



# Guide to Partnering



**Hello, I'm Pauline Durand,  
Partner Success Manager for  
Cloud9 Insight.**

We've put together this simple guide to partnering us so you can offer Microsoft Dynamics 365 Customer Relationship Management (CRM) system to your clients. This will allow you to protect and nurture your client base by providing new services, without any of the investment and risk of doing this on your own.

It's an opportunity to have more conversations with your clients about their needs, positioning your business as an expert advisor, without you having to upskill. All you need to do is put your trust in us to guide your client through planning, implementation, training and post-sales support. If you spot the opportunity, we'll do the rest. And, if your referral is successful, you could realistically make thousands passively in kickback commissions.

In the following pages, we set out some clear guidance on what you can get out of our Partnership Programme. We also advise you on how to spot leads and suggest some of the questions you should be asking your clients if you think Microsoft Dynamics 365 might be right for them. We also talk you through each of the modules offered as part of Microsoft Dynamics 365 to help you understand the opportunities.

But don't take our word for it! Throughout this guide, our friends and colleagues chip in to tell you why partnering could work for your business.

Don't hesitate to contact me at [\*\*pauline@cloud9insight.com\*\*](mailto:pauline@cloud9insight.com) if you need any more information about partnering with Cloud9 Insight.

Kind regards,

*Pauline Durand*

Pauline Durand  
Partner Success Manager at Cloud9 Insight



Cloud9 Insight

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01

# Why Become a Partner of Cloud9 Insight?

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At Cloud9 Insight we believe “**teamwork makes the dream work**” and by partnering with Cloud9 Insight, you could boost the service you give your clients, deepening your relationships. Through our Partnership Programme, we offer you the opportunity to increase your product offering with Microsoft Dynamics 365 Customer Relationship Management (CRM) system, **protecting and nurturing your client base**, without any of the investment or risk of doing this on your own.

# Who Are Cloud9 Insight and What Do We Do?

2015  
PRESIDENT'S CLUB  
*for Microsoft Dynamics*



**Exclusive Microsoft Dynamics  
365 Partner That Has  
Implemented 800+ Microsoft  
Dynamics 365 Solutions**



**SMB Market Specialist**



**Transparent Project and  
Budgeting approach**



**Microsoft Certified Business  
Change Consultants**



**Training and Knowledge  
Transfer**



**Post Project Client  
Success Care Package**



**We Cover the Whole  
of the UK and EMEA**

We are a specialist and expert Microsoft Dynamics 365 Gold Partner with 40 employees based in Brighton on the south coast of England. In just over 10 years, we've implemented over 800 Dynamic CRM solutions, each project having been delivered by our dedicated expert consultants. We don't offshore any services because we want to ensure high quality standards are consistently met with great communication. Your journey starts when you are onboarded by our Partner Success Manager, Pauline. When you spot an opportunity, you can share this with Pauline and she will initiate contact with the Sales team to understand more about your client's needs. Our talented Delivery team then works with you and your client to implement a solution and post project support from our Customer Success Team kicks in. We are known for our collaborative approach to working with partners. We will treat your clients with the utmost respect, providing free pre-sales and best practice advice and keeping you up to date, every step of the way.

Gold  
**Microsoft  
Partner**



# Why Microsoft Dynamics 365 for Your Clients?

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**MS Secure Cloud**



**Realtime Reporting  
D365 + Power BI**



**Scalable +  
Customisable**

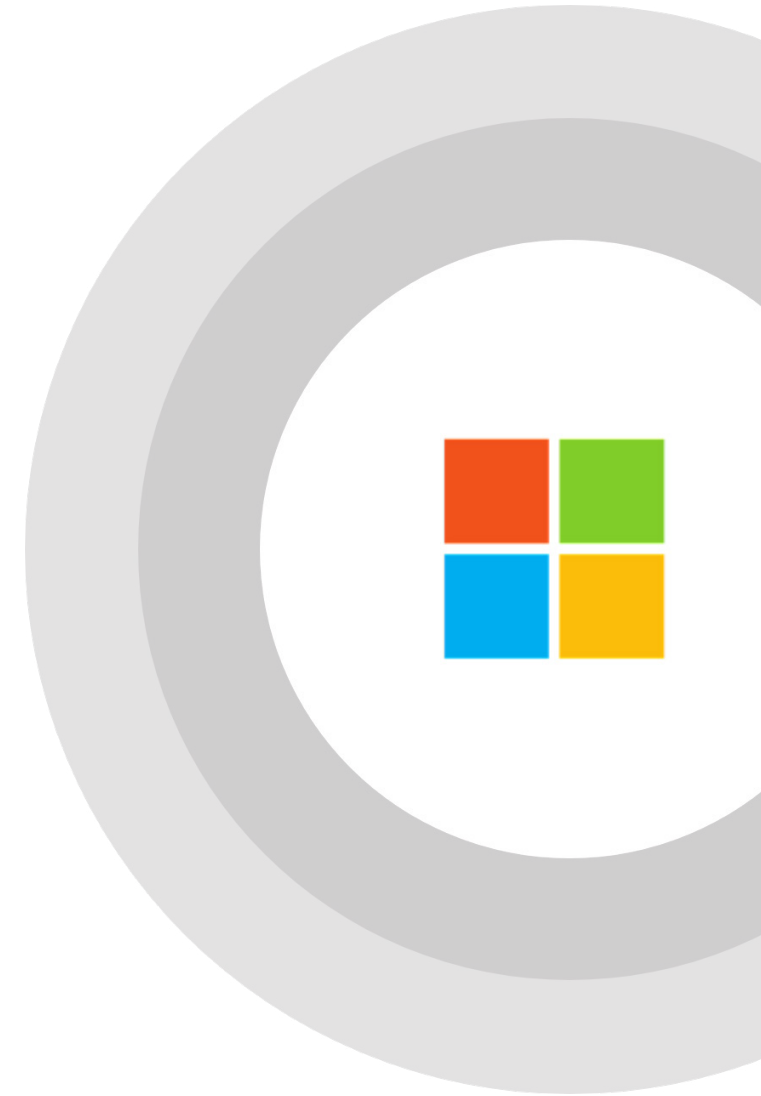


**Deep O365  
Integration**

First and foremost, Microsoft Dynamics 365 is part of the Microsoft Secure Cloud. The most common benefit we see from a CRM project is that it makes the best possible use of your data by giving you access to real time reporting, allowing you to understand the health of your company. Driving business change starts with better business insight and reporting. After successfully delivering more than 800 projects, our experience – coupled with best practice – tells us that it's best to start small and plan an incremental roadmap of capability and business change. From there, your clients can build out slowly, managing risk. This method drives quick return on investment for your clients, meaning they can get comfortable with the projects that are being delivered. Clients also often already understand Office 365 applications, including Teams, and so they appreciate the deep integrations Microsoft Dynamics 365 offers with those tools.

***“Cloud9 Insight are a partner I know I can depend on. Their passion for the products, industry expertise and transparency make them the perfect advocate for P2P (Partner to Partner). Plus it helps that they are just a great bunch of people”***

**Kathleen Parker**  
Territory Channel Manager Biz Apps  
Microsoft



# What's in It for You as a Partner?



## Diversify your portfolio

Offer Microsoft Dynamics 365



## New revenue stream

From £1k to £30k+ profit per project



## Free pre-sales

From our experienced team



## Retain licences

Build recurring licence revenue



## Increase wallet share

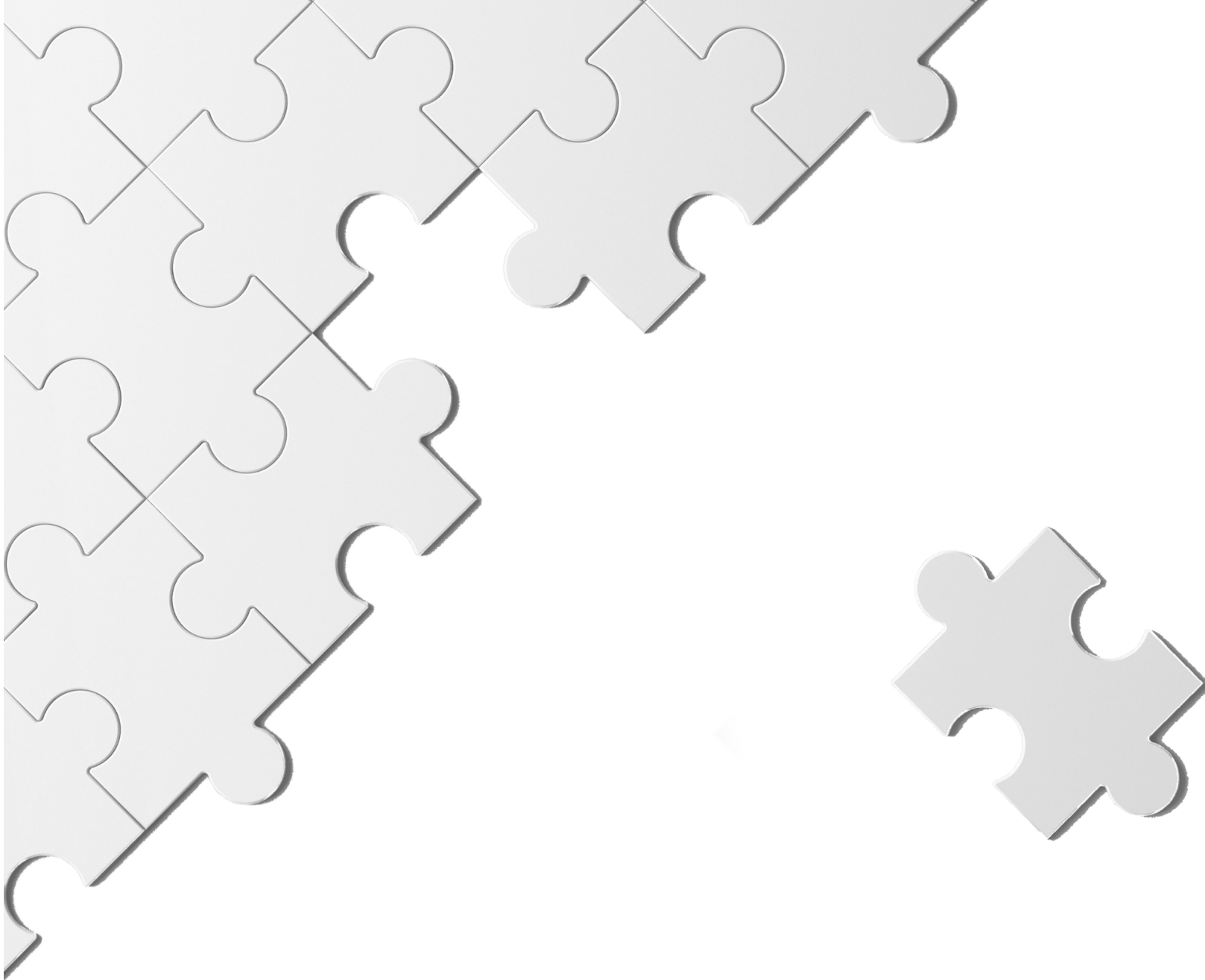
Microsoft Dynamics 365 is proven to increase Azure and other M365 usage



## Fast Track packages

Simple starter packs for quick and easy implementations

By growing your product offering, you're not only able to win more clients, but you're also able to achieve more with your existing clients and boost their interest and loyalty. By referring these leads to us, you could earn commission of anything from £1,000 to £30,000 from each project you introduce to us. Cloud9 Insight will offer – completely free pre-sales, delivered by our experienced team and we'll help and guide you and your client at every step. We can also work with you to create joint marketing campaigns or share disruptive CRM content for your website. It's not just about upfront revenue share; it's also about retaining the licence revenue. Moreover, Dynamics is proven to increase other Microsoft usage, such as Azure consumption and the Microsoft 365 suite. As well as increased recurring revenue and Microsoft licences recognition, this increased usage will also drive more project services for you.



02

# What Is Microsoft Dynamics 365?

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**Microsoft Dynamics 365 is a suite of modules** to support all aspects of a business. The following slides will provide an overview of what each module does, the main features, who would use it and the main competitor products - **perfect for identifying opportunities.** Each business can choose one or more modules for their business which as they grow, provide a fully connected solution. Cloud9 Insight would recommend starting with one or two modules and **growing into further modules when the time is right** and the client is seeing ROI from their Phase 1.



Sales



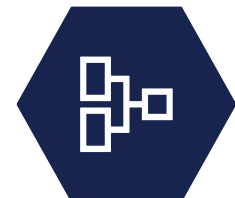
Customer Service



Marketing



Field Service



Project Operations

# Microsoft Dynamics 365 Modules



## Sales

Microsoft Dynamics 365 for Sales provides an easy-to-use, intuitive CRM platform for sales teams of all shapes and sizes. The user is greeted with a role-specific interactive dashboard, providing real time insights and analysis on their pipeline, accounts and daily tasks.

The process starts with the lead – tracking where it came from and its progress along a customisable process bar. Live reporting is always at your fingertips with Kanban and query list views presenting your data.

As the sale progresses, the user is prompted to categorise by forecast, and then to key metrics and numbers to drive accurate management information. Microsoft Dynamics 365 will support selling all types of products, and users can pick from control price lists. As they progress the sale, quote versions are tracked, and document templates ensure that brand guidelines are followed.

The interactive forecasting tool gives managers a true representation of the pipeline. They can see in a single view which team members are going to hit targets, where the gaps are, and all of the data that sits behind this report.



# Why Sales?



## Sales Features

- Sales Pipeline
- Product Catalogue
- Quotes/Orders
- Account Management
- Forecasting
- Reporting



## Sales Who is it for?

- Any business with a sales team
- Offers better visibility of customers
- Increases revenue and conversion rate



## Sales What could it replace?

- Salesforce
- HubSpot
- Zoho
- Sugar
- Act
- Capsule

# Microsoft Dynamics 365 Modules



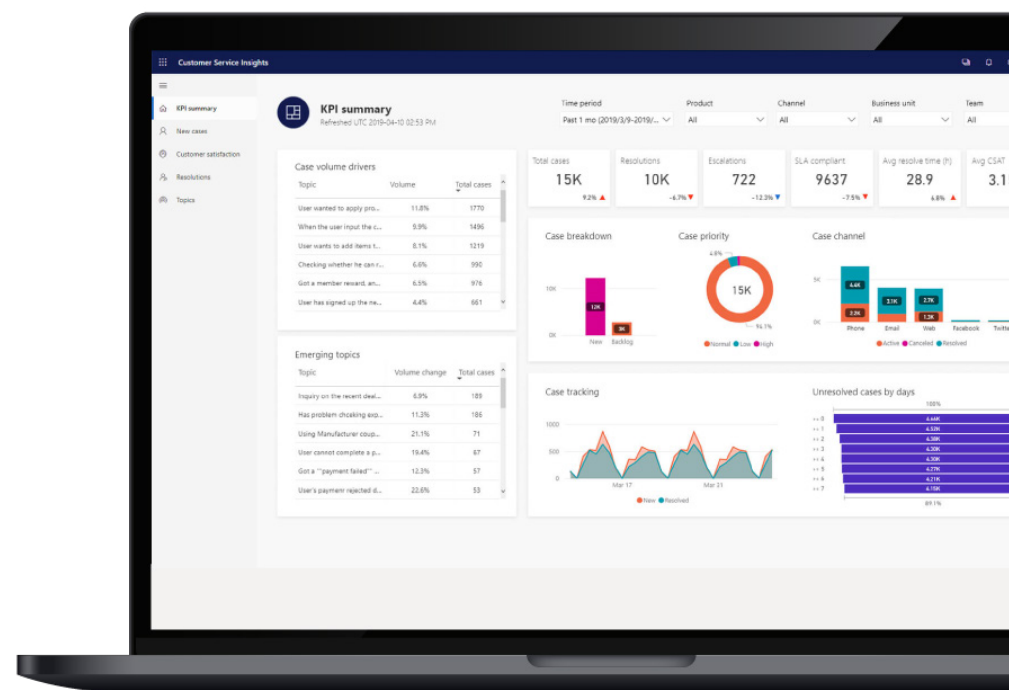
## Customer Service

Microsoft Dynamics 365 for Customer Service provides a service desk solution to enhance your customers' experiences through case and ticket management.

The user is greeted with a tailored, role-specific dashboard showing the important metrics and urgent task list. The case record is the central data point linking to the customer. The related devices or products, their case history, and also configurable process bar to ensure the right steps are followed all the way to resolution.

All capabilities present the user with internal and external knowledge articles to help speed up the problem solving, and you can even automate FAQ responses directly to the customer.

Throughout the journey, comms are tracked, including phone calls, emails and appointments that sync natively with Outlook. Cases can be auto created and routed into queues. And with SLAs and entitlement management, the case won't breach your promises to your client.



# Why Customer Service?



## Customer Service Features

- Case & Ticket Management
- Contracts & Entitlements
- SLAs
- Chatbot and Portal



## Customer Service Who is it for?

- Any business providing support
- Proactive customer service
- Support a product or service



## Customer Service What could it replace?

- Zendesk
- ConnectWise
- ServiceNow
- Zoho Desk

# Microsoft Dynamics 365 Modules



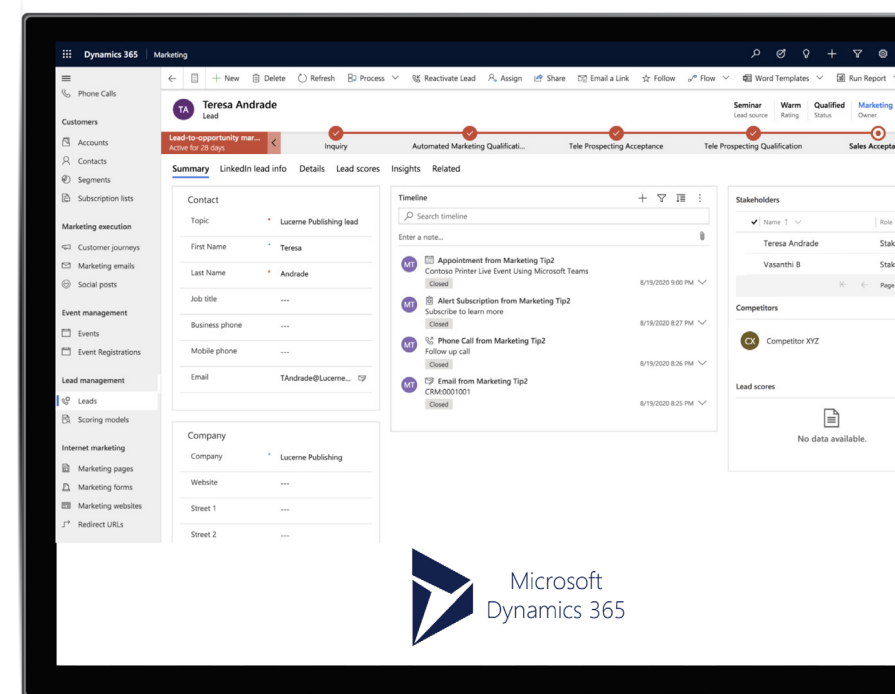
## Marketing

Attract and capture new leads to grow your marketing database with inbound marketing tools. From anonymous visitor to loyal customer, this module gives you valuable insights into audience behaviours on your website.

You can easily create landing pages and forms directly within Microsoft Dynamics 365 for a variety of marketing initiatives. You can also integrate the solution to the leading event platforms to track and measure registration, attendance and past participation, right in Microsoft Dynamics 365.

Lead management features allow you to consolidate leads from multiple channels and score and nurture them until they are sales-ready. The easy-to-use email and SMS editors and multiple sending methods make it simple to create and send emails.

Post to your company's Facebook, LinkedIn, Twitter and Instagram accounts from Microsoft Dynamics 365. Easily create and send surveys with the drag and drop survey editor. Campaign management tools enable you to plan and automate campaigns and report on the overall effectiveness of your marketing efforts. Use campaign tracking to see the number of participants that are currently in an automation, as well as the number of participants that have successfully passed through each step.

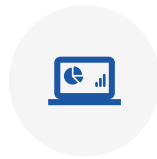


# Why Marketing?



## Marketing Features

- Email Marketing
- Campaign Automation
- Social
- Forms/Surveys
- Web Tracking



## Marketing Who is it for?

- Any business with a marketing team
- B2B or B2C engagement
- Driving new lead generation
- Interaction with existing contacts



## Marketing What could it replace?

- HubSpot
- MailChimp
- DotDigital
- Communigator
- Campaign Monitor
- Force24

# Microsoft Dynamics 365 Modules



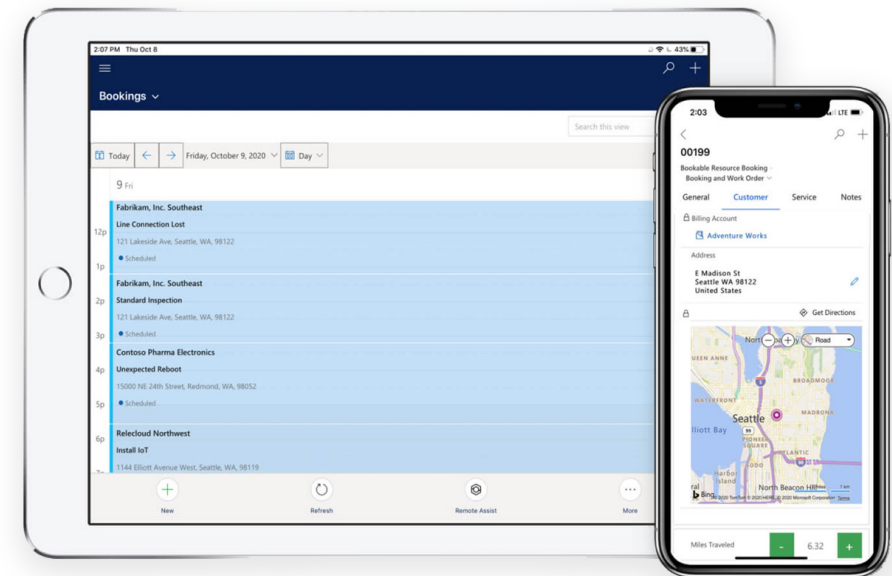
## Field Service

Microsoft Dynamics 365 for Field Service manages your mobile workforce to resolve service issues and deliver a first class customer service. The schedule board provides a live view of your workforce job statuses sets and resource availability.

Schedulers can drag and drop to change plans, and schedule new work orders using maps and filters to match the best person for the job. Each work order is linked to a customer with pre-populating incident type templates to ensure engineers are following a compliant task list.

Customer assets can be stored, and SLAs and entitlement managed to enable preventative service and scheduled maintenance on a timely basis. The mobile experience is rich but easy to use. Users can see their schedule and amend statuses. They can also view customer details and get directions while being GPS tracked back to the office.

Once they reach the job, the engineer can see their tasks, parts required and can complete the work by taking photos. All of this data drives live intelligent dashboards and reporting to power better decision making and, ultimately, enhanced customer experience.



# Why Field Service?



## Field Service Features

- Scheduling
- Resource management
- Work orders
- Timesheets and expenses
- Connected Internet of Things



## Field Service Who is it for?

- Any business with a field based service team
- Proactive and scheduled maintenance
- Enhance the customer experience
- Scheduling for increased efficiency of resources



## Field Service What could it replace?

- Jobber
- MIMS
- SimPRO

# Microsoft Dynamics 365 Modules



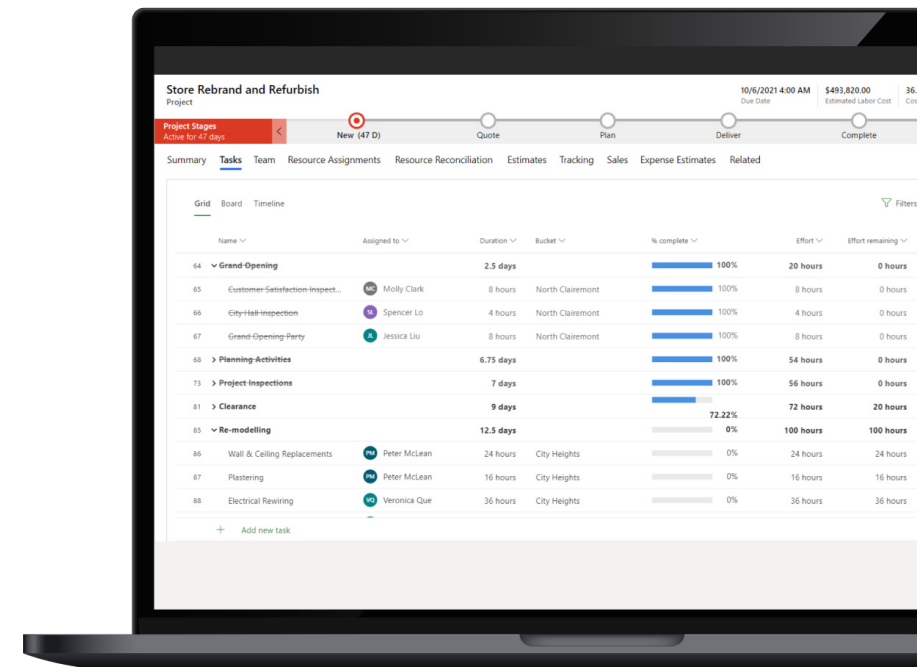
## Project Operations

Microsoft Dynamics 365 for Project Operations connects sales, resource management and project execution into one single application.

Sales opportunities go through the flow of prospecting, opportunities, and quoting – with constant analytics and assistance along the way. Once the quote is accepted, users can start planning the project with tasks, milestones, and resources, presented in a variety of visuals, including Gantt charts.

You can also see the agreed commercial estimates from the sale stage, including costs and bill rates. Each resource has their own skills, costs, and work hours. And the project managers are provided with the live board to schedule or move those resources.

As the project reaches completion, timesheets are entered and approved, while resources are reconciled and actuals entered to ensure maximum profitability, and the highest customer satisfaction.



# Why Project Operations?



## Project Operations Features

- Project Management
- Project Tasks/  
Milestones
- Scheduling
- Timesheets & Expenses
- Resource Management



## Project Operations Who is it for?

- Any business that is delivering projects
- Increase efficiency of project resources
- Deliver projects on time
- Increase collaboration between sales and project teams



## Project Operations What could it replace?

- Asana
- Basecamp
- Trello
- Jira
- Monday.com

03

# Success Stories

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# What Our Partners Say



*"One of the very best CRM services companies out there, with a great team."*

**Nigel Ridpath**  
Cowry Solutions



*"We love your team, they are responsive and positive in every way. Everything I hear about Cloud9 Insight is positive, not only from the team, but I have also received verbal feedback from our clients too."*

**Ian Brown**  
Insight



*"When thinking about partners to work with on Dynamics 365, Cloud9 Insight are first to mind.....They provide an excellent service to our partners and to their customers, always a positive experience which leaves our partners and me wanting to work more with the great people at Cloud9 Insight."*

**Mathew Batterbee**  
Ingram Micro Cloud



*"Partnering with Cloud9 Insight has been hugely successful with their can-do approach, high level of care and attention to detail. I find their team to be professional, knowledgeable, credible and responsive."*

*Partners can now create a new revenue stream and diversify their Microsoft portfolio without the need to invest heavily in building out a D365 practice. Their passion for the industry and technical abilities help partners and their clients adopt D365 CRM through implementation, training, and support."*

**Natalie McKay**  
Power Platform Team Lead  
Westcoast Cloud

# What Our Clients Say



**Microsoft**

Cloud9 develops a strong partner network to grow their Microsoft Dynamics 365 business

**Cloud9 Insight**

About Cloud9 Insight  
Cloud9 specializes in the implementation, training, and support of Dynamics 365 CRM and Office 365 to enable business transformation of SMEs. It offers strategic projects and Fast Track CRM for implementation.

**Microsoft products**  
Dynamics 365 Sales  
Sales  
Service  
Marketing  
Field Service  
Project Operations

**Industry**  
All

**Organization size**  
10-50

**Geography**  
UK & English-speaking markets across EMEA

**Dynamics 365 Partner since**  
2019

**Customer Outcomes**  
70% of new business revenue came from PDP in the last 12 months

**Microsoft Dynamics 365 shop expands offerings with Business Central integrations**

Cloud9 Insight designs and implements CRM solutions for small to mid-size companies using the full Microsoft Dynamics 365 Customer Engagement ecosystem—sales, marketing, customer service, project operations, and field service. Customers can choose from three different implementation options: the Strategic Project approach, which provides bespoke solutions for clients with an existing CRM or a complete set of requirements; Fast Track CRM, which offers a quick and cost-effective way for accounts with 20 or fewer users and no current CRM tool to implement Dynamics 365 and Micro CRM, which delivers a pre-configured solution to businesses with five or fewer users to get them running fast.


Over the past couple of years, the company has been exploring ways to increase its offerings while staying true to what the team does best. "Cloud9's core business has always been customer engagement, however more and more clients are demanding an end-to-end integrated solution that supports the complete lifecycle management of their clients," explained Carlene Jackson, CEO for Cloud9, "and Business Central, born in the cloud as part of Dynamics 365, is a natural choice thanks to its integration with Office 365 and Azure."

Today, the company works with Business Central partners through the Microsoft partner-to-partner network to deliver integrated solutions for mutual customers. At the same time, it is developing its own off-the-shelf integrated option to help Fast Track CRM customers get started even faster. "The ability to integrate CRM with Business Central to support end-to-end customer interactions provides a unique proposition that not only sets Microsoft ahead of its competitors but also sets us, as Microsoft partners, ahead of our competitors as well," said Carlene Jackson.

**Customer Outcomes**  
70% of new business revenue came from PDP in the last 12 months

**“The ability to integrate Dynamics 365 Sales with Business Central to support end-to-end customer interactions provides a unique proposition that not only sets Microsoft ahead of its competitors but also sets us, as Microsoft partners, ahead of our competitors as well.”**  
—Carlene Jackson, CEO

Read Case Study



**Cloud9 Insight**

**Business Transformation Stories**

**ClearCourse**

**Joshua Rowe**  
Head of Mergers and Acquisitions  
ClearCourse Partnership

**“Cloud9 was quick and collaborative. For us, speed was of the essence, and they brought that. [Dynamics] is absolutely imperative for the success of our team.”**



**Cloud9 Insight**

**Business Transformation Stories**

**ACQUIS**

**James Rudolf**  
Chief Commercial Officer  
Acquis Insurance Management

**“Cloud9 Insight helped us to deliver a successful D365 implementation which will add huge value to our business. Their understanding of our objectives, a tried and tested approach, lots of experience and insight were all very beneficial..”**

## Business Transformation Stories



Jeff Alexander  
Chief Executive  
Gatwick Diamond Business



*"From the initial process, to design stage, implementation and through to ongoing support, Cloud9 has delivered exactly as promised. We've found the Cloud9 team very approachable on a personal level – they're fun to work with, and that makes a big difference in any work environment."*

## Business Transformation Stories



Kate Shand & Chris Tiernan  
Enjoy Education



*"We were impressed with Cloud9 from the beginning. They were very quick to respond to questions, they took the time to understand our requirements, and they just 'got' it."*

## Business Transformation Stories



Robert Thompson  
CEO  
See Group



*"The benefits of the CRM are multifaceted. One of the key things for me is the CRM is just one cog in the wheel in terms of bringing together the various different software within the Microsoft package, which obviously has a great benefit to the business operation..."*

***“The key to our success wasn’t just the products robust features and flexibility, but the extremely competent & very friendly support team that Cloud9 Insight provided that was truly focused on addressing our needs.”***

**Rushan Pathirana**

Head of Business Intelligence

Genuine Solutions



***“Cloud9 were patient, informative and thorough in understanding requirements and ensuring that everyone in the room has a voice. We had a very successful project”***

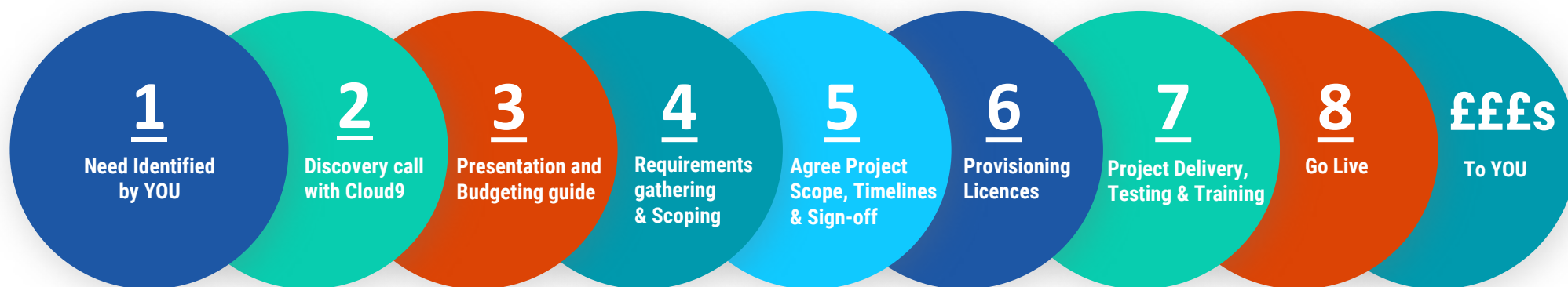
**Roger Bateman**  
Project Manager  
Carers Support



04

# How to Refer a Lead to Cloud9 Insight

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## 1 Need Identified by YOU

The first thing for you to do is identify the opportunity. A great way to do this is by asking the questions that we've set out in the next section (overleaf), which will help you understand whether one of your clients or prospects could be interested in Microsoft Dynamics 365. If you spot an opportunity, that's when you would get in touch with us here at Cloud9 Insight.

## 2 Discovery Call with Cloud9

We would then take on the referral, ensuring that the whole process takes as little of your time as possible, while still keeping you in the picture and in control. Our first job would be to work with you to organise a discovery call to ascertain the requirements of your client, to understand elements like budget and desired timelines, and to agree the right approach for their project.

## 3 Presentation and Budgeting Guide

Once we'd gathered this initial information, we would give a presentation to your client showing them key solutions that they might find useful to deliver on their objectives. We'd also provide them with our transparent budgeting guide, outlining the project costs, such as licences, different support options, and also implementation estimates.

## 4 Requirements Gathering & Scoping

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At this point, your client would usually be keen to proceed so we would start doing a paid for Requirements Gathering and Scoping. This would involve drilling into the fine detail of elements like the preferred data model, reporting requirements, and process support needs. These workshops would be delivered with the client and the output would be a detailed requirements document in scope.

## 7 Project Delivery, Testing & Training

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Following licence provisioning, we start the project. The implementation includes building the solution, mid-project reviews, data migration and system testing. Once your client is happy with the core solution, we move to User Acceptance Testing (UAT) where the client does rigorous testing to confirm the solution meets their Phase 1 requirements ahead of Go Live. Throughout the project, training is provided including Pre-UAT, bespoke video creation and go-live training which can be delivered through end-user, super-user and train the trainer methods.

## 5 Agree Project Scope, Timeline & Sign-off

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At this point, we would review what we'd planned up to that point with your client, make sure they were absolutely happy that the project met their objectives, agree timelines and then sign off the project scope in order to start the project.

## 8 Go Live!

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Finally, we would support your client through their Go Live. This is when our post-project support can make all the difference to your client's level of satisfaction. We have a comprehensive Client Success Care Package that would ensure they have access to experienced consultants – and, if necessary, training – giving you and your client peace of mind and ad hoc support as required.

## 6 Provisioning Licences

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In terms of provisioning Microsoft Dynamics 365 licences to your clients, you are the decision maker. You are welcome to provision the Dynamics licences to your clients, which will increase your recurring revenue and Microsoft recognition. Furthermore, this won't affect your clients seamless experience as you can simply add the Dynamics licences to their monthly Microsoft bill. Or, if you'd like us to take care of it, then that's fine too!

## £££s to YOU

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On completion of that project, we would organise the referral kickbacks or if it had been arranged through a white label model, then these margins would have already been acquired by yourselves through project transaction. As a reminder, a single referral could realistically earn you anything from £1,000 to £30,000 in commission.

05

# Good Questions To Ask A Prospect

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# Some Good Questions to Ask a Prospect



## Are you using Microsoft Office 365?

This one sounds obvious, but we've seen a real trend that shows clients already using Office 365 converting at a significantly higher rate to using Microsoft Dynamics 365 than those who aren't. This is probably because of the fantastic integrations with tools like Outlook, Teams, SharePoint, and various other Office 365 tools.



## How do you use your data to grow your business?

This is important to understand not only what data your client has – but whether they're using that data. Typically, businesses use data for activities like tailored marketing communications, customer updates and to understand trends on what's selling and who their customers are.



## Where do you store your data?

This is a really important question to ask to get your client or prospect to think about where their data is. It also helps us to understand what systems and processes we might be replacing with the new Microsoft Dynamics 365 world.



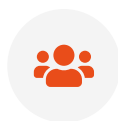
## Where do you see opportunities to improve your systems?

The idea of this question isn't to be negative, but to try and draw out some of the challenges and pains that your clients have with their current process and infrastructure setup. This is the opportunity for us to understand what the improvements are that we need to make in order to get the all-important client buy-in.



## How many users would you have?

Again, this sounds like an obvious question, but it's important for us because it helps us understand how big or small your client's relevant teams are. Often there will be tens, hundreds or even thousands of Office 365 users at a company but, at the same time, the number of CRM users will be far fewer. So trying to think about who would actually use the Microsoft Dynamics 365 CRM solution is important.



## What business functions would you like supported?

As you saw earlier in this guide, there are several modules of Microsoft Dynamics 365. So asking the customer what functions or teams they need supported by a new solution is a good way of helping us match the right module to their needs.



## When are you looking to have a new system in place?

This question is an invitation to the prospect to start thinking about when they actually want to go live with the new system. They might have a point in time that we need to be aware of when we're starting to build out what a project might look like.

Visit our [exclusive private Partner Channel](#) which has all the videos you need to initiate great conversations.



**Partnering for Success  
With Cloud9 Insight &  
Microsoft Dynamics 365**



# Thank You!



*Find out more about partnering with  
Cloud9 Insight by contacting me at:*

*Pauline Durand*

Pauline Durand  
Partner Success Manager at Cloud9 Insight

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[Pauline@cloud9insight.com](mailto:Pauline@cloud9insight.com)

# For More Information

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