




 Cloud9  
University

Mini Sales MBA for  
Microsoft Dynamics 365

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# WELCOME

## We are Cloud9 University: The Learning Centre for Digital Skills

Cloud9 University is offering a joint initiative with Ingram Micro over 12 weeks to educate busy salespeople to sell Microsoft Dynamics 365 to business leaders in a credible, consultative manner.

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There has never been a better time to sell Microsoft Dynamics 365. Use is exploding and margins are high for resellers. Yet the huge market of UK businesses using Modern Workplace is still almost untapped with only 2% also using Dynamics. Therefore, businesses in the Microsoft Partner Channel need to be engaged in marketing and selling Dynamics.

Welcome to Cloud9 University.

Brought to you by Ingram Micro and Cloud9 Insight



# Introduction

## The Purpose of Initiative

- To enable the sustained growth of the technology ecosystem within the Partner Channel
- Engendering a business-led approach to sales – one that focuses on business outcomes
- Creating a highly-skilled and loyal sales workforce
- To help the existing Sales Channel identify new opportunities within existing client base



By Carlene Jackson  
CEO at Cloud9 University



The opportunity for businesses, particularly those in I.T., to offer Microsoft Dynamics 365 to their customers and clients is well-known. And a view has proliferated that if partners are taught how to use the software, then they will be able to sell it.

In reality, it is business conversations, focused on strategic goals, that will persuade decision-makers to embark on a CRM implementation, spreading usage of Dynamics throughout the UK economy. And while knowledge of products is important, partners need to know about so much more.

The challenge for Microsoft, distributors, managed service providers (MSPs) and re-sellers is that tech sales people in their partner networks often do not understand how to have those business conversations to sell cloud solutions.

And, while there are many courses in existence that can help people become functional consultants in Dynamics, there are few that enable businesses to explain to their B2B customers why they should implement the software. Instead, they often focus on preparing people for exams.



## Approach

Cloud9 University's Mini Sales MBA in Microsoft Dynamics 365 offers a structured course in selling the CRM solution.

The 12-week course is split into four modules, covering 'advanced selling skills', 'the Microsoft product ecosystem', 'understanding your client' and 'budgeting and contracting'. We have adopted the Catalyst methodology as part of the course content so it aligns with the recommended Microsoft strategy.

Each week, students watch two 30-40 minute pre-recorded lessons at a dedicated password-protected online platform, at a time convenient to them.

They also attend a 90-minute live group tutorial each week, during which they are encouraged to participate in group conversations, engage with the tutor and make professional contact with fellow students.

Live tutorials will comprise of a group review of 'homework', and discussion of a mock client case study (see overleaf). In addition to these activities, students will be expected to partake in directed self-learning, incorporating Microsoft Learn content, for between one and two hours per week.

All live sessions will be recorded and made available for access by the learners and all tools and course materials are available to students throughout the course.

There are two assessments over the 12 weeks, including Microsoft's Fundamentals exam and a Cloud9 assessment, leading to recognised Cloud9 certifications.

In order to ensure the learnings from the course are transferrable from paying attendees to colleagues who have not attended the course, a coursebook based on the content will be published.\*

This will be priced at £19.95 per copy and will serve as a manual for Microsoft Channel sales professionals, covering in text and images the sales topics covered during the course.

\*Expected to be available in mid-2023

## Client Case Study

Respecting client confidentiality, our tutors will refer throughout the tutorials to a recent sales and deployment of Microsoft Dynamics 365 by Cloud9 Insight at a veterinary technology equipment manufacturer.

This firm had a new product launching and its internal systems weren't ready for growth. It also had siloed teams of Sales, Service, Installation and Marketing. They implemented a Microsoft Dynamics 365 in five phases:

- **Phase 1a:** Dynamics 365 for Sales
- **Phase 1b:** Marketing integration with Hubspot
- **Phase 2:** Dynamics 365 for Service
- **Phase 3:** Dynamics 365 Field Service
- **Phase 4:** PowerApps Portal
- **Phase 5:** Omnichannel for Customer Service

Results included:

- A seamless solution with three Dynamics 365 modules and two integrations
- Omnichannel service for their clients
- Successful product launch and business growth

## Who Should Enrol?

Experienced sales professionals from MSPs, indirects and other business partners interested in selling Dynamics.

Sales professionals keen to have more strategic conversations with their clients and sell Dynamics.

# Profile of a Typical Student



**Name:** Jake Harris  
**Age:** 28

**Professional role:** Senior Sales Manager at a Managed Services Provider (MSP)

## Narrative

Jake graduated from university five years ago and went straight into a sales role. He has since gained a solid amount of experience selling Modern Workplace solutions at an MSP but knows little about Microsoft Dynamics 365. Currently, Jake's working day consists of motivating and managing a sales team, building a pipeline of new clients, working with existing customers, sales presentations, networking and prospecting.

Jake is a strong advocate of digital transformation. His key concern at work is customer retention and hitting his sales targets. He appreciates that gross margin on Modern Workplace is small. He would be interested in any training that would enable him to increase that margin. However, he is turned off by courses that seem overly technical and prefers to get his training in-person, including online, rather than from a book. Jargon is also a turn-off. Easy-to-understand pricing is key – Jake wants to be confident he can make money on any product he sells.



## Structure at a Glance

The course is split into four modules, as per the graphic below. It begins with "Understanding the Microsoft Product Ecosystem". In this first section, students are introduced to a whole range of Microsoft tools so they understand the wider context in which they are selling Dynamics. This will include learning how Dynamics might integrate with tech products their client already uses, as well as how Dynamics can address their client's needs.

Next, comes Module 2: a tour through some powerful "Advanced Selling Skills". At this point, our tutors introduce students to tools and methodologies used by accomplished and effective sales professionals. They are also taught advanced techniques to identify and close opportunities.

Participants, even those with years of experience in Sales, are unlikely to have encountered some of the tips, tricks and techniques taught in this module at any point in their careers. This includes research methods, understanding client and sector vocabulary, marketplace trends.

The third module addresses the challenge that attendees might have become used to speaking to their prospects and clients at a technical level, and teaches them instead to understand their clients' needs.




Finally, organisations reselling software can sometimes put themselves at risk if they are not properly managing client expectations and are not precise in their contracting. The fourth module captures best practice around budgeting and contracting.

Module 1	Module 2	Module 3	Module 4
Understanding the Microsoft Product Ecosystem	Advanced Selling Skills	Understanding your Client	Budgeting/ Contracting
	Cloud9 Assessment		Microsoft Fundamentals




Please see overleaf for week-by-week detail on the course content. An overview of the 12 weeks is illustrated in the graphic on page 8.






## Understanding the Microsoft Product Ecosystem

-  **Week 1**
  - Microsoft Product Ecosystem
  - Introduction to Licensing
-  **Week 2**
  - Dynamics for Sales & Marketing + ClickDimensions
  - Service and Field Service
  - Project and ERP
-  **Week 3**
  - Preparation for Fundamentals Exam

## Advanced Selling

-  **Week 4**
  - Solution Selling
  - Strategic Sales Planning
-  **Week 5**
  - Understanding Client Environment pt.1
  - Understanding Client Environment pt.2
-  **Week 6**
  - Objective Handling and Coaching Skills
  - Advanced Closing Techniques

## Understanding Your Client

-  **Week 7**
  - Marketing for Sales
  - Preparing & Executing Sales Introduction
-  **Week 8**
  - Prep & Executing Presentation pt. 1
  - Prep & Executing Presentation pt. 2
-  **Week 9**
  - Understanding Project & Buying Journey
  - Customer Project Life Cycle & Securing References
  - Key Account Management

## Budgeting/Contracting

-  **Week 10**
  - Organisational Change Management
  - Understanding Project Components & Complexity
-  **Week 11**
  - Contracting & Legal
-  **Week 12**
  - Ingram Resources
  - Budgeting and Cost Modelling

Course length:  
12 weeks

Format: 2 x pre-recorded lessons per week, each 30 to 40 mins (60 - 80 mins in total)

60 - 90 min live tutorial per week

Microsoft Fundamentals certification & Cloud9 Mini Sales MBA certification




For more information, email [bizapps@ingrammicro.com](mailto:bizapps@ingrammicro.com)

## Detailed Course Content









### Week One

**Module:** Understanding the Microsoft Product Ecosystem

**Lesson one:** Microsoft Product Ecosystem

-  Overview of the Microsoft product ecosystem
-  The Dynamics family
-  Introduction to Power Platform and how clients are using

**Lesson two:** Introduction to licensing

-  Options for buying licensing (same as Modern Workplace)
-  'Base and attach' approach
-  'Land and expand' approach
-  Common licensing FAQs (examples: Trust Centre, cancelling licences/ notice period, global admin)
-  Management of upgrades
-  Ongoing product support available
-  GDPR FAQs
-  Licences required during project



## Week Two

**Module:** Understanding the Microsoft Product Ecosystem

**Lesson three:** Dynamics for Sales, and Marketing, plus ClickDimensions

- Core business capabilities / needs relating to products below
- Sales
- Marketing
- ClickDimensions
- Competitor products

**Lesson four:** Service and Field Service

- Core business capabilities / needs relating to products below
- Service
- Field Service
- Competitors

**Lesson five:** Project and ERP

- Core business capabilities / needs relating to products below
- Project Lite (Cloud9 IP)
- Business Central
- F&O
- Competitors

## Week Three

**Module:** Understanding the Microsoft Product Ecosystem

**Lesson six:** Preparing for the Fundamentals exam

- Overview of Microsoft Learn Fundamentals course content
- Example questions
- Preparing for your exam

## Week Four

**Module:** Advanced Selling

**Lesson seven:** Solution Selling

- Solution-selling
- Understanding where the customer is in the buying cycle
- Understanding the P2P model and how to leverage, including commercial wins.

**Lesson eight:** Strategic Sales Planning

- Industry trends and language (with examples)
- PESTLE analysis of external factors likely to impact your target sector  
– and sources of free information / sector insights
- Client competitive analysis and benchmarking
- Understanding clients' business model, value chain, and strategic objectives

# Online Learning



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## Week Five

**Module:** Advanced Selling

**Lesson nine:** Understanding Client Environment pt.1

- 🎓 Project stakeholder mapping
- 🎓 KPIs / objectives
- 🎓 Understanding client project goals
  - ROI – business case and perceived benefits

**Lesson ten:** Understanding Client Environment pt.2

- 🎓 “Wow” moments during the sales cycle to aid conversion
- 🎓 Influencing decision makers and budget holders
- 🎓 Value-based pricing
- 🎓 What’s in it for the client?
- 🎓 Identifying compelling events

## Week Six

**Module:** Advanced Selling

**Lesson eleven:** Objective Handling and Coaching Skills

- 🎓 Objection handling
- 🎓 Client coaching
- 🎓 Challenging clients’ perceptions
- 🎓 Adding value during the client buying cycle
- 🎓 Use of questions to uncover need and drive decision-making

**Lesson twelve:** Advanced Closing Techniques

- 🎓 Understanding emotional drivers for decision-making



## Week Seven

**Module:** Understanding Your Client

**Lesson thirteen:** Marketing Dynamics

- 📘 The difference between sales and marketing
- 📘 A campaign framework
- 📘 Going niche
- 📘 Building a landing page – structure and key messages
- 📘 Email marketing
- 📘 Assessing marketing R.O.I.

**Lesson fourteen:** Preparing & Executing Sales Introduction

- 📘 CRM Maturity Roadmap
- 📘 Understanding High Level Requirements
- 📘 First meeting follow-up to increase conversion

## Week Eight

**Module:** Understanding Your Client

**Lesson fifteen:** Preparing & executing your sales presentation – part one

- 📘 Preparing for a client presentation
- 📘 Solution ROI
- 📘 How to add value to the customer's product planning
- 📘 Catalyst framework

**Lesson sixteen:** Preparing & executing your sales presentation – part two

- 📘 "Demo To Win"
- 📘 Catalyst framework

## Week Nine

**Module:** Understanding Your Client

**Lesson seventeen:** Understanding Project & Buying Journey

- 📘 Project methodology
- 📘 Waterfall versus Agile, Sprints approach
- 📘 Gaining client commitment
- 📘 RACI / risk management

**Lesson eighteen:** Customer Project Life Cycle & Securing References

- 📘 How to structure the customer project life cycle to avoid litigation
- 📘 Project governance
- 📘 How to gain successful client references

**Lesson nineteen:** Key Account Management

- 📘 Optimisation review
- 📘 Strategic Account Management
- 📘 Preparing and undertaking a business healthcheck with clients to identify new opportunities
- 📘 Maximising future phases





## Week Ten

**Module:** Budgeting and Contracting

**Lesson twenty:** Organisational Change Management

- 🎓 Managing business change
- 🎓 Managing digital transformation
- 🎓 Understanding end user training strategies
- 🎓 Change adoption curve
- 🎓 Rallying the stakeholders and cascading vision to all employees
- 🎓 Preparing for requirements
- 🎓 Identifying what needs to change to achieve future state vision
- 🎓 Overview of PROSCI methodology

**Lesson twenty-one:** Understanding Project Components & Complexity

- 🎓 Value Stream Mapping
- 🎓 Typical areas of project complexity and how they impact budgets and commercials
- 🎓 A guide to the Catalyst training course

## Week Eleven

**Module:** Budgeting and Contracting

**Lesson twenty-two:** Contracting & Legal

- 🎓 Essential sales skills for contracting and legal understanding
- 🎓 Ensuring successful project sign-off

## Week Twelve

**Module:** Budgeting and Contracting

**Lesson twenty-three:** Budgeting and cost modelling

- 🎓 Introduction to budgeting and cost modelling for your client's project
- 🎓 Funding
- 🎓 ECIF
- 🎓 Catalyst

**Lesson twenty-four:** Course recap and Ingram Resources

- 🎓 Course recap
- 🎓 Ingram Micro resources to grow your Dynamics sales
- 🎓 Where to find further information and tools used during the sales process.



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coming soon!**



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