



Customer Journey-in-a-Box | Playbook

SMB Better Together Sales

January 2023



For every \$1 of Microsoft revenue partners in Western Europe sell, customers purchase an additional average of \$6.70 of the partner's services and products.

\$1 =
USD



\$6.70
Western Europe



\$6.10
Total (Worldwide)



For every \$1 of
Microsoft revenue

Resale-led
partners make
\$2.21
in economic value

Services-led
partners make
\$5.75
in economic value

Software-led
partners make
\$7.86
in economic value

Customer Journey Insights

Now more than ever, small to mid-sized businesses need a sales tool that saves them time and reduces costs. With a streamlined sales force automation (SFA) solution that includes core SFA and works seamlessly with familiar tools like Office 365, it's intuitive and simple for your sales teams to build and manage customer relationships.

⚡ Priority

- Unlock Data to Maximize Sales Impact with Dynamics 365 Sales



Segment

- SMB Scale & Midsized SMB

★ Hero SKU

- Sales/Sales Pro

🏠 Up/cross sell path

- Power Apps
- Power Automate
- Business central
- Customer Service Pro

@ KPIs

- # Customer adds
- \$ CSP revenue



Solution Area

- Business Apps

Audience, workshops & assessments

Market Opportunity: FY23 TAM all segments \$3,6B, growing 16.77% YoY.

Target Customers

- **Land** New Customers targeting High propensity accounts leading with D365 Sales or Sales Pro
- **Cross/Upsell** D365 Sales, Power Apps, Business Central

Buying Persona

- VP of Sales
- Sales Manager
- Sales Operations

Solution Play

- Connected Sales and Marketing
- SMB: Unlock Data to Maximize Impact with D365 Sales

Industry

- SMB Scale & Midsized SMB

Targeting Tool

[Microsoft CloudAscent](#)

Campaign material

Connected Sales and Marketing & D365 Sales BOM

- [Sales and Sales Pro GTM assets](#)
- [SMB Partner Assets](#)
- [Better Together Assets O365 and D365](#)
- High Volume Program assets: [Dynamics 365 Partner Portal \(microsoft.com\)](#)
- [Digital Marketing Content \(DMC\) Campaigns](#)
- [Partner led marketing guidelines](#)
- [Brand Central](#)
- [Demo resources](#)
- [Pricing | Microsoft Dynamics 365](#)

Partner

Capabilities

- ✓ [Catalyst Accredited Partners](#) that masters to sell and deliver
- ✓ D365 Sales Partners with [MCPP Designation](#)
Or
Legacy Competency
 - Cloud Business Applications
 - Small and Midmarket Bus Apps Option Competency
- ✓ MW Partner wanting to expand with D365 Practice

Skilling and enablement

Activate Digital Selling materials and Readiness paths:

- [Business Applications SMB D365 Sales Practice Building, Readiness](#)
- [Accelerate and scale your SMB-focused Dynamics 365 practice: Partner series](#) – High Volume Program
- [SMB Dynamics 365 Sales School – Microsoft Dynamics 365 Story: Offerings for SMB](#)
- [Dynamics 365 Sales training content](#)
- [Catalyst Readiness](#)

BizApps Enablement Guides:

- <https://aka.ms/enablementguides>
- [Certification overview](#)
- [Partner Training Calendar: Partner Training Calendar \(microsoft.com\)](#)
- **Other resources**
- How To: [Leverage Co-op Marketing Funds](#)

3 questions you should ask the customer:

- How has your customer experience strategy changed over the last year?
- How much value are you deriving from your existing data?
- How consistent a seamless is the journey for your customer?

Customer Journey

Tactics

Funding & Incentives



Listen & Consult

Partner led Digital Campaigns, Telemarketing, Events, Webinars

- All partner led marketing campaigns should ideally be based on a Packaged Offer and drive demand to 1.few and 1:1 engagements
1:few Customer webinar, 1:1 Build Intent Demo/workinars or Catalyst Presales Workshops.

Run DMC Campaigns without additional investment.

High Volume Program Assets and Tactics

Through Partner Marketing (1:many)

- Marketing funds are available for the partner led demand gen based on local subsidiary prioritization



Inspire & Design

1:1 Workshop/Workinar and where relevant on larger Scale following Catalyst Journey leveraging Partner Offer Program funding

BizApps Solution Assessment

1:1 Partner Offer Presales activities (workshops) to build intent to purchase following the MCEM/ Catalyst Customer Journey: Envisioning Workshop, Business Value Assessment, Solution Assessment, Tailored Demo, Pilot.

1:1 Partner Offer Presales activities (workshops)
MSX Qualified Oppty 20% stage with D365 ACV of min \$20k. Payout From 1,5k-100k,



Empower & Achieve

CSP incentives: Rewards activities during pre-sales phase that lead to new or existing customers acquiring new Microsoft D365 Online seats.

Partner Incentives MPN

Portal: aka.ms/partnerincentives

- Partner Center Incentives-specific support

Microsoft Commerce Incentive (CSP Breadth motion):

- Business Applications billed revenue 4.75%
- Accelerator D365 Business Central 5%
- Accelerator D365 Sales Pro, Power Apps, 10%
- Accelerator Customer add – Business Applications billed revenue, 20% see details in Portal



Realize Value

Post Sales activities to increase usage and reduce paid to active gap in existing installed base.: Envisioning and Value Realization, Success Enablement, Center of Excellence, Solution Optimization, Change Management.



Manage & Optimize

Usage Incentive: Helps partners develop a sustainable annuity business for growth of customers' usage of Microsoft Dynamics 365.

Portal: aka.ms/partnerincentives

Partner Center Incentives-specific support

CSP incentives usage

MAU * Rate Card * 15%

Power Suite / Customer Insights Usage