



Customer Journey-in-a-Box | Playbook

Connected Sales and Marketing

Dynamics 365

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

Connected Sales & Marketing automates, digitizes, and improves the marketing & sales functions of an organization selling to other businesses (B2B). . . Customer Experience is often poor and customer relationships are fragmented. Organizations need to unify data from multiple, diverse sources to help engage with customers providing the best experience.

⚡ Priority

- Customer Experience / Connected Sales and Marketing

🕒 Segment

- Strategic
- Major Commercial
- Corporate & SMB Scale

🗄️ Solution Area

- Business Apps

★ Hero SKU

- Sales

🏠 Up/cross sell path

- Marketing
- Customer Insight
- Viva Sales

📊 KPIs

- # Workshops & Programs
- # Customer adds
- \$ CSP revenue

Audience, workshops & assessments

Target Customers

- **Land** New Customers targeting High propensity accounts leading with D365 Sales
- **Cross/Upsell** Mkt, CI to MAL customers in Enterprise or SMC who use D365 Sales
- **Surround** accounts with CRM Compete with Viva Sales

Solution Play

- Connected Sales and Marketing.

Industry

- EOU FSI, Retail and Manufacturing
- SMC/SMB Cross

Priority

- **Market Opportunity:** FY23 TAM \$3.6b, growing 16.77% YoY. **Largest TAM:** in FSI, Retail & CG, Media & Communication, Commercial Other and Manufacturing.

Campaign material

Connected Sales and Marketing BOM

- [Solution Play Assets – Connected Sales and Marketing](#)
- [Win new customer with teamwork – Context IQ – Use Case Pitch Deck](#)
- [Digital Marketing Content \(DMC\) Campaigns](#)
- [Partner led marketing guidelines](#)
- [Brand Central](#)

| CATEGORY | DECISION MAKER | SOLUTION PLAY | WE TAM | HUB PRODUCT | SPOKE PRODUCT | X-SOLUTION | PRIO INDUSTRY |
|---------------------|-----------------|--|---|-------------|---|--|----------------------------|
| Customer Experience | CRO/CMO | Connected Sales & Marketing | \$3.6Bb | D365 Sales | D365 Marketing, Customer Insights, PP, Viva Sales | M365 (Teams), Azure Synapse, Mixed Reality | Manufacturing, FSI, Retail |
| Industry | Target Audience | Hero Industry Solution Play | Hero Customer Scenario | | | | |
| FSI | CRO/CMO | Deliver differentiated CX | <ul style="list-style-type: none"> • Unified Customer Profile • Banking Customer Engagement | | | | |
| Manufacturing | CCSO | Engage customers in new ways | <ul style="list-style-type: none"> • Connected Sales & Marketing | | | | |
| Retail | CRO/CMO | <ul style="list-style-type: none"> • Elevate the Shopping Experience • Maximize the Value of your Data | <ul style="list-style-type: none"> • Real-time personalization • Unified Customer Profile | | | | |

Partner

Criteria

- ✓ Catalyst Accredited Partners that masters to sell and deliver across Sales and Marketing (and Commerce in Retail)
- ✓ Competency Partners: Cloud Business Applications or New MCPP Designations Partner

Skilling and enablement

Activate Digital Selling materials and Readiness paths:

- [Dynamics 365 Partner Portal \(microsoft.com\)](#)
- [Catalyst Readiness](#)
- [Dynamics 365 Sales training content](#)
- [Dynamics 365 Customer Insights training content](#)
- [Dynamics 365 Marketing training content](#)

- [Certification overview](#)

Other resources

- Partner Playbook for the Microsoft Business Apps Discover Workshops <https://aka.ms/wsplaybook>

BizApps Enablement Guides:

- <https://aka.ms/enablementguides>

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 Workshops (1:few):

- Customer webinar
- D365 Discover Workshop: Connected Sales and Marketing. Partner Playbook <https://aka.ms/wsplaybook>

Through Partner Marketing (1:many)

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

Workshops (1:many)

- Microsoft support in orchestration/invitations of accounts to Partner Led Digital Discover workshops.



Inspire & Design

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.

- SMB Presales Offer Coming Soon

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



Empower & Achieve

OSA Sell or 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
CPOR Guide on Partner Center

OSA: 15% CE base, 30% F&O base, 10% Power Apps/Automate

CSP: 4.75% base
20% Customer Add (12Months)
5-10% Product Accelerators



Realize Value

1:1 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
CPOR Guide on Partner Center

OSU
QoQ MAU * Rate Card
Power Suite / Customer Insights Usage
CSP incentives usage
MAU * Rate Card * 15%
Power Suite / Customer Insights Usage