THE BEST OF DYNAMICS PARTNERS

Stories & Best Practices of Partners Growing Revenue with Their Existing Customers

All Microsoft Dynamics partners take care of their customers, but some have tapped into special techniques to turn everyday customer interactions into revenue generating opportunities that can be grown from within.
Welcome to the Best of Dynamics Partners guide for marketing to existing customers.

In today’s economy, your best prospect may be one of your customers that has already implemented a Dynamics Solution. As their business evolves and changes, so should their system. The best practices published inside this guide may spark a creative idea to help grow revenue with your current customers. I'd like to thank all of the partners whose stories you will read for their willingness to share their best practices.

Sincerely,
Morgan Wheaton
Director, Worldwide Existing Customer Marketing
Microsoft Business Solutions

Why focus on existing customers?

- **Opportunity to generate revenue**
  Uncover new opportunities for services, add-on or upgrade revenue within the customer base.
- **Speed up the selling process**
  Take advantage of deeper credibility and more familiarity with unique needs.
- **Deepen your area of expertise**
  Develop trust along with strong case studies.
- **Save money**
  It costs six times more to sell to prospects than existing customers.
- **Create a community of addressable opportunities**
  Turn your existing customer base into a community in which you can grow together.

What we do:
We put an emphasis on getting customers to Convergence and getting more than one person per company. We start talking to customers about planning to attend Convergence about 6 months prior to the event; we create a blog and post information there for customers to read; we leverage testimonials received from prior year attendees in marketing material; we send an email following day 1 or 2 of the conference to all of our customers who are not attending to share the highlights and announcements made.

One way we get multiple client contacts to attend is to help them understand how more attendees can help their company truly benefit from the volume of rich content delivered at Convergence. "It's more content than one person can handle," we tell them.

We have a conference call with each customer registered to attend to find out what their interests are and to come up with a plan of action at Convergence—we look up booth numbers, research exhibits, and recommend sessions to help optimize their time. For instance, if they are looking for barcode solutions, we'll tell them about the available solutions and may even escort them to the booth.

Prior to the show, we send our customers a welcome packet that includes all of our contact information so they can reach us at the show. While at Convergence, we host a Meet-and-Greet event and spend quality time with our customers to make them feel part of the Encore team.

Results:
We have a lot of follow-up after Convergence and it has a huge impact between those attending Convergence vs. those who don’t.

What it takes:
- Planners and organizers.
- Account Managers to plan and care for customers on site.
- Great follow-through skills.

On Convergence as a Great Customer Relationship Opportunity

**Company:** Encore Business Solutions

**Country:** Canada

**SanDy BeRgman**
On Onboarding New Customers

What we do: We use a process for onboarding new customers and making renewal feel natural.

We service about 150 active customers, and it’s important to set expectations with each of them at the beginning of the process about what will happen and when.

First, we have a kickoff meeting with a new customer and introduce them to their Customer Service Manager. Then, we review their current service plan in detail. They know up front that they will receive an invoice for BreP in about ten months, and that it will include all the great stuff we review with them at the kickoff. Then, we do an orientation to CustomerSource with knowledgeable salespeople.

The CustomerSource training ensures that customers are aware of what they’re getting and the value of their plan. They receive their login information and we demonstrate scenarios for using CustomerSource. Our salespeople always promote CustomerSource in their interactions with customers.

We regularly check to ensure customers are on the right plan. For example, one customer was on unlimited support, but in our routine analysis, we determined that they were better-suited to a 16% plan given their support usage.

Results: Twenty-two percent of revenue resulted from maintenance renewals. We had sixty-seven percent revenue growth (83% with multi year). Customer satisfaction was 4.68/5.0.

What it takes:
- Create a process to orient customers with CustomerSource.
- Develop internal training on the value and features of CustomerSource.
- Set expectations on renewals.
- Schedule regular plan assessments for customers based on their usage.

More tips:
- We offer our own support plan, which is structured similarly to the Microsoft plan.
- Rank your customers as level A, B, or C. It’s subjective, but it can help you prioritize and focus on A customers.
- We perform Customer Care Surveys to collect feedback, and we have user groups two to three times a year. This strengthens renewal value and uncovers opportunities.
- Reinforce the value of BreP whenever you talk to your customers.
- Don’t forget about promotions.
On “Unleashing Your Potential” to Drive Renewals and Add-Ons

What we do: Microsoft’s Unleash Your Potential program offers a great method for contacting the client 60–70 days prior to renewal with an information sheet for the Business Ready Enhancement Plan. The connections show the client that we’re thinking of them and allow us to make follow-up contact. Before the Unleash Your Potential tool, I maintained my own spreadsheet of questions that helped extract key information from customers.

We group the Unleash Your Potential prospects into two scenarios:

- **Customers who want to do more:** We listen for signals of when to introduce Unleash Your Potential. The questions are fantastic: “What do I want to do today, what do I want to do two years from now?” We have a series of meetings in which we time the conversations to sync with their business cycles: planning, budgeting, deployment during less busy times. Overall, we let the customer come to their own conclusions.

- **Satisfied customers:** We schedule another touch in six months if they are satisfied, or move to the renewal contact schedule.

Results: We were very successful in using the Unleash Your Potential Tool for driving great renewal rates, and we even placed second in the North American License Model Transition (LMT) contest because we were using the tool.

What it takes:

- Disciplined communications with purposeful scheduling over time
- A predefined plan of actions with existing customers
- Follow the Unleash Your Potential Tool training and ask the questions that help identify opportunities. (Go to PartnerSource and search on “Unleash” to learn more.)
- For credibility, always meet commitments or alert clients before a deadline. Reset expectations along the way—clients are generally understanding.
- An Existing Customer Champ who is comfortable with client conversations and can contribute by understanding the solutions at a high level. Picking up on keywords customers use and signals of “what’s missing in the business”. Know how you’re going to convert opportunities into business. Be willing to have budget conversations and work within their confines by prioritizing their budget in optimum places. Identify trends; for example, if you hear several conversations about HR, schedule a webinar about the HR product that includes a demo on how that product will address their needs.

More tips:

- If the Unleash Your Potential questions aren’t suited for your kind of customer, create your own set of questions. Going in with a prepared set of conversation questions makes you much more productive. Also, attend face-to-face meetings whenever possible. Make sure the controller attends, and the director of finance should sit in to get involved in the process early.

- We use CRM to contact each client at least twice a year. We offer road-mapping sessions with them so we know the direction the company is going and how satisfied they are—plus, it prompts them to think further about the product.

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On CRM as a Core Relationship Tool

What it takes:
- Make CRM a way of life in your organization. Use it more than a static information-gathering tool; integrate it into all of your customer conversations and business metrics.
- Schedule a weekly formal orchestration meeting for salespeople, consultants, and the Helpdesk to review all client activities.
- Plan monthly trainings and offer those trainings to customers.
- Commit to using CRM to track customer conversations.

On Moving “B/C” Clients to “A” Status

What it takes:
- We schedule a quarterly exercise to tier our customers.
- Define a focus on collecting customer examples and case studies.
- Decide to focus on customer activities at Convergence.

More tips:
- Offer employee commissions on licenses and services.
- Offer an in-house learning center for training classes.
- Foster both IT and financial relationships so events are a mix of both.
On Connecting Customer Activities

What we do: We combine an assortment of activities annually, semi-annually, quarterly, and monthly, including:

1) Annual Intergen Dynamics Day: A two-day event that showcases Microsoft Dynamics technologies and highlights opportunities for our customers to leverage their current investments.

2) Semi-Annual Intergen Connect: A half-day event held every six months after Dynamics Day to connect with customers locally and showcase new technologies and/or provide tips and tricks for our customers to leverage.

3) Quarterly Smarts Newsletter: Our recurring showcase for all things Intergen.

4) Monthly Twilight Seminars: These seminars run at least monthly in each of our offices to provide technical and business updates around new technologies.

www.intergen.co.nz/our-events/think-seminars/

What it takes:

- Determine your capacity and take on as many events as you can deliver with quality.
- Establish a discipline of timing and planning around sustained events and communication mediums.
- Hire content development and event management experts.
- Have a team that’s ready to support a regimented schedule and committed to customer care.

More tips:

- Executive staff in your company should commit to the cycle of these activities and assign appropriate owners for each. Clear lines of communication and account ownership are a must.

Result:

- We have a high BREP renewal rate, good upgrade program of work, loyal customers, and high revenue from existing customers.

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On Year-Ahead Planning & Annual Customer Assessments

What we do:
Each year in February, we plan a schedule for our entire year of marketing and customer retention events.

Marketing events/campaigns
We work closely with the Microsoft Dynamics Indonesia team coordinating our activities to be in line with their marketing campaign schedules to share product and technology updates. First semester this year we worked to promote Microsoft Dynamics CRM in two campaigns. The first campaign was targeted for Non-Profit Organizations. The second campaign was on cloud-based CRM for a broader audience where we launched our hosted Dynamics CRM Online offering. In these events, we invited our existing customers for a breakfast session with a well-known marketing expert in Indonesia as a speaker. In each event we launch, our sales team will introduce new solutions to our customers, share materials, conduct special overview demos and sit together with them to give a more comprehensive introduction of our solution and diagnose existing business needs.

Customer retention events
Apart from regular Customer Help Desk (Support Team) interaction, Account Managers contact each customer on a quarterly basis to review and assess the current condition of the system. The purpose is to identify issues, if any, that need attention, such as changes they anticipate in their business, additional solutions/modules they will need and plan to implement, and time frame they be ready to upgrade, etc.

More tips:
- We feel it is important to develop personal relationships with our clients so they do not just feel that we are there for the sales opportunities.
- We conduct an annual Customer Gathering event which is a half-day session to share product roadmap and release plans, as well as providing information and tips for managing their Dynamics solution. Before the event, we send an annual survey to collect customers’ experience on our support service, areas they would like us to improve and additional service/solutions they would like us to provide. We find these to be useful in improving our offerings, establishing more personal connections, and identifying recurring business that we can offer to the customers based on their needs such as additional user licenses, add-on modules, etc.

All interactions between our support team and account manager with customers are recorded and tracked within Dynamics CRM.
On Being Vertical

What we do: We focus on working with the appropriate associates within our winery vertical. For example, if we are promoting retail or wine club solutions, we reach out to the tasting room and wine club folks. Using Microsoft CRM we track the various contacts within the customer organization in order to become more efficient at providing them with relevant materials.

We have various events that help us to reach out to our customers; these include newsletters, promotional or informative e-mail blasts, Friday Afternoon Wine Tastings, and user group meetings on a bi-monthly basis. For our Retail vertical, we target the retail contacts and host a quarterly RMS User Group. This group is coordinated by one of our users (not our company) and is held at a customer site. We attend at their invitation and facilitate any discussions they request. This group is truly the users' meeting. For the NAV users we provide lunch at our office where the customer picks the topic of discussion. Most recently, a group of Executives and CFOs discussed topics that were relevant to them including: account schedules, budgeting and current issues. We host an annual Holiday Open House so everyone can come together and get to know each other, and us, better.

Result: Our annual renewals are 100% for the Microsoft Dynamics NAV Business Ready Enhancement Plan (BREP), and our focus results in a higher percentage of renewals and better working relationships with customers.

What it takes:

- It’s important to identify the right contact in the customer’s organization. CRM helps us track who has what position and who are the organization’s key players.
- Schedule consistent communications and check-ins with news, announcements, reminders, and social media participation.
- Build an infrastructure that supports the user groups, for example, workshops and wine tasting events.
- A customer champion with good communication and organization skills, patience to work through Microsoft red tape, and the ability to research will persevere.

More tips:

- Business partnering plans: We take existing customers to lunch periodically to discuss where they are going with their business and how we can help them. On-site courtesy consultations determine whether they have the latest versions and whether they need additional training.
- Launch workshops: Workshops such as “Launch of Microsoft Dynamics NAV 2009” area good way to connect with existing customers about Convergence, features, and new product enhancements.
- Service plan renewals: For renewals, we typically target financial folks (from VP of Finance to an Accounting Manager). In smaller businesses, we work with the owner. The customer champions for these accounts do all of the annual renewals, check-ups, follow-ups, and reminders prior to renewals. Regular newsletters and training classes help non-technical people manage the process.

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On Making Upgrades Easy for Clients

What we do: We use an Upgrade Planning Document that is based on years of experience tracking upgrades and application compatibility. The document includes a list of third-party products that customers have, compatibility listings for things such as printers, and dependencies such as Windows 7. We generate a checklist (one to three hours) reviewing that information so our consultants can give accurate estimates of how long it will take to complete the customer’s upgrade so we can set proper timeline and budget expectations with the customer.

We take on the responsibility for coordinating the customer’s annual Business Ready Enhancement Plan renewals. We’ve tracked all of the solutions sold into that same customer and synchronize all of their renewal dates. We confirm their quotes 60 days before they lapse, and send them a renewal quote including the products they own. This quote indicates which service plan they are currently on and provides pricing options for all the service plans available from Microsoft. This stimulates a lot of conversations with our customers as they evaluate what plan to choose for the current year. We help them decide which products to keep, move, add, and so on. The Upgrade Planning Document makes it easy for them and if they want more information, we have User Group meetings they can participate in once a year.

Schedule Service Planning Session: We send customers an agenda with topics such as: What does your existing environment looks like: users/licensing/renewals. What are you doing manually, repetitively? Then, what is your business going to look like three to five years from now? What is your strategy? Sharing that with us helps us both start planning ahead to achieve that goal.

Customer Service Managers not only manage the customer interface, but they also are tasked with understanding what the solutions are and the third-party ISV technologies that play a role. ISV solutions are also a big part of our focus in owning the upgrade process. We represent about 37 ISV products to make sure that we have the solution that the customer needs (while typical partners represent around five to ten).

Result: Because we’ve made the renewal process so clear and easy, I have checks coming in today (May) for renewals that aren’t due until July. Our cash flow has improved and our renewal rate is over 90%. We and our clients know that they will never miss renewing their plan on time.

What it takes:

- Good customer record-keeping.
- Time carved out for customer analysis and recommendations.
- CSMs committed to finding the right solution through good research.

More tips:
- Frequency and format is important. For newsletters, we’re discovering that the short format is much more effective.
- I learned a tremendous amount by attending Microsoft’s annual training sessions.
- You have to get face-to-face with customers to establish trust.
- Host one or two training series a month on something educational (like tips and tricks). We have branded our webinars educate and we’ve been doing this for 24 months. They were well attended in the beginning but we are finding they are not as well attended now.
On Evolving with Current Customers

What we do: We focus on what’s best for current customers, whether it’s licensing, financing, or service plans.

Lately, we’re seeing interest from some of our current customers in evaluating rental or SPLA-based solutions. Customers understand the idea of “hosting” now and feel more confident. The “cloud concept” is a current buzzword, and we need to help customers evaluate how it relates to them. Customers are curious about the cost comparison and there will be a few who switch to SPLA, such as those who are lapsed or those with expiring hardware.

However, new customers are coming through the SPLA, so we’re watching carefully how the new model changes our cash flow and business model. When new customers can spend $50,000 now or rent the solution for a few hundred dollars long-term, having the hosted solutions is a great offering. The last new on-premise deal we sold to a new customer was summer 2009.

Because of this, our future business is leaning in a new direction and we’ll eventually be managing many of our customers in a cloud-based environment. We spent a long time figuring out the various effects on our business and what margins should be built in.

We used to sell a $50,000 Great Plains deal with cash up front at 40–50% plus consulting on top of it. But with hosting, you’re not getting the up-front payment. Hosting is predictable, but it’s maybe a couple thousand a month—so if we’re getting two or three new customers we’re okay. Subscription pricing has a cut-off point where it would be equal to a purchase. After three to four years, you’ve paid for your software.

Result: We’ve really embraced the hosting concept and become a leader in the hosting and SPLA spaces, and that’s how we won the Partner of the Year Nomination.

What it takes:

- Carve out time to evaluate your business, including margins, your sales staff, and resources that might change in a SPLA-based model.
- Work up some calculators to compare the choices for your existing customers.
- Take the time to walk customers through the cloud-based scenario and whether it’s right for them.
- Provide a careful explanation of what changes and what doesn’t if they transition. For example, transitioning on-premise may still mean that they own the software, but we just host it for them. Therefore it’s unlikely that many of our existing customers would move what they have on-premise today to the cloud. They may own old hardware and that might mean it’s more economical to have us host.

More tips:

- For selling the ASP-based solutions, you may need more of a typical salesperson that understands the ASP infrastructure hosting environment. Our new hosted salespeople were selling a lot more than on-premise solutions. Our ASP offering is launching at WPC.
- Consider what will be different for your business: how you sell, the closing cycle, licensing, locality (for example, you may not be able to do on-site visits in person because your customers could be anywhere in the world).

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On Collaboration Platforms (Groove, LiveMeeting, SharePoint) with Existing Customers

What we do: We collaborate using Microsoft Office Groove (Microsoft Office SharePoint Workspace 2010) as the tool to manage all project activities jointly with our clients (including documentation, issue tracking, and project resources’ calendars) combined with Web-based helpdesk support. We send a quarterly newsletter to clients about new developments and features. We have a feedback system in place to learn what we can improve.

To balance our online tools, we also hold monthly interactive LiveMeeting webinars for existing customers in which we talk about capabilities, show functional demos of products, and answer questions. This leads to in-person, one-on-one conversations we can use to identify new opportunities.

Result: Last year we easily and effectively introduced existing customers to new products and modules and upsold them by using collaboration technologies.

What it takes:
- Set up a Microsoft LiveMeeting account.
- Deploy and learn Microsoft Office Groove.
- Deploy a newsletter mailing system.
- Define a reliable online helpdesk and feedback system.
- Devote a specialized marketing expert with long-term investment to growth within the base.

More tips:
- You need to hire a marketing person for EC responsibilities, not a sales person.
- Differentiate yourself from other ERP providers. Our differentiation is our expertise in serving the Professional Services industry.
- Don’t skip the investment in marketing and customer management.

On Partnerships and Social Media

What we do: We host our events jointly with our network of business partners: infrastructure, other Microsoft Dynamics partners, and applications partners. We host Lunch & Learns, Technology and Vertical events, and webinars every month. We’re very partner-centric and we hold 12–20 events each year with a joint partner.

Our last joint customer event was an all-inclusive dinner party that we hosted at Convergence. Thirty customers and prospects attended.

We also take advantage of social media sites like Twitter to talk about products and recommend that customers take advantage of our services and a free service “tune-up.” This provides an opportunity for us to take a look at how their system is running and determine whether we can add our services.

Results: We have recurring work with over 50 customers and have saved 20–50% of our marketing costs by splitting expenses with our business partners.

More tips:
- Make the time and financial commitment to managing existing customers. It’s not insignificant, but it can be worth it.
- When using social media, choose your platform and be sure to stay focused on results.
- Create a workflow methodology for each contact point. How often will you contact them, how will you learn what their pain is, and how can we help?
- Hire someone who can knowledgeably discuss business processes and deployment.
- Develop and apply consistent branding.

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On Customer Road Maps to Drive Revenue and Season Junior People

What we do: We want to be a technology partner to our customers, not just a supplier—so we offer Business Road Maps at least once a year to each customer using the Your Business Solutions Roadmap Tool (part of the Unleash Your Potential program from Microsoft). Through an interview-style assessment and a detailed report, we help customers take advantage of a tool loaded with knowledge and best practices.

The Tool is good for us because we don’t have enough time to work in-depth with everyone, and we want to have longer engagements with the most profitable customers. But if we don’t spend time with each of our customers, the relationship goes colder and colder over time.

So, we developed a program that uses our junior people to help in this process which in turn helps them gain experience. The process for each customer typically includes about half a day of interviews. Using the tool and a script, the junior salespeople look for opportunities and take notes.

The Tool is very thorough so even an inexperienced person conducting the survey can detect the main opportunities. They don’t need to know, for example, that in Manufacturing you need to talk about Inventory Management, because the questions explain it. Then, we bring in a more experienced person who can paint a good picture of what the customer should do, and the junior person learns from this mentorship.

This type of assessment would normally cost €6000 for a 35-page report. This tool generates a professional, but much less expensive, report in a week’s time.

Result: Our senior salespeople can now focus on opening new business while junior people use the Tool to gather information and build capacity with customers. They also learn what topics to cover and how to identify opportunities. In the first quarter we used the Tool, we uncovered 18 opportunities.

We can now forecast sales with our existing customers on a more predictable basis. We can better calculate the revenue stream with each customer, and we can help them define their budget.

The assessment speeds up the sales cycle because it can accelerate customers’ thinking. It shows us which customers are not planning anything and which are economically viable.

What it takes:

- Download the Your Business Solutions Roadmap Tool.
- Take time to train your staff.
- Determine target customers to approach with the tool.
- Keep a disciplined schedule of reaching out to existing customers.
- Ensure that your top consultants are mentoring junior sales reps.

More tips:

- When you conduct the audit, spend the day working through the entire organization.
- Combine the tool with a loyalty reward program to keep your top customers happy.

What it takes:

- Download the Your Business Solutions Roadmap Tool.
- Take time to train your staff.
- Determine target customers to approach with the tool.
- Keep a disciplined schedule of reaching out to existing customers.
- Ensure that your top consultants are mentoring junior sales reps.
On Customer Referrals

Customer evidence is paramount to our organization’s growth. Through the RSC Recognition and Rewards Program, we can generate revenue from existing customers while obtaining evidence and driving business within the organization or with new customers.

Our clients participate in offering:
- Phone references
- Reference letters
- Case studies
- Site visits
- Speaking engagements

Result:
Client referrals have come from several sources:
- The client: Referral of additional work with business units we have not worked with previously.
- RSC employee: Referral of cross team work. For example, if while working with the finance team and BI is mentioned as a need, we now have the opportunity to bring the BI team in for a discussion.
- Peers within the community. For example, in a reciprocal relationship such as with ISVs, we want the ISV to bring us in to work with accounts that may need our services.

What it takes:
- Set up a program that is defined with rewards commensurate with the referral.
- Have vehicles to communicate the referral program to this audience, including a Web overview of the referral program, multiple touches with a newsletter, a direct 3-D mailer, and face-to-face communication with clients while resources are on site.

More tips:
- The Recognition and Rewards Program can also be used as an effective negotiation tool. A prospect that wants a discount may be a compelling primary reference in return.
- The compensation for these referrals must be scalable depending on the quality of the information and conversion of the lead. We also must consider the recipient of the compensation. All referrals must receive acknowledgment at a minimum.
What we do: The vertical approach is part of our DNA. We group our customers by segment, and the account managers that work with them are knowledgeable about that sector or industry. We develop a marketing plan for the year where 100% of our customers are addressed in a vertical market, and we create special offers for those customers. We divide our sales department between Sales Account Managers in charge of new customers and Sales Account Managers who look after our present customers.

For our vertical market customers (hotels, airports, airlines, leisure), we hold big events twice a year with our experts in attendance. Usually we choose special attractions and not the classic conference room in a hotel; for example, we organized an event in the RCD Mallorca Stadium (Real Club Deportivo Mallorca, S.A.D.) which is a Spanish football team from Palma (Majorca) which currently plays in the Spanish first division. We also organized an event at a karting race, and after the presentations we invited the customers to take the karts out for a spin. We also offer events, tours, and even a wine tasting for customers.

We host eight to ten breakfast events per year and maintain regular communication with newsletters that include announcements of new products and content that our account managers feel would be valuable to their sector.

We have annual meetings with each customer and ask them to complete an annual satisfaction survey to measure our results and we create a special proposal for each customer.

Result: Due to our recognized expertise in verticals, we have extended our expertise into new geographies because our account managers have become well known. Thus, we’ve been able to expand to areas like Spain, Dominican Republic, Mexico, Latin America and Europe.

What it takes:

- Keep experts with deep knowledge in a particular industry on staff.
- Plan big events and be willing to invest in a significant sponsorship.
Renewals:
- Renewal reminders are sent to clients about 70 days before the due date with the plan options available to them. This is then followed by a personal phone call to review their needs and ensure that they are aligned to the correct annual plan. Invoices are then sent so that renewal occurs by due date.
- Do renewal reminders, client events twice a year, and monthly webcasts.

We have a very professional service plan renewal process; we have a referral and rewards program, and local user groups.

Events:
- Host lots of in-person events and some webinars. We foster both IT and financial relationships.
- Host monthly webinars to introduce new products, quarterly newsletters, renewal options provided 60+ days prior to renewal date that include Microsoft and third-party products, and heavily promote convergence.
- Host some customer events such as an annual gathering, send product updates, send quarterly customer newsletters, call monthly, send a BREP due date reminder, and schedule customer visits.

Training
- Have an in-house learning center for training classes.

Support
- Have a dedicated support team to handle user problems, renewal reminders, customer gathering, customer visitation, monthly newsletter, regular call to have an update about customer's condition.
- We run a support portal, reachable around the clock for our customers and with a four-hour response. Our consulting presents solutions that focus on the customer's needs regardless of sales.

Download “Your Business Solution Roadmap”
http://go.microsoft.com/?linkid=9044944
1. Review the quick presentation and demo
2. Prioritize your base, build your plan
3. Begin scheduling appointments
Establish your customer lifecycle communications. It might look something like this:

**Welcome.** Orient your customers to their benefits and introduce their customer care representative who will be their single point of contact. Make sure they are familiarized with the best ways to access and use their benefits on a daily basis.

**Use.** Customers who have taken full advantage of the benefits of their Business Ready Enhancement Plan are more likely to renew. Early in the customer’s service contract lifecycle, they should understand how to take advantage of their benefits – and you can be their guide.

**Envision.** This is the time for you to discuss their vision and get plans in place so you can deploy their next solution. Use the Business Capabilities Plan to help define “What’s our next project?” In many cases, customers already own the software and just need you to help them make full use of their capabilities.

**Renew.** Microsoft automatically sends notifications and 90 and 60 days prior to renewal lapse. If you’d like to own your own customer renewal communications, you must achieve an 85% renewal rate and opt to manage the process entirely yourself.

**Lapse.** If managed effectively within the first few months, 92% of those lapsed will renew within 180 days. So, the 180-day communication window is crucial!

4. Execute your plan. It might include a series of the following kinds of communications:

- Newsletters
- User groups
- Lunch & Learns
- Customer satisfaction evaluations
- Customer care surveys
- Customer advisory board meetings
- Executive lunches
- Customer conferences

5. Measure and revise

- Customer satisfaction and loyalty
- Customer references

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**Step by Step: Making It Happen in YOUR COMPANY**

1. **Assign your Existing Customer Champion.** Skills to look for:
   - Nurturing and observant
   - Good communication skills
   - Organized
   - Strong collaboration skills
   - Responsive
   - Committed long-term
   - People-oriented
   - Schedule-conscious
   - Able to understand and uncover revenue drivers

2. **Analyze your business and develop a plan (you may want to prioritize the five potential areas where you can focus selling your services and solutions):**

   - Renewals: Manage expiring Microsoft Dynamics Service Plan contracts as a leverage point.
   - Win-Backs: Bring lapsed Microsoft Dynamics Service Plan customers back onto a plan.
   - Up-Sell Support: Upgrade to Deluxe Business Ready Enhancement Plan and BRAP. This involves tracking support incidents and conveying the value of the new service plan.
   - Add-on Functionality: Expand a client’s technology capabilities.
   - Migrations to Business Ready Licensing: With Microsoft’s new licensing model, some customers get even more flexibility and reduced costs when they extend their Microsoft Dynamics footprint by migrating to Business Ready Licensing. Check with your PAM for more information about local availability.

3. **Prioritize customers and communications:**

   - A Customers (your top 20%): Personally managed via executive breakfasts, business reviews, and more.
   - B Customers (your middle 50%): Periodically contacted via e-mail, phone, national and local events.
   - C Customers (your bottom 30%): Managed as a group in one-to-many engagements such as local events, mailings, and newsletters.

4. **Prioritize your Existing Customer Champion.**

   - People-oriented
   - Schedule-conscious
   - Able to understand and uncover revenue drivers

5. **Analyze your business and develop a plan (you may want to prioritize the five potential areas where you can focus selling your services and solutions):**

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Partner Resources
(Some resources may be USA-only)

Marketing Guidance
Take a look at the Microsoft Dynamics Marketing Guide for Partners.

https://mbs.microsoft.com/partnersource/communities/marketing/resources/marketingcreativeresources/resourcguidev2.htm

Marketing Professional Community
Start here for single-source starting points for Microsoft Dynamics Resources:

https://mbs.microsoft.com/partnersource/communities/marketing/

Your Business Solution Roadmap tool
Helps you produce an implementation roadmap for your customers that business process with the right Microsoft Dynamics functionality and the people who need it.

https://mbs.microsoft.com/partnersource/marketing/campaigns/existingcustomer/unleash

Get on board with Sure Step:
Sure Step helps you minimize risk, improve customer satisfaction, and increase efficiency with easy-to-use implementation guidance and tools, proven best practices, and customizable templates.

https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/surestep/

Become an expert on service plans:
Learn more about the Microsoft Dynamics customer service plans and make it easier to renew your customers.

https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/

Take advantage of Partner Service Plans:
Learn how Microsoft can help you better support your customers by leveraging the benefits of a Partner Service Plan.

https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/partnerserviceplans/