

FOR MSP OWNERS, VCIOS & CHANNEL LEADERS

The MSP Partnering Playbook

How to find Dynamics opportunities, protect the client relationship, and close the business application risk gap – without becoming the delivery team.

TRUNORTH DYNAMICS MICROSOFT



INSIDE
**SIX TRIGGER PHRASES
& THE PARTNER MOTION**



FOR MSP OWNERS, VCIOs, AND SERVICE LEADERS

At some point, a client raises something you don't deliver. The honest answer:

“We don't do that.”

Most MSPs aren't expected to deliver ERP, CRM, Power Platform, or accounting system projects. So when a client brings one up, “we don't do that” is operationally true.

But the client still has to make that decision – inside the very environment your team is paid to protect. Those choices now shape **cybersecurity, compliance, identity, reporting, and operational resilience.**

Without a partner path, that answer leaves your client to make a high-impact technology decision alone – and leaves you exposed to whatever they choose. This playbook gives you a simple motion: recognize the trigger, make one warm introduction, stay in the room, and earn referral revenue without taking on delivery risk.

Contents

PT 1 The Risk Gap	04
Why “we don't do that” leaves you exposed	
01 The Risk Gap Created by “We Don't Do That”	05
02 The Decision Layer: Strategy Becomes Security Posture	07
PT 2 Spotting the Opportunity	08
The language to listen for, and what to do next	
03 Six Trigger Phrases Your Team Should Recognize	09
04 The Partner Motion: Simple for You, Valuable for the Client	10
PT 3 Working Together	11
Answering objections and building the motion in 90 days	
05 Common MSP Objections, Answered	12
06 The 90-Day Path to Build the Motion Into Your Practice	13
07 The 10-Signal Opportunity Scorecard	14
PT 4 About TruNorth Dynamics	15
08 About Us · Industries · The MSP Referral Program	15

“We don’t do **that**” creates risk.

Your team isn’t built to deliver ERP or CRM. But clients still make those calls inside the environment you protect – and a decision made without you is a risk you inherit.

The risk gap created by “we don't do that.”

Most MSPs aren't expected to deliver ERP, CRM, Power Platform, or accounting work. But clients still make those decisions **inside environments the MSP is expected to protect.**

That's the gap. The MSP owns infrastructure, identity, and security. The client owns the business applications that run finance, operations, and sales. When a platform or partner decision happens in between – quietly, and without IT in the room – no one is accountable for how it affects the environment underneath.

Business application decisions are now security decisions

A new ERP, a replaced accounting platform, or a citizen-built automation doesn't stay in its lane. Each one touches surfaces the MSP is measured on:

Cybersecurity — new data stores, integrations, and admin accounts expand the attack surface

Compliance — audit, reporting, and records requirements move with the platform

Identity — every new app is another set of logins, roles, and access to govern

Reporting & operational resilience — the business comes to depend on systems no one is formally supporting

THE POINT

“We don't do that” may be operationally true. But without a partner path, it leaves the client to make high-impact technology decisions alone – and leaves the MSP exposed to the consequences.

Three ways the gap shows up.

The same exposure appears again and again across client books. Learn to recognize it.

EXAMPLE 01

Legacy on-prem ERP.

A client is still running an aging, on-prem ERP on old SQL. Support is thinning, upgrades stall, and the box becomes a ransomware and business-continuity liability – sitting inside the network you manage.

EXAMPLE 02

Client-led platform replacement.

Finance decides to replace the accounting platform on its own. The new system spins up identities, data flows, and integrations – none of it scoped with IT or security in the room.

EXAMPLE 03

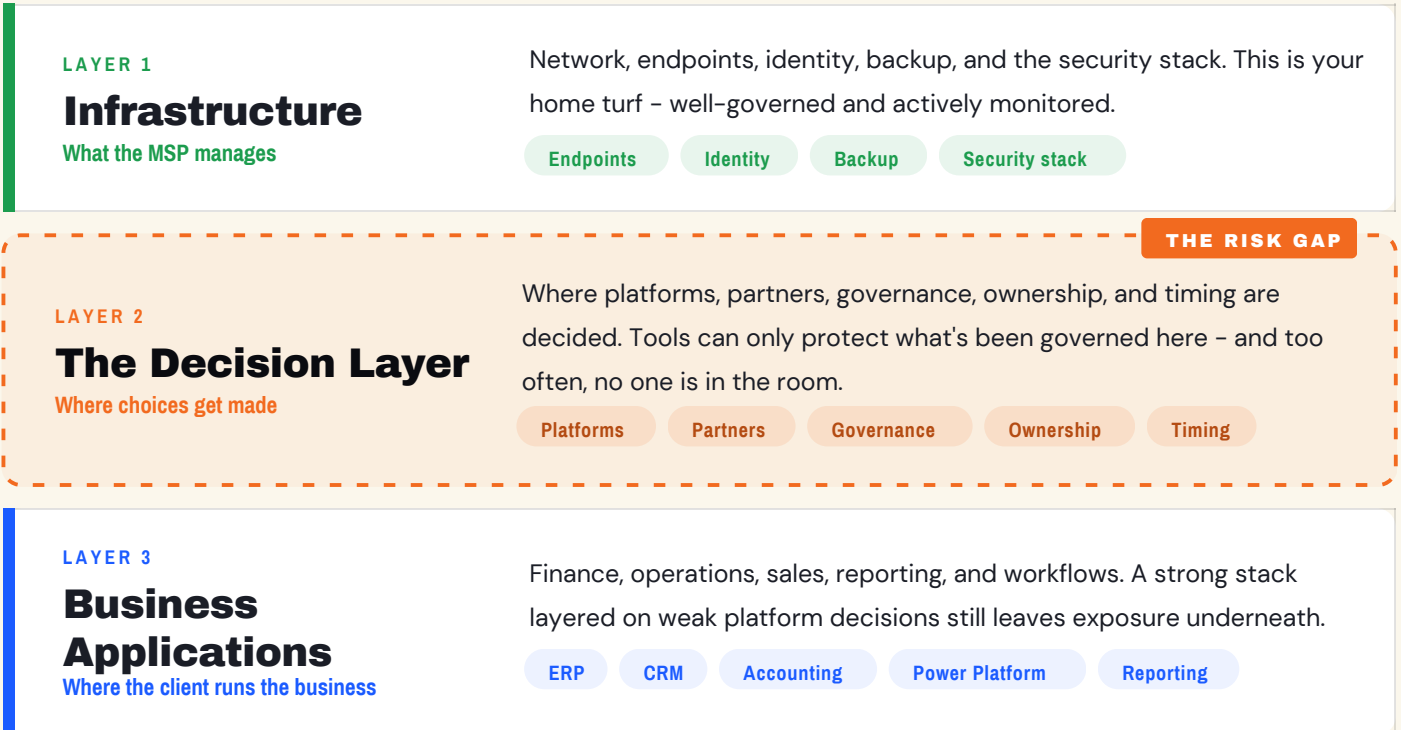
A poor Dynamics partner relationship.

The client already has a Dynamics partner – but with orphaned admin rights, weak change control, and thin documentation. Improvements stall, governance stays informal, and the MSP has no visibility into a system the business now depends on.

In every case, a business application decision quietly became a security and governance problem - on the MSP's watch.

Where technology strategy becomes security posture.

Every client environment has three layers. The middle one is where the risk gap lives.



KEY TAKEAWAY

MSPs don't need to own the decision layer alone. But they do need a way to keep clients from making business application decisions without security and governance in the room.

Learn to **hear** the trigger.

Your team is already in the conversations where these opportunities surface – vCIO reviews, tickets, renewals, audits. The skill is recognizing the language and knowing what to do next.

Six trigger phrases your team should recognize.

Train the team to listen for language that signals business application risk – and a referral opportunity.

“We're still on GP, NAV, or SL on-prem.”

01

SIGNAL

Legacy ERP, aging SQL, upgrade and support pressure, ransomware exposure, and business-continuity risk.

“Our accounting software is old.”

02

SIGNAL

Replacement decisions may happen without IT – creating identity, data, and integration gaps.

“Sales doesn't have a real CRM.”

03

SIGNAL

Customer data scattered across inboxes, spreadsheets, tasks, and unmanaged lists.

“We need better reporting.”

04

SIGNAL

Shadow BI, manual reporting, data movement, and inconsistent decision-making.

“Our Dynamics partner isn't working out.”

05

SIGNAL

Orphaned admin rights, weak change control, poor documentation, and stalled improvements.

“Can someone just automate this?”

06

SIGNAL

Citizen-built automation with real data access and limited governance.

The partner motion: simple for you, valuable for the client.

Five steps. Your team never becomes the delivery team.

1

Hear the trigger.

A client raises one of the six phrases during a vCIO review, ticket conversation, business review, renewal, or audit discussion.

2

Make one warm introduction.

Send a single email to TruNorth and the client. Keep it simple:

"This came up in our review, and I think TruNorth is the right team to help you evaluate it."

3

TruNorth leads discovery and delivery.

We assess the opportunity, guide the roadmap, scope the work, and deliver the project. Your team does not become the ERP delivery team.

4

You stay in the room.

The MSP remains the trusted advisor. TruNorth keeps you informed, aligns around security and governance considerations, and protects the relationship.

5

Referral revenue flows back to you.

Business application projects range from smaller advisory engagements to larger implementations - often creating meaningful referral revenue without delivery overhead.

Protect the relationship. Add the revenue.

The objections are predictable, and they resolve the same way: this motion strengthens the client relationship instead of risking it. Here's how to think about it – and how to build it into your practice in 90 days.



Common MSP objections, answered.

Every one of these resolves toward the same conclusion: a stronger client relationship, not a weaker one.

Q Will this put my client relationship at risk?

No — the goal is to strengthen it. TruNorth isn't replacing the MSP relationship; we cover the business application surface the MSP isn't built to deliver.

Q What if the client isn't ready for a full project?

That's exactly why the intro is valuable. A structured conversation clarifies timing, risk, budget, and readiness before the client makes a rushed decision.

Q Do we need to learn Dynamics?

No. Your team only needs to recognize the trigger, make the introduction, and stay aligned on the client's broader technology posture.

Q Is this just a sales referral?

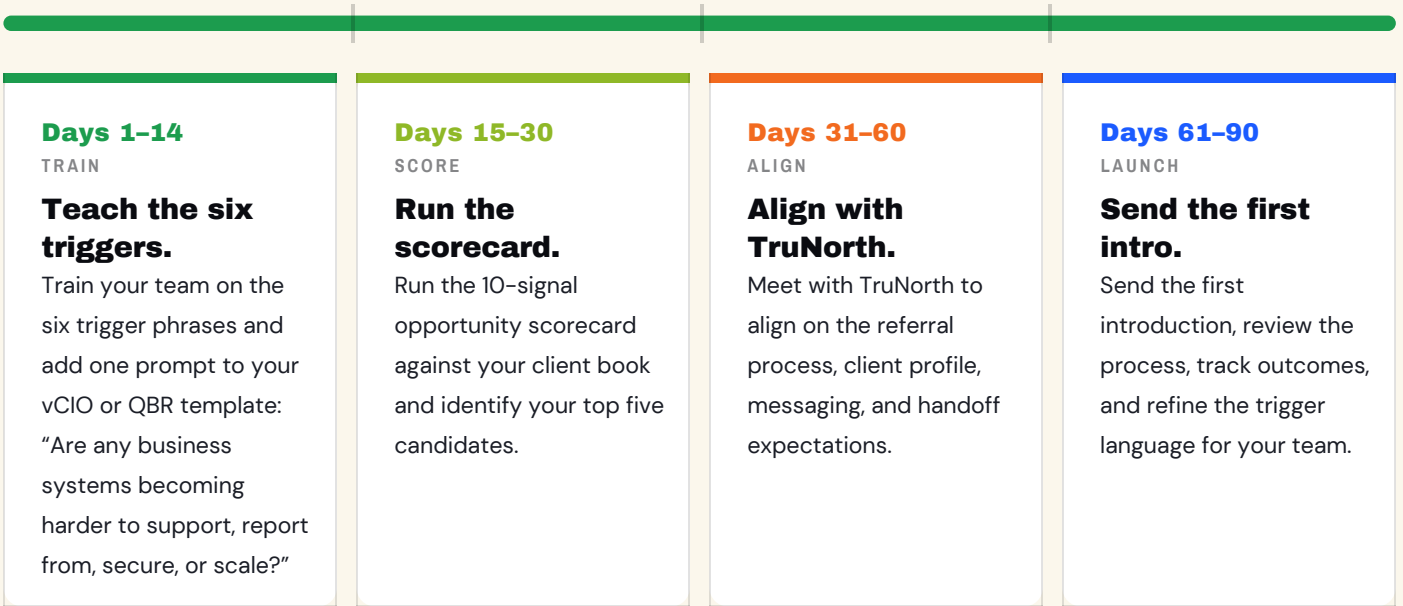
It's a partner-led risk-reduction motion. Referral revenue matters, but the bigger value is helping the client make better application decisions with the right people in the room.

Q What makes TruNorth different?

Strategy, not just software. TruNorth aligns technology and strategy across Dynamics 365, Power Platform, AI, and business process improvement – so clients get a clearer path to business flow, not just a deployment.

The 90-day path to build the motion into your practice.

Four phases. A few habit changes. A repeatable referral engine.



THE HABIT

One new prompt in every QBR is the whole engine. When "are any business systems getting harder to support, secure, or scale?" becomes routine, the triggers surface themselves.

The 10-signal opportunity scorecard.

Run this against any client. The more boxes you check, the stronger the case for a warm introduction – and the more business application risk is sitting inside your environment.

Score your client

Check every signal that applies – three or more, make the introduction

- | | |
|--|--|
| <input type="checkbox"/> Still running GP, NAV, SL, or another ERP on-prem | <input type="checkbox"/> Accounting or ERP platform is aging, unsupported, or end-of-life |
| <input type="checkbox"/> Sales team has no real CRM; customer data is scattered | <input type="checkbox"/> Reporting is manual, shadow BI, or inconsistent |
| <input type="checkbox"/> Current Dynamics or app partner is unresponsive or weak on governance | <input type="checkbox"/> Orphaned admin rights or weak change control on business apps |
| <input type="checkbox"/> Citizen-built automations with real data access and little oversight | <input type="checkbox"/> Core operations run on disconnected systems and spreadsheets |
| <input type="checkbox"/> Compliance, audit, or identity exposure tied to a business app | <input type="checkbox"/> A platform or partner decision is being made without IT or security |

TEAR-OUT · USE IT THIS WEEK

Three boxes checked? You have a conversation worth one email.

You don't scope it, price it, or deliver it. You make one warm introduction – and TruNorth takes it from there while you stay in the room.



START A REFERRAL

SalesTeam@TruNorthDynamics.com



About TruNorth Dynamics.

TruNorth Dynamics helps SMBs align technology and strategy through Dynamics 365, Power Platform, AI, and business process modernization – so clients get more than software delivery. They get a clearer path to business flow.

Industries we serve

Manufacturing

Distribution

Professional Services

Accounting & Advisory

Nonprofit

For MSP partners, we provide a practical path to support business application conversations – without requiring your team to become the implementation team. You recognize the trigger and make the introduction; we lead discovery, delivery, and long-term support.

WHY WE WROTE THIS

MSPs are often the most-trusted and least-equipped voice in a client's business application decision. This playbook gives your team a simple motion to protect the relationship, close the risk gap, and earn referral revenue.

The TruNorth MSP Referral Program

A low-effort partnership that protects your client relationship and rewards the introduction.

Referral revenue share

ON PROJECTS YOU INTRODUCE*

Dedicated partner contact

ONE POINT OF HANDOFF

You stay in the room

RELATIONSHIP STAYS YOURS

*Structured through a simple partnership agreement.



ONE EMAIL CLOSSES THE GAP

Heard a **trigger** in your last review?

You don't have to scope it, price it, or deliver it. Send us the scenario – we'll help your client evaluate:

- Legacy or on-prem ERP risk
- An accounting platform replacement
- A real CRM for the sales team
- Reporting and Power BI
- A stalled Dynamics partner relationship
- Governance for citizen-built automation
- A broader business application roadmap

No delivery overhead. No pressure. Just a partner who covers the business application surface your team isn't built to deliver – while you stay the trusted advisor.

START A REFERRAL

SalesTeam@TruNorthDynamics.com