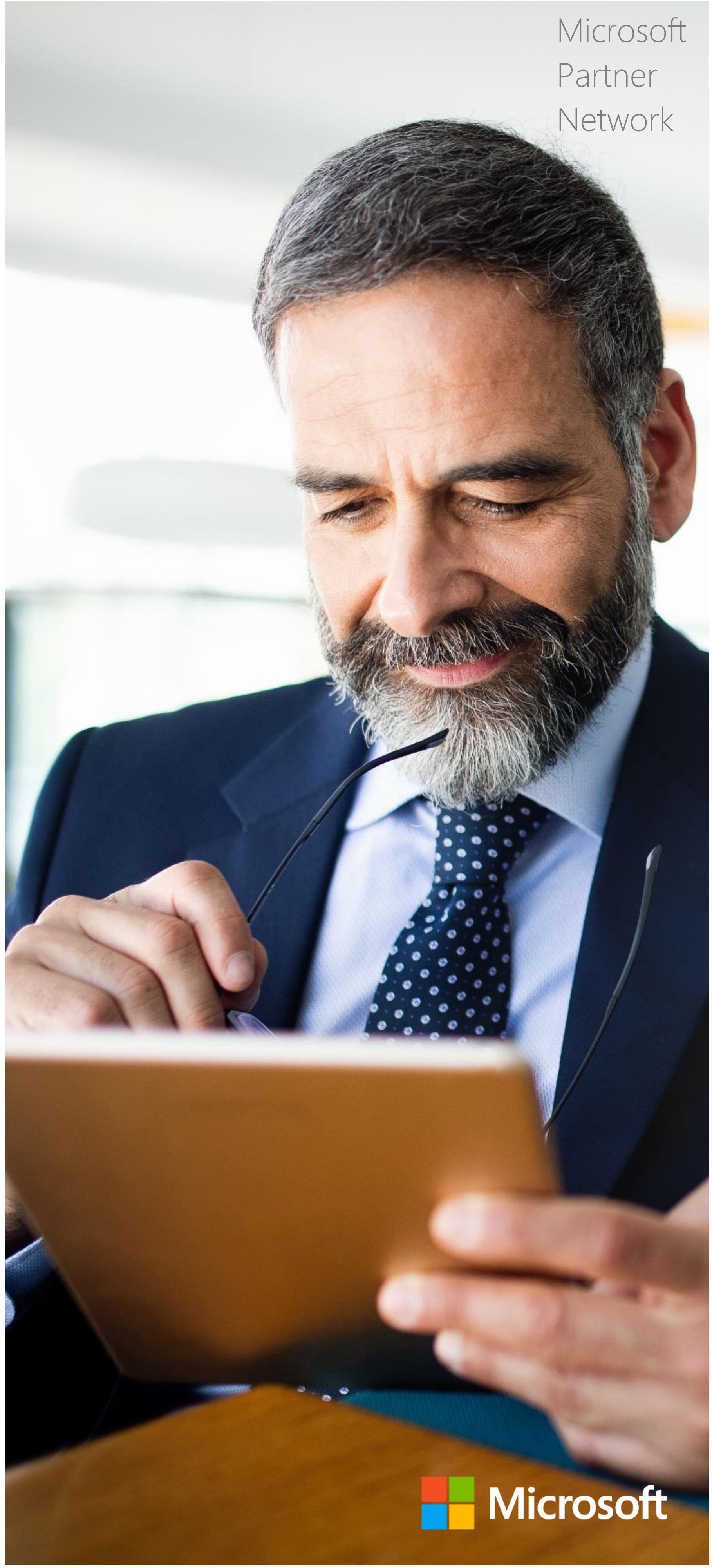
Volume Acceleration Guide for Business Application Partners in the SMB Market

8 Capabilities Needed to Scale to a High-Volume Practice



Prepared for Microsoft Corporation by

NEURAL IMPACT
The Neuroscience of Emotional Engagement

Microsoft

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Building a High-Volume SMB Practice

A true SaaS business model requires a shift from delivering large customer projects on a time and materials basis and relying heavily on referrals for new business to consistently adding many new customers more frequently. This guide is written to help Microsoft partners focused on the SMB business application space to understand the core capabilities needed to effectively scale their practice to become a high-volume business. The opportunity is enormous today as IDC estimates 78 million SMB organizations worldwide with an associated $17 billion SaaS solution spend potential and an additional threefold spend in services. Partners who can offer repeatable solutions in an accelerated time frame on a fixed outcome basis are best positioned to capitalize on this.

The recent pandemic and new cloud adoption landscape are challenging the traditional business models and practices of many project services-focused partners. During challenging economic times, buyers are focused on preserving capital and are more conservative when making decisions. Project-based, time- and materials-priced approaches are perceived as high risk and increasingly less desirable than quick-to-implement, pre-customized, already proven industry solutions that meet their unique needs out of the box. Today’s buyer demands vendors have deep domain expertise and offer fixed-priced, pay-as-you-go options. Their preference is for smaller initial projects that are deployed quickly and immediately achieve measurable benefits or solve specific business problems.

This requires refreshed thinking, strategies, approaches, and methodologies related to how you develop, position, market, sell, and deliver solutions and services as well as provide ongoing value. Your go-to-market approach now needs to scale exponentially, and that means generating more leads, shortening sales cycles, lowering costs of customer acquisition, and expanding into new markets without necessarily needing to increase your current capacity at the same rate. It requires packaging and pricing repeatable offers, focusing on delivering specific outcomes, deploying remotely and more efficiently, using an agile delivery and Power Apps development methodology, learning to upsell post go-live, and accelerating lead generation and sales activities, all while keeping customer acquisition costs low and satisfaction high. No small feat!

The eight high-volume capabilities outlined in this guide will support you to scale more effectively and efficiently, expand faster, and accelerate your growth while driving margins. We have also included examples of best practices from Dynamics partners around the world to get your creative ideas flowing.

This guide will outline the steps you can take to:

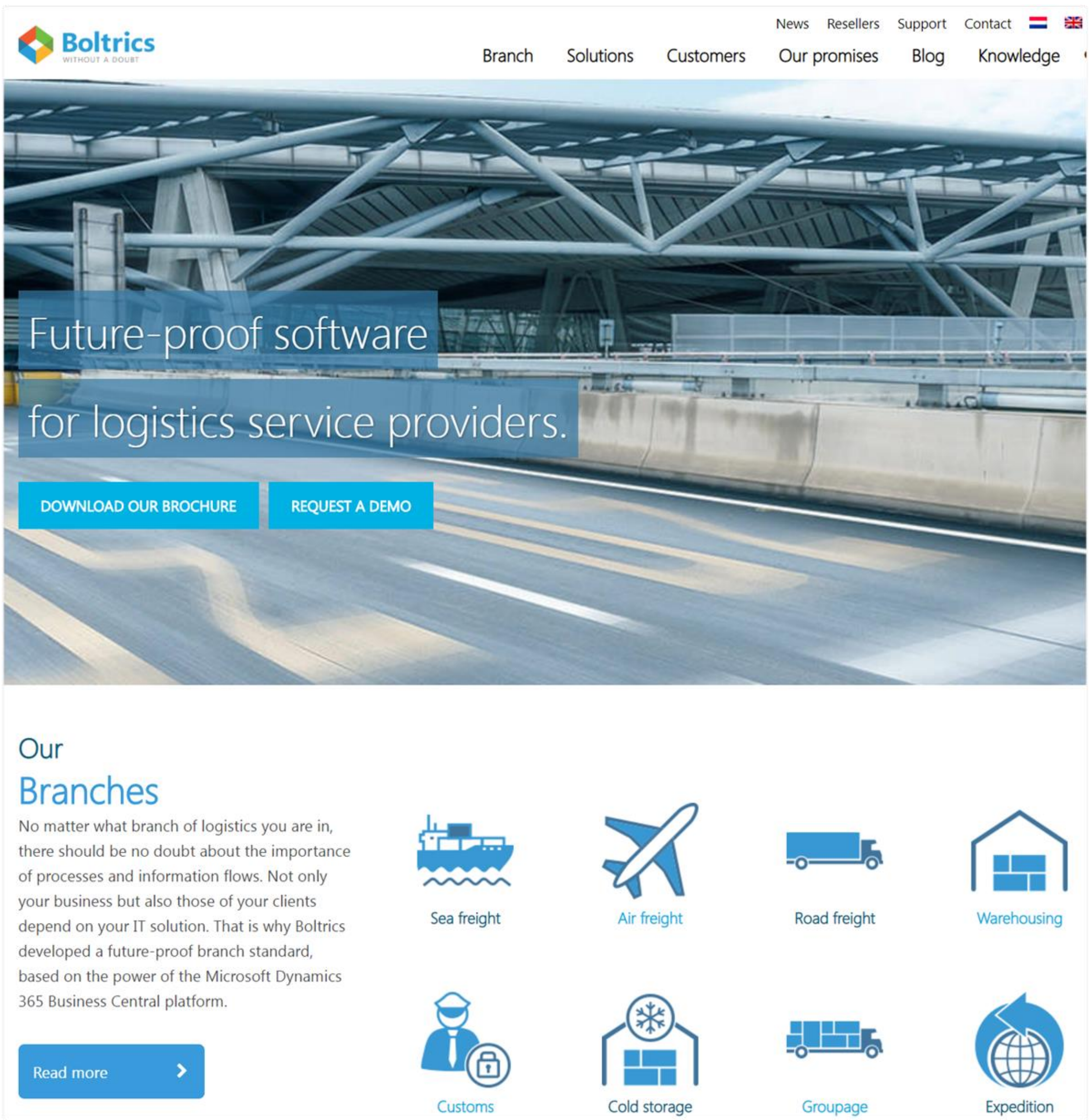
- ✓ Focus your business to gain efficiencies and differentiate your offerings.
- ✓ Monetize and bring to market Power Apps and industry-specific solutions that reduce churn and increase margins.
- ✓ Increase margins and earn more consistent revenue.
- ✓ Scale sales and marketing to drive greater demand.
- ✓ Accelerate and lower the cost of customer acquisition.
- ✓ Deliver more value to customers, sooner.
- ✓ Capture more SMB market share and revenue.
- ✓ Scale and grow faster.

Capability 1: Focusing on a Specialization or Industry

Many services-focused Dynamics partners today go to market with a predominantly horizontal strategy. They often target "everyone" with a "we can help anyone" mindset, mistakenly believing this will achieve more opportunities and higher revenues. However, this approach makes it nearly impossible to competitively scale your practice. Evidence demonstrates that pursuing a mass market results in long sales cycles, low win rates, frequent “no decision” outcomes, high costs of selling, price discounting, high churn rates, and a lack of compelling competitive differentiation.

Customers today prefer to work with providers who already understand their industry, business model, processes, and underlying IT systems. They demand rapid deployment and compressed time to value. They want low-risk, out-of-the-box solutions that satisfy specific requirements and to pay by subscription for as long as they are deriving benefits.

Sample Industry-Focused Landing Page from Boltrics



https://www.boltrics.nl/en/

Take a Focused Approach

Consequently, a key first step toward faster customer acquisition is to identify an area of specialty and focus. This can be a specific industry that you know well, such as manufacturing or professional services, or a problem that you have spent years learning how to solve — over and over again — across industries, such as managing memberships, increasing quality control, managing projects, streamlining online selling, and more. Most Microsoft partners do not have the marketing budget or resources to effectively target more than three market segments or pursue multiple specializations, so it is important to narrow your focus. When identifying target segments, we recommend analyzing your existing revenue and customer base both by industry and by customer type, identifying any "accidental" industry clusters or specific market segments you may already have a foothold in and are not yet adequately leveraging in your GTM strategy.

When choosing target verticals, begin by aligning with one or more of Microsoft's target verticals:

Automotive	Banking & Capital Markets	Consumer Goods	Energy
Government	Defense & Intelligence	Health	Insurance
Manufacturing	Telcommunications	Media & Entertainment	Retail

Identify Your Core Competencies

Next, conduct an internal review to identify your organization's core competencies. Document your internal capabilities, both general and industry specific. What do you know that others do not? What have you mastered? Leverage the unique industry knowledge, capabilities, and competencies your team has taken 20 or more years to acquire. Take stock of your team's industry domain expertise in addition to technical knowledge and skills. Creating and offering a compelling suite of new cloud business solutions and Power Apps, as well as a new set of high-value optimization services, requires more than technical expertise. In a Microsoft ecosystem spanning three Clouds, multiple workloads, and various business models (including partners, systems integrators, independent software vendors, managed services providers, cloud solutions providers, distributors, and more), it is critical to identify what you know better than anyone else and what white space in the market you can own.

Conduct an Internal Audit to Identify IP

Next, conduct an internal IP audit. Identify any repeatable tools, templates, guides, integrations, or other assets you have built. What processes, useful workflow or reusable code have you invested time and resources into developing. Which of these can be productized and monetized? How have you solved customer problems that are repeatable and leverageable?

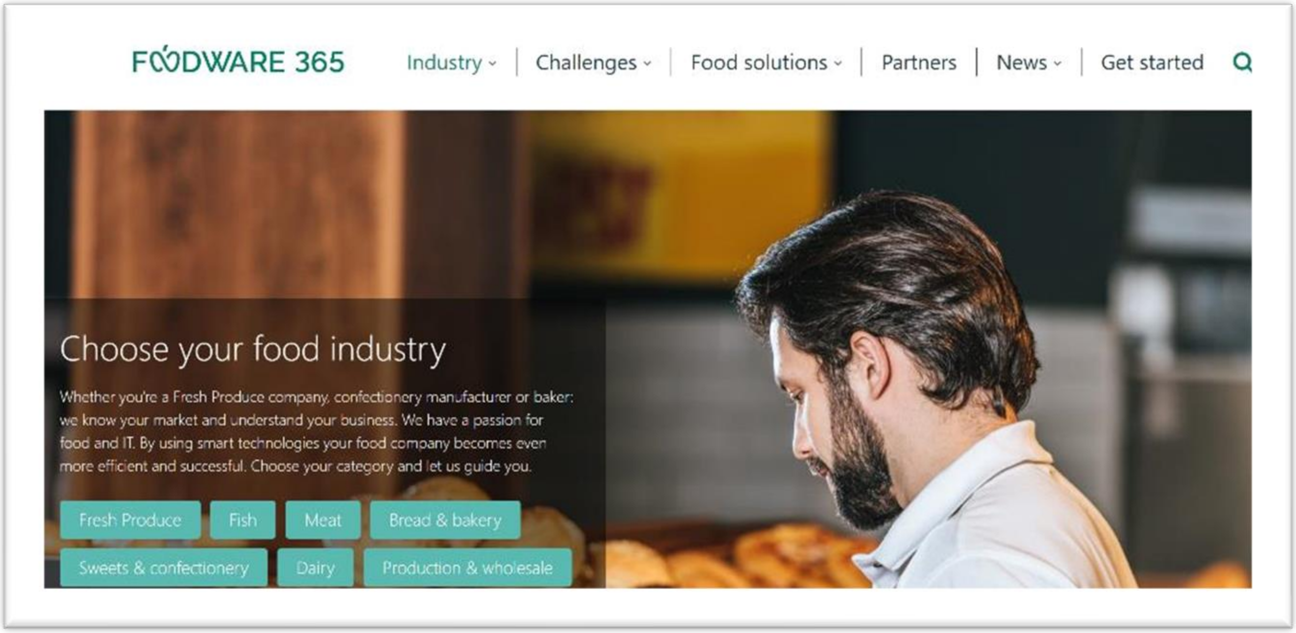
Determine Your Target Market and Disruption Drivers

Before you commit to your priority focus area(s), assess the market to determine which segments present the best growth and revenue opportunity for you. When choosing specific target industries, consider those undergoing disruption or have a sense of urgency to transform. In an SMB-focused practice with offers built around Business Central, Customer Engagement, and the Power Platform, this could be organizations that have intensified cybersecurity challenges related to endpoint security with a remote workforce, new urgent COVID-related constraints or challenges, an increased need for collaboration and communication across multiple locations, or the need to access customer data within a Teams customer call. Scan your competitive environment to understand the intensity of rivalry: a possible factor in your decision making.

Volume partners who have a declared focus are able to implement repeatable offers at scale more easily. In the process, they enjoy higher win rates, shorter sales cycles, lower customer acquisition costs, more differentiation, and lower churn. Take time to clearly define your target market and competitive differentiation.

If you are struggling to narrow your list of target segments to three, try the free online industry competitive assessment tool and choose verticals where you have a strong competitive advantage: http://neuralimpact.ca/industryassessment/

Here is an example of a Business Central partner with a singular vertical focus (food) and several micro verticals within the food sector, i.e.



https://www.foodware365.com/en/food-solutions/

Segment Your Market

When you do not target specific market segments, it is very challenging to package the right offer and bundle of services, commit to fix pricing-specific outcomes, determine appropriate subscription pricing, and have relevant marketing messages. Without segmenting and being able to make assumptions about the customer's environment and needs, it is too high risk and challenging to design and develop a high volume, scale motion.

To more effectively resonate with SMB buyers in your focus verticals, it is important to further segment your target market by number of employees, number of locations, revenue size, primary buying needs, IT capabilities, and more. Only then can you determine price tiering and breadth of product and services offerings.

Within the SMB market, variability does exist. For example, a one-location supermarket may not have any IT resources and may need a different bundle of onboarding and support services than a multi-location retailer, such as integration between their Dynamics business solution and Shopify. A regional chain of supermarkets, while still limited in number, operate in a more complex IT environment with multiple systems. They may have more internal technical resources but need a deeper set of e-commerce and supply chain functionality.

It is important to understand that SMBs identify more with their industry than their size; they think of themselves as grocery retail, for example, not as a small business. So be sure to customize both your offerings and your marketing communications to be industry-specific and speak to their current challenges, which you can help solve.

Businesses large and small are now having to digitize everything. They are re-visiting and pivoting their product and services offerings, reinventing their delivery approach, and needing to enable secure remote workers, all while reducing costs and better managing new risks. Determine which market segments would benefit most from your solutions and services offerings and which are the best fit for your organizational focus and competencies.

Vertical Segment 1	Vertical Segment 1	Vertical Segment 1

Capability 2: Creating Differentiated Solutions

To achieve success for your SMB-focused offerings, ensure they align with prospect challenges and current market demand. Your solutions and services should be designed to drive specific beneficial outcomes for customers.

Having an industry focus makes identifying repeatable core challenges you can solve much easier to identify. As such, this repeatability can support efficiency and scale across all stages of the customer lifetime journey from acquisition to customer retention.

If, for example, you offer solutions and services for several small local manufacturers, you will begin to identify “universal” processes and workflow patterns, understand their communications and compliance requirements, identify inventory- or supply chain-specific problems, and be in a position to monetize both your newly acquired domain expertise as well as invest resources into customer-funded, low-risk, repeatable new Power Apps that can be monetized and increase customer stickiness. If you work closely with customers in the education sector, for example, you will quickly be able to identify specific subscription product and services offerings that you can bring to market, be it virtual classroom as a service or online student engagement as a service.

Understand Your Customers’ Challenges

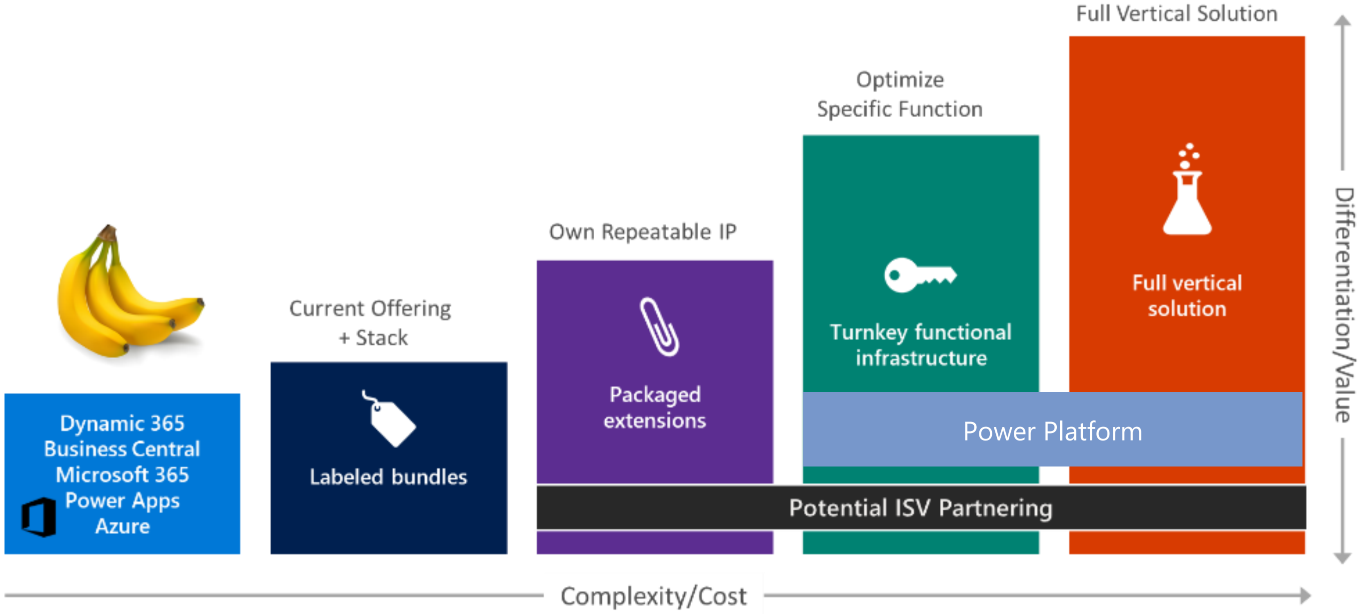
We recommend that you research the driving forces creating business challenges for customers in each of your target segments in terms of regulatory changes, economic impacts, new pandemic-related health and safety requirements, changes in customer demands, and pressures resulting from new competitive entrants. Then, design attractive product and services offerings to align with and specifically alleviate these core business challenges and constraints and provide the much-needed benefits or new capabilities they desire. For example, several SMB partners have quickly brought new power platform service offerings to market in response to COVID-affected retailer environments, including a shopping distance app that manages customer traffic within a store to ensure new regulations are met and a curbside pickup app to offer customer collection post online or phone purchase.

Take a Phased Approach

As an initial step, take your horizontal offers and elevate them by infusing industry-specific language, imagery, and messaging into your sales and marketing assets and motions. Then package and price them appropriately for that specific vertical. As you gain a cluster of customers in each industry, progress toward a more intentional vertical strategy by bundling other solutions and specific services, such as endpoint security options or 3rd party ISV solutions to complement your offer. This journey and progression do not require significant financial investment or unnecessary risk-taking at the outset.

As your expertise and experience in your target verticals increases, begin to invest in industry-specific IP or Power Platform based workflows, Apps and more. This journey begins by bundling and packaging existing Microsoft products to meet the needs of a particular industry then focuses on marketing only. Next, you can leverage best of breed proven Dynamics ISV’s solutions to bridge gaps and provide a more industry-focused solution. Next, begin to offer no-code, Power Platform-based solutions and apps to automate specific workflows or business processes, reporting, and analytics. Lastly, invest in your own IP and build end-to-end, fully customized industry solutions and repeatable integrations that truly differentiate your offerings and allow for increased margins. Shifting from a horizontal go-to-market strategy to a more vertical-focused strategy does not require immediate, large, high-risk capital investments or a complete disruption of your current business. Walk before you run and begin by taking a small step along the IP maturity spectrum. With success and momentum, you will confidently move toward being a full end-to-end verticalized SMB solutions provider.

IP Maturity Model



Identify Core Emotional Buying Triggers

Very few SMBs go window shopping for new technology. While most could benefit from improved business processes and more automation, very few will proactively initiate, augment, migrate, modernize, or replace their existing technology services and solutions without a significant business reason. Changing technology is perceived to be uncomfortable, complicated, expensive, and risky. In a strained economic environment, most businesses will only invest in new technology when there is a compelling and measurable benefit, significant business risk to be mitigated, or limitation impeding the company's survival or growth.

Take time to identify compelling buying trigger events. Most SMBs will default to workarounds or manual processes to avoid investing or changing current systems. At some point, however, these stop-gap processes fail. An SMB then experiences a material impact that forces it to seek a more robust solution. These moments are called "trigger events" and are specific business events that demonstrate (often painfully) that a business can no longer rely upon its current technology or business processes and expect to grow.

Trigger events are always emotionally charged and often come as a surprise. They can be painful events such as losing a big customer, a current solution, or a contract. It could be COVID-19 forcing them into lockdown, a security and/or compliance breach, ransomware attack, privacy violation, change in regulation, an acquisition/merger, negative PR event, or a change in key leadership or ownership. These events need to be handled immediately; they always lead to a change in behavior, which sends them searching for a solution to their problems. An opportunity that ends in a “no decision” after many months of pursuit is often because a core emotional trigger is lacking or another more urgent pain is competing for the budget earmarked for your solution.

To have the best chance to uncover, engage, and resonate with your Dynamics 365 and Power Platform-based SMB offers, take time to map out the top 3-5 emotional trigger events in your target industries. COVID is a good place to start. List your last ten client engagements on a whiteboard; beside each one, write down the top reason the customer invested in your technology. Identify the desired benefits or outcomes (e.g., We wanted to be more efficient or to increase productivity.) not what “happened” that sent them looking to invest in a new solution NOW vs. in the future (e.g., Our plant has to immediately implement sanitation measures and reconfigure workspaces for safety, including stagger shifts, increase distance between workers, and ban visitors on factory floors).

Here are examples of emotional triggers aligned with a few Microsoft solution-focused sales plays applied to a manufacturing scenario:

Operational, Regulatory, Customer, Security, and M365 Sales Plays	
Sales Play	**Key Customer Concerns (Emotional Triggers)**
New Operational and Regulatory Sales Play	• Our supply chain has been shut down or disrupted; we need to quickly pivot to sourcing materials locally. • We are struggling to meet new worker safety rules and compliance regulations, which are impacting our production and distribution. • We can't seem to balance the huge fluctuations in inventory due to swings in demand triggered by lockdowns and inconsistent supply of materials. We are losing revenue as a result or have excessive inventory or write-offs. • Our margins have dropped below sustainable levels. • Our cash flow doesn't cover our operating costs right now. • We can't pivot our supply chain quickly because we don't have insight into critical materials and components. • We need to quickly implement more factory automation to reduce the number of workers on the shop floor at one time.
Customer Engagement Sales Play	• Our customer service and satisfaction are being negatively impacted because our employees are not able to do what they used to be able to do. • Customers don't want to come to our plant; we need a way to engage with them remotely. • Customers want more control over their orders and insight into deliveries remotely. • We have laid off several salespeople, and our revenue has dropped.

Security Sales Play	• We've lost control over who has access to our company's valuable information and where it is. Employees are sharing information from their personal devices and accounts. • We are experiencing increased cyber-attacks as hackers are using the concerns over the virus to prey on our employees, who are working outside of a secure office environment. • Our employees have gone rogue. We are struggling to keep control over employee devices and data security.
M365 Sales Play	• Team members don't have access to the critical documents and information they need to do their job. • Our salespeople can't visit customers to close new customers. • Productivity of our design and engineering team has dropped since they have not been able to work together in the office and have been working remotely.

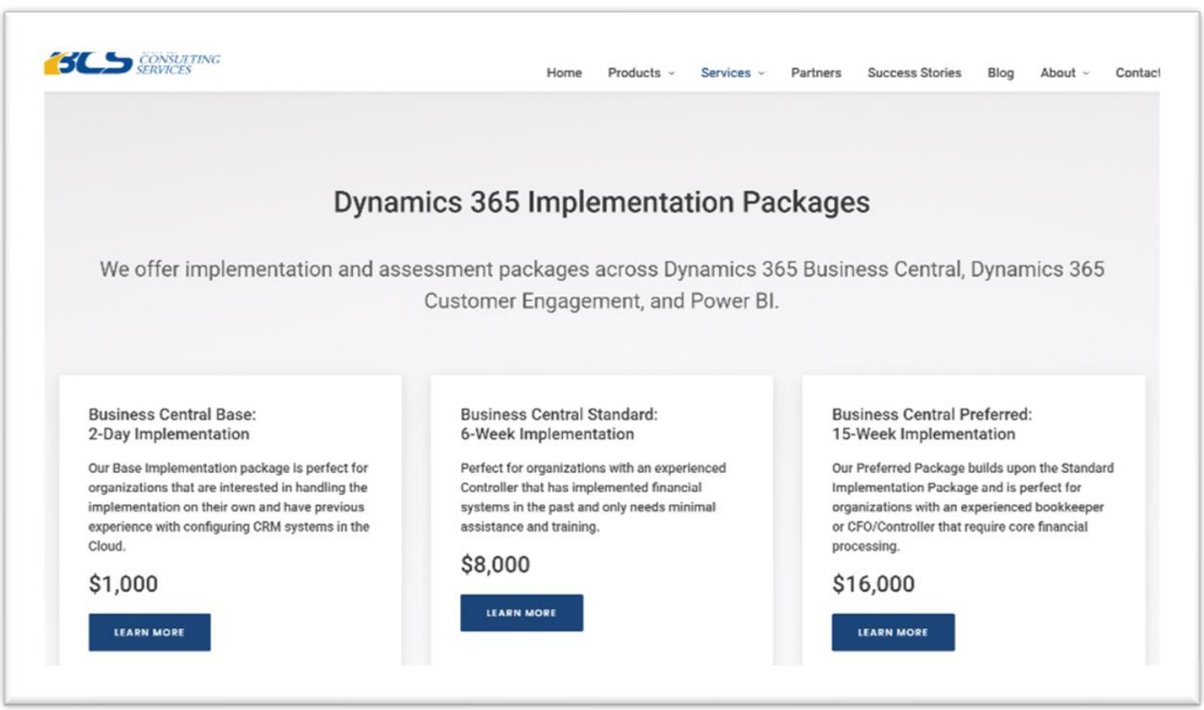
Capability 3: Packaging and Pricing Your Offers

When prospects and customers reach out for help, they're often faced with the dreaded, ambiguous response: "it depends". It's complicated, and it depends on the technical environment, architecture, number of locations and employees, or one of the many variables that impact project scoping. When customers ask how much a solution costs, they are often looking for a rough idea. They want to know if it fits within their range of possibility. Many are experienced IT professionals or sophisticated business owners, so they know there are unknowns that will impact the final price. But when a partner says they can't be certain, that every situation is different, or that it depends, the prospect hears risk and begins to feel distrust. Would you take the time to speak to an agent and visit a house that is for sale without first knowing the price range? Probably not. Yet we often insist on making prospects speak to a sales professional before getting any idea of the related costs. Now, compare the "it depends" response to a specialized Microsoft

Dynamics partner, one who easily articulates various options and/or clearly communicates that while more discovery work needs to be done, most projects fall within a predictable range of $35,000 – $45,000. Is that within your range of expectations? Dynamics partners who provide scope and pricing clarity inspire confidence for two important reasons: 1) they are transparent, which creates trust, and 2) they lower the perceived project risk.

Cloud buyers today increasingly want to consume a full range of services — advisory, project, and managed — on a subscription or as-needed basis. This requires a new marketing and selling process. Focusing on selling "project services" vs. solutions with accompanying ongoing onboarding and optimization services is slow and transaction-focused vs. customer lifetime focused. Selling unique and singular projects based on a traditional time- and materials-priced business model is less profitable and effective today. Shifting to a volume practice anchored in the Cloud requires moving to a more packaged pricing model with defined service offerings at fixed prices with high repeatability. This process begins by identifying outcomes that customers want to achieve and taking out the cost risk and uncertainty for buyers.

Sample pricing website page from Bond consulting services:



*https://bondconsulting*services.com/dynamics-365-implementation-packages/

Package Offers in Meaningful Tiers

Begin by reviewing your past proposals, quotes, and statements of work. What is a "small implementation" comprised of, on average? A complex one? Which three "standard" offerings would you feel comfortable delivering on a fixed price or subscription basis? What services are you requested to provide repeatedly that could be sold as a monthly service offering?

This offer development, packaging, and pricing process takes some time but is not as difficult as you may envision. The intention is to give the buyer price transparency, shorten the sales cycle, and drive higher margins rather than focus on maximizing billable hours and utilization rates. Over time, efficiencies achieved by repeatability and investing in optimization tools allow you to deliver the same customer outcomes with fewer resources and higher profitability.

Well-structured offers (e.g., packages) can also provide differentiation for your Dynamics 365-based solutions, Power Apps, and other SMB offers by combining technology and services in a clever way. This also helps qualify leads, reduce sales costs, save time pursuing customers who cannot afford your solutions or do not perceive enough value.

We recommend that you provide three different packaged bundles at meaningfully distinct price levels, for example:

Rapid Deployment	Best Deal Typical / Recommended	Full-Featured
A basic pilot or quick start offer, this is your low touch, low-cost option to reduce risk and barriers to purchasing and help you drive more volume. These buyers then become your pipeline for further upsell and cross-sell opportunities. Think of this as the minimum needed to get up and running quickly with basic, core functionality. Once they trust you and get value, you can come back and provide more services. Exclude customization in this offer.	High margin, often repeatable solution or set of services offerings designed to meet most needs of the majority of new prospective buyers. Focusing on target markets is critical to defining this offering.	A full-featured solution or highly complex project with extensive customization and/or services needed, which should attract a narrow segment of premium customers.
$	$$	$$$

Developing offers requires you to understand your SMB target market, your service delivery capabilities, and your risk tolerance. A thorough analysis of your past projects can guide your process to identify what to include in each package, but more importantly, what to exclude. Think about the outcomes you deliver and what value that has to customers. You will learn much more from executing and testing versus endless cycles of scenario modeling with no action. The key is to trial and test judiciously, fail fast, and pivot immediately.

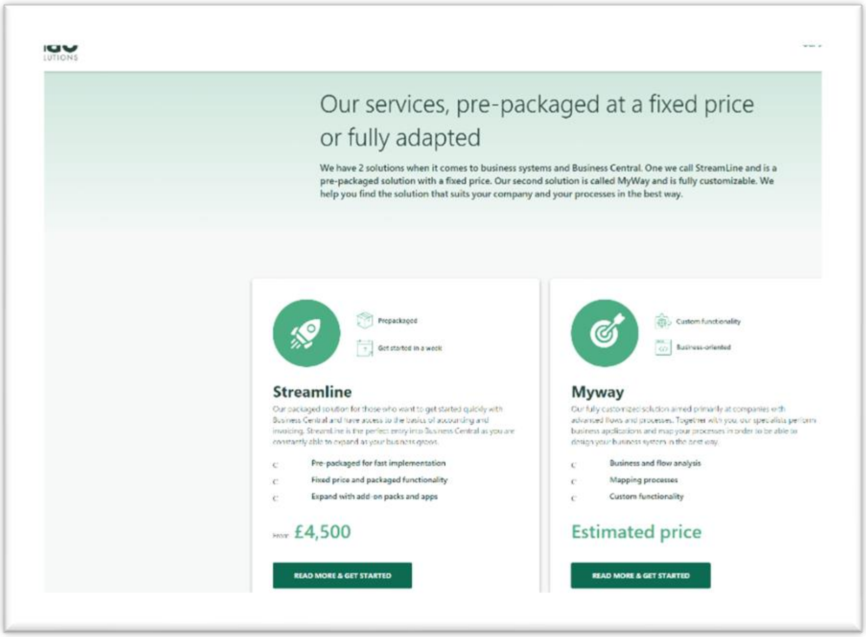
Price Transparency

Pricing is a crucial, pivotal element in any high-volume practice success story. It can be a game-changing growth lever. To achieve volume at scale, it is critical to reduce SMB buyer resistance by providing published pricing clarity. Your buyer wants transparency and will unconsciously be biased toward trusting and buying from organizations who confidently disclose the price of their solutions and services.

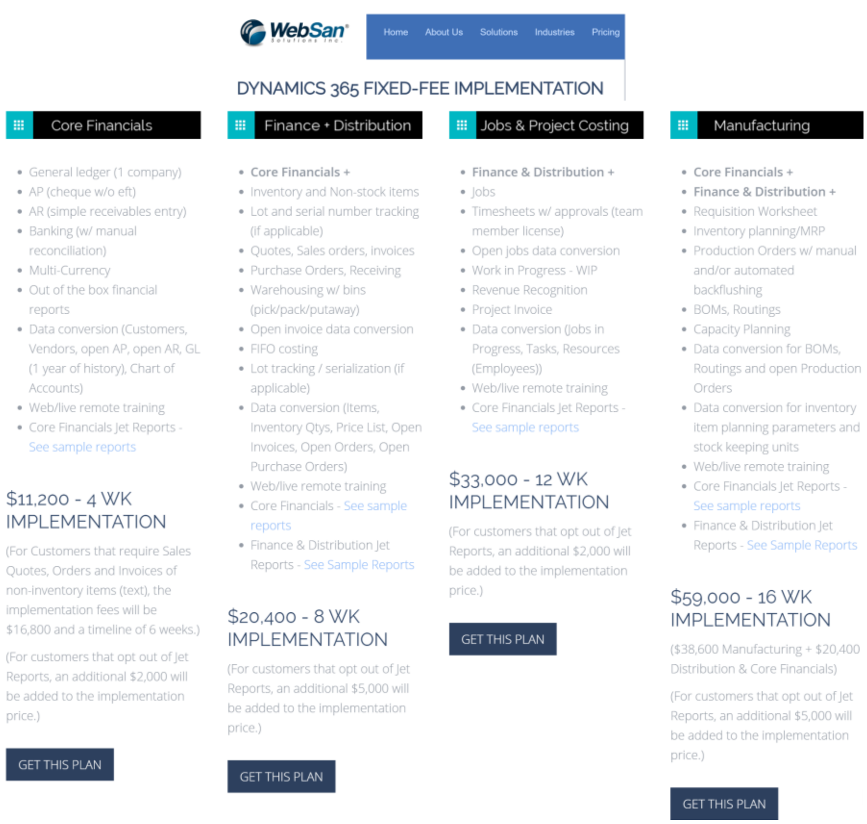
There are several pricing approaches you can adopt. Choose one that aligns with how your prospect wants to buy, rather than simply based on a cost+ markup pricing approach. Does it make sense for the buyer to pay per user, by location, device, on a transaction basis, based on consumption, outcomes, or performance? Price tiering is a critical element of your monetization strategy, especially as you develop and bring to market new Power Apps. You can also offer a higher month-to-month subscription price or a slightly reduced twelve-month commitment price, or a deeper discounted three-year monthly rate if you wish to trade some margin for increased commitment and less risk.

If you incorporate a mix of licenses, project, and managed services into your Dynamics 365, Power Platform, and other SMB offers, consider also a fixed fee implementation price upfront with a bundled subscription license plus ongoing services price, which combines the technology and ongoing managed services. According to an MDC Research study (Feb. 2018), over 70% of Microsoft ISV partners are including licenses and support in the subscription price vs. pricing them separately. When making offer pricing decisions, remember that the goal is to give buyers control and choice, to offer a range of price points that will likely fall within their budget range, and to help you drive more annuity revenue and margins. You can still keep your “contact us, it’s complicated” button on your website, but if they don't want to contact you, provide an alternative to get the pricing information they are looking for during the early stages of their buying journey.

Sample fixed fee implementation packages from Nab Solutions & WebSan Solutions:



https://www.nabsolutions.se/vara-tjanster/
https://www.websan.com/



Capability 4: Generating Demand

Buyer Persona Identification

Driving demand depends on how well you create and distribute content and messaging that resonates with your target buyer personas/audience. You will need to identify, understand, and speak to the compelling challenges, problems, needs, and ambitions that initiate a search for a solution. We recommend developing three target personas: **Why**, **How**, and **What**, which typically correspond to the executive, line of business, and IT/end user levels and functions within an organization. Each target buyer wants different types of information, will consume content in different formats and channels, and have different time constraints. Develop content that will be found online during the buying journey that seeks to educate prospective buyers. Targeting only an IT buyer and focusing on product features and services will limit your ability to attract new customers.

Try our free online tool to help you define personas and their messaging preferences: http://neuralimpact.ca/buyerpersonaprofile

Know your customers:

- ✓ What are their primary pains and challenges?
- ✓ What do they most want to achieve?
- ✓ What drives their decision making?
- ✓ Who influences them?
- ✓ What do they consume to learn about technology buying decisions?

Digital Buying Journey

Next, align your digital buying journey with your persona profile. Determine in the first three phases (explore, evaluate, and purchase) which assets you should develop to provide valuable and relevant answers that move prospects through to commitment. Experiment with different content formats and channels and then measure, fine-tune, or pivot for best results. The table below outlines the key assets needed at each stage; to generate demand, focus on the first three phases.

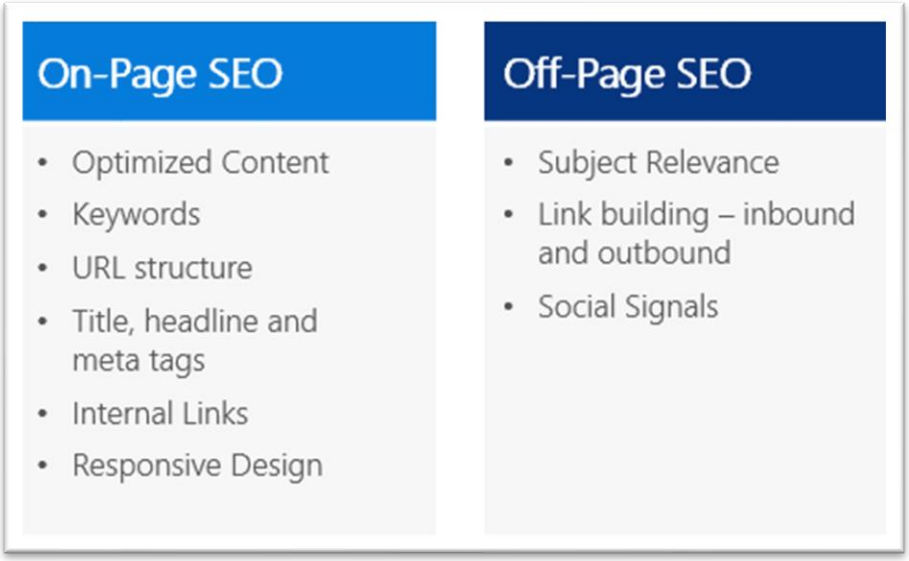
Content for Each Stage of the Buying Journey

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		

Today's prospects are in full control of their buying journeys. They seek solutions digitally, independently, and anonymously, often not making direct vendor contact until upwards of 60% through their search cycle — they will find you well before you find them. If you aren't easily found, growing your market share will be challenging. Competency in Search Engine Optimization (SEO) will help you rank highly in search results.

Digital Strategies: Search Engine Optimization (SEO) and Inbound Marketing

Consider on-page SEO, which makes it easier for search engines to find your site, index it, and classify your content. The key elements to get right are useful and unique content, smart keyword selection, easy site navigation, page titles, headlines, description, site speed, and enticing calls-to-action. Off-page SEO is also important and includes actions to increase your website's trustworthiness and authority. You achieve this by well thought-out inbound and outbound links, positive brand mentions, and posting high value, useful, and relevant content.



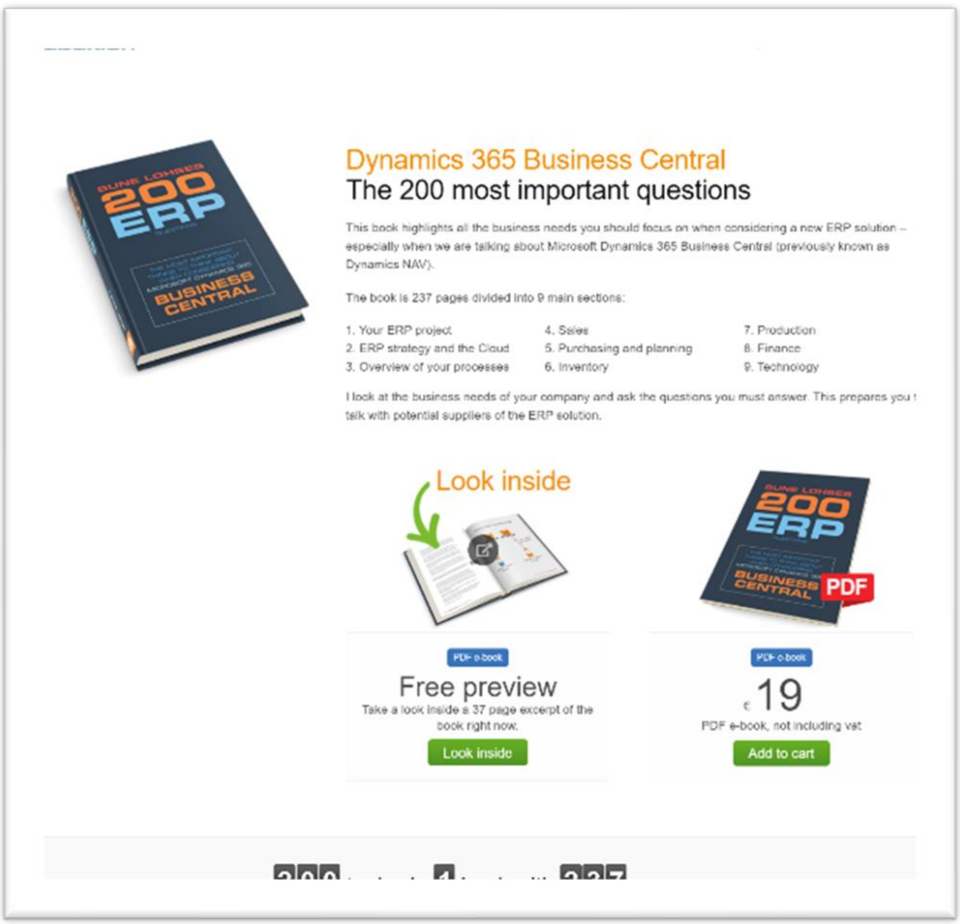
Your inbound content foundation should offer the best original and authoritative content on your area of expertise, industry, niche workload, or practice. Great content is the fuel for growth. Identify a challenge where you can be a leading authority. This, for example, could include helping professional services firms leverage technology to increase their margins by better managing their projects and billing or enabling medical clinics to build better long-term relationships with their clients. To help you develop content that drives buyer conversion, be sure to download "The Ultimate Guide to Content Marketing" at https://aka.ms/spmcontentmarketing.

Create a single "big idea" content piece (e-book, industry report, guide, or whitepaper); from here, you can construct a series of smaller, nimbler content executions (infographics, videos, blog stories, mini-cases, podcasts, or LinkedIn posts) and distribute far and wide.

Sample single "big idea" content piece from Velocio:

https://www.velosio.com/landing/dynamics-365-business-central-features-ebook/

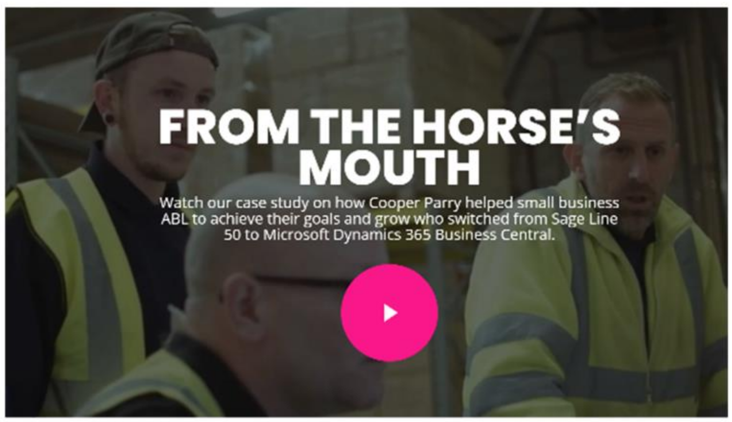
Another great example of a educational conversion asset from Abakion in Denmark:



https://abakion.com/business-central-book/

Incorporate video into your content format choices. The new remote business environment makes video especially impactful for attracting attention, promoting trust, and securing higher levels of engagement and interest. Several types of videos can support your digital marketing activities, including explainer, product, customer, webinar, and thought leadership videos. In a digital world, text is non-emotional, and when we have digital fatigue, video speaks to us in a more human and engaging way. For tips on creating emotionally engaging videos, download the Video Best Practices Guide here.

Sample customer proof video from Cooper Parry: https://youtu.be/cXduHxEpSG4



https://cooperparryit.com/kickstart-business-central/

Nurture Calendar

While generating a consistent incoming flow of high-quality leads is critical, it is equally essential to nurture those leads on an ongoing basis. Establish lead scoring parameters to develop re-marketing campaigns and nurture programs. A useful approach is to build a 12-month nurture content and campaign calendar with quarterly themes that trigger action, have vertical specificity, and are emotionally compelling. Include growth, loss, risk/compliance, and control. We strongly recommend Implementing a marketing automation system to effectively schedule your content distribution with the anticipated higher volume of interactions.

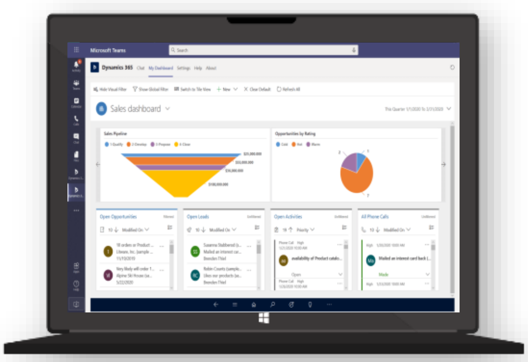
6 Month Nurture Content Calendar

Month	Theme	Target Persona	Series Focus	Topic	Content Format	CTA	Subject Matter Expert	Publish Date
1	Growth	Business owner /CFO, WHY	**Smart Manufacturing / Meeting the demands of Buyer 2.0 / Sales hacks**	1) The future of manufacturing in a connected world	4 x 2 minute video series delivered by an extenal authority 350 word blog (transcribed)	Infographic - "Connected Manufacturing"	External SME / Marketing Manager	Jul-18
				2) 5 ways to scale your business to meet increasing demand		"integrated factory" interactive tour (lookbook)		
				3) A review of pay per use business models in manufacturing		Research report (Exec summary)		
				4) Increase revenues with aftermarket service offerings		Online check list "identify the smart product opportunity"		
2		Sales Director, Marketing Manager HOW		1) Stand out from the crowd: Delivering superior customer service	4 x 10 minute on-demand webcast 350 word blog (transcribed)	Business Central Customer Case Study	Sales Manager	Aug-18
				2) How to increase sales peformance - 7 steps to success				
				3) Keeping your customers happy - 3 strategies to reduce churn			Marketing Manager	
				4) Understanding buyer 2.0		Interactive quiz with report		
3		Sales Representative WHAT		1) Using visual dashboards (Power BI) to zero in on sales opportunities	Click Through mobile solution demonstration with voiceover (approx. 5 minutes)	Inteactive product tour	Pre-Sales or Delivery Consultant	Sep-18
				2) Using outlook to streamline your sales process				
				3) Seamless sales order processing with integrated productivity applications				
2	LOSS	Business owner /CFO, WHY	**Managing Resources / Data Driven Enterprise / Working Smarter and Faster**	1) Identifying efficiency gaps in your value chain	2 x 2 minute video series delivered by an extenal authority 350 word blog (transcribed)	Online check list "Productivity audit"	External SME	Aug-18
				2) How smart is your production process?				
3		Operations Manager / Accountant / Production Manager HOW		1) Using real time data to improve supply chain decision making	3 x 15 minute live and on demand webcast series Three 350 word blogs	Webcast Registration	Pre-Sales or Delivery Consultant	Sep-18
				2) Waste not, want not - optimise your stock levels with predictive intelliegence				
				3) Maximise business productivity by streamlining your quote to cash process				
4		Logistics Manager / Project Manager WHAT		1) Complete your deliveries quicker with Field Service	2 x 30 minute LIVE webcast 2 x 350 word blog (transcribed) 5 tweets	Webcast Registration	Pre-Sales or Delivery Consultant	Oct-18
				2) Tips and tools to increase worker productivity on the go			Marketing Manager	
3	Risk/Compliance	Business owner /CFO, WHY	**Industry 4.0**	1) Overcoming the threat of overseas competition (off-shoring)	15 minute LIVE & on-demand webcast delivered by an external authority Two 350 word blogs (transcribed)	Webcast Registration	External SME	Sep-18
				2) Addressing the manufacturing skills shortage				
4		IT Manager, Operations Manager HOW		1) Cybersecurity - safeguarding your business for Industry 4.0	10 minute video 350 word blog (transcribed) 5 tweets	Infographic - Top 10 Tips to secure your business from cyber threats	Consulting Lead / Marketing	Oct-18
				2) Using predictive intelligence to deliver supply chain stability	10 minute video 350 word blog (transcribed) 5 tweets	Interactive eBook (short form)	Pre-Sales Consultant	
5		Accountant WHAT		1) Month end financials - removing common data errors and duplication	30 minute LIVE webcast 350 word blog (transcribed) 5 tweets	Webcast Registration	Pre-Sales Consultant	Nov-18
4		Business owner /CFO, WHY	**Automation**	1) A complete business view - turning the promise into reality	2 minute video 350 word blog (transcribed) 5 tweets	"Data visualisation" (lookbook)	Pre-Sales Consultant	Oct-18
5	Control	Operations Manager, Project Manager HOW		1) 5 Steps to automate and secure your supply chain	10 minute on-demand webcast 350 word blog (transcribed)	Interactive eBook (short form)	Project Director/Marketing	Nov-18
6		Bookkeeper / IT Manager / Sales Executive WHAT		1) Eliminate manual entries - work smarter, not harder	Click Through mobile solution demonstration with voiceover (approx. 5 minutes)	N/A	Finance	Dec-18

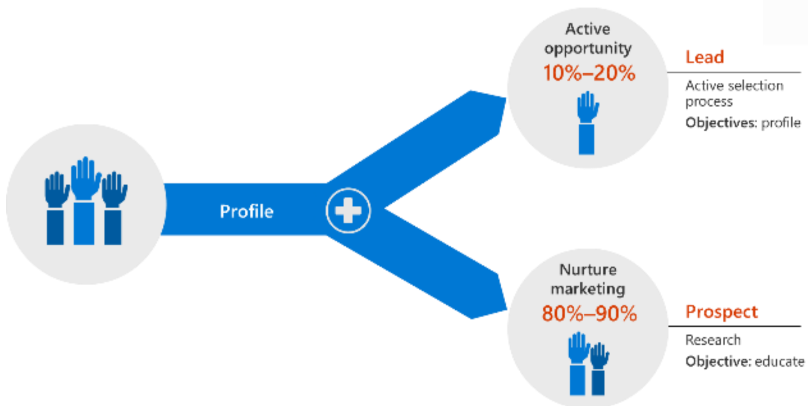
Capability 5: Accelerated Virtual Sales Cycles

Architecting and developing a high-volume Microsoft Dynamics 365 offer is one thing, but selling it remotely — at scale — brings on a new set of challenges, especially in the current economic climate where you're more likely to lose to a no-decision or delay than you are to any one competitor.

To collect cloud customers at scale, it is important to shift the majority of the customer acquisition activities to marketing. Sales professionals can easily qualify and manage a sales cycle with only 10–20 customers per year, but to scale and accelerate volume to 0 or more customers, marketing will need to lean in. Marketing is responsible for creating relevant, engaging content that compels prospects to disclose who they are. Marketing needs to nurture prospects through much of their buying journey and educate them until they raise their hand to speak with a sales professional. Sales professionals then have a very short time to determine their needs and, if there's a fit, convince them to step into an accelerated buying process. To scale in the SMB market, you no longer ask what they want and then build customized proposals. You are, instead, moving toward selling ERP or CRM as a service and moving away from long, custom sales cycles. Our traditional project services-based sales process is too slow and expensive. In a high-volume sales environment, you're often talking prospects OUT of functionality to ensure they fit within the standard solution configuration your organization has brought to market.

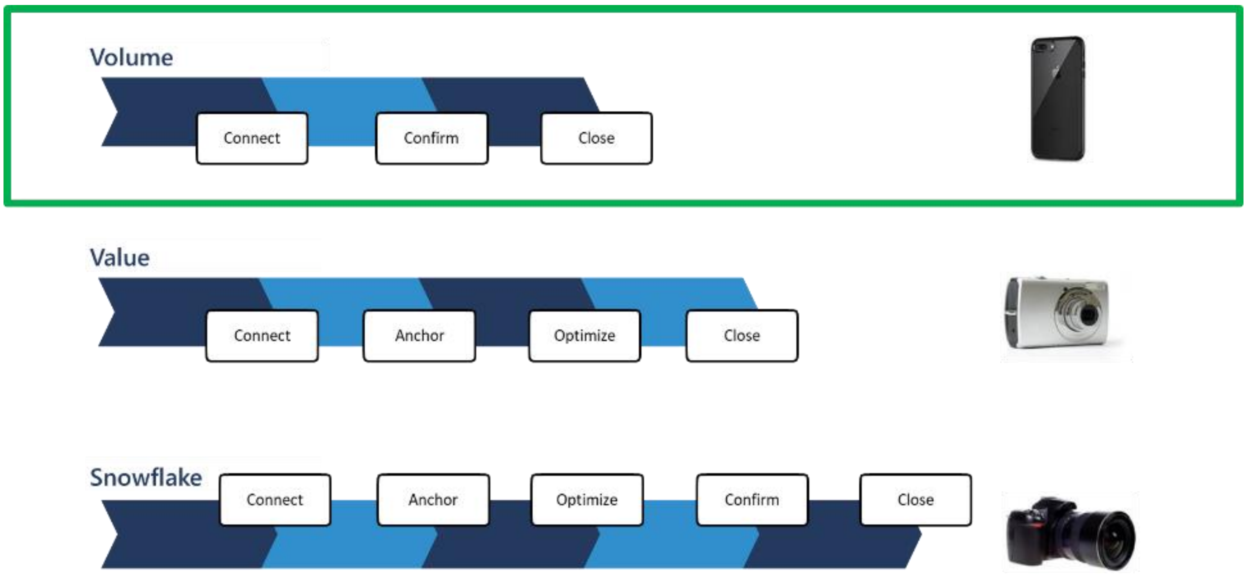


To effectively drive a lower cost scale, sales motion marketing needs to lean in, qualify, and nurture prospects until they are ready to buy.



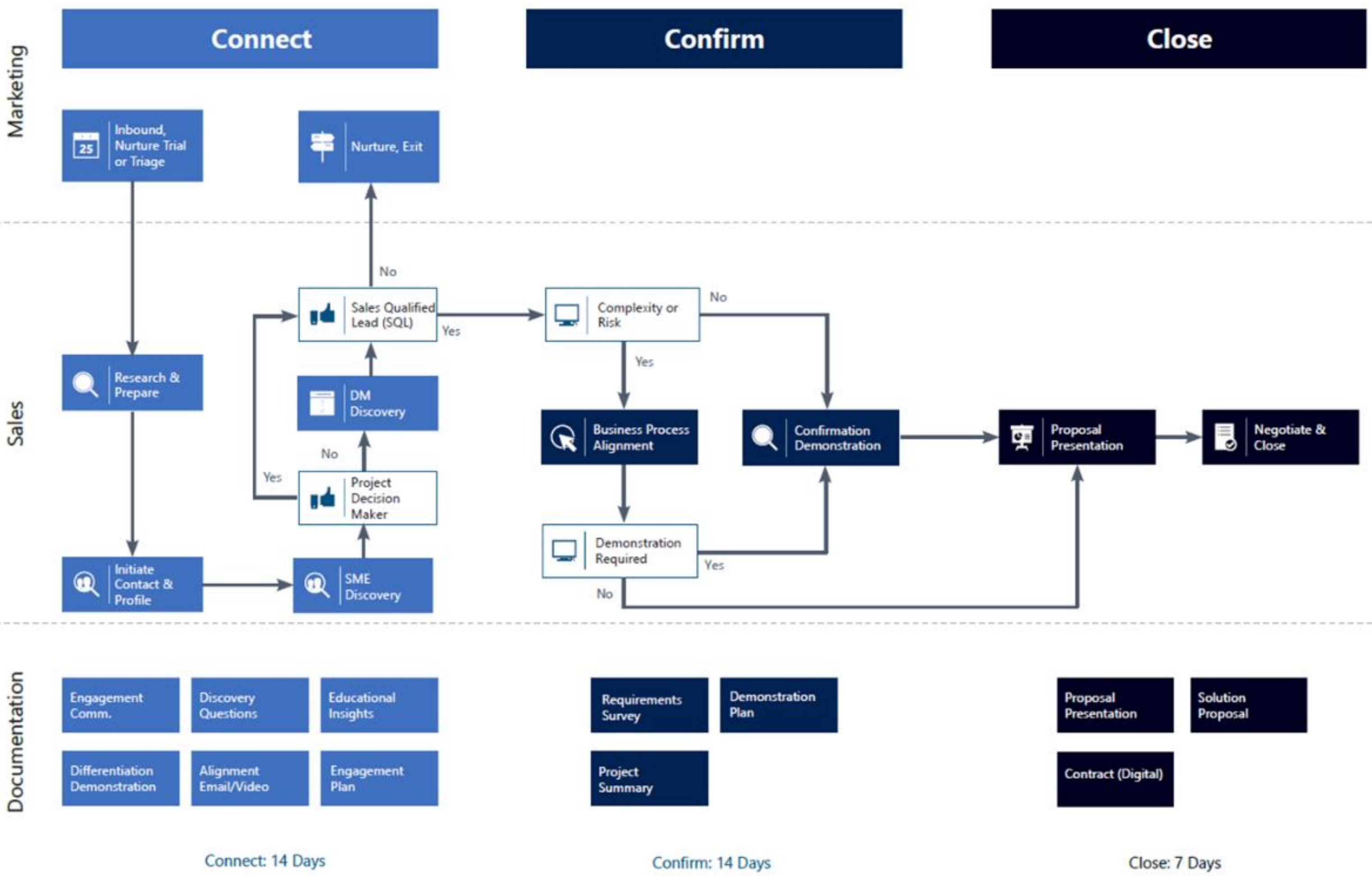
Define Your Sales Process

Unfortunately, there is no longer one primary business applications sales motion. In the Cloud, there are three, and each one is designed to address very different buying scenarios. Buyer profile number one wants near-immediate access to an SMB-optimized or industry-specific solution that requires limited configuration and few project services. They're looking for low cost and risk, fixed fee implementations, and subscription licensing. Their selection process is usually limited to three or fewer stakeholders; the sales cycle should be fast and the cost of acquisition low. This is the primary buyer profile for most high-growth partner solutions:



This high-volume sales motion is a prescriptive three-phase process designed specifically for selling repeatable business application solutions. The first phase, Connect, includes all the research and discovery calls required to develop a solid understanding of the overall project. It also validates that your solution addresses your prospect's primary requirements. The second phase, Confirm, is where you will win most of your deals. In this body of work, you'll complete two critical activities. The first confirms your prospect can execute (or improve) their business processes with limited configuration and, ideally, no customization. This meeting is facilitated through a remote whiteboarding session. The second core activity is the confirmation demonstration, where you focus solely on your prospect's critical business processes and business outcomes. The shorter the demo, the better.

The final phase of high-volume sales motion is Close, where you present your solution recommendation and pricing relative to the business impact or ROI via a remote proposal presentation (PPT). For clarity, without a defined accelerated sales motion, it's almost impossible to drive deal velocity.



Pre-Configure Repeatable Sales Assets

The easiest and fastest way to drive deal velocity is to configure a set of industry- or vertical-specific prospect engagement assets that clearly communicate your organization deeply understands their business challenges and project objectives. From a psychological perspective, you want every interaction with your prospects to surprise them in some way and to exceed their expectations. Tailoring all of your critical prospect communications for maximum emotional impact reinforces your differentiation and creates positive bias early in the engagement cycle. We have included several high-value templates and guides in this program, which you can use as a starting point for your own sales assets.

Visual Engagement

Now that we've set some context around the overall motion, it's time to look at where and how you can leverage the emotional power of visual engagement in your remote sales cycle. For starters, you want to turn on your webcam during every Teams call with your prospects. This small act instills confidence and unconsciously implies you have nothing to hide. It also compels your prospects to turn on their webcams in return, which enables you to interpret their body language, form stronger personality assumptions, and determine their level of interest. When it comes to visual engagement, you have several new tactics to work with; the first is a credentialing video. Rather than reaching out with easy-to-ignore or delete emails, record a brief, ninety-second introduction that references your prospect's previous engagement activities, offers additional marketing assets (videos, infographics, webinars, etc.), and positions you as an industry or vertical specialist. They'll open and watch the video because it's different. The next engagement tactic is to create and send a brief voiceover PowerPoint video (two to three slides maximum) summarizing and confirming your understanding of key project discussions. At two to three minutes, the video is easy to consume and reinforces that you understand your prospects' business objectives. It also stands out from the predictable emails being sent by your competitors.

Remote Whiteboarding

Remote whiteboarding is a game-changer. A LOT of psychology comes into play when you light up a remote whiteboard session and then guide your prospects through a structured visual discovery process. Whiteboards drive increased participation, disclosure, collaboration, recall, and executive engagement. Remote whiteboarding is far more effective than PowerPoint and/or verbal interview-style discovery to get to the truth about a project. Exiting the Connect phase, schedule a project review and business process alignment whiteboard session with the project team.

The remote Solution Alignment Whiteboard walks your prospect through five key elements: project drivers and objectives, current challenges, new desired capabilities, project risks, and finally, the project impact or business case. The purpose of the remote whiteboarding session isn't just to validate your understanding of your prospect's project and confirm their requirements can be satisfied within the boundaries of your repeatable solution; it's to ferret out new information that you can then leverage to take control of the buying process, selection criteria, and stakeholder priorities. Remember, the initial project or implementation is just the beginning of your relationship with the client.

Summary

These five core capabilities are required to consistently drive an effective, high-volume virtual sales motion:

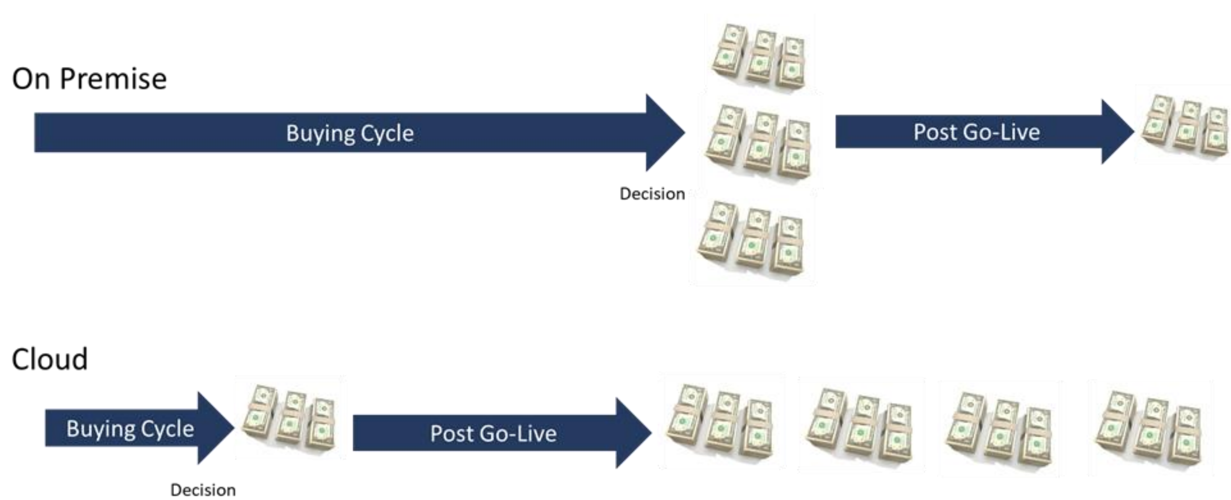
1. To establish the trust and rapport that is typically built during face-to-face meetings, you need to develop conversational competence in your focus industry or vertical.
2. Do your best work early. Over-invest in research because 10–20 minutes is just not enough time to make a difference in call number one.
3. Configure industry and/or contextually relevant sales assets to support a consistent and compelling value-added narrative. Every communication your prospect receives from you needs to be anchored in THEIR business values and objectives.
4. Visually engage your prospects. Replace email summaries with voiceover PowerPoint videos. Replace auditory discovery calls with virtual whiteboarding. Replace text-heavy content blocks in your proposals with visual messaging: say it with pictures.
5. Less is more: less risk, less scope, less complexity, fewer project services, shorter demonstrations. Less "tell me what you want", and more "here is what you need". High-volume selling is anchored in simplicity and safety, both from a solution and a sales engagement perspective. You can help them unlock more functionality and capability later, after they go live.

Capability 6: Fast-Tracking Time to Value

New Buying Cycle

In the SMB market segment, the days of large projects that drive lots of project services revenue is largely over. The average deal size and project scope duration have both dropped significantly over the past five years. Today's cloud buyers are structuring smaller projects that address immediate business problems, then expanding the solution and user count later. They no longer want perpetual licenses. They want to pay for what they consume and delivers value, and nothing more. This change has flipped the traditional Dynamics partner's business model on its head, but, more importantly, it's changed the narrative and expectations around business impact and value delivery.

In a traditional on-premise scenario, partners often collect much of their total project lifecycle revenue from their customers prior to going live. If customers failed to achieve the ROI goals, it didn't really have much impact on partner profitability or revenue growth (at least not in the short term). In the Cloud — where SMB customers largely implement pre-configured solutions that pull through fewer project services — if customers don't have line-of-sight to clear measurable benefits, they won't buy anything else, or worse, they'll take their business to a new partner or explore a new solution.



This change in buyer behavior has a material impact on sales and marketing approaches as well as on how you resource project delivery and support. Most Dynamics partners have built-up project services teams over many years to support the delivery of a relatively small number of medium to large projects each year. Most of these resources have a deep technical understanding of NAV or Microsoft CRM and love nothing more than being handed a complicated problem to solve — the harder, the better. To clarify, these are NOT the resources you'll need to build your high-volume practice. Not only will they be too expensive for a repeatable, high-velocity implementation model, but they'll also be bored beyond belief. Your high-volume delivery engine is a process manufacturing motion, not engineer-to-order. To drive both scale and profitability, you'll need to staff your implementation and support team with lower-cost resources who are comfortable completing many similar tasks with multiple customers, often simultaneously, rather than with experts who are excited by complex challenges that nobody else can solve.

Changing Project Lifecycle

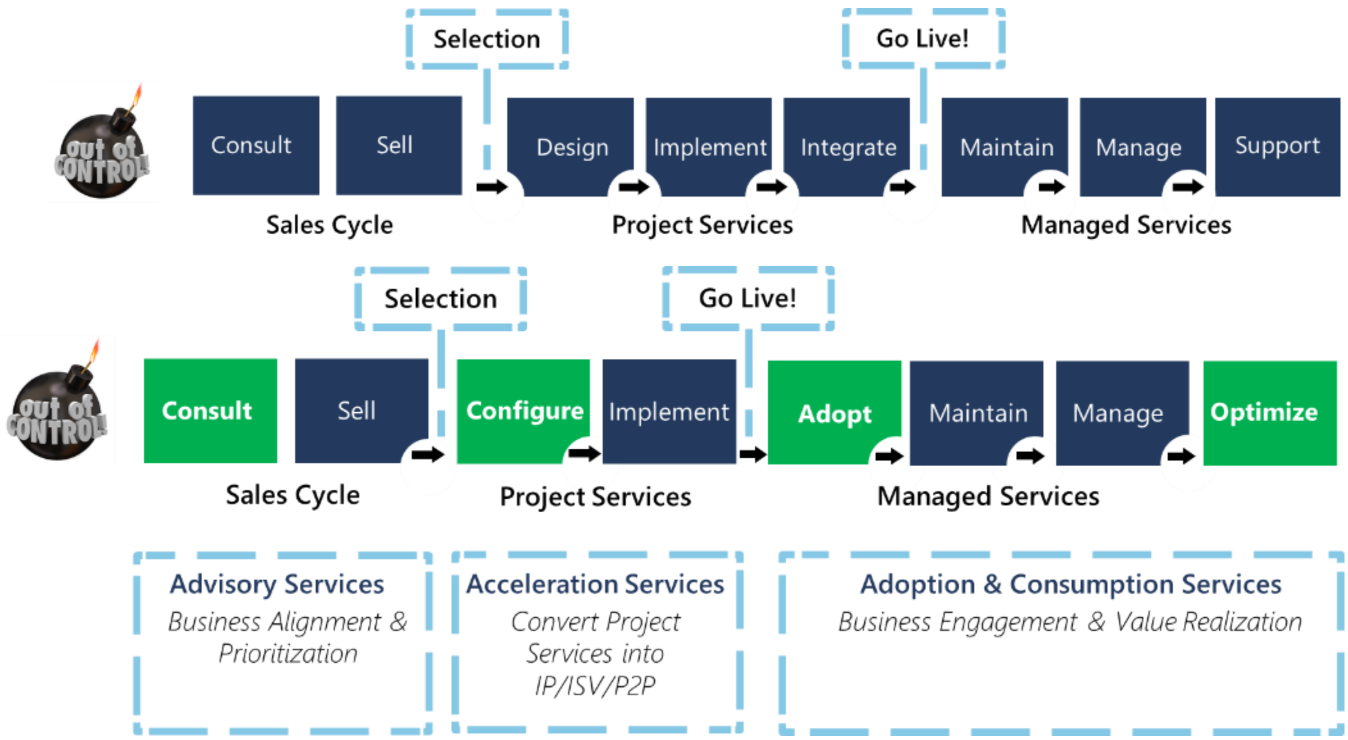
Business application projects used to be relatively straightforward. Prospects (and customers) would experience a business challenge or technology limitation, then kick off a very predictable three-phase journey. Phase one focused on vendor selection, which often included a third-party consultant. Phase two focused on project implementation. It included all the activities required to bring projects to go-live and typically followed a waterfall delivery methodology.

Phase three focused on sustainment, infrastructure optimization, and end-user support. It also included waiting around for the dust to settle so the sales team could start scoping the next project. From a Dynamics partner perspective, the best day in this journey is the go-live event. The project has finally been delivered, the final invoice has been sent, and the project team has moved on to the next engagement that is anxiously waiting for them. Another satisfied customer. A win/win from our view.

But from a customer's perspective, this project looks very different. They are likely suffering from project fatigue, a missed delivery date, and budget over-runs. To make matters worse, all of the smart consultants they'd been working with are now gone. While we are busy celebrating, to many of them, go-live can sometimes feel like the worst day in their project lifecycle.

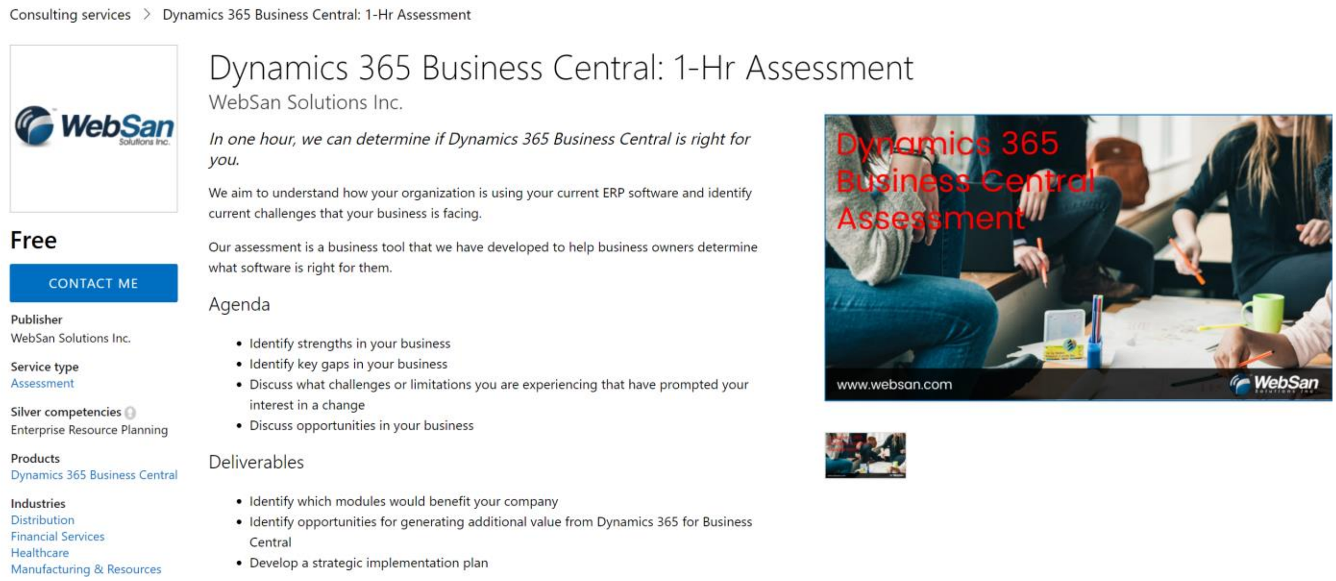
Cloud Project Lifecycle

This change radically impacts the types of solutions and services you need to develop, as well as the resources required to deliver them. To really accelerate the growth of your high-volume practice, you want to develop services that align with all three of the cloud project lifecycle phases, not just one or two.



During your prospect's selection phase, it is helpful to develop and offer an inventory of simple, remotely facilitated **Advisory** services. In the context of a high-volume practice, these are small wedge offerings or assessments that are sold and delivered during active sales cycles. They are designed to help prospects define the best possible project scope as well as the high-level business outcomes and measurable benefits. Their sole purpose is to reduce project risk and increase project ROI.

Example advisory service from WebSan Solutions Inc. and Wipfli



Consulting services > Dynamics 365 Business Central: 1-Hr Assessment

Dynamics 365 Business Central: 1-Hr Assessment

WebSan Solutions Inc.

In one hour, we can determine if Dynamics 365 Business Central is right for you.

We aim to understand how your organization is using your current ERP software and identify current challenges that your business is facing.

Our assessment is a business tool that we have developed to help business owners determine what software is right for them.

Agenda

- Identify strengths in your business
- Identify key gaps in your business
- Discuss what challenges or limitations you are experiencing that have prompted your interest in a change
- Discuss opportunities in your business

Deliverables

- Identify which modules would benefit your company
- Identify opportunities for generating additional value from Dynamics 365 for Business Central
- Develop a strategic implementation plan

Free

CONTACT ME

Publisher
WebSan Solutions Inc.

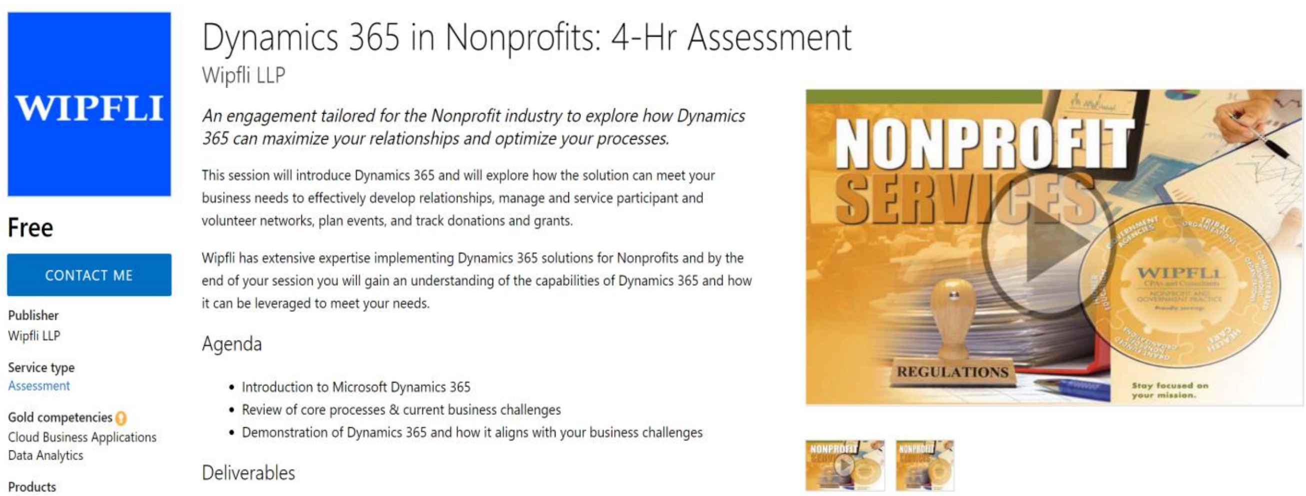
Service type
Assessment

Silver competencies
Enterprise Resource Planning

Products
Dynamics 365 Business Central

Industries
Distribution
Financial Services
Healthcare
Manufacturing & Resources

https://appsource.microsoft.com/



Dynamics 365 in Nonprofits: 4-Hr Assessment

Wipfli LLP

An engagement tailored for the Nonprofit industry to explore how Dynamics 365 can maximize your relationships and optimize your processes.

This session will introduce Dynamics 365 and will explore how the solution can meet your business needs to effectively develop relationships, manage and service participant and volunteer networks, plan events, and track donations and grants.

Wipfli has extensive expertise implementing Dynamics 365 solutions for Nonprofits and by the end of your session you will gain an understanding of the capabilities of Dynamics 365 and how it can be leveraged to meet your needs.

Agenda

- Introduction to Microsoft Dynamics 365
- Review of core processes & current business challenges
- Demonstration of Dynamics 365 and how it aligns with your business challenges

Deliverables

Free

CONTACT ME

Publisher
Wipfli LLP

Service type
Assessment

Gold competencies
Cloud Business Applications
Data Analytics

Products

During the implementation phase, you'll need to develop **Acceleration** services, which often show up in the form of your own IP. The objective is to automate or accelerate repeatable project tasks like provisioning, data migration, chatbot frameworks, integrations, and reusable functionality like workflows, pre-defined reports, and industry-specific requirements that are not included in the off-the-shelf Dynamics applications. Acceleration services also come in the form of P2P applications and ISV solutions.

Managing Acceleration Services Projects

When creating acceleration packages, it might be time to rethink how your services team is managed, and how you manage projects. You're effectively running your business as a fixed price delivery machine. Think repeatability, and volume. Without adjustment to your project methodology, the risk is transferred to your organization/ Shift how your invoice, how you record revenue and pivot from focusing on billable hours to delivering the same outcomes and value quicker and with less resources. Also provide your project team with very clearly defined tools such as SOW documents and processes to manage change requests.

Work from a single project plan template. When the sales team quotes this service product or 'SKU' they should have a standard project plan, and statement of work they can share with the customer. Even better, you can even add it to your pricing page on the website to really cut down your cost of selling. This is the same project plan your project team should inherit. The team shouldn't be creating a new one each time. Doing this impacts your cost structure, budgeted hours by role, and scope. It also sets a poor expectation with the customer who already approved the SOW as part of the agreement.

Manage changes. There are two types of changes. Those that result from internal problems, or scope changes. Both need to be tracked, and both need an approval process. Internal change requests often indicate the team requires more training, the product needs more pre-configuration, or the plan was never correct to begin with. External change happens when the customer wants to take on more work. These two types of changes should be managed differently, with a different approval workflow.

Tracking project efforts. Acceleration packages require different metrics. Start thinking in terms of project metrics that the team has control over. The individuals that are doing the work can't control revenue, but they can control effort and time. Try fix timing and measuring repeatable projects and determining how many hours are required to accomplish specific outcomes. Review budgeted vs actual and identify processes that can be improved or optimized with a small investment in time and resources or by leveraging tools. At a task level team members need to see budget, actual, estimate at completion, and variance. Conduct regular profitability reviews. This information should be easily accessible to resources and project managers at all times.

Use Hybrid Methodology. Instead of using a waterfall approach, incorporate a hybrid approach which uses the planning precision and structure afforded by a waterfall approach, while also providing the benefits of sprint based approaches. Hybrid works exceptionally well for your customers because:

It provides a clear expectation of timeline and effort at each stage of the project.

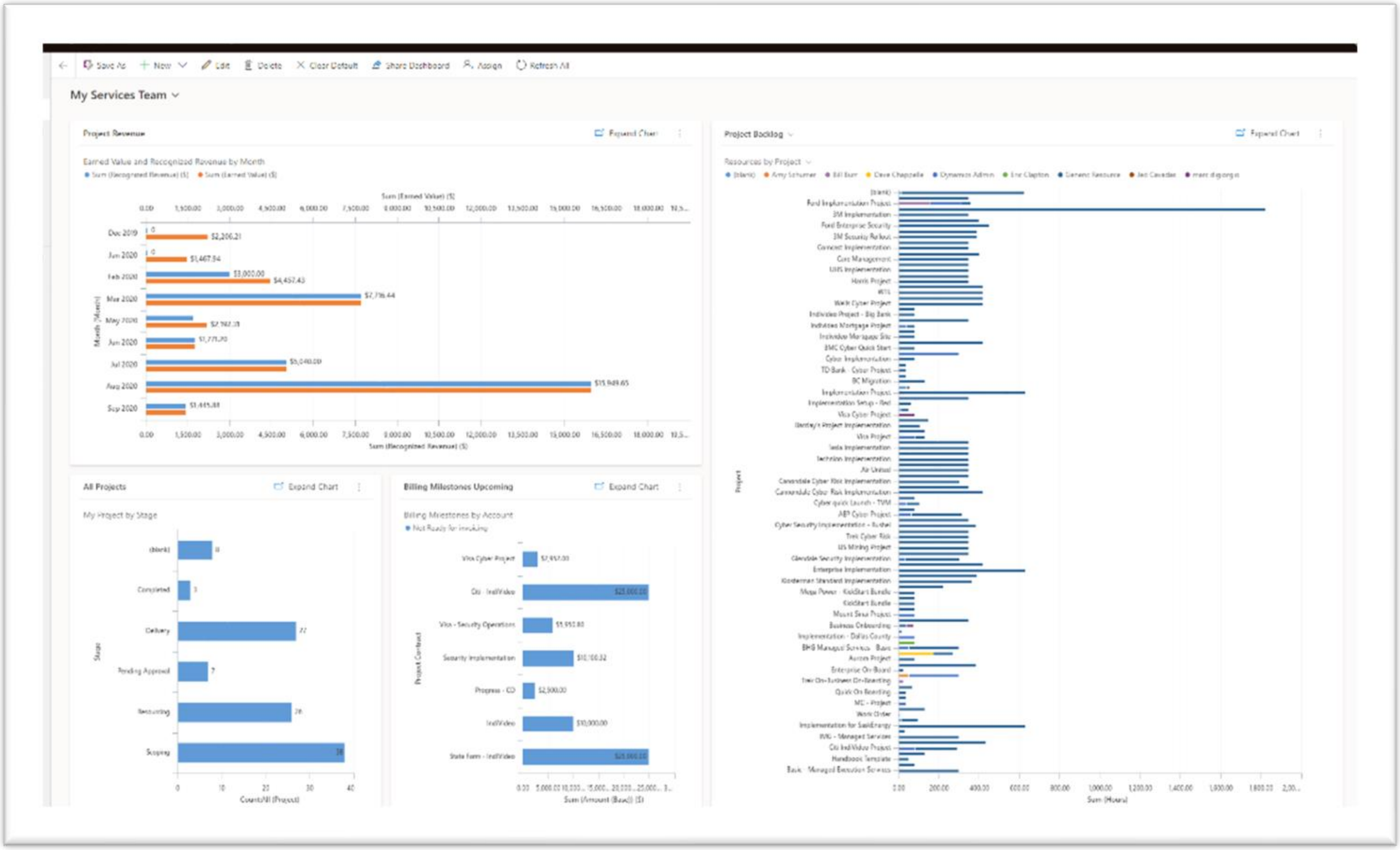
Instead of getting buried in project phases like analysis and design (which provide limited value to the customer), it accelerates this stage, and gives customers something to look at very early so they can participate in the final design.

It solicits feedback from customers but still limits the amount of time spent on configuration or customizations.

Capture & Measure appropriate metrics. Acceleration services are about scale. Projects should focus on metrics like Progress %, Actual, and expected effort against budget, labor costs, project gross margin, and customer NPS. At a team level, track metrics such as backlogs by role and project, team gross margin, utilization, recognized revenue and how that compares to earned value and planned value, and project NPS.

Revenue Recognition. Recognizing revenue with fixed priced projects is different from time and materials. Focus on billing milestones, compare the amount invoiced against the earned value of the project over time using progress % completion. Always try to stay ahead of the completion by shifting the majority of the invoicing to early stages of the project.

Sample Dynamics project dashboard from Tekstack



https://www.tekstack.com/

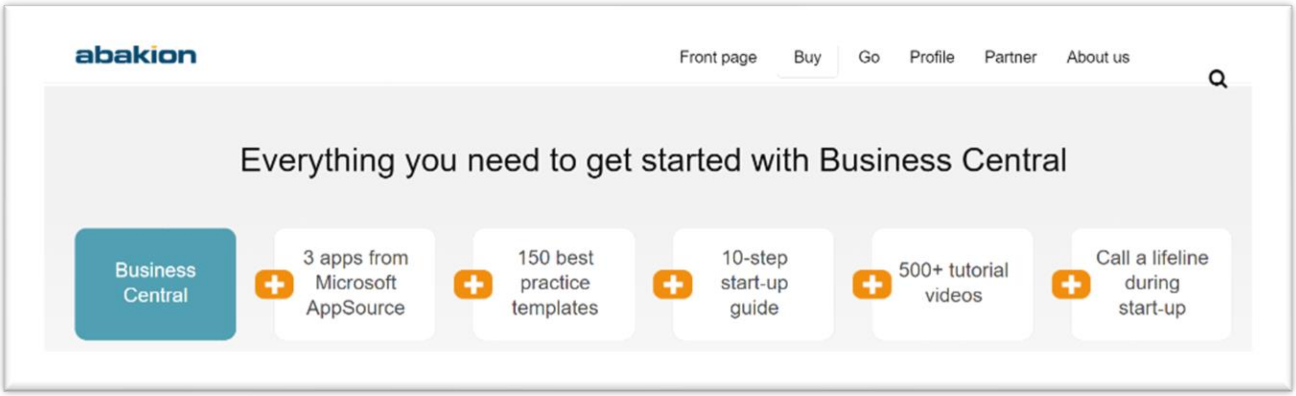
Perfecting Managed Services

Lastly, develop new proactive **Adoption** and **Consumption** services that ensure your clients' cloud investments deliver measurable, business value. For clarity, these are not reactive, call-me-if-you-have-a-problem managed services. These are high value service offerings delivered by senior, experienced resources that know how to connect with your customers' business community, as well as IT.

Managed Services requires a 'customer success' element in the business. This could be a role oriented towards sales, or services; but they tend to be people that have a high degree of business acumen and product knowledge. They can translate business pain points into technology solutions for the customer. For these roles to be successful at scale, consider putting three programs in place:

Customer Self-Service Portals. Provide customers with as much self-service content and knowledge as possible. This could include knowledge articles that deflect case submissions, a community discussion forum, scheduled or recorded webcasts on key topics, tips and tricks videos, and a secure portal where they can see the status of their projects, cases, invoices, and subscriptions. Putting these in place allows you to offer a low price entry services package for a segment of your customer which allows them to be self-managed, allowing you to focus ,pre time on higher value initiatives with customers.

Self-service approach from Abakion with 500+ videos.

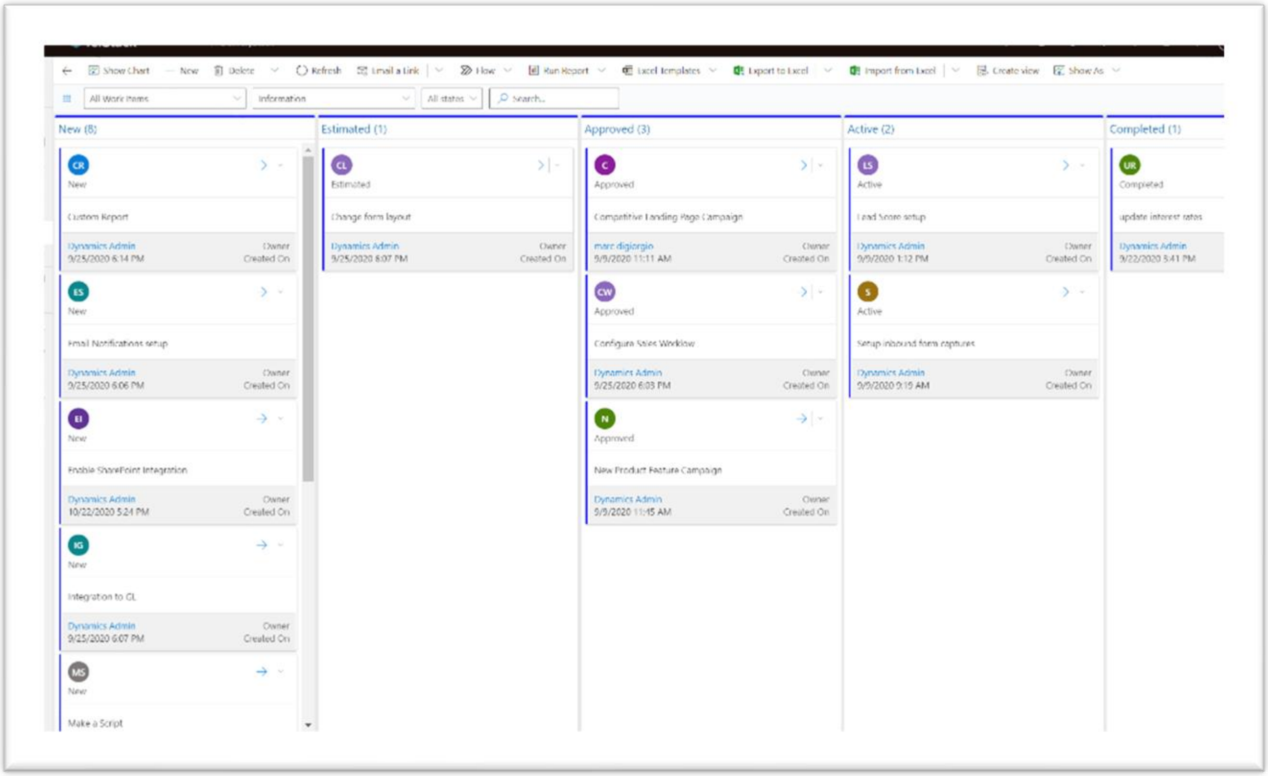


https://abakion.com/go/#overview

Customer Success Playbooks. Try to automate as much process and communication as possible. As your customer volumes increase you want to achieve more revenue per headcount, this is only possible with programs such as playbooks. Create playbooks for customer renewals, customers-at-risk, and upsell or expansion opportunities.

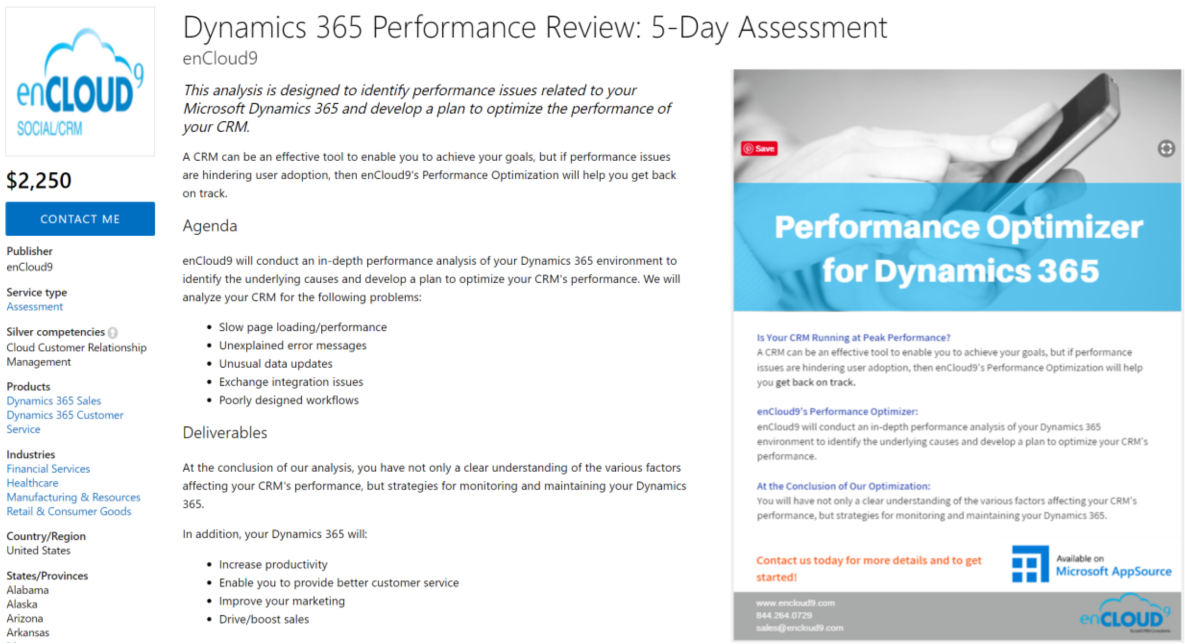
Managed Services. Tier your customer support levels with a 'T-Shirt Sizing' approach. This "low touch, typical touch, high touch" option approach allows you to show value differentiation and provide customers with control and choice. Tiering levels can vary according any criteria. These can include varying SLA's, entitlements, email vs phone support, consulting services. There are several ways to provide the value customers are looking for and they will demonstrate this interest by opting into the program that is best for them.

Managing service requests takes on a different type of task assignment, so consider using a Kanban board to assign work items, and sprint iterations for scheduling the work in the team.



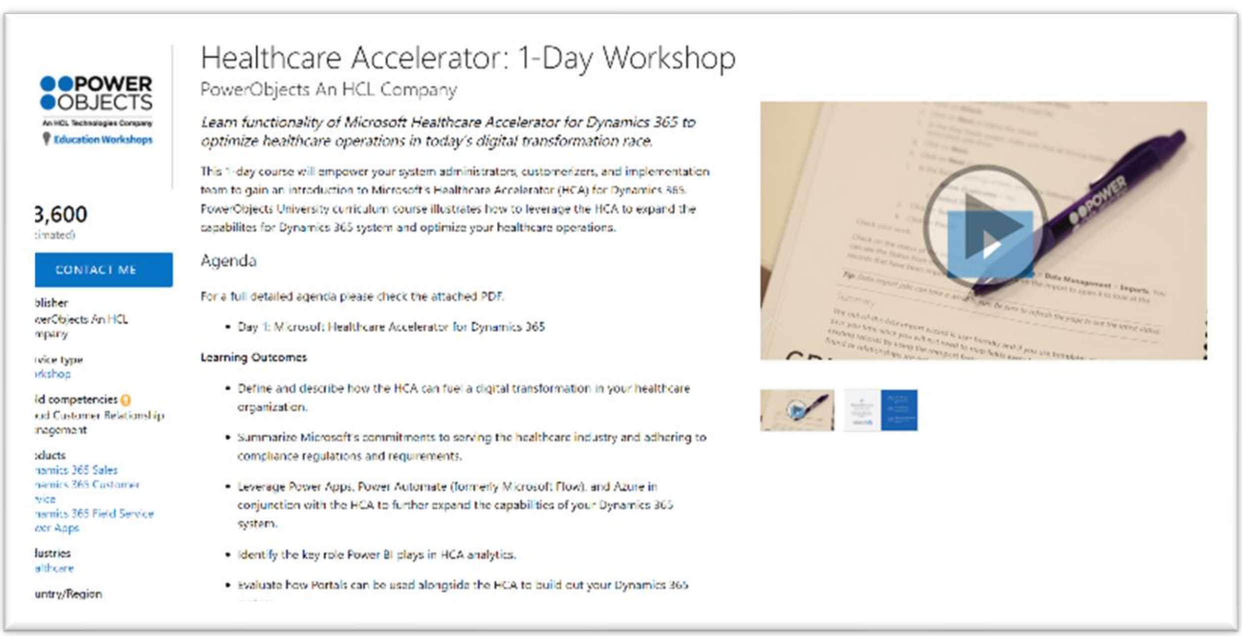
SMB customer buyer behavior has changed significantly, resulting in a radically new set of demand drivers. Dynamics partners now need to view projects as a continuum, rather than as a point in time, or series of points in time. To consistently drive customer value in a high-volume practice, you develop repeatable PROACTIVE service offerings that align with all three phases of the cloud customer lifecycle.

Example of services that drive increased adoption and consumption from enCloud9:



https://appsource.microsoft.com/en-us/marketplace/consulting-services/encloud9.dyn365_performance_analysis

The Power Platform and Power Apps also create an opportunity to create and sell a new set of services. Consider creating a set of advisory services related to your Power Apps or the Power Platform. Sample from PowerObjects:



https://appsource.microsoft.com

Capability 7: Increasing Customer Lifetime Value

Building and nurturing positive customer outcomes post-deployment is critical to securing recurring and renewal-based revenue streams as well as additional new solutions, projects, and managed services revenue. A lifelong customer is of far greater value than any one-off transaction. Partners who want to pursue a high-volume practice can't afford to invest in single transaction buyers as it can take up to 16 months to break even with a SaaS offering. In a cloud business model, high customer churn can have disastrous consequences. High volume does not mean cheap and fast ending with unhappy customers.

Customer Lifetime Value

Customer Lifetime Value (CLV) is the revenue from a customer over the lifetime of their relationship with you. Nurturing your current customers is good business. Customer retention is cheaper than customer acquisition. Satisfied customers generally spend more, refer more, and are less price sensitive.

Post-implementation, you want happy and satisfied clients who are generating value from and fully utilizing their investment. Customers want to pay-as-they-go and only for as long as they are getting value for their investment. As a key first step, we recommend that you understand the initial engagement point with your key customers and map out their anticipated customer journey. This way, you can define, shape, and deliver natural and logical next-best offers and services that align with very predictable industry or vertical-specific business challenges.

Post Go-Live Nurture

Post go-live customer nurture campaigns will help promote customer satisfaction and stickiness. Consider several of the following options:

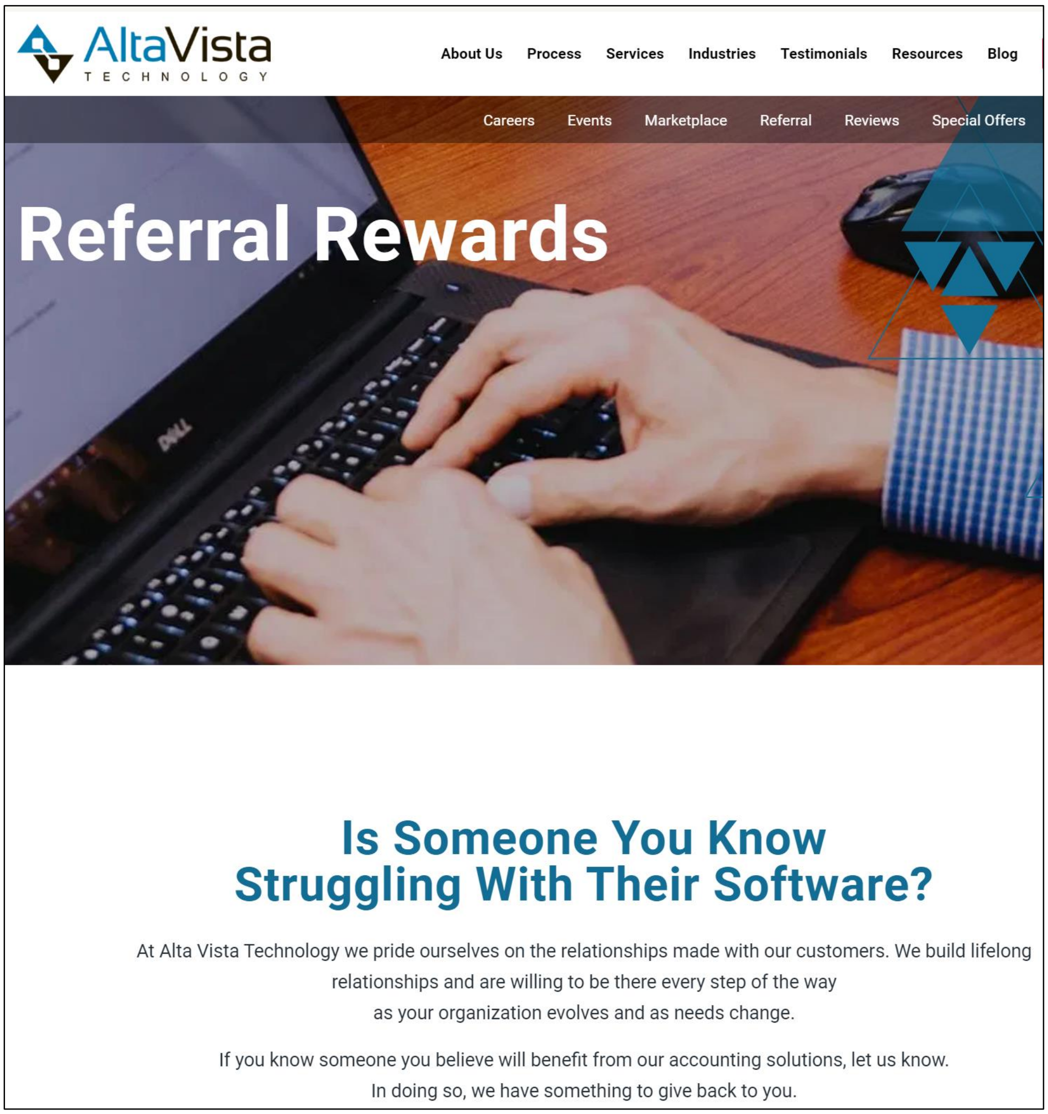
- **Onboarding:** Onboard customers quickly and ensure a proactive, dedicated onboarding and deployment process across welcome, administration, implementation, adoption, and training. The first 14 days are critical. Customers must incorporate the solution into their daily business activities to realize value and cement adoption. Include all contact and support information, key highlights of your offering, and support sources through multiple sources, including forums and online resources.
- **Education/Lesson-Based Nurture:** Build trust and continued rapport as you provide value through education. Help them engage and learn through best practices from other users who share a similar profile. Offer tips and tricks and use cases or tutorials to help them fully adopt your solution. The more industry-specific, the better.
- **Product/Service/News Updates:** Use newsletters to provide pertinent updates about your company and offerings. You could keep customers educated on industry trends and best practices and update them on other offerings, upgrade options, and promotional discounts.
- **Milestone Nurture:** Delight customers by celebrating their customer anniversary. Use telemetry data to track their success with your offering and send emails once key success goals or business impacts have been achieved.
- **Legacy Nurture:** Create nurture triggered by low usage and include information on some underused or overlooked features and to help them achieve better results.

Advocacy

If you deliver a strong customer experience, then you are better positioned to leverage your best customers to advocate on your behalf. Ask them to act as a reference and to contribute to mutually beneficial testimonials, case studies, and social media amplification. Perhaps a brand advocate can speak at an in-person or digital event or be featured in a customer video. Make sure there is something in it for them personally, not just for you. Offer them an opportunity to gain visibility or credit toward their next purchase.

84% of B2B decision makers start the buying process with a referral. In fact, referrals are usually the number one method of attracting your best leads. Consider a referral program that offers some level of incentive or reward for new business gained.

Sample referral website landing page from AltaVista Technologies:



https://www.altavistatech.com/referral/

Renewal

Use your renewal process as an opportunity to further expand your footprint and achieve a greater share of your customer's wallet. Have a work-backward plan from 90, 60, and 30 days out.

At 90 days out, schedule a meeting to review the past year, identify issues, and uncover opportunities. Have a business conversation anchored in your customer's business, strategic challenges, goals, and any anticipated changes. Use telemetry data to uncover opportunities, and be sure to rectify any problems before the next 60-day check-in.

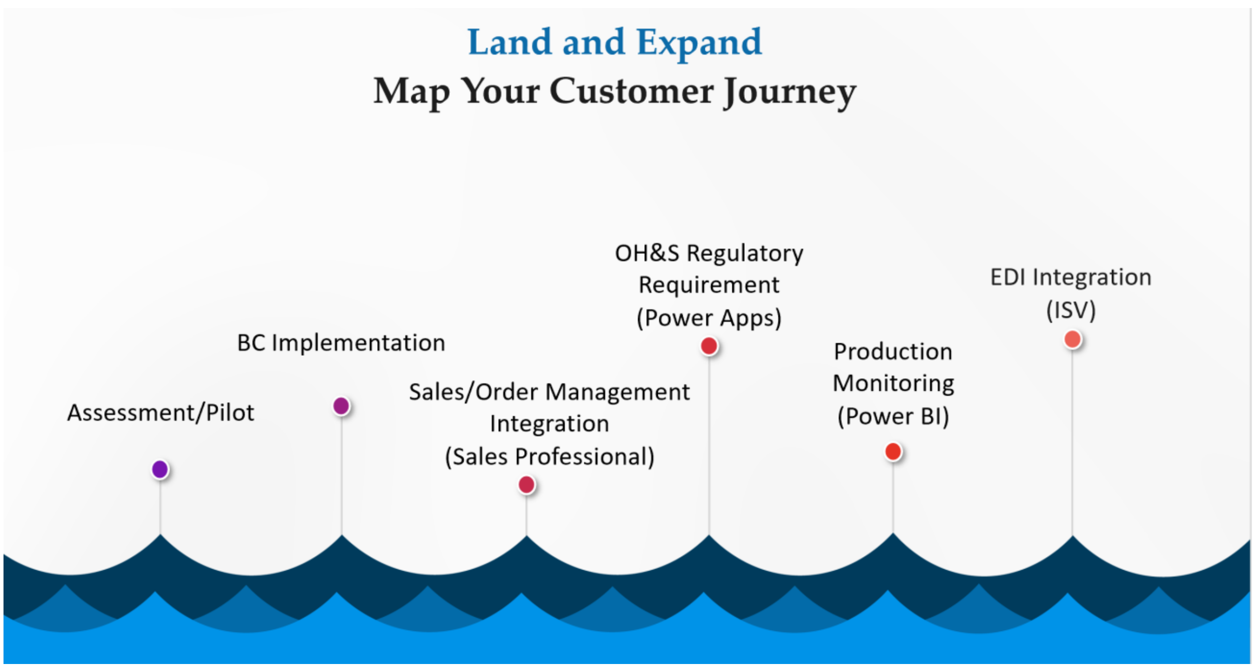
At 60 days out, follow up on key 90-day meeting takeaways and showcase all new updates and capabilities to demonstrate your commitment to meeting their ongoing and new needs. Also, target discovering one or two relevant, next-best offers that increase value or extend their existing solution (e.g., new workloads they can move to the Cloud, Power Apps they can purchase, integration you can conduct to provide even more insight into and control over their business, or new business problems you can help them address). This is the time to determine what your next upsell and cross-sell will be; it is also the opportunity, as their trusted technology partner, to plant seeds for new possibilities of adding value.

At the 30-day mark, present renewal and upgrade options as well as any promotional or discount offers that will secure earlier or large ongoing commitment. The key here is to create fear of missing out if they don't renew and quantitative proof of value delivered for their investment, which helps them secure ongoing or additional funding and cements continued commitment.

Proactive Renewal Cycle

Land and Expand

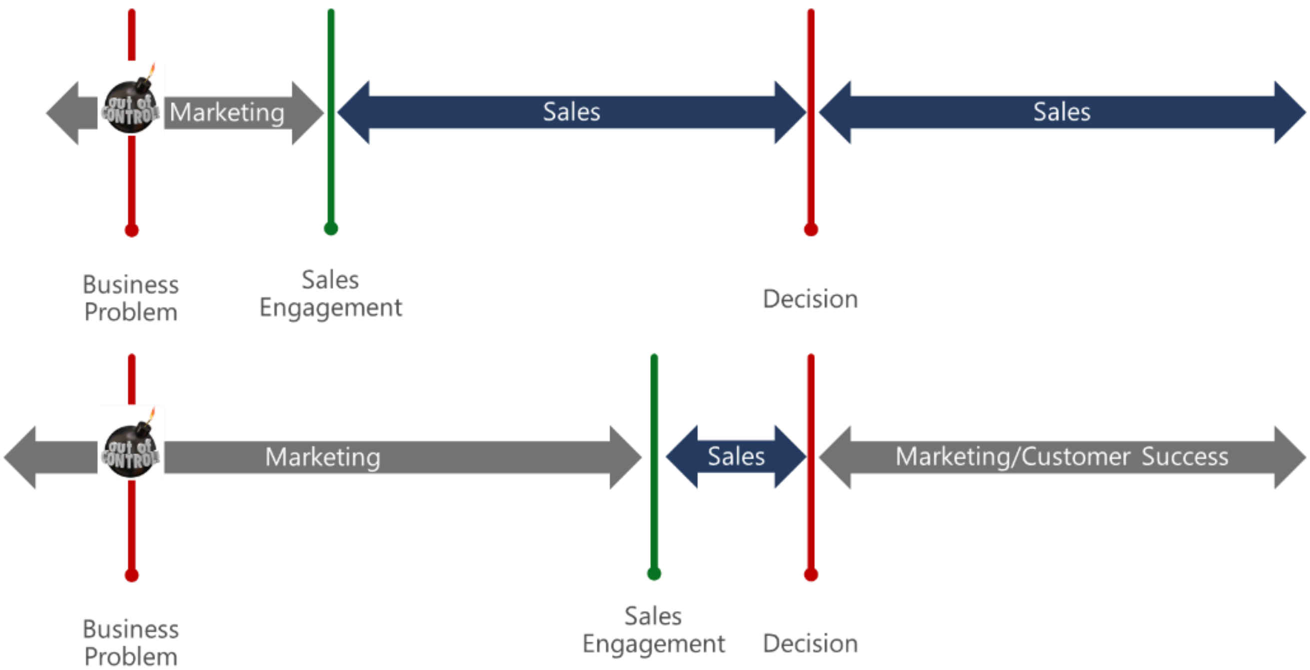
You don't have to wait until renewal to pursue a land and expand strategy. You can hunt for opportunities to provide incremental project offerings or additional solutions and services at any time. Many partners have built-in periodic review sessions with their top customer tier, and this is an ideal moment to explore the customer's business challenges and opportunities and align those to potential new technology options. Arm yourself with telemetry date or usage and consumption information that can help you identify new areas for deeper or wider usage. Find areas ripe for optimization or needing more efficiency. Given your understanding of the typical customer journey in your vertical or sweet spot, you can proactively develop new Power Apps or value-added services that will match the next maturity level of their business.



Capability 8: Driving Scale and Growth

Marketing-Driven Sales Motion

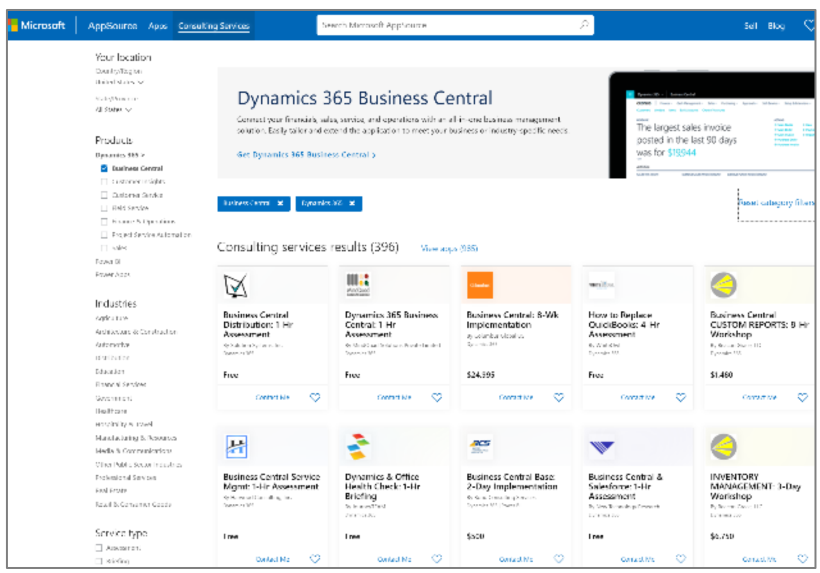
There are three primary strategies for scaling your high-volume Dynamics practice. The first is to build your marketing engine to slowly replace much of the work that is being facilitated through your sales organization today.



High-volume practices are anchored in repeatable, focused solution sets. As a result, buyer profiles, business challenges, project scopes, and objections will not vary much from prospect to prospect. Today, most Dynamics partners rely on their sales organizations to carry the majority of the customer acquisition load. In the old, tell-me-what-you-want-and-I'll-build-it for-you world, marketing would generate leads, then throw them over the fence to sales. Sales would then drive a very resource-intensive, personalized sales process that often included a highly customized solution demonstration. A high cost of customer acquisition was manageable when we collected a large sum of revenue upfront for a perpetual license fee and a large, committed project. At the risk of overstating the obvious, this approach does not scale, nor does it support a high-volume customer acquisition strategy. To get the most value out of your sales team and to scale your business without adding more sellers, you will want to implement a marketing automation system that replicates the majority of what your sales professionals do now. This includes monitoring website activity with heat maps on your website, implementing chat to answer sales questions, creating educational videos, webinars, and compelling customer case studies. It also means putting your pricing online. Over time, marketing gradually replaces the prospect engagement activities at the front end of the sales cycle. We are not suggesting that a digital sales process will ever be BETTER than a high-touch, face-to-face personal one; however, to drive scale and lower costs of customer acquisition in a global digital marketplace (impacted by a pandemic), it is the only financially viable way.

Get Your Offerings Up on AppSource and Optimize Your Listings

Another strategy to increase your leads is to quickly get your new Power Apps, solutions, and consulting services up on Microsoft's Commercial Marketplaces. AppSource is a digital storefront visible to thousands of business buyers who have invested in and use Microsoft technology every day. They are searching for new solutions and services to help them grow their businesses.



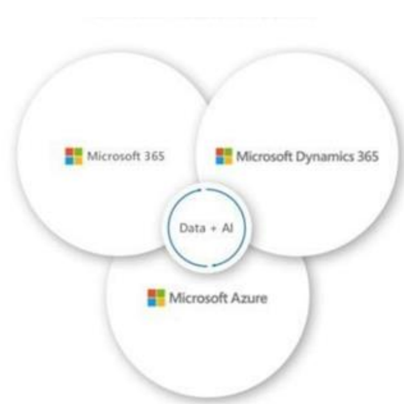
The volume and quality of leads partners are receiving from AppSource is growing daily. You may not be big enough to land on page one of a Bing or Google query today, but in an AppSource search, you will come out on top if you have the right messaging.

Prospects are self-educating. You don't find them anymore; they find you. They are increasingly turning to Microsoft first and then to AppSource for industry- and vertical-specific solutions that address their specific business problems (but not if your AppSource listing doesn't clearly communicate your value proposition). It must include short, high-impact videos that showcase your domain knowledge and differentiating capabilities, include pricing, and have positive peer reviews. Your AppSource listing should also lead directly to a solution-specific, optimized landing page on your website, not to your corporate homepage, so you can take them the final mile to buying. A few small adjustments to how you position and describe your solution on AppSource can make a big difference in whether it resonates with your target prospect personas or not.

Download the [Azure Marketplace & AppSource best practice guide] to learn how to get the most out of your online marketing efforts.

Partner to Partner (P2P)

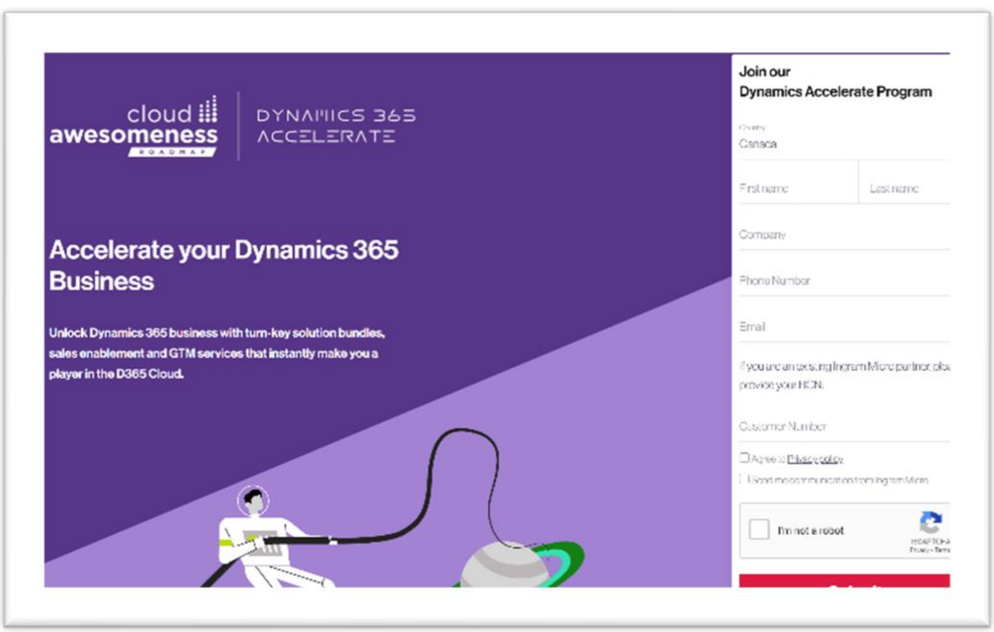
The next scale strategy to mature high-volume Dynamics partners is to develop mutually beneficial P2P relationships. For many years, Microsoft Dynamics partners who focused on the SMB market segment peacefully co-existed with their Modern Workplace brethren. Life was relatively simple. MSPs looked after the infrastructure and productivity suite, and Dynamics partners looked after business application needs. MSPs sold into the IT organization, and Dynamics partners sold into the business community. The two worlds seldom overlapped, but all that changed when Microsoft launched its three-cloud strategy. The Microsoft ecosystem pivoted from product to platform, and the lines between the solution areas began to blur. Then the pandemic drove



everyone home to work. Customers now increasingly want to build business processes that flow back and forth between their business applications and their productivity tools. Sales and customer service team members want access to business data, and more, during Microsoft Teams calls. Increasingly, they also want a single monthly invoice and one trusted partner they can rely on for all their IT needs. There is a blurring of lines between Dynamics 365, Microsoft 365, Teams, SharePoint, and everything else. And they want all of it to run in the Cloud.

This shift demands that partners in the ecosystem form trusted, close working partnerships and relationships. Identify key Modern Workplace (MSP) and Azure partners aligned with your target market and corporate culture. Take time to proactively define your ideal Modern Workplace and Azure partner profiles. They should share a common industry or vertical focus as well as a similar end customer profile in terms of size, revenue, and buying style. Geographical coverage may be important in the beginning as you establish your first few P2P relationships, but, over the long term, physical distance should not be a barrier to your "channel" growth. You can also reach out to your indirect partners (Ingram Micro, Sherweb, Tech Data, and others) to see if they have a P2P program you can join or who can help broker introductions.

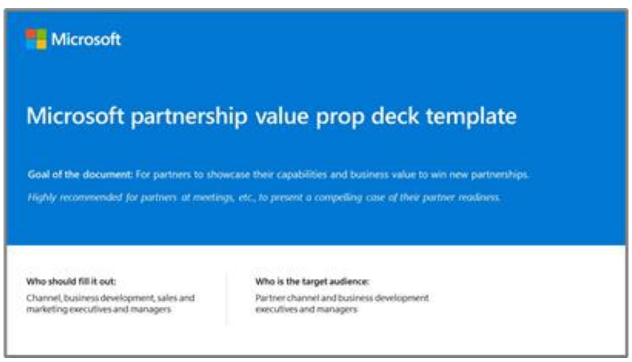
Sample Dynamics 365 P2P program from one of the global distributors, Ingram Micro:

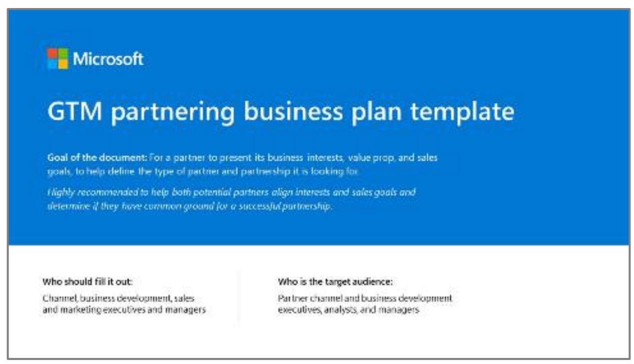


https://www.ingrammicrocloud.com/ca/en/dynamics/

Once you've clarified your P2P partner profile, the next step is to define your value proposition, your GTM partnering business plan, and your sales battle card. (insert links here). Your value proposition summarizes your focus industries and verticals as well as the challenges you see in that market segment. It includes an overview of your solution, the core benefits it could deliver to an MSP partner's customers, what you bring to the table in terms of the partnership, and a brief explanation of organizational expectations within the partnership. You should also clearly define the anticipated roles and responsibilities of each party. Your MSP and Azure partner(s) will be responsible for opportunity identification, pre-qualification activities, and a warm introduction to their customers, ideally at the CEO or MD level. You will likely assume responsibilities for pre-sales support, opportunity management, solution deployment, end-user support, and providing feedback on project and customer status to your P2P partner.

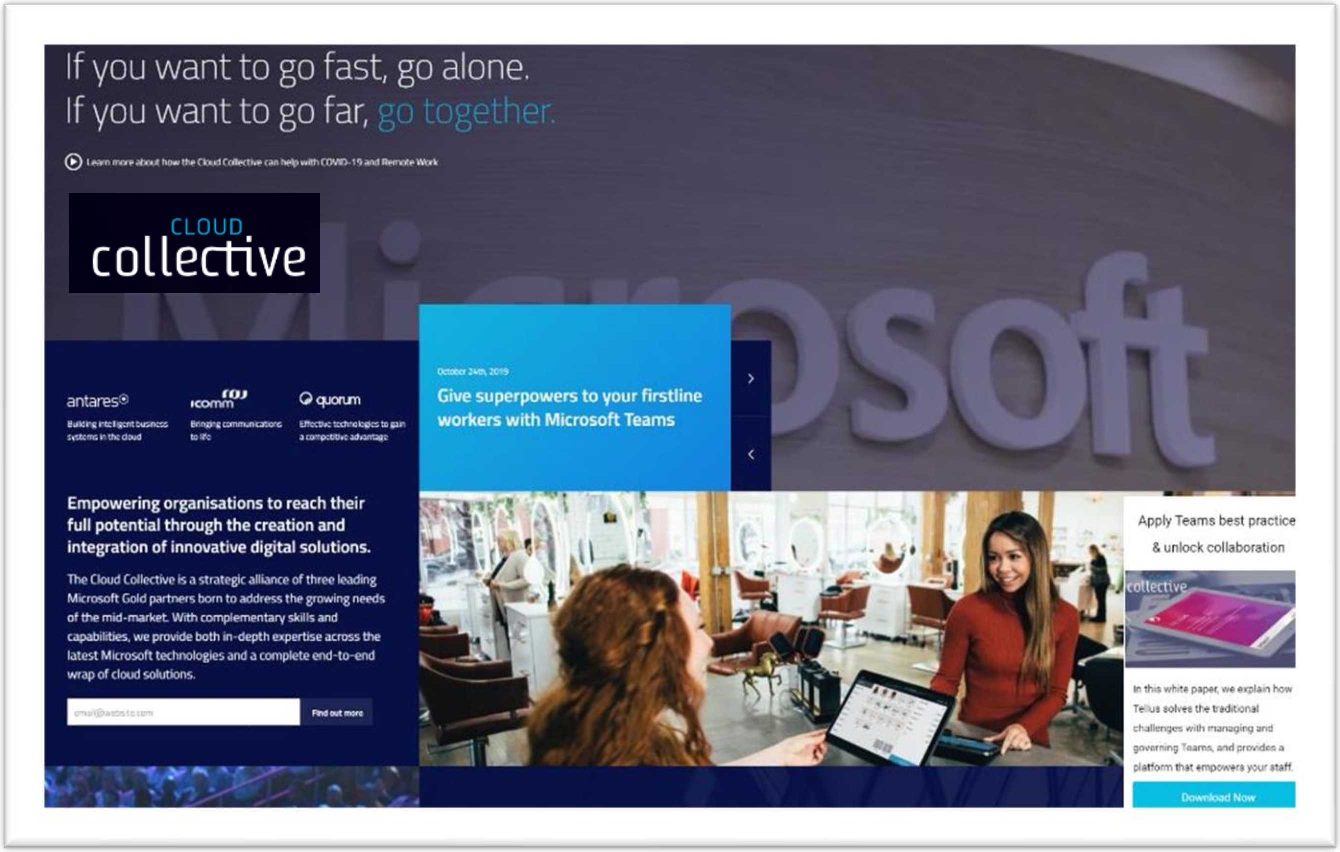
See these two resources to help you get started:





GTM activities and lead generation tactics can range from "reactive" engagement, where your Modern Workplace or Azure partner(s) uncover an active project or business need at a specific client all the way through to developing and executing joint marketing campaigns in each other's respective customer bases.

See this excellent example from Australia, where three Microsoft partners with different core competencies across three clouds have come together to offer a seamless end-to-end solution to the mid-market. Their model includes pooling their marketing investment and resources to collectively generating new leads and sharing revenue. The breadth and depth of the Microsoft technology platform and the size of the global market is too extensive for any one partner to effectively meet all the needs of a customer today and in the future. It is time to focus on building strategic relationships across the ecosystem, positioning you for scale and growth.

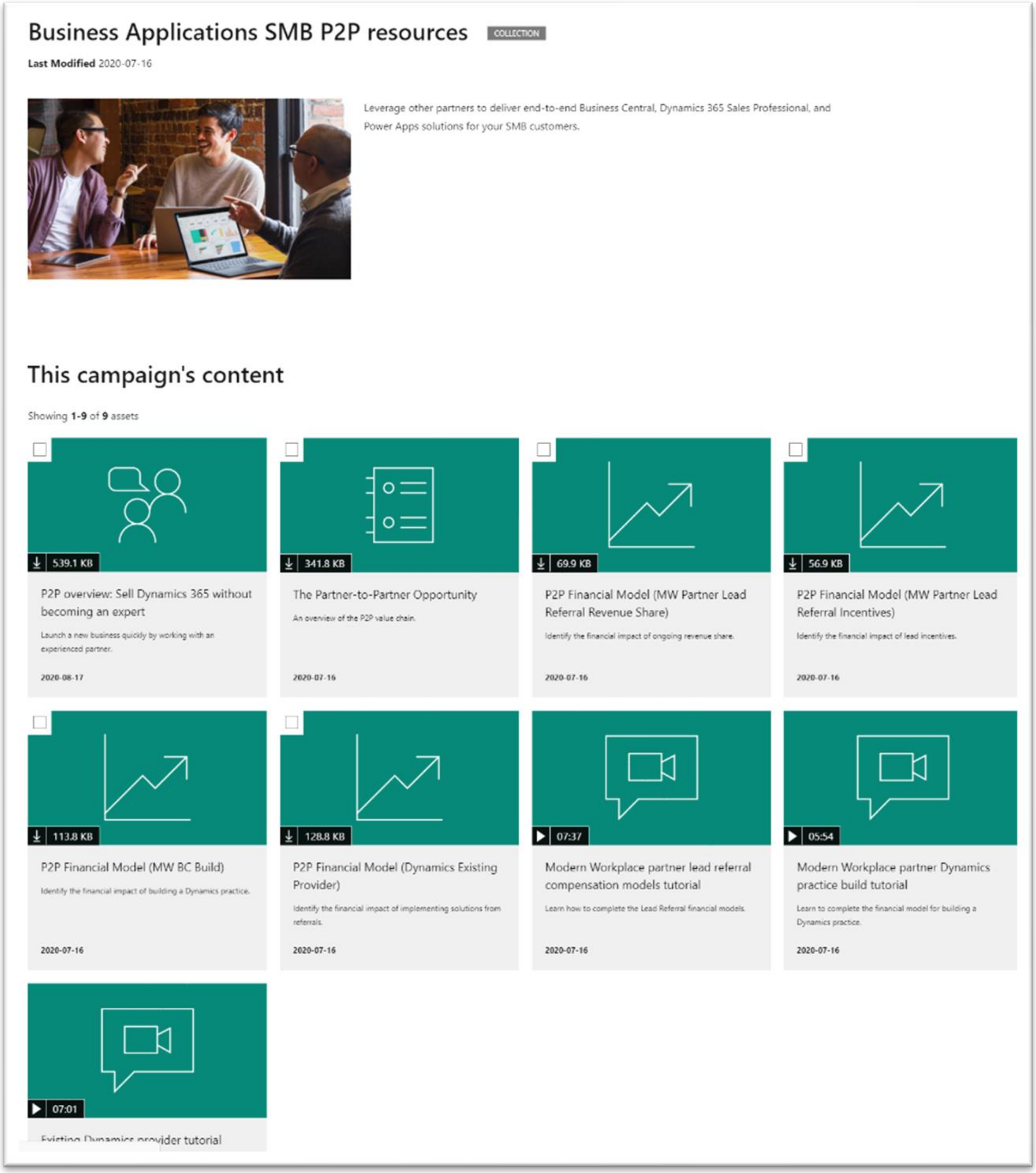


https://www.cloudcollective.com.au/

P2P Economics

The final piece of the P2P puzzle is defining the economic relationship. How you choose to compensate your Modern Workplace and Azure partners will largely depend on whether they want to be the partner of record for the Dynamics licensing (with all of the associated costs that come along with it) or relinquishing the POR to you. To help you model the various P2P compensation options and land on the right revenue sharing strategy, Microsoft has developed several financial models and video tutorials that you can find here. Regardless of the compensation agreement you land on, the primary benefit and value proposition to Modern Workplace and Azure partners is anchored in inoculating their accounts against three-cloud competitors targeting and penetrating their current base of customers and helping them increase their share of revenue by adding ERP or CRM “as a service”.

See the following resources to help you on this journey: https://partner.microsoft.com/en-us/asset/collection/business-apps-smb-p2p-resources#/



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Final Thoughts

This guide provided a summary of the key capabilities you need to master becoming a highly successful volume partner in the SMB space. Each of these capabilities is critical and will take time to develop.

Once you have defined your SMB focus, built a suite of solutions, services, and Power Apps to bring to market, and effectively packaged those offerings, you can then begin to generate demand. Developing educational content will help you increase inbound leads, and more automated marketing and sales motion will allow you to qualify and close more opportunities faster and at a lower cost. Optimizing your deployment strategy, leveraging ISV solutions, and building repeatable tools will help you deliver outcomes faster and at a lower cost, delighting customers. You can then amplify your efforts with an extended P2P strategy. Finally, a customer lifetime mindset will ensure you deliver great value and continually optimize and innovate, ensuring high retention and satisfaction. This model will fuel your growth, increase your margins, and successfully position you to scale and move into new markets or solution areas.

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