

# Monthly Recurring Revenue with None of the Work!

## What You Do:

- Keep doing what you do best
- Guide Clients with strategy
- Expand your service offerings
- Build deeper relationships with your clients
- Refer Clients
- Invest in your core business

## What We Do:

- Provide you with information, training and tools to help you find Dynamics Opportunities
- Spend time getting to know your client's business
- Design custom solutions using D365
- Implement and Support Custom Dynamics Solutions

## Benefits For You:

- Protect your clients from looking for a Dynamics solution elsewhere.
- There is no cost to you
- Monthly revenue share based upon gross monthly billing
- The MSP can hold the licenses
- You have a partner 100% focused on delivering business apps to your clients

## Client Project Flow:



### Client Discovery:

- Understanding client need and confirm if D365 is a fit



### Demo:

- System overview by Solution Architect (SA): includes pre-demo questionnaire if applicable.



### Roadmap:

- Client wants to move forward and quote is provided and opportunity won/invoice generated.
- Project created and ISV demos scheduled.



### Solution Overview:

- Solutions Overview document created.
- Document reviewed.
- Client agrees to final Solution Overview.



### Statement of Work:

- Create project opportunity with 3<sup>rd</sup> party products.
- Statement of Work/Quote sent to the client.
- Statement of Work approved.



### Project:

- Project kick-off meeting scheduled by PM. Implementation by PM and Project Team.
- Go live!



### Project Handoff:

- Hand off to Client Success Team/Support Team.

# Microsoft Dynamics 365 Business Application Lead Qualification

**Purpose:** Use this lead qualification worksheet to evaluate if the client is a potential fit for Dynamics 365.

## Pre-Qualification

- What industry is this prospect in?
- What geographical area is the business' focus?
- What is the organization's annual revenue?
- How many employees does the organization have?
- Is the project sponsor a member of the C-suite or ownership group?
- Are they a co-managed or a fully managed client?

## Business Qualification

- Are you currently using M365/Azure and other Microsoft stack applications?
- What Business systems (Financial, ERP, CRM, Etc.) are you using today?
- How many companies/entities does the organization have?
- Is there a target date to be live in the new system?
- Has budget been approved for this initiative?

## Financial Systems

- What applications are used for Accounting, Distribution, Manufacturing?
- On-premises or Cloud based applications?
- How many users are currently working within this software?
- Is payroll handled in house or is it outsourced?
- Are there integrations in place with other systems?
- What applications are used for reporting/forecasting?

## Customer Engagement & Connected Operations

- How are leads, opportunities and sales managed/tracked today?
- How many people are on your sales team?
- How are you currently forecasting sales?
- What sales information are sales managers/owners asking for?
- Do you manage marketing events, campaigns, or initiatives?
- What applications are used to track events, campaigns, or initiatives?
- How many users are on your marketing team?
- Do you track customer service activities and/or cases?
- Are you tracking projects or field service operations?

**Want to explore a partnership with us? Qualification questions?** Reach out to speak to one of our Partner Success Managers. Call 888-929-387 or email [partnersuccess@trunorthdynamics.com](mailto:partnersuccess@trunorthdynamics.com).