Cloud9 **Learn**

Mini Sales MBA for Microsoft Dynamics 365

Cloud9 Insight

Cloud9 Learn

WELCOME

We are Cloud9 Learn: The Learning Centre for Digital Skills

Cloud9 Learn is here to educate busy salespeople on how to sell Microsoft Dynamics 365 to business leaders in a credible, consultative manner.

Contents

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 365, to support clients with sales, marketing, and customer service.

Welcome to Cloud9 Learn.

Brought to you by Cloud9 Insight, an Accredited Microsoft Solutions Partner for Business Applications

Cloud9 Insight

Microsoft
Solutions Partner
Business Applications

Introduction

- To enable the sustained growth of the technology ecosystem within the Partner Channel

- To create a consultative 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 its existing client base for Dynamics 365

By Carlene Jackson
CEO at Cloud9 Learn

The opportunity for Microsoft Partners to offer Microsoft Dynamics 365 to their customers and clients is well-known. Evidence has shown that if partners are taught how to spot opportunities and take a business-led approach to selling, it can create significant up-selling opportunities.

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. While knowledge of products is important, partners need to know about so much more.

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

Whilst 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 Dynamics 365. Instead, they often focus on preparing people for exams. At Cloud9 we take a different approach.

Client Case Study

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

This firm had a new product launch and its internal systems were not able to support their increase in scale. They also had siloed teams of Sales, Service, Installation and Marketing. They serve as a great case study as they have adopted many of the Dynamics family of solutions. The client 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

Clients results achieved 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 and from Sales Managers, indirect and other business partners interested in selling Dynamics or setting up a Dynamics 365 practice.

- Sales professionals keen to have more strategic conversations with their clients and sell Dynamics 365.

Approach

Cloud9 Learn'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'.

Each week, you will watch pre-recorded lessons at a dedicated password-protected online platform, at a time convenient to you. A monthly group tutorial will also take place, during which you are encouraged to participate in group conversations, engage with your tutor, ask questions and make professional contact with fellow students.

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.

The course incorporates elements of MBA Content and best practice sales approaches as well as tools used to support Coud9's sales success.

Profile of a Typical Student

Name: Jake Harris
Age: 28
Professional role: Senior Sales Manager at a Managed Service 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 off-putting. Jake wants to follow a proven method of selling Dynamics 365.

Structure at a Glance

The course is split into four modules, as per the graphic below. You will be introduced to tools and methodologies used by accomplished and effective Dynamics sales professionals and taught to identify and close opportunities.

It begins with "Understanding the Microsoft Product Ecosystem" so you can understand the wider context in which you are selling Dynamics.

Module 2 covers "Advanced Selling Skills". Many sales professionals may not have attended formal sales training in their careers.

This Module will include learning how Dynamics might integrate with tech products your client already uses, as well as how Dynamics can address your client's needs.

The third module guides learners in having better quality business as opposed to product and technical conversations with clients.

This module helps sellers relate better to your clients and clients industry pain points. It includes research methods and understanding client and sector vocabulary, marketplace trends.

Finally, the fourth module captures best practice around budgeting and contracting. Organisations reselling software can sometimes put themselves at risk if they are not properly managing client expectations and are not professional for projects contracting.

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

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

Module 1
Understanding the Microsoft Product Ecosystem

- Microsoft Product Ecosystem
- Introduction to Dynamics 365 Licensing

- Features and benefits of Dynamics for Sales and Marketing + ClickDimensions
- Service and Field Service
- Project and ERP

Module 2
Advanced Selling Skills

- Introduction to Solution Selling
- Strategic Sales Planning

- Understanding Client Environment pt.1
- Understanding Client Environment pt.2

- Objective Handling and Coaching Skills
- Advanced Closing Techniques

Module 3
Understanding Your Client

- Marketing for Sales
- Preparing and Executing Sales Introduction

- Prep and Executing Presentation pt. 1
- Prep and Executing Presentation pt. 2

- Understanding Project and Buying Journey
- Customer project life cycle and securing references
- Key Account Management

Module 4
Budgeting and Contracting

- Organisational Change Management
- Understanding Project Components & Complexity

- Contracting & Legal

- Budgeting and Cost Modelling

Course length:
12 weeks

Cloud9 Mini Sales
MBA certification

For more information, email
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Detailed Course Content

Module 1
Module Title: Understanding the Microsoft Product Ecosystem
Lesson 1: Microsoft Product Ecosystem

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

Lesson 2: 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**

Module 2

Module Title: Advanced Selling Skills

Lesson 3: Dynamics for Sales, and Marketing, plus ClickDimensions

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

Lesson 4: Service and Field Service

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

Lesson 5: Project and ERP

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

Lesson 6: Strategic Sales Planning

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

Lesson 7: 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**

Lesson 8: Understanding Client Environment pt.1

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

Lesson 9: 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**

Lesson 10: 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 11: Advanced Closing Techniques

- **Understanding emotional drivers for decision-making**

Module 3
Module Title: Understanding Your Client
Lesson 12: 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 13: Preparing and Executing Sales Introduction

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

Lesson 14: Preparing and executing your sales presentation – part one

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

Lesson 15: Preparing and Executing Sales Introduction

- **"Demo To Win"**

Lesson 16: Understanding Project & Buying Journey

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

Lesson 17: Customer Project Life Cycle and Securing References

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

Lesson 18: Key Account Management

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

Module 4
Module Title: Budgeting and Contracting
Lesson 19: 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 20: 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**

Lesson 21: Contracting and Legal

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

Lesson 22: Budgeting and cost modelling

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

Lesson 23: Course recap

- **Course recap**
- **Where to find further information and tools used during the sales process.**

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More courses coming soon!

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www.cloud9insight.com/learn/