



Dynamics 365 Bootcamp

Blake Cheek – D365 DSE/SSP

July 21, 2021

Who am I

...an introduction

- Blake Cheek – D365 Design Sales Engineer
- Licensing expert and D365 evangelist
- Decades of experience in customer service, technical support, and sales for SMB and enterprise customers
- Dynamics is my passion! Your success = my success



Who am I

My Goals

- Support you/your company
- Give you accurate, honest advice
- Help anticipate issues before they arise
- Make your company look great
- Ensure that your customer has an outstanding experience



Why?

What Motivates Me

- I strive to go beyond “good job” in everything I touch. I strive for excellence.
- Mistakes, even small spelling and grammatical errors, are terribly embarrassing for me. I don’t want you to make mistakes either.
- A pat on the back and a firm handshake don’t put food on the table...results do.



SYNNEX



What is CSP?

The Microsoft Cloud Solution Provider Program (CSP) enables partners to directly manage their entire Microsoft Cloud customer lifecycle. Partners in this program utilize dedicated in-product tools to directly provision, manage, and support their customer subscriptions. Partners can easily package their own tools, products, and services and combine them into one monthly or annual customer bill.



SYNNEX CSP

Why join Microsoft CSP with SYNNEX?

Three unique ways we support partners



Simplicity

You're in command. Providing a consolidated bill for all of your tools, products, and services makes customers happy, while an easy-to-use portal for pricing, billing, financing options, and subscription management keeps you in control.



Support

You're covered. Confidently expand your business with comprehensive, personalized support from SYNNEX—available to every partner at any time, 365 days a year, through our Microsoft cloud partner portal.



Savings

You're competitive. Generate recurring monthly revenue and increase your bottom line with some of the industry's best margins. Our robust cloud vendor ecosystem and hardware portfolio make it easy to build a complete solution.



SYNNEX Platform Differentiation

End User Storefronts

- Automated self-service for end customers, controlled by the reseller.

Payment Gateway

- Allows end customers to view & pay invoices within the storefront via Net Terms or Credit Card. Simplifying and further automating the billing process.

PSA Integrations

- Integrating with leading platforms to create greater access and automation for SYNNEX partners.

Reporting

- What information is most important to you? SYNNEX has the ability to pull specialized reports and have them sent on a daily, weekly, or monthly basis.

Azure Consumption Dashboard

- Real-time consumption dashboards across all Cloud products.

Benefits

...and SYNNEX Value!

STELLR

Dashboard Reporting

- O365/Azure

Cost Optimization tools (beta)

ISV Attach

Open API's

End User Storefront

Payment Gateway

O365 / AZURE / D365

No Proration of O365 Licenses

- First month Free

Dedicated Account Manager

MW, Azure, and Dynamics Engineers

Pre-sales technical support

- Azure Summit
- M365 Workshops
- D365 Boot Camps
- Live Webinars

MARKETING

ContentMX

Marketing Development Funds

- End User Events
- Lead Generation Campaigns



Capture the Cloud

1: Ascend



Eligible for SYNNEX partner support and access to exclusive ready-made marketing campaigns.

All resellers authorized for Microsoft CSP with SYNNEX qualify for this level.

-
- Premium product discounts
 - Exclusive promotions
 - Access to Stellr Learning Center
 - Invitations to [live monthly webinars and in-person events](#)
 - [LinkedIn Capture-the-Cloud group](#)
 - On-demand business resources, such as resource hubs, full kits, white label services
 - Enablement tools and resources
 - Automated end-customer marketing through [DEMANDSolv](#)

2: Accelerate



More SYNNEX support, access to a content and data booster package for customer engagement, exclusive promotions, and priority invitations to SYNNEX and Microsoft exclusive events.

For resellers with at least \$15,000/month in Microsoft CSP revenue.

All the benefits in Ascend, plus:

- Marketing development packages valued at up to \$3K per half year.*
- Incentives and prizes
- Exclusive invitations to Microsoft and SYNNEX in-person events
- SYNNEX support for Microsoft certifications (AZ900, MS900, MC-901)
- 5% discount on Microsoft services
- Complimentary cloud-based Autopilot deployment

3: Altitude



This level provides our most experienced partners with the advanced tools and access needed to scale even loftier heights.

For resellers with minimum \$50,000 per month in Microsoft CSP revenue who also submit an annual customer testimonial.

All the benefits in Accelerate, plus:

- Marketing development packages valued at up to \$5K per half year.*
- Automatic eligibility for Stellr ConnectX



Capture the Cloud

Resources and Links

Capture the Cloud Registration:

- <https://resources.synnecorp.com/register-for-capture-the-cloud.html>

Capture the Cloud LinkedIn:

- <https://www.linkedin.com/groups/12532491/>

(If that doesn't work, just search **SYNNEX Microsoft Capture the Cloud**)

Program Lead:

- Christopher Schofield
chrissc@synnex.com



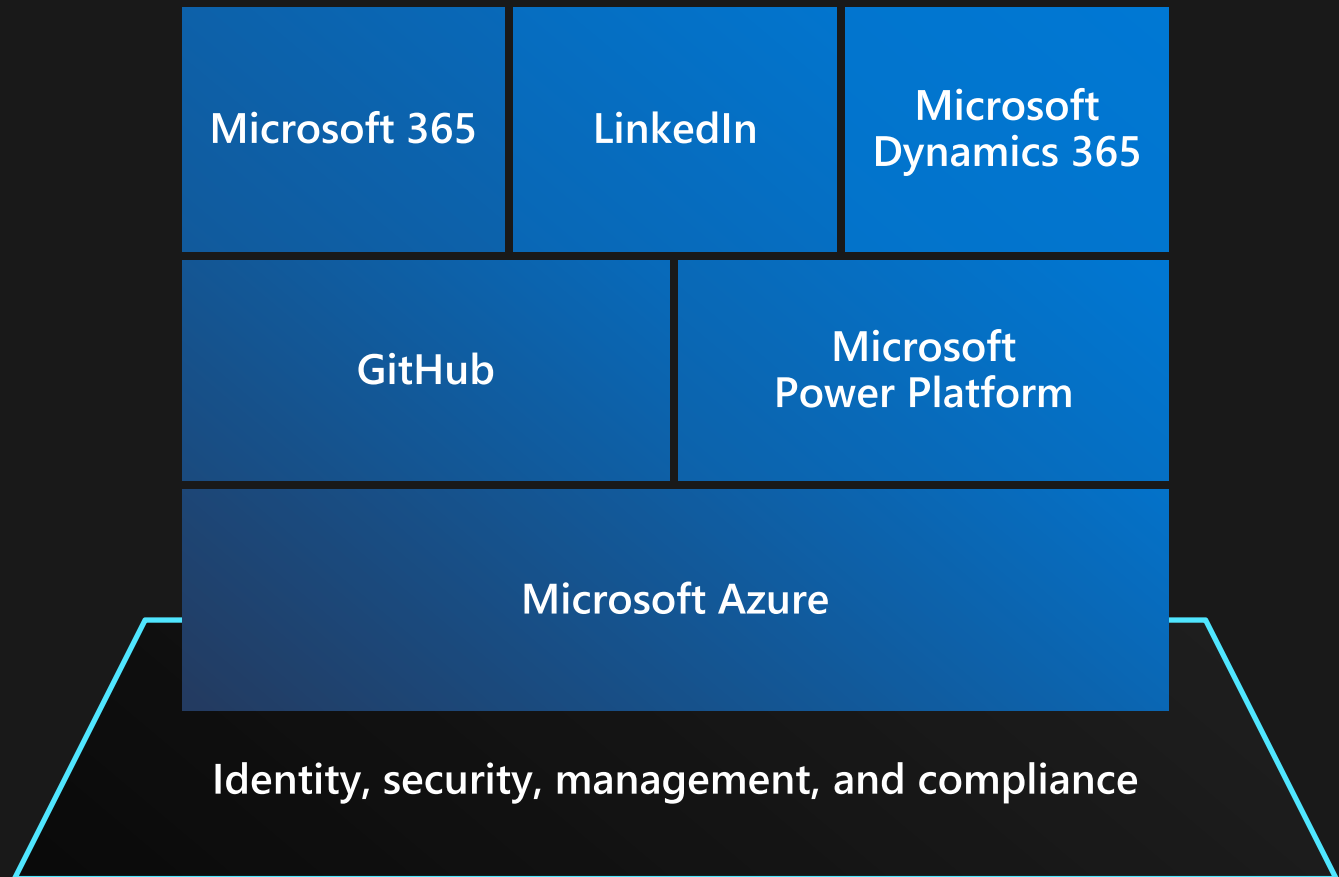
Why We're Here

Organizations are transforming like never before

“ We’ve seen **two years’** worth of digital transformation in two months. From remote teamwork and learning, to sales and customer service, to critical cloud infrastructure and security—we are working alongside customers every day to help them adapt and stay open for business in a world of remote everything. ”

—Satya Nadella,
CEO

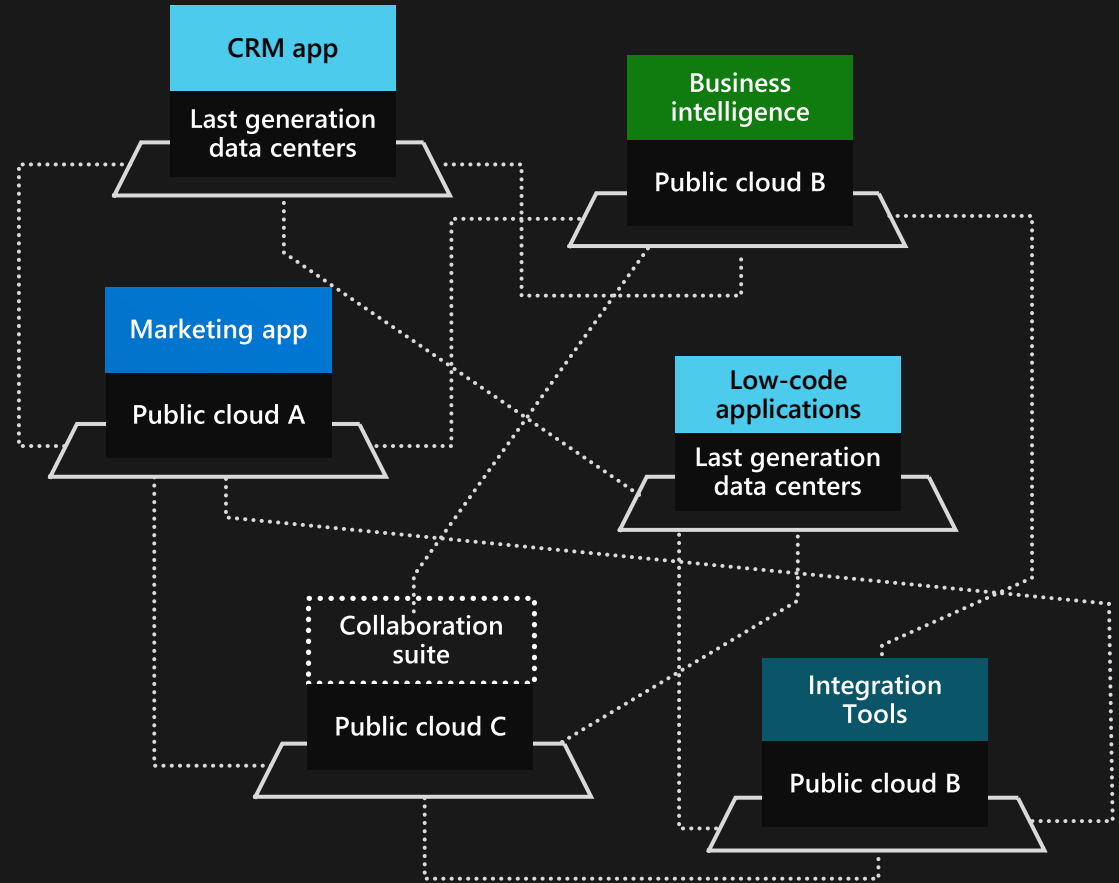
Microsoft cloud



Microsoft cloud



Our competition



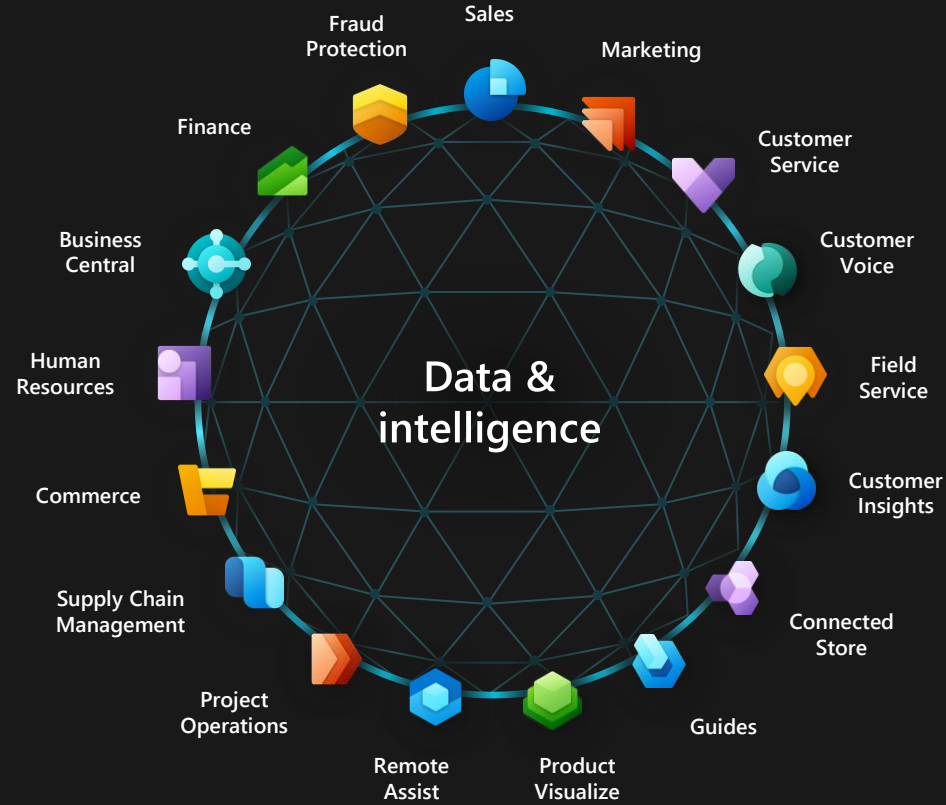
Business applications



Digital feedback loop



Microsoft business applications



SMB "hero" Business Apps Cloud Services

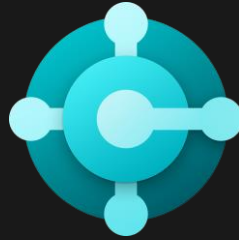


Dynamics 365
Sales
Professional

\$65/user/month

\$20*/user/month

**attached with Business Central*



Dynamics 365
Business
Central

From \$70 to \$100

Per user/month



Power
Apps

\$5/user/app/month

\$20/user/month

Dynamics from 30,000 feet

A high level overview

Dynamics isn't just one product; it is a product line!

The Dynamics product line can generally be divided into two categories:

- Customer Relationship Management (CRM)
 - **Sales**, Customer Service, Marketing, Field Service, etc.
- Enterprise Resource Planning (ERP)
 - Finance, Supply Chain Management (SCM), Human Resources, **Business Central**, etc.

It is very modular. Build the solution that you need!

Runs on Azure for unparalleled security and seamless integration with Microsoft Office 365.



D365 Sales

Microsoft's CRM Solution

Dynamics 365 Sales enables salespeople to build strong relationships with their customers, take actions based on insights, and close sales faster. Dynamics 365 Sales allows you to keep track of accounts and contacts, nurture sales from lead to order, and create sales collateral. It also lets you create marketing lists and campaigns, and even follow service cases associated with specific accounts or opportunities.





What does this mean?

Dynamics 365 Sales

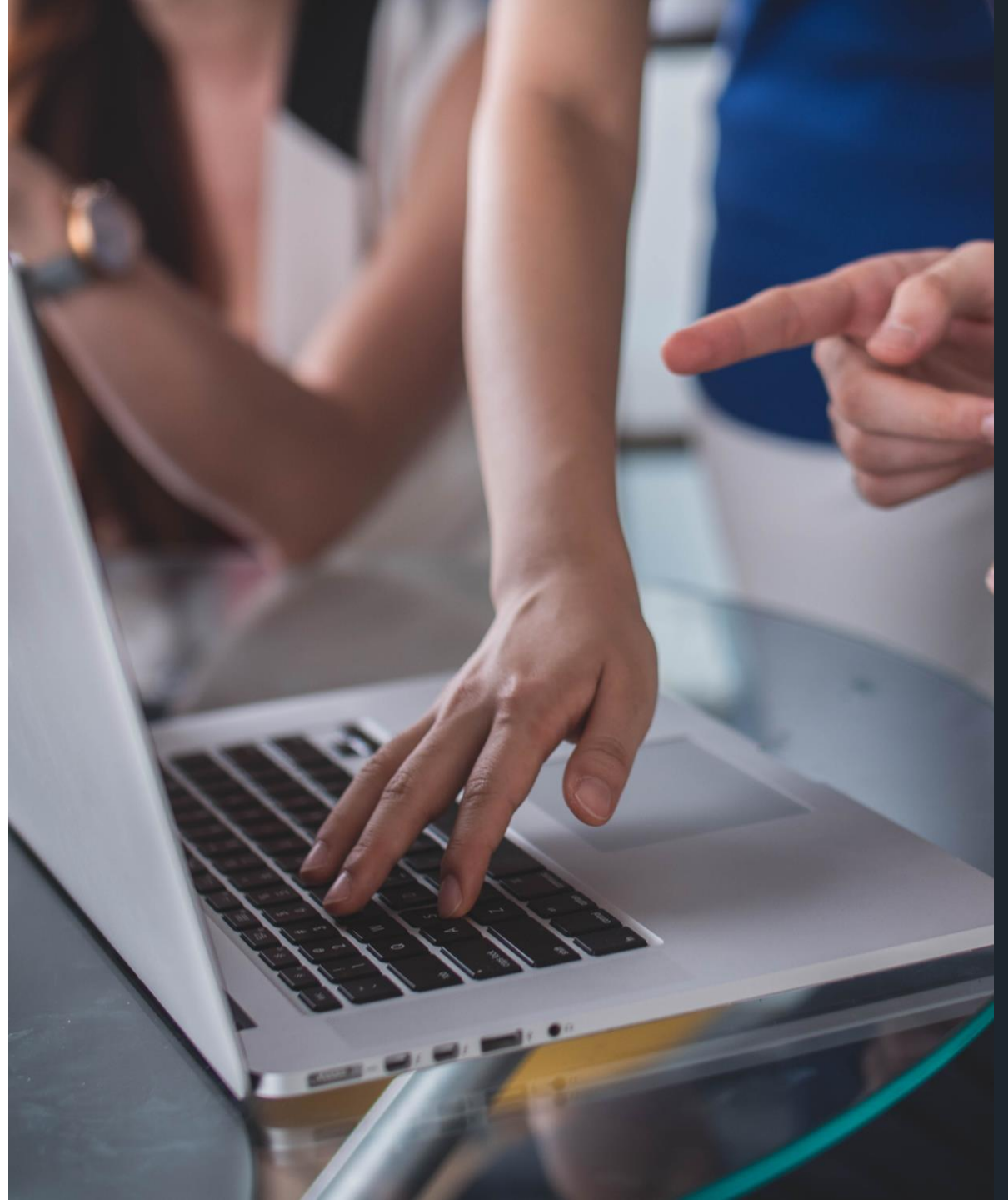
- Improve sales efficiency
- Boost sales effectiveness
- Increased upsell & cross-sell
- Reduce time to close
- Better client relationships
- Increased productivity
- Improved customer retention



D365 Business Central

Microsoft's ERP Solution

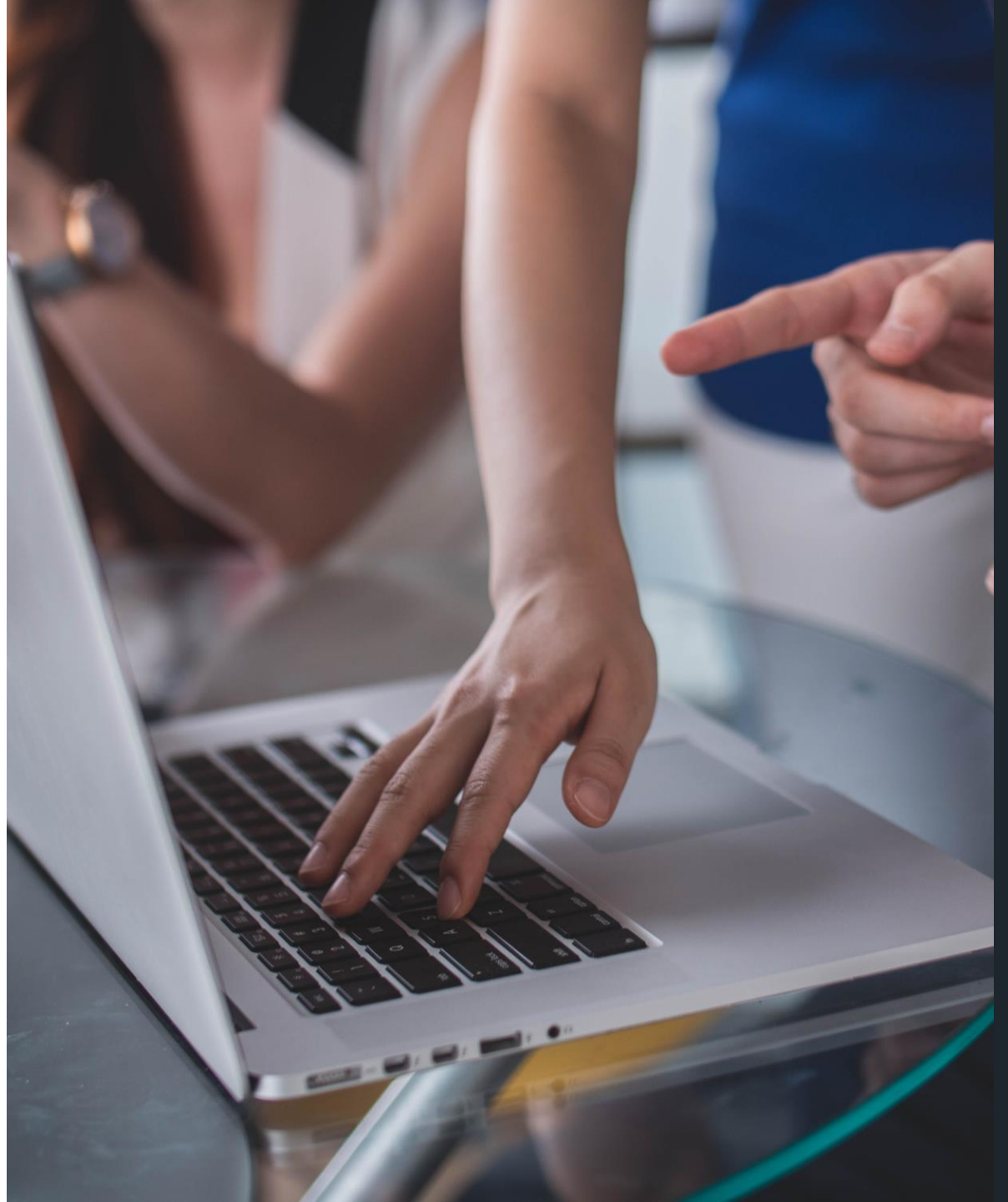
Business Central is a business management solution for SMBs that automates and streamlines business processes and helps you manage your business. Business Central enables companies to manage their business, including finance, manufacturing, sales, shipping, and more.



What does this mean?

D365 Business Central

- Improved collaboration
- Increased productivity
- Simple estimating/quoting
- Simplified business operations
- Maximize efficiency
- Seamless integration



The Coolest Thing...Integration!

It's What Makes D365 a Heavyweight Contender

Dynamics 365 lets employees work how they want to work from the systems they want to work in.

Microsoft Dynamics 365 has some integration with the following Microsoft apps and services:

- *Word
- *Excel
- *Outlook
- *SharePoint
- *Power Platform (Power Apps, Power Automate, Power BI)
- *OneNote
- *Teams
- *Other D365 SKUs





Better Together

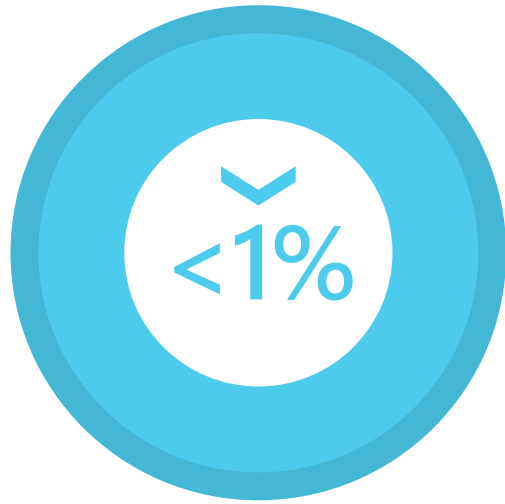
A Partnership Story

The salesperson role is considered one of the most outward-facing jobs in a business. It can be helpful for salespeople to be able to look inward in the business and see what is happening on the back end. By integrating Business Central and D365 Sales, you can give salespeople that insight by enabling them to view information in Business Central while they are working in D365 Sales. For example, it could be useful to know whether you have enough inventory to fulfill an order.



Market and partner opportunity

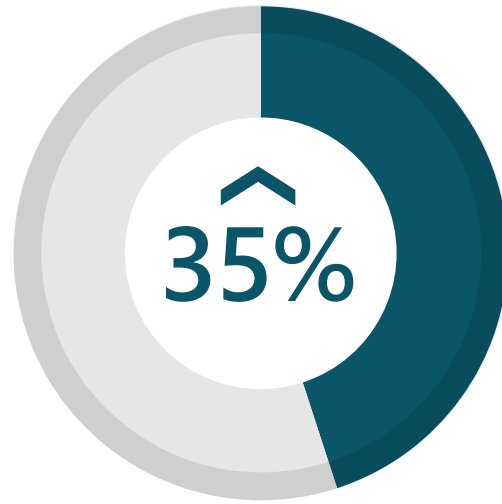
There's no better time to sell Dynamics 365



1% penetration

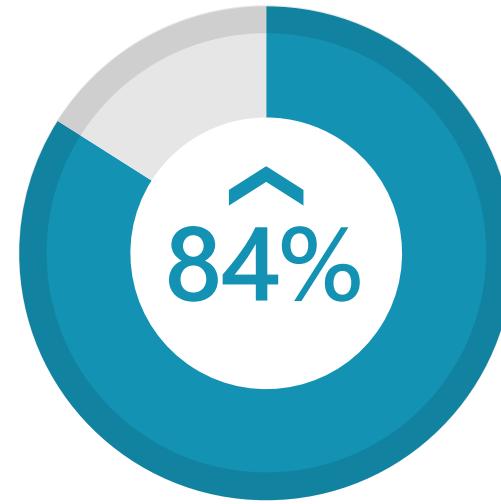
<1% penetration of our Microsoft 365 customer base with Dynamics 365

Microsoft Cloud Ascent



35% YoY growth

Capture your share of the total 35% YoY Dynamics 365 and Power Apps net revenue growth



84% revenue increase

Increase average revenue per Microsoft 365 user (ARPU) by up to 84%

(Internal Microsoft Research)



Double Azure revenue

Adding Dynamics 365 doubles Azure revenue in an existing Azure customer

(Internal Microsoft Research)

Microsoft 365 + Dynamics 365

Customer example

Microsoft 365
Business Premium


 **200** users

Licencing :
\$20/user/month

To:
\$52/user/month

+

Dynamics 365
Business Central Premium

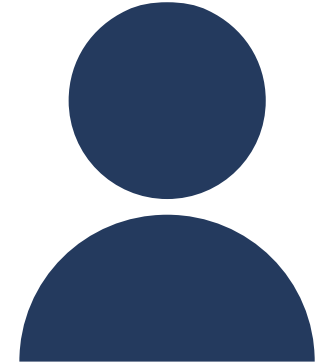
 **+20** users
13 full users and
7 limited users

Licencing:
\$100/user/month

Team members user:
\$8/month

\$1 of licencing = \$3 of services

>



Incremental revenue :
\$30K/year

Opportunity revenue potential

Microsoft 365 medium business sockets are ready for Dynamics



Business Central



Sales Pro



Act now



400K
customers



6.5M
users



\$2.5B
in revenue

Top of mind for our SMB customers...

How can we do
remote work better?

How can we
maintain security?

How can we
reduce our costs?

Empowering businesses with Microsoft 365

Better tools
for remote work

Better security
for remote work

Opportunity to
reduce costs

Better together opportunity for Microsoft 365 resellers

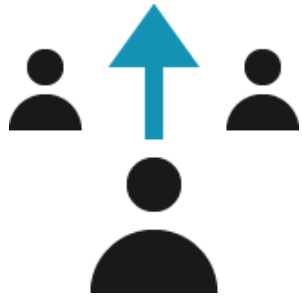
Differentiate
your business

Add customer
stickiness

Grow new
revenue opportunities

Work Smarter

Empower your people to confidently take action and get more done with seamless connectivity between Dynamics 365 and Microsoft 365



More collaborative

Enable employees to stay connected wherever they work to communicate better together and with your vendors and customers



More productive

Stop jumping between apps to redefine business processes and reinvent productivity—you'll not only get your work done faster, but you'll also improve accuracy



More 'WOW' moments

Shift from being reactive to proactive with continuous business insights that guide you to better customer experiences.

Use case examples :



Dynamics 365 Business Central – Elevator pitch

Adapt **faster**. Work **smarter**. Perform **better**.

Target audience:



Owner/CEO,
finance leader



Operations
or IT leaders



Influencers: external
accountant/consultant

Quick pitch – Run your small and medium-sized business operations using a connected solution across finance, sales, service, projects, supply chain and manufacturing. Make your business vision a reality with the adaptability, insights and performance needed to outpace your competition.

Customer benefits

1. **Adapt faster.** Innovate and adopt new business models faster with flexible deployment models, mobility, reliability, security, and adaptable solution that grows with your business.
2. **Work smarter.** Get a complete picture of your business with easy to create dashboards and built-in analytics that proactively inform and guide employees.
3. **Perform better.** Enable high performance with guided workflows, governance, and real-time metrics that drive continuous process optimization, accelerates financial closes, and improves cycle times.

Conversation starters: Work smarter – better together with Microsoft 365



Question

How many times has the inability to access information quickly, slowed you down, disrupted business operations or affected a sale?

How many different systems do you need to work in to finish one task?

Have you put off a purchasing decision because you fear a new solution will disrupt your business performance and customer experience?



Answer

More collaborative: Use the Business Central app within Microsoft Teams to easily share your business data with colleagues and

More productive: Minimize switching between apps or dual, manual data entry– Interoperability with Office 365 means people can work directly within Microsoft Outlook, Excel, Teams, and Word. Your people will get up to speed faster using intuitive processes that leverage the tools they use every day to get their work done.

More WOW moments: Get an end-to-end view of data from across your business, always up-to-date and accessible from any device. Spot trends, prevent issues, deliver great customer experiences, and use built-in AI to sell smarter and optimize key operational processes. Guide your employees to make smarter decisions with the right information within the flow of work.

Dynamics 365 Sales Professional – Elevator pitch

Regain focus and sales momentum

Target audience:



VP Sales/Management



Sales Operations



Influencing roles: CMO,
CFO, CIO

Quick pitch – Now more than ever, small to mid-sized businesses need a sales tool that saves them time and reduces costs. Boost seller productivity and build relationships with a modern solution that works with familiar tools like Microsoft 365.

Customer benefits

1. **Connect with and guide customers.** Provide sellers with steps to move a deal forward and the context to tailor customer interactions.
2. **Adapt to a digital environment.** Empower sellers with sales capabilities that are integrated into familiar tools and make digital collaboration easy.
3. **Sell from anywhere.** Modern mobile apps that provide contextual news, social data and task flows from the home office or anywhere else.
4. **Reduce costs by optimizing sales processes.** Get up and running quickly with applications configured for sellers' specific sales processes.

Conversation starters



Question



Answer

Do your sellers struggle with figuring out what to focus on?

Timeline -Sellers juggle an increasing number of stakeholders, it gets harder to tailor and personalize interactions. Business process UI – To prevent distractions, organizations need to narrow down the optimal choices. Reports, charts, dashboards - Many sales reps are unclear of what's expected of them. 10 people are involved with the average purchase decision. Gartner

Do you your sellers complain around too many disconnected tools?

Seamless sales tools - New sales tools, if not intuitive and integrated into the sales rep's daily routine and workflow, will become a distraction. Mobile apps - Today's sales reps work on the go. Modern sales tools need to support this. Collaboration - With more and more people involved in sales deals, sellers need new ways to collaborate. 60% of companies lack a well-designed sales process TOPO.

Sales Force automation takes too much time and effort?

Microsoft's Business Application Platform - With Dynamics 365 Sales Professional, organizations can start simple – with just the capabilities sales teams need now. 92% of sales organizations rank sales engagement platforms as critical to their success TOPO. 90% of sales leaders plan to invest in tech to help sellers engage with buyers more effectively TOPO.

What this means for YOU

The big payoff

- Offering Dynamics 365 is a great way to increase revenue, create customer stickiness, and drive upsell/cross sell opportunities.
- You have a great partner in SYNEX.
- You are surrounded by geniuses and those who want to see you succeed.
- You can get started quickly and easily by taking advantage of our Partner-to-partner resources.

We sincerely hope that, after today's session, you will see why smart partners are diving into D365 and want to do the same.



To be continued...

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3...2...1...Liftoff



Don't let KNOWLEDGE be the reason your Dynamics practice never gets off the ground.

“Send me the deck”

“Send me some materials”

“Send me a video”

+

Lack of commitment

=

Decks never viewed

Materials never looked over

Unwatched videos



Don't let ~~KNOWLEDGE~~ EFFORT be the reason your Dynamics practice never gets off the ground.

"Send me the deck"

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Don't let ~~KNOWLEDGE EFFORT~~ RESOURCES be the reason
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Lack of commitment

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Where to Turn?

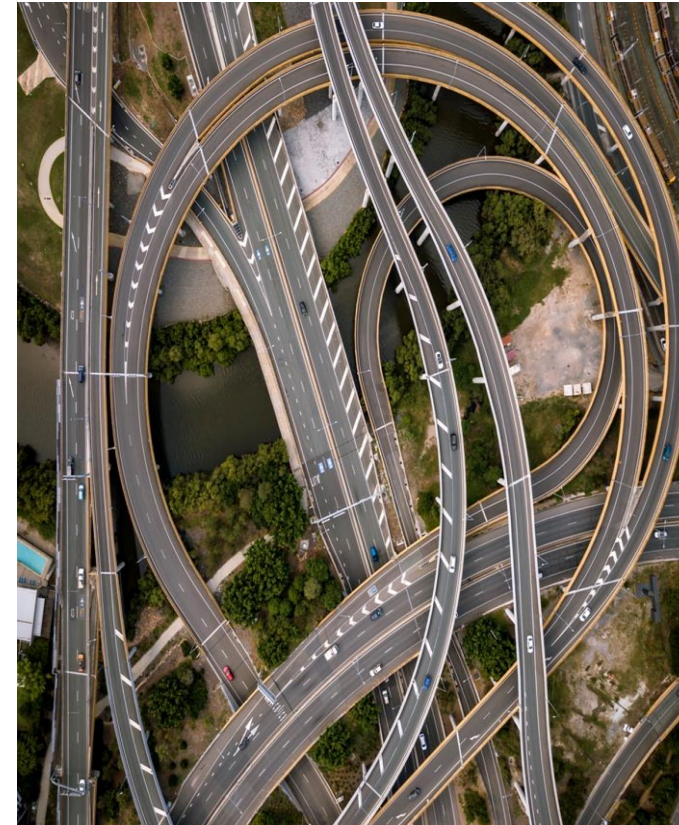
The Road to a Dynamics Practice.

There is an incredible wealth of information readily available online direct from Microsoft about D365.

The 4 resource barriers to starting a practice:

- Time
- Knowledge
- Effort
- Labor

If you want to sell, implement, and provide support for D365, you must overcome these barriers.



Partner-to-partner model

Partner-to-partner value chain



The P2P Option

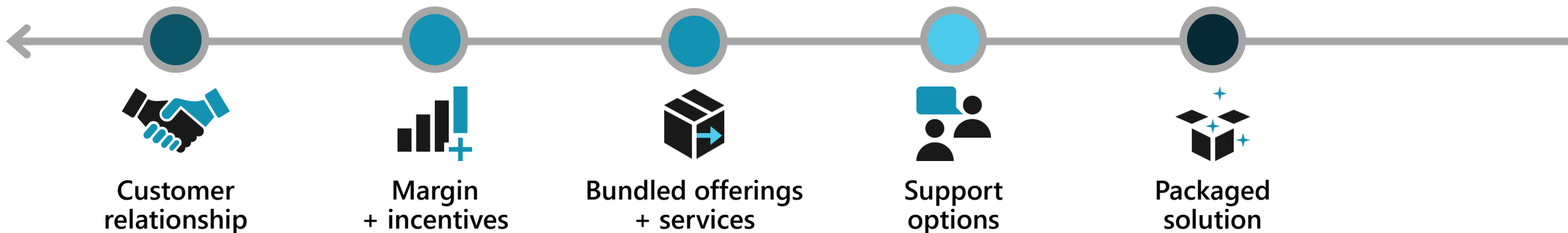
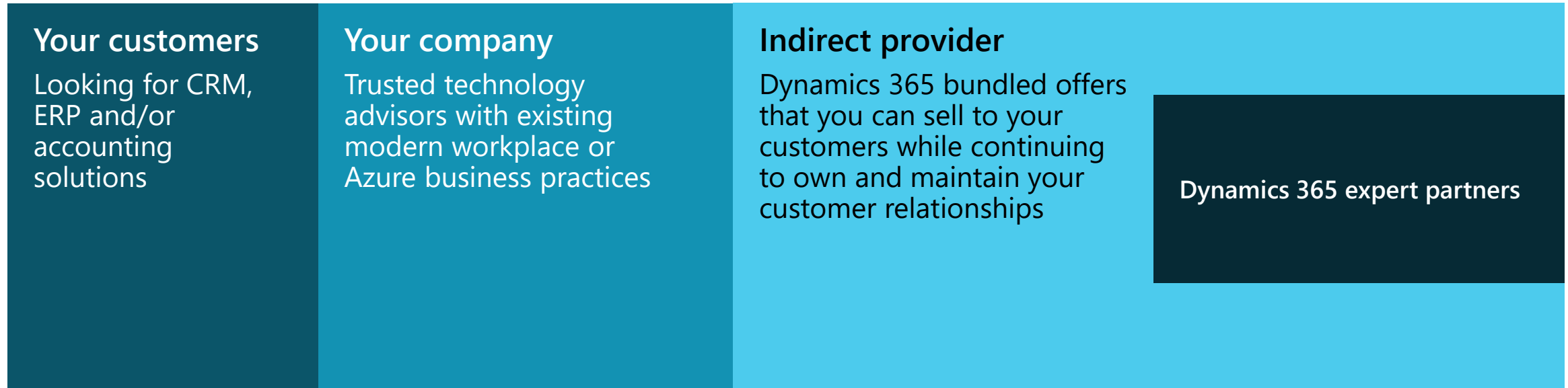
Be an Expert without being THE Expert

SMB customers want a single, trusted technology advisor to consult on all their business processes. So, if they have to look elsewhere for a Dynamics 365 provider, they just might take their productivity and security needs somewhere else, as well.

- Pairing D365 with M365 increases average revenue per user.
- Customers who use Dynamics often grow into other D365 offerings/additional seats.
- There's billions of dollars on the line.



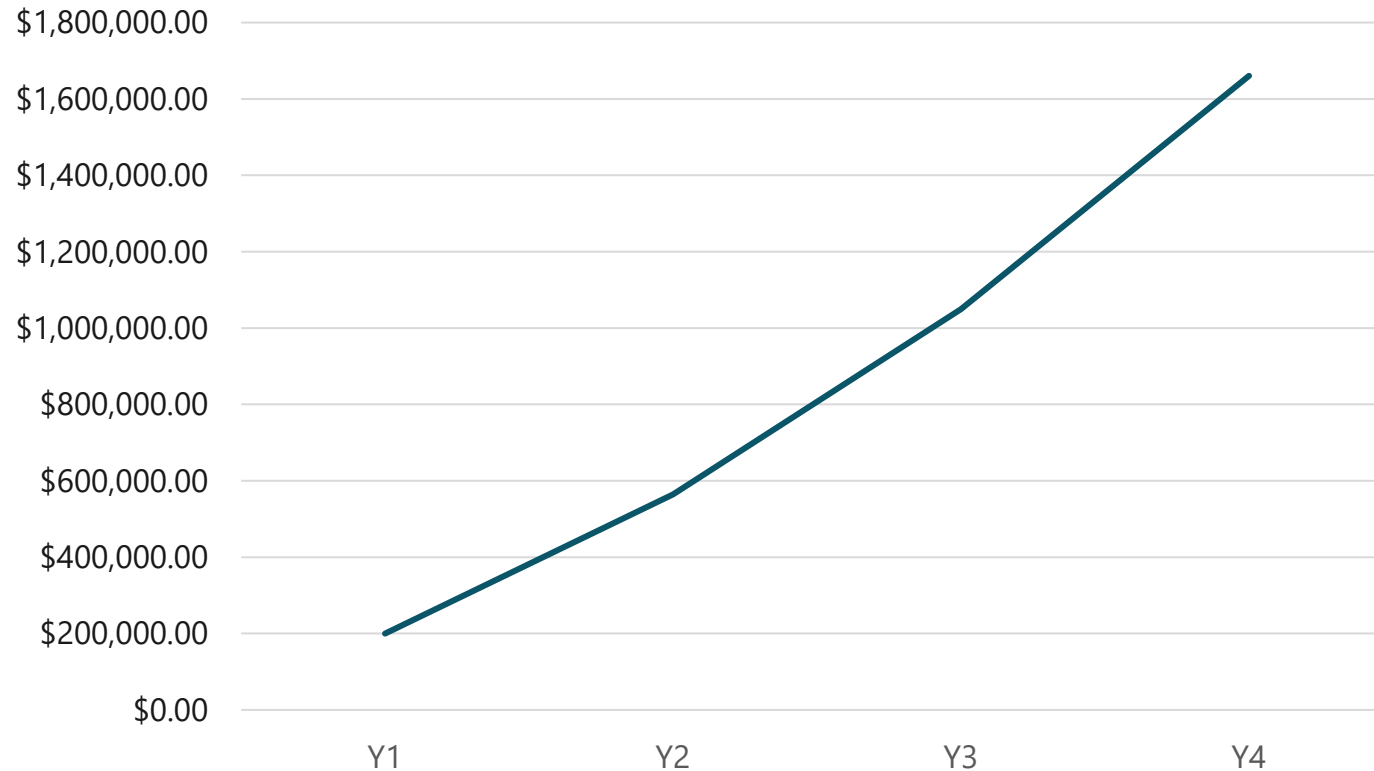
Partner-to-Partner (P2P) model



Partner-to-partner financial opportunity

[Aka.MS/SMBP2P](#)

Cumulative Financial impact



Add 5 Dynamics 365
new customers*/month
and

Earn in average \$1.5M
in 4 years

*6 full users + 3 limited users

D365 In A Box

All you need to close a D365 Deal

When you take advantage of the partner-to-partner option, know these things:

- YOU:
 - How to identify D365 opportunities
 - Prequalify the customer
- SYNnex/Service Partner will:
 - Qualify opportunity
 - Help close the deal
 - Implement
 - Train
 - Support
- YOU:
 - Collect licensing revenue
 - Collect % services revenue
 - Maintain partner/client relationship
 - Look for additional opportunities



The Self-Starter

Start by Reading the Manual

Reading is Fun

There are two primary, trusted sources for D365 documentation:

- The Dynamics 365 Licensing Guide
- Microsoft Docs (docs.microsoft.com)



Trial the Software

Demos and Trials!

There three ways to trial Dynamics:

- CDX Demos (cdx.transform.microsoft.com)
- Dynamics Trials (trials.dynamics.com)
- Paid "trials" / IURs*

*Customer Engagement available with Action Pack/Gold/Silver. Business Central available with more advanced competencies.



Study and Get Certified

Choose Your Path

There is one best learning resource, but multiple paths to take:

<https://docs.microsoft.com/en-us/learn/certifications/browse/>

- Entry Level CRM – MB-910
- Entry Level ERP – MB-920
- MB-900 – Retired Dec 2019 (Do Not Use)
- MB-901 – Retired June 2021 (Do Not Use)

Other study and training sites exist, but information may be hit-or-miss and/or unreliable.



Stay Up-to-Date

Some News & Resources

There are so many sources for D365 News, Updates, and More:

- YouTube
 - Follow:
 - Microsoft Dynamics 365
 - Microsoft US Partner Community
 - Microsoft Power Apps
- Dynamics 365 Partner Portal:
 - <https://dynamicspartners.transform.microsoft.com/>
- Dynamics Community:
 - <https://community.dynamics.com/>
 - SYNEX Microsoft:
 - <https://www.synnecorp.com/us/microsoft/>



Low Risk Implementation

Apply Your Knowledge

There's one final step, apply everything that you've learned. I strongly recommend doing this internally and in a sandboxed, non-production environment.

Remember: Anything you put out there, you're responsible for support, updates, etc.

Then, ask yourself: "Is this something I'm prepared to not only do well, but to make a focus in my business?"



Final Thoughts

It is easy to get in over your head

Benefits/Risk Assessment

- Everything has a cost:
 - Time costs opportunity
 - Knowledge costs effort
 - Effort costs labor
- Ask yourself:
 - Can I do this well or just good enough?
 - Is it worth my time to learn if I'm just going to do it just a few times a year?
 - What's the price of being wrong?
- Put yourself in your customer's shoes.



What can I do?

What Can I Do?

Secrets to Success

Nobody should try and tackle D365 on their own.*

- Think of D365 less like a piece of software and more like a project.
- It takes a TEAM to make a project successful.
- Getting in over your head is a bad look.



What Can I Do?

Secrets to Success

Get the Experts Involved Early and Get Out of the Way

- Trust your partners/teams that this will be a successful project.
- More heads involved = longer project timelines.
- Many times, the MSPs/VARs are their own, largest obstacle.
- Inability to delegate suggests lack of faith in your employees. (Leadership 101)



What Can I Do?

Secrets to Success

Set Realistic Partner Expectations

- If you've never done this before, you should look for help.
- This is a project, and it will take time.
- There needs to be a budget.
- Dynamics is a treatment, not a cure.
- Customer adoption and success require commitment at all levels.



What Can I Do?

Secrets to Success

Ask the Right Questions

- Has the customer ever used a CRM/ERP before? What was that experience like?
- What problem area(s) is the customer looking to address?
- Is there a budget?
- Is there a timeline?
- What is the anticipated # of seats?



What Can I Do?

Secrets to Success

Identify the Right Opportunities

- Microsoft legacy/on-prem solutions are reaching EOL (SL, AX, GP, NAV) and will require a more modern solution.
- Customers outgrowing QuickBooks.
- Customers asking about finance/accounting.
- Customers currently frustrated with business inefficiencies.
- Customers who want to improve their sales process.
- Customers already running a MSFT shop who could greatly benefit from “Better Together”.



What Can I Do?

Secrets to Success

- **Have the conversation with your customers/clients/partners**
- **ASK Questions**
- **ACTIVELY Listen**



Why SYNEX for Dynamics?

Why SYNNEX for Dynamics

Ecosystem

- The SYNNEX CSP program ensures that you can get all of your cloud licenses under one roof.
- Support for other MSFT & other clouds.
- One stop shop for hardware, software, etc.

Expertise

- We are your licensing experts. This ensures that your customer gets the right licenses on the first try.
- Customers on legacy or out-of-date SKUs? Let us help!

Accessibility

- Dynamics can be challenging. Let us make it easy.
- We offer straightforward advice, sales resources, and a best-in-class P2P program.
- Dedicated MSFT team.



Why SYNNEX? Presales Support

Presales Demos

- Can be done by SYNNEX or we can leverage existing partnerships for more advanced engagements.

Trials Available

- Want to test functions or features before you buy? Start a 30-day trial of Business Central today! (Max 25 users)

D365 Sales Guides

- We have comprehensive guides that will walk a reseller through the process of starting a Dynamics practice.



Why SYNNEX? Post Sales Support

Deployment Partners

- Leverage SYNNEX's existing relationships with D365 Service partners.

Deployment Guides

- Want to deploy without a services partner? We have deployment guides from MS. (Not recommended if you are new to Dynamics)



Marketing with DEMANDSolv

A FREE marketing solution for SYNNEX Partners

Weekly cadence of pre-prepared, customizable marketing materials

Curated emails with a powerful CTA

Easy to use channel portal

Response-generating high-quality assets

Ready-to-send Twitter/FB/LI posts



Welcome to
SYNNEX
DEMANDSolv™

Additional Marketing

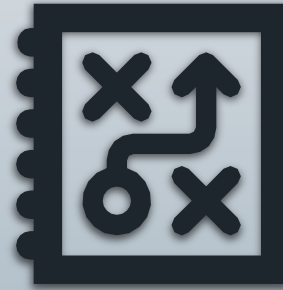
Webinars



Solution Briefs



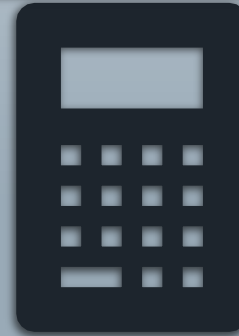
Pitch Decks



SOW Templates

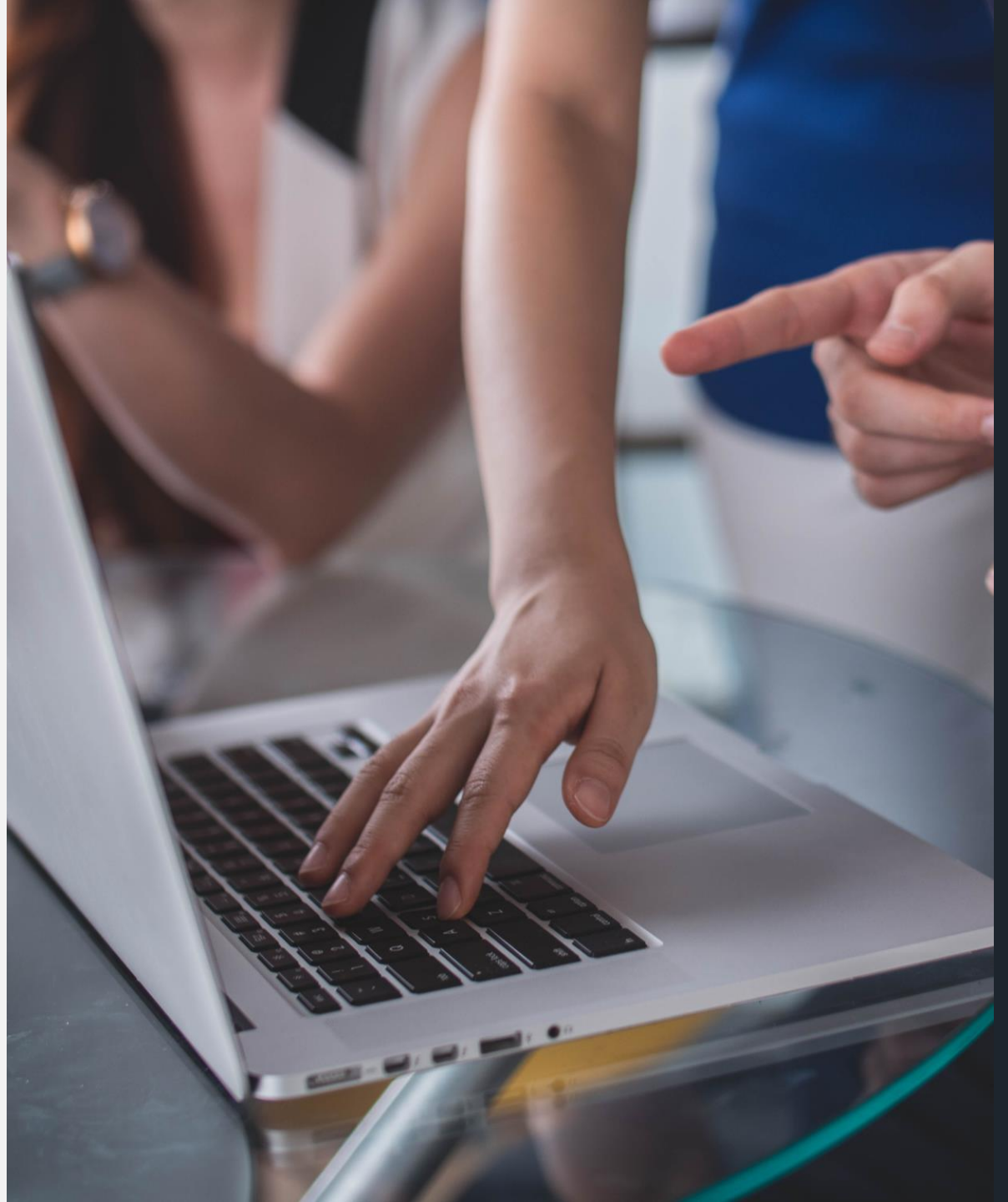


ROI Calculators



Why SYNnex for D365?

- We have a dedicated Dynamics team to help answer product and licensing questions.
- Our Dynamics team stays up-to-date on the latest in-market promotions.
- We are the D365 licensing experts.
- Not sure what D365 SKU your customer needs? No problem. We are here to help!



Let's Recap

- **Microsoft Dynamics is your next big bet.**
 - There's a huge opportunity to capture additional revenue
 - ASK/LISTEN for potential D365 opportunities (QuickBooks, need for a CRM solution, etc.)
- **SYNNEX is your Dynamics partner.**
 - Let us be your experts
 - We making selling D365 easy
 - Let us help you win and close more deals
- **We have D365 Services partners to help seal the deal.**
 - You don't have to be the expert if you leverage SYNNEX





Contact

Your ISR or SYNNEX Account Manager

-or-

Blake Cheek – blakec@synnex.com

Follow me on LinkedIn for current D365 news, updates, and other musings:

[Linkedin.com/in/blakecheek](https://www.linkedin.com/in/blakecheek)

Thank You





Next steps

Visit: <https://aka.ms/smbp2p>

&

<https://dynamicspartners.transform.microsoft.com/>