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- Britain Butcher | Creative Manager at Coffee Beanery

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I love when something feels right. Whether that’s meeting a new colleague, working on a project that makes the time fly, or – quite honestly – wearing a summer wardrobe that still fits.

The idea for a magazine centered on fit, whether that’s with your clients and team, marketing strategy, or relationships with fellow Partners, is a timely yet timeless topic.

You’ll read about culture from Pam McGee, who could write a book on the topic (hurry over to page 42). Barbara Pfeiffer of The Partner Marketing Group covers why one size doesn’t fit all in your marketing (check out page 46). Returning from their debut in the Spring 2017 magazine, you’ll read about finding “the one” in a SMART way from Diana Kreklow and Shann McGrail (see if those butterflies are well-placed on page 14).

On a sentimental note about fit, this issue rounds out the 14th year of producing The Partner Channel Magazine. Fourteen years...can you believe it? As we begin our 15th year, I’d love to hear from you on what has been a good fit for you from The Partner Channel’s offerings over the years (see contact info below).

As always, thank you to the people who round out our publishing and contributor team; your talents are well-honed and appreciated! Thank you also to the Partners who support us through displaying their wares in advertisements and The List.

Here’s to finding the right fit in all aspects of business and life.

Jenny Davis
Dynamics 365 brings tremendous change and unprecedented opportunity for Microsoft Partners.

**eXtreme365 brings the partner community and Microsoft together to build strategies for tomorrow!**

**Highlights from the recent Lisbon event:**
- Record breaking attendance at the eXtreme365 for Partners event
- First-ever eXtreme365 for Customers event surpassing registration targets
- 100 speakers delivering more than 180 dynamic sessions throughout the week
- Expanded content to address the entire Intelligent Business Cloud platform
- Another sold out Executive Exchange leadership forum
- Over 200 people attended Microsoft product and ISV training
- Attendees from 36 countries contributed at this global networking and learning event!

Watch for announcements about our fall 2017 US and spring 2018 European event!

Who attends an eXtreme365 event?
- Microsoft Leaders, Microsoft Field, Partner Executives, Sellers, Technical roles
- Business Decision Makers and Administrators within Customer organizations

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CONNECT + LEARN = GROW
Adrienne Machina is the chief velocity officer of Tornado Marketing and an in-demand copywriter, speaker, and consultant with a special focus on online marketing. Adrienne is a firm believer that progress is better than perfection, and that boring marketing will get you nowhere. She helps clients harness their business passion and purpose into marketing that reflects their company’s unique strengths and attracts their ideal clients. Adrienne has worked in the Microsoft Dynamics channel since 2000 and teaches marketing to entrepreneurs at the University of Wisconsin–Madison.

Tracy Faleide

Tracy Faleide has nearly 30 years of experience in communications, project and people management, change management, strategy alignment, and marketing. She held several communications and leadership positions at Great Plains Software and Microsoft, led her own consulting and writing business, and now serves as the storyteller (aka director of corporate communications) at Intelligent InSites, the leading provider of operational intelligence for healthcare.

Peter Joeckel

Peter Joeckel has been a leader in mid-market ERP since 1986 when his company installed some of the first network-based manufacturing systems in the country. As a business owner, Peter built and eventually sold one of the fastest-growing and forward-thinking value-added software dealerships in the country. Its success was fueled by innovative software selection techniques and an outstanding project delivery team. He sold the organization in 1999 to an e-commerce provider when it had grown in less than three years from zero to $6 million in annual revenue with more than 300 customers and 45 employees. He has assisted in the selection and implementation of hundreds of ERP solutions and has been recognized for his ability to match the right solution for a customer’s needs and interests of executives with the right vendor. Peter’s clients rely on confidence knowing that their marketing copy hits the needs and interests of executives with the right veracity while highlighting their all-important unique selling point. Tammy ghostwrites thought leadership articles for CFDs and CEOs and has been published by Accounting Today, Financial Executives International, Insurance Innovation Reporter, and Global Banking and Finance.

Diana Kreblov

Enthusiastic and insightful, Diana cut her business teeth in sales and sales management at some of the world’s best organizations including Microsoft, IBM, Attachmate, and Computer Associates. Her responsibilities included the development and management of partnership strategies, business and solutions development, marketing innovation, and performance reporting. She enjoys working collaboratively with virtual teams, managing complex multi-Partner engagements, and developing Partner and channel programs that deliver results.

Barbara Pfeiffer

When it comes to innovative marketing for technology companies and their channel, few people possess the level of expertise, leadership, and passion as Barbara Pfeiffer, senior marketing consultant for The Partner Marketing Group. Barbara has spent most of her career developing and driving high-performing marketing programs for Microsoft and a global network of VARs and ISVs. She was the strategic mind behind many exclusive Microsoft programs such as GAP, Landlord, Butterfly Publisher, Marketing Essentials, and Marketing Office Hours. Barbara is constantly on the leading edge of marketing and specializes in helping clients build and execute comprehensive marketing plans including social media, inbound marketing, nurture marketing, and content marketing, as well as assisting with critical assessments and plan/program development and management.

Tammy Farrell

CPA and Certified Fraud Examiner Tammy Farrell formed Savvy White Papers to combine her business acumen with her love of writing. Engaging an expert researcher, analyst, and writer, Tammy’s clients relax with confidence knowing that their marketing copy hits the needs and interests of executives with the right veracity while highlighting their all-important unique selling point. Tammy ghostwrites thought leadership articles for CFDs and CEOs and has been published by Accounting Today, Financial Executives International, Insurance Innovation Reporter, and Global Banking and Finance.

Pam McGee

Pam McGee is a business consultant, speaker, coach, and principal of pM/See Consulting. She is a futurist, well-read, simple, and curious. She likes to speak on business and leadership topics, women’s leadership, and equity issues. She consults and coaches executives and senior leaders on strategy, leadership, change, business, and personal growth. She has a real knack for facilitating meetings so the participants gain a higher level of learning, are eager to meet again, and leave better than they came. She does keynotes, coaching, consulting, workshops, and meeting facilitation, as well as chair and teaches at Minnesota State University Moorhead in the professional management department. Her passions, experiences, and teaching areas are strategy, culture, integration after M&A, organizational development and design, leadership, project management, lean, change management, emotional intelligence, and personal growth. She is well-versed in the software industry, healthcare, manufacturing, banking, and non-profits. Pam has coached, consulted, and spoke in more than 22 countries, and her past career experience includes leadership roles at Microsoft, Great Plains Software, Eddie Bauer, and Macy’s.

Shann McGrail

Shann McGrail is the co-founder of Devrevo Inc. and co-creator of SMART P2P, a program of best practices to enable Partners to successfully grow their businesses through building strong partnerships. Connecting the dots in new ways for outstanding results is a signature strength for Shann. Equipped with years of Microsoft senior leadership experience in enterprise services, operations, and sales positions, Shann is most passionate about helping others succeed in reaching their potential and getting the most from the power of technology and partnerships. Shann’s company, Devrevo Inc., specializes in developing and diversifying talent in the digital economy and building partnerships for business growth. She also devotes time to the executive in residence program at a local innovation center helping business start-ups and female entrepreneurs. With a background in theatre and improvisation, Shann keeps it interesting by bringing fun and creativity to any opportunity.
Scott Aafedt, business solutions consultant at DFC Consultants, has completed advanced training on inventory and asset management software from Panatrack. The in-depth training covered PanatrackerGP’s system architecture, extensibility, transaction training, use cases, best practices, project scoping, and support topics. At DFC Consultants, Scott works extensively with businesses who need connectivity between their warehouse or floor staff and back office. By giving companies the ability to truly understand their data, inventory levels, and track assets, managers have a firm grasp on their information and can make better financial and inventory decisions. DFC Consultants is a Microsoft Gold Certified Partner offering advanced ERP software solutions for small and medium businesses across the United States. Learn more at www.dfcconsultants.com.

Njevity, Inc. announced that Brooke (Webb) Smith has joined the Colorado-based company to further develop their growing portfolio of Microsoft Dynamics ERP and CRM software and services. As director of marketing, she will work to continue Njevity’s proven success in providing Microsoft Dynamics ERP solutions and services to many of the top Microsoft Dynamics customers and Partners in North America. Brooke comes with a wealth of B2B marketing experience within the Microsoft channel, having spent the last eight years at Vicinity Manufacturing where she was instrumental in developing their highly regarded marketing department and successfully launching the VicinityBrew software brand. Joining just after the official launch of Njevity’s new PowerGP Online product, Brooke will lead the effort of bringing PowerGP Online to market through her expertise in digital marketing and social media and her understanding of the Microsoft Dynamics ecosystems. For more information, visit www.njevity.com.

SBS Group has announced the partner tiers for their new Stratos Cloud Alliance program. SBS Group is designated as an indirect provider through Microsoft’s Cloud Solution Provider (CSP) program. Formerly called a Tier-2 Distribution Partner, an indirect provider connects Microsoft and resellers of Microsoft’s cloud solutions, including Microsoft Dynamics 365. Technology partners will be able to partner with SBS Group to help ease the complexity of selling Microsoft solutions. There will be three tiers, or partner levels, for interested technology partners to consider and choose from: Cloud Agent, Cloud Partner, and Cloud Merchant. To read the full press release, visit www.prweb.com/releases/2017/03/prweb14195389.htm.

GOT NEWS? Share it with us at www.thepartnerchannel.com/magazine under “Got News?”, and we’ll print it in the Fall 2017 issue of the magazine.

FIGURE OUT YOUR NEXT MOVE.

Download our monthly reports from www.thepartnerchannel.com/marketing-in-the-microsoft-dynamics-community
UPCOMING EVENTS? Going somewhere, but it’s not on the list? Let us know, and we’ll include it in the next issue! Go to www.thepartnerchannel.com/magazine under “Calling All Events!” to submit details. Find registration links to these events online at www.thepartnerchannel.com/upcoming-events.

August
Microsoft Dynamics GP Tech Conference
August 7-10 | Fargo, ND
www.gptechconf.com

September
DSLUG
September 12-15 | Tampa, FL
www.dslugconference.com

Directions North America
September 17-20 | Orlando, FL
www.navdirections.com

Microsoft Envision
September 25-29 | Orlando, FL
www.microsoft.com/envision

Microsoft Ignite
September 25-29 | Orlando, FL
www.microsoft.com/ignite

October
Directions EMEA
October 4-6 | Madrid, Spain
www.directionsemea.com

AXUG Summit
October 10-13 | Nashville, TN
www.axugsummit.com

CRMUG Summit
October 10-13 | Nashville, TN
www.crmugsummit.com

GPUG Summit
October 10-13 | Nashville, TN
www.gpugsummit.com

NAVUG Summit
October 10-13 | Nashville, TN
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We have just completed the second year of The Genius Series! To close out the program, we ask each student to complete a personal essay about their journey in the marketing world.

I’d like to lend my words for this page to Brittany Shelley of AvidXchange, as she shares what Partner-to-Partner relationships, consistency, and her marketing journey mean to her.

**BRITTANY SHELLEY**
**PARTNER MARKETING COORDINATOR, AVIDXCHANGE**

I’d like to think I’ve always had a creative eye, which led me down the path of graphic design in college. However, approaching my junior year, I found that graphic design was only a piece to the marketing mix, and I craved a better understanding of how all the other pieces fit. So with only two years left, I switched to integrated marketing communications and learned the importance of defining your target audience, delivering a consistent message, focusing on effective channels, creating visual identity, and developing an integrated strategy.

Following college, I’ll be honest that I didn’t have a true understanding of how marketing could vary based on the organization or industry. It took personal experience to truly understand the difference in marketing to a business versus marketing to a consumer. As most of my experience in college consisted of internships with non-profits, I was used to creating a mixed digital approach with both B2B and B2C target persona consideration.

My first real dive into the non-profit space was with the Alpha-1 Village Foundation. As an advocate for the Foundation, I developed relationships with key stakeholders in the community to maximize the awareness of our values as well as maintain and increase sponsorship opportunities. Non-profit marketing is expected to evoke emotion, gain attention, and inspire people to take action. Through my experience with non-profits, I learned interchangeable strategies that could be used in the B2B space. A key strategy I took with me was the importance in setting goals, tactics, and objectives. When you are on a minimal budget, clear and relevant benchmarks are essential to a successful campaign.

It was my time on a committee board that led my shift to IT. After working on a committee with the CEO of an IT firm, I joined his team and gained a new understanding of marketing in the IT space. As a VAR, the organization was a solutions provider in the hardware space. I managed all creative and technical elements of our B2B marketing initiatives including brand creation, development of print and web collateral, lead generation, channel Partner relationship building, customer segmentation, and service product development. My main role was to establish trusted relationships with our channel Partners and work together to increase business profitability through the execution of joint marketing campaigns. I spent four years working alongside companies such as Cisco, NetApp, Aruba Networks, and EMC on the channel side. It was after working with these organizations that I realized they joy I may find in managing the Partner relationships.

When I joined the Partner marketing team at AvidXchange nearly a year ago, I wanted to bring my personal experiences as a VAR to the table. From working on the VAR side, I found the onboarding experience to be the most important in forming a strategic partnership. As AvidXchange was rapidly growing their Partner ecosystem, I worked with the team in perfecting our onboarding experience for the Partner. Onboarding is your Partners first impression of you, so you want to make it a great experience. That includes the proper training, sales resources, and marketing engagement.

We created consistent communication during all stages of the onboarding process and armed Partners with the resources needed to be successful in selling our product. We also created several campaigns-in-a-box that Partners could leverage right out the gate that included webinar topics, blog posts, social posts, and email campaigns. As we understand a successful program is Partner-centric, we have regular communication with our Partners to understand the types of marketing material they require. As it was the most important aspect during my time in non-profit, I work with my Partners now to set goals, tactics, and objectives for each of the campaigns we run. Marketing education should be fundamental in your Partner relationships. This is why I found it important to talk with like-minded professionals and participate in educational classes such as The Genius Series by The Partner Channel. I think the key things I’ve learned through my marketing journey are constant education and focusing on an integrated approach. One of my favorite quotes is by Beth Comstock who says, “Whether B2B or B2C, I believe passionately that good marketing essentials are the same. We all are emotional beings looking for relevance, context, and connection.”
“I seriously get a boost of energy after we have our meetings. I finally had the desire to put creative planning and thought into the webinar follow up campaign I’ve been mentally working on for months. Felt like I accomplished something useful and forward-thinking.”

— Lindy Belley, Integrity Data

When it comes to your career **where are you going?**

If you’re standing still or coasting on a monotonous cycle, your motivation and skill level are deflating…faster than you think.

Don’t fizzle out! Kick it up a notch this fall by joining The Genius Series: Marketers Excel Into Geniuses.

Meeting with fellow peers from the Microsoft Dynamics Partner community AND learning from industry experts is the best way to build momentum in your career without leaving your office.

**WHAT IS THE GENIUS SERIES?**
A focused curriculum for marketing expertise, community networking, and mentorship opportunities.

**WHAT ARE THE BENEFITS?**
- Professional development
- Skill-level improvement
- B2B trend analysis
- Best-practice alignment
- Networking with peers and industry experts
- Confidence-building sessions
- Career-boosting opportunities

**WHAT IS THE TIME COMMITMENT?**
Two-hour live webinar each month for a nine-month period.

**WHAT IS THE COST?**
$1500 or pay $175 in nine monthly payments.

Learn more at www.thepartnerchannel.com/the-genius-series or contact Bethany Foyt to register at Bethany@thepartnerchannel.com.

LEADERSHIP

SUMMER 2017 | THEPARTNERCHANNEL.COM

SMART P2Ps:

story by SHANN McGRAIL AND DIANA KREKLOW illustration by DAVE SWANG

SEVEN STEPS TO FINDING “THE ONE”

The heart races with excitement. The dialogue is a fast-paced exchange full of ideas and potential. Hours together seem to fly by in an instant. Thoughts are so in sync that each can finish the other’s sentences. This is what it feels like when you are in the company of “the one” – your ideal partner. Alas, as nice as that sounds, finding the right “one” can be a challenge. Successful business partnerships, just like romantic ones, take time and commitment. In both types of relationships, it is often the case that what starts out full of hope and promise for a long-lasting arrangement of mutual fulfillment, ends up quickly heading toward frustration and disappointment. But fear not – with a little guidance, you will be well on your way to meeting your dream business partner.

BUILDING PARTNER-TO-PARTNER RELATIONSHIPS WITH SMART P2P

SMART P2P (www.smartp2p.net) is a framework developed to help businesses overcome the challenges of finding and building meaningful partnerships. It calls for any potential suitors to have a dating profile, of sorts, that captures details of what they are looking for in, or can offer, a Partner across five key dimensions: Sales, Marketing, Agreements, Readiness Resources, and Technology. SMART P2P helps would-be Partners establish trust, share, and adapt to allow each other’s strengths to shine through, and live happily ever after, accomplishing all the goals for which the partnership was initiated in the first place.

SEVEN STEPS TO PARTNERSHIP SEVENTH HEAVEN

To get you started and help you avoid as much heartbreak as possible, lessons learned from recent SMART P2P engagements have been summarized in seven steps for finding your ideal Partner:

» Know Yourself – While “tell me a little about yourself” might sound like a cheesy pick-up line if heard over a cocktail in a dimly lit room, it is a standard and legitimate business networking question that is almost certain to be asked early in any partnership pursuit. It is important, therefore, to be well-prepared with an answer.

Having a business value proposition that considers how Partners fit into the equation is a good place to start. You need to be able to clearly articulate and demonstrate the value you will bring to the relationship if a channel Partner is to spend time and resources with you. Unless you can deliver value to a Partner, do not set your sights on them. Make sure you can clearly identify target clients, the pain points your company...
can resolve or opportunity you can help address, a brief highlight of the solution you offer and the benefits clients stand to derive as a result, and the type of Partner with which you want to work. Spending time up front thinking about all of that and being able to articulate it on the spot will make it easier for Partners to see themselves involved with you.

» **Develop a High-level Channel Strategy and Selling Model** – Determining how a working relationship with a Partner will function is essential to understanding with which types of Partners you will be most successful. Understanding if you want to sell with a Partner or through a Partner will help target Partners with a business model that fits what you are looking for. It will also help you find the right type of Partner for your needs (i.e. managed service provider, systems integrator, independent software vendor, etc.)

Determine how a working relationship with a Partner will function is essential to understanding with which types of Partners you will be most successful.

» **Determine the Precise Characteristics of an Ideal Partner** – Now it is time to get down to the details and get more precise about the characteristics of the ideal Partner. Consider what you need from a Partner when it comes to:
  - Geography (what parts of the world do they need to service?);
  - Size, in terms of revenue and number of employees;
  - Technology alignment;
  - Industry focus;
  - Alignment with existing Partners and strategy.

This is also a good place to check in on the image your company is projecting. If you are going to be approaching Partners, they are going to do their own background checks. As such, it is worth taking the time to ensure your website is up to date and references current partnerships and that company LinkedIn and Twitter pages are actively promoting Partner success stories and Partner-based business opportunities.

» **Create a Target List** – With an understanding of what an ideal channel Partner looks like, a target list of prospective channel Partners can be created. Generating this list can start from any number of sources. The best bets include existing company knowledge and relationships. You can also widen the search and review other lists. Redmond Channel Partner, for example, offers various lists of top Microsoft Partners (https://rcpmag.com/articles/2016/06/01/top-us-microsoft-partners.aspx). Another option to explore is Microsoft Pinpoint (https://partner.microsoft.com/en-US/Marketing/find-microsoft-partners).

» **Play the Numbers Game** – Recruiting Partners is a numbers game. The more Partners targeted at the top of the pipeline, the better the chances of closing a few solid relationships. Do not limit yourself to starting out by looking at only a few potential Partners.

  In a recent interview, Kati Quigley, Microsoft’s senior director of Partner marketing and recruiting, said there are approximately 400,000 Partners in the Microsoft ecosystem. Playing the Partner recruiting game would start with that entire field of possibility. Narrow that down to between 300 and 500 Partners who are a potential fit for your company. Then do another level of review to cut the list down to approximately 30 Partners who would be a strong fit and start your pursuit. (Access the interview at https://www.avepoint.com/blog/strategy-blog/microsofts-kati-quigley-microsoft-partner-network/)

» **Take a Reality Check** – With your list of potential Partners in hand, it is now important to prioritize efforts according to desirability, probability of engagement, and available resources. Be realistic and align resources to where there is the best likelihood of success. It can take up to three months to work through the potential list of Partners. If you are short on time, resources, or both, consider hiring a service to help you expedite recruitment.

  As your company starts to actively reach out and engage with each of the channel Partners on the prioritized list, you need to ensure that you and your team have all the required information at the ready. For example,
SMART P2P calls for completion of its "Partner Profile Template" as an excellent way to help team members prepare for Partner meetings and as a tool to educate the broader team (sales, engineering, marketing, legal, and executive) about the value of the proposed channel partnership. This education is important as these may be the stakeholders called upon to invest time and resources into the partnership to move it forward.

» Get Serious – It is time to set up meetings to get to know each other better. Since you have a list (albeit, narrowed and prioritized – still you only have limited time and resources available) of potential Partners waiting to confirm whether your company is a good fit, you want to quickly determine if there is a basis on which to take the relationship to the next level. This is where all the work you did in step one to get to know yourself as a business and capture your core value comes into play. If you start the conversation with prospective Partners on your short list by building a solid understanding of each other’s value proposition, it should give you both a strong indication at the outset of a likely future together.

It is realistic to expect to sign between three and five Partners after this step. Through the course of further discussion and as more is learned about each Partner, you will prioritize how you allocate resources such that the larger proportion of what is available goes to those who have the most promise of delivering results.

HAPPILY EVER AFTER

Finding an ideal business partner is akin to finding a partner in your personal life. Knowing what one values in oneself and what one finds of value in another, be it a person or organization, and staying true to that as the list of prospective Partners is evaluated, can keep you from investing time and energy into an endeavor that will not lead to anything fulfilling. Use the seven steps above to guide your company’s search for “the one” who will create a happily ever after situation for your partnership goals.

For more information, check out www.smartp2p.net.
THE FIT FOR MICROSOFT DYNAMICS GP IN THE Dynamics 365 World

story by PETER JOECKEL illustration by SHAWN OLSON

With almost 30 years of experience in the mid-market ERP space, it has always been my opinion that Microsoft Dynamics GP (nee Great Plains) had the biggest and best Partner ecosystem. That simple fact alone made it the best package in the market for a long time.

However, the acquisition by Microsoft never panned out the way everyone hoped. The deep Microsoft financial pockets have been great for the technical upkeep of the product, especially in how it integrates into the Microsoft technology stack. The issue has been the positioning relative to other Microsoft ERP solutions and how this affected Microsoft Dynamics GP Partners.

The honeymoon was probably over long before the acquisition of Navision and Axapta when the technical folks at Microsoft looked under the hood of Great Plains and marveled at what they now owned.

The last time I wrote about this topic, I was given valuable feedback on my writing and analysis skills in both short and long responses:


» Long – A lengthy blog post that pointed out in joyous detail why and how I was depriving some perfectly good village of an idiot.

» As a bonus, I learned a new word – Bollocks. Loosely translated I think it means good job, mate.

As a bonus, I learned a new word – Bollocks. Loosely translated I think it means good job, mate.

With that kind of encouragement, how can I resist?

The advent of the Dynamics 365 product line fundamentally changes the business landscape for Microsoft Dynamics GP clients and Partners alike.

Regardless of what Microsoft comes out and says publicly in regard to how it will support the Microsoft Dynamics GP product line, there is no logical position for Microsoft Dynamics GP in the Microsoft Cloud world.

Let’s look at some facts:

Over recent years, the Microsoft Dynamics GP Partner community has felt like the ugly redheaded stepchild in the Microsoft Dynamics family, prettier only than the Microsoft Dynamics SL folks that have been relegated to punch line status, because of the emphasis on the Microsoft Dynamics AX (formerly Axapta) product line.

Even the Microsoft Dynamics NAV (formerly Navision) folks were starting to feel like second-class citizens as Microsoft trumpeted Microsoft Dynamics AX as their enterprise solution and Microsoft Dynamics NAV, GP, and SL were lumped together in an SMB gang.

Then everything changed dramatically with the introduction of the two Dynamics 365 lines. Until there is a new “plan of the day”, of course.

To understand the future of Microsoft Dynamics GP, you must step back and look at the bigger Microsoft picture. Industry analysts say that Satya (Nadella, Microsoft CEO) has bet the ranch and his legacy on pivoting Microsoft to a cloud company. Does anyone remember how much he was willing to overpay to buy Salesforce? Only Benioff’s record attempt at greed killed that deal.
And why spend “literally billions and billions,” as Carl Sagan would say, buying a CRM package when Microsoft already has a CRM solution of their own? Because it is a cloud product, and Microsoft must show growth in their cloud business to make stock analysts happy. Of course, everything ties back to the stock price and options tied to executive compensation.

The release of the Dynamics 365 product lines creates two cloud-based solutions:

For the SMB Market:
Dynamics 365 for Financials is currently positioned as a “QuickBooks” alternative built on a scaled back set of Microsoft Dynamics NAV functionality.

However, the promise is for that functionality to keep expanding until it encompasses all the capabilities of Microsoft Dynamics NAV available today – and more – as it is integrated into the Dynamics 365 family.

For the Enterprise Market:
Dynamics 365 for Operations is basically the latest release of Microsoft Dynamics AX “optimized to run in the cloud.”

In this environment, what are the viable options for Microsoft Dynamics GP clients and Partners?

- Why not as a perfectly positioned on-premises solution?

With its huge installed base and aging, but still loyal, support ecosystem, there is no reason why the Microsoft Dynamics GP line can’t be viable for years to come. There are far inferior products sitting in the portfolios of holding companies that continue to generate tidy annual maintenance fees without any significant updates to the product line.

As an FYI, there are still lots of Novell users out there.

More importantly, there are still a lot of companies that are not interested in having their accounting system in the cloud. Never mind the basic fact that a browser is at best sub-optimal for the repetitive data entry that dominates day-to-day accounting system use. If you disagree, you never had to enter hundreds of GL reversing journal entries.

The last major report that I could find, the 2016 Report on ERP Systems and Enterprise Software from Panorama Consulting Solutions Research, indicates that “consistent with previous years, most respondents chose to implement on-premises ERP software.” Both last year and this year, 56 percent of organizations selected on-premises software.

Microsoft Partners are now focused on the 365 product line and the cloud. With this focus/tunnel vision, it is easy to start believing that everyone is rushing to the cloud when more than half of new implementations are still going on-premises.

What impact would a major data hack of a well-known ERP cloud provider on the market? How secure is that information?
Regardless of what Microsoft comes out and says publicly in regard to how it will support the Microsoft Dynamics GP product line, there is no logical position for Microsoft Dynamics GP in the Microsoft Cloud world.

With competitors like NetSuite and Acumatica aggressively courting an ever more disgruntled and disillusioned Microsoft Dynamics GP Partner channel, is there a willingness to position Microsoft Dynamics GP as the leading mid-market ERP on-premises solution? Probably not by Microsoft if there is a potential to cut into cloud sales.

Let’s form a coalition of Microsoft Dynamics GP Partners with the goal of buying the product from Microsoft and restoring it to its former prominence.

I’ll chip in.

Peter Joeckel has nearly 30 years of experience in the ERP world. He heads a team of highly experienced ERP and CRM professionals uniquely qualified and positioned to help Microsoft Dynamics GP clients and Partners transition into the Microsoft Dynamics 365 world.
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want to make the word ZOG your favorite new phrase.

» Is this really your ZOG?
» What’s your ZOG?
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No, ZOG is not a cool-kid texting thing.

ZOG STANDS FOR ZONE OF GENIUS

Living in the ZOG is a way of creating your life so that you maximize your personal fulfillment while forging deeper connections with family, friends, clients, employees, and employers.

Zone of Genius is a term coined by Gay Hendricks in his book “The Big Leap,” which has become one of my favorite business books. I'm committing to re-reading it once a year until I have mastered living in my Zone of Genius.

You know you are in the ZOG when you get into a creative flow. Time melts away. You are doing work that is fulfilling and meaningful to you. You can create success in multiple areas of your life.

HOW WE SABOTAGE OUR SUCCESS

The premise of “The Big Leap” and Zone of Genius concept is that we only have so much tolerance for feeling good, what Hendricks calls an “upper limit problem.” Just as we have a weight set point and a financial set point, we have a “feeling good” set point. As a result, when things start going well in our lives and we approach our upper limit, we bring ourselves back down to our comfort level by sabotaging our efforts, usually completely unconsciously. We forego happiness for comfort.

We may think we want success, but we don’t know what that looks or feels like. We know what our lives look like today, and we grow comfortable with what we already have. That’s why people who lose weight often gain it back. Even when people experience success in one area, they may experience a breakdown in another area. For example, many people achieve business success, but then they sabotage their health by drinking too much or neglecting their personal relationships.

IS THIS AN UPPER LIMIT PROBLEM?

» Have you ever promoted a great employee, only to watch him/her flounder?
» Ever had a super successful day at the office, and somehow, despite your good mood, you end up in a big fight with your spouse?
» Have you ever been presented with a major opportunity, only to get sick at the absolutely worst time?
Upper limit problems are sneaky. We experience them as outside events that are happening to us, not something we are doing. (Why did she have to pick a fight with me today? I was having such a great day.)

Recently my friend Deanna hired a business coach. At the same time, she got a money-making opportunity to work with a big new client. She chose the client over the coaching. Client consulting squeezed out the time she had allocated to work with her coach to pursue the direction she wanted for her business. This is a perfect example of an upper limit problem. Just as she takes action to up-level her business, she gets pulled back down. She can rationalize that she really needs the money. Maybe she does, but this cycle will keep showing up until she breaks through.

**MOVING UP TO A NEW ZONE**

If your goal is to live your highest, best life, you must become vigilant about quickly recognizing and solving upper limit problems. The four zones described in the book are:

» **The Zone of Incompetence** – You’re not good at this work, but maybe you feel you “have to” do it. A great example is when something goes wrong with your computer (assuming you’re not the tech guy). Instead of calling the tech guy, you spend eight hours trying to fix it yourself. If you’re in sales or consulting, you just burned a lot of opportunity cost to fix that computer yourself. Recognize when you’re stubbornly insisting that you must do things yourself.

» **The Zone of Competence** – You’re good at these things, but your talent is not unique. An analogy I use here is that if you were a rock star, you probably could set up the stage, pack the van, and test the sound equipment, but you need to conserve your time and energy to be a rock star. This is work that you should delegate to someone else.

» **The Zone of Excellence** – The excellence zone is the danger zone. You are exceptionally competent at this work and likely well-paid. You’re comfortable. Many people live most of their middle age years in this zone. It’s a great place to be, until you decide that it’s not. Your inner longings start creating feelings of discontent.

» **The Zone of Genius** – These are our passion projects, the whispers in your ear that you should write that book, start that business, ask that woman out on a date. When you’re in the ZOG, you are thriving!

**HOW DO YOU FIND YOUR ZOG?**

I’m a master at finding other people’s Zones of Excellence and Zones of Genius. I make my living helping companies express their unique genius through their marketing strategy and messaging. But let’s put the marketing aside and just talk about how you identify your areas of genius.

Here’s where to look:

Go back to your childhood.

*What did you love as a kid? What were your favorite activities?*

I have a picture of me sitting in my cousins’ sandbox. While all the other kids are playing on the jungle gym, I am practicing writing. When we played pretend, I always wanted to play school, and I was always the teacher. I literally used to thumb through the dictionary for hours, trying to memorize words, writing down the ones I found most interesting, useful, or titillating. (Love that word!) I was absolutely fascinated that there were so many nuances to the English language. Is it any shocker that today I make my living teaching and writing?

Think about what irritates you.

*Your weaknesses provide clues about your strengths.*

I know that I have almost no tolerance for being bored. People regularly say things to me like, “How do you manage to get this all done? How do you juggle two businesses, travel, raise kids, keep on top of all your projects, and still somehow fit in a social life? Isn’t your life too crazy? When do you watch TV?”

I hardly ever watch TV. TV bores me. What excites me? Starting fresh. I love new notebooks, new pens, and new projects. Whether it’s taking on a new client or a new hobby, I dive in, loving the strategizing and imagining the transformation ahead of me. And then I like the doing. But after things are running smoothly for a while, I’m ready for a new challenge.

Doesn’t that sound like a perfect job for a marketing consultant? I come in, turn things around, and move on to the next client who needs me. In the life I’ve created for myself, every day is different. Some days I’m speaking at a conference. Some days I’m writing until 2:00 a.m. I am constantly switching gears between different clients and projects. What would drive other people insane is perfect for me.
What do other people notice?
Rock your quirks. They make you special.

What do people always notice about you? Are you hyper-organized? Do you plan your family vacations with detailed spreadsheets? When I first started out as a marketing consultant, my first client was meticulously detailed. He actually had a rule that you could not leave papers on your desk at the end of the workday.

As fastidious as he was about the orderliness of the office, it was equally applied to his business systems. Papers had to be scanned and filed into specific directories. Employees were required to update the time-billing system every 15 minutes. If the threshold of meetings went over the amount of time allocated, he became highly vigilant of signs that the project might be going sideways.

While some people found these rules onerous, clients loved him! He capitalized on his strengths by going after clients who had been through failed implementations. What do people want after they’ve lost thousands of dollars on a project gone wrong? Confidence that this project is being strictly managed. Instead of competing with all the other Microsoft Partners that sold similar products and solutions, he narrowed his focus to work exclusively with these turn-around projects. These clients paid him well because they needed most what he did best!

FIND YOUR ZOG AND ENCOURAGE EMPLOYEES TO FIND THEIRS

It’s unrealistic to think everyone could live every day completely in the ZOG. But the idea is to minimize non-ZOG activities as much as possible. Good employers don’t let employees stay stuck in the Zone of Competence – or worse. People commonly get hired into positions that aren’t a great fit. They do their best to make it work for themselves or the company, but if it’s not their ZOG, it will never work long-term. Moving someone or letting them go may be the best thing that ever happened to them.

I was super excited to be managing a team of people at the ripe old age of 26. As the company grew, I was juggling sales, marketing, and people management. One day I got called into my manager’s office and was told that someone new was taking over as the department manager. My role would shift to be exclusively focused on sales and marketing. At first, I was hurt. I was a great employee. How dare they! Managing people made me important.

But looking back, managing people was not my greatest strength. Sales and marketing is. Thirty years later, that “new manager” is my best friend. Even if having a difficult conversation hurts in the moment, our roles as business owners and executives is to encourage employees to spend more time in their Zone of Excellence and Zone of Genius, which adds more value to your business, to your customers, and ultimately to your employees themselves.

Not everyone gets to the ZOG in their lifetime, but everyone should be encouraged to up-level their Zone. Get in the ZOG. Because – ZOG – life is good! 😊

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Armanino opened its doors as a CPA firm more than 50 years ago. Founded by Andy Armanino, Sr. and a couple of his partners, the company was built on their vision of providing great customer service and building client relationships. They had a goal of adding one employee each year. Fifty years later, they’ve greatly surpassed that with more than 1,000 employees across the United States.

Today, Andy Armanino (Andy, Sr.’s son) runs the company as CEO, and they continue to be the fastest-growing CPA firm as well as one of the 25 “Best of the Best” accounting firms in the nation. As a high-growth firm, the people at Armanino embrace a culture of entrepreneurialism and innovation. With any change they make, whether that’s a possible merger, hiring a new employee, or embarking on a whole new market, they ask, “Will this make us more innovative and entrepreneurial?”

One area that has definitely made Armanino more innovative is the consulting side of their business, headed up by Tom Mescall. Thirteen years ago, they added this service onto their offerings and asked how to make a more positive impact on their clients’ lives and continue to ask this for every implementation project they take on.

“Of course, we strive to build trust and loyalty with our clients, but we also set out to make a positive impact on their lives and entire business. We believe that fuels our ability to grow, their ability to succeed, and helps our clients get ahead of their competitors,” Tom says.

Armanino provides Microsoft Dynamics AX, Microsoft Dynamics GP, Microsoft Dynamics CRM, Power BI, and most recently, Microsoft Dynamics 365, to a wide range of industries. From very early on, Armanino wanted to be known as the consultants for CFOs (chief financial officers). With this in mind, they have created a concept called the CFO Evolution®, which is a framework for CFOs to see where they are today and where they need to go to succeed as a company.

Tom shares, “We are constantly doing research, CFO surveys, and building thought leadership so that we can speak to the challenges CFOs face every day. It’s a great catalyst for us to align with the world of accounting.”

In their research, they noticed (in Silicon Valley) that CFOs spend less than three years in a job. “We wanted to be on speed-dial with CFOs as they moved to their next company. That was a big goal, and we have accomplished that, setting the stage for our rapid growth.” Tom continues, “By constantly building relationships and adding value to our clients in a comprehensive way, we are the first company that comes to mind when they need accounting management help at their next gig.”

Another area where they go above and beyond with innovation and entrepreneurism is with their corporate social responsibility initiative, Helping Hand. Board chairwoman of the Armanino Foundation, launched in March 2017, Mary Tressel shares, “This includes two annual hands-on programs. The Great Give is where we close down our offices for one day, and all our employees go volunteer for a local non-profit. The 30
by 30 program encourages younger staff members to gain leadership skills by heading up community service campaigns, such as getting a group together to walk for a charity, or inviting their co-workers to volunteer at shelters. 

Armanino has donated nearly 18,000 hours of service to their communities since 2009 through the Great Give, and the event gets bigger every year. 

In addition to all of this, the Armanino Foundation matches any staff contribution two-to-one. Charitable organizations are nominated by firm employees and selected by a committee. After only two rounds, Armanino has donated a total of $46,000 in grants to charitable organizations across the U.S. 

Tom adds, “Giving back is a great example of what we call innovation here. Innovation doesn’t have to be the biggest bang in the world. Ninety percent of innovation is incremental innovation. Innovative ideas come from a giving-back culture, and this mindset continues to take us down many paths of growth and impact in our business.”

THE TOP FIVE

We asked Tom five questions about Armanino, focusing on fit, impact, and community.

The Partner Channel (TPC): How do you help your clients find the perfect fit?

Tom Mescall (TM): We lead our implementation projects with a strategy and transformation approach. It’s not just about the technology; it’s about what they want to achieve at their business from top down. We align all our recommendations to the business and wrap technology in with that answer. It’s an innovative approach to focusing on what the client sees as the biggest impact factor. 

Our clients are not only dealing with technology challenges, they are dealing with growth challenges, people challenges, and more. By taking a strategy and transformation approach, we’re going in on an assessment basis, asking critical questions, and coming back with a roadmap of recommendations. Technology is part of those recommendations, but is not the whole thing. Then we have a strong dialogue on how to make those recommendations happen.

TPC: What are some of the biggest impact factors your clients are concerned with?

TM: Growing their business is number one. Companies are challenged with how they stay ahead of their competition and increase distance between them. Maybe that’s through mergers and acquisitions or expanding geographically, but they struggle with how to envision that before it’s happened. That is a lot of how we consult and help our clients get past that hump.

Ultimately, in order to do that, they are also looking at implementing the most efficient ways of operating their business. Technology is a big contributor, but many clients have a lot of technology that is not integrated together. They have duplicate technology and maintain the same things everywhere. When they can make systems talk to each other to provide high value, taking out manual and low-value business processes, they can achieve growth goals and go beyond.

TPC: What type of clients do you have on Microsoft Dynamics 365?

TM: Mainly our enterprise accounts, who are $500 million companies or higher, are making the shift to Dynamics 365. By combining Microsoft Dynamics AX and Microsoft Dynamics CRM, it’s a great solution for companies of that size who are still growing. Technology has matured to such a level where our clients are asking how this technology can transform their business – and it can! Our clients are not just focused on getting ERP or CRM in place; it’s about getting the technology that enables them to do more. It’s an extremely exciting time.

TPC: What industries do you work best in?

TM: We focus on the high-tech (software, hardware, and semiconductor manufacturing companies) and life sciences (medical device, pharmaceuticals, and biotech companies) industries. We have built modules on top of Dynamics 365 specific to those markets.

TPC: What do you like most about the Microsoft Dynamics Partner channel?

TM: The most exciting thing about the Microsoft Dynamics channel is the convergence of technology. Combining technologies like Microsoft Dynamics AX, Microsoft Dynamics CRM, Power BI, Skype, and now even LinkedIn. It’s leading to greater analytics, efficiency, and ultimately, to machine learning!

Technology is an enabler, and it’s giving companies a deeper way of looking at making decisions. By looking at where our clients are today and where they will be in five years, it allows us to have a bigger impact. We here at Armanino want to have a say in how the world is changing, and Microsoft Dynamics solutions and the community help us do that.

“Armanino will continue to be our support. They’ve been a very important part of the success of this project, and they were all very invested in it. They became part of our family.”

– Marv Nelson, COO of A-dec

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PRODUCTS

Microsoft Dynamics GP, Microsoft Dynamics AX, Microsoft Dynamics CRM, Power BI, and Microsoft Dynamics 365
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Ladies and gentlemen, we have a winner!
Congratulations to Deanne Rasmussen of Warren Averett Technology Group for winning our Spring 2017 contest.

Now for the next round of the Word-A-Ganza! Posted along the perimeter of this page are 25 words that relate to the topics and themes included in this issue of The Partner Channel Magazine. These words can be found in the grid horizontally, vertically, diagonally, backwards, and forwards. You can submit your completed word find to us for a chance to win a $10 gift certificate to Starbucks so you can enjoy future word finds over a latte or cup of tea.

Simply scan and email your completed word find to Jenny Davis at Jenny@thepartnerchannel.com or mail a copy to The Partner Channel, 1240 Elm Street, Fargo ND 58102. If you don’t want to write in your magazine, contact Jenny, and she’ll email you an electronic version of the same word find.
Last week I got a Facebook friend request from my real-life friend Lynette. Since we already were “friended,” I sent her a “hey, I think you’ve been hacked” text. To which she replied, “LOL – no I’m such a dip I got a new phone and started over with all my accounts.” After actually laughing out loud, I imagined Lynette’s internal dialogue going something like this:

(Lynette to Lynette) You know what...last me on Facebook whined too often about first-world problems. How uncool was I complaining about the seven minutes I had to wait for my full-body massage? Yuck. New me is going to be funny, not whiny. Instead of complaints, I’ll share videos of baby goats jumping over things. Everybody loves those baby goats!

After chuckling about this new example of Lynette’s uniqueness, I considered the freedom and promise of fresh starts. Remember when we were kids and we could call “do-overs” when things got heated on the flag football field? We all pretty much knew when it was okay to make the call, and that – once made – the call stood without question. Everyone agreeably went back to their prior spots, and the game resumed. No fuss, no muss.

What if we could call do-overs that easily as adults? I know people who have “clean slated” it. In most cases, traumatic losses or life-changing events gave them no other options. After thinking more about what I’m now calling the “baby goat thesis,” I propose we stop waiting for catastrophes before cleaning our slates. In a report published by The Wharton School at the University of Pennsylvania entitled “The Fresh Start Effect: Temporal Landmarks Motivate Aspirational Behavior,” authors Dai, Milkman, and Riis propose two primary explanations for the fresh start effect.
They found that naturally arising time markers, like the first day of summer, New Year’s Day, and even just Mondays, help us disconnect from past imperfections, making it easier to leave bad habits behind. They also posited that these time markers disrupt our focus on the minutiae of our daily routines, triggering us to step back and take a big-picture view of life, helping us make decisions about what we’d like to change.

To prove their theories, the authors systematically studied the habits of thousands of their fellow students and found that gym attendance is higher on Mondays than on all other days, and that students exercise more both at the start of a new semester and on the first day after a school break. And so, I think it’s safe to say that new weeks, seasons, and semesters give wind to our fitness fresh starts, giving us higher chances of success.

But, what of our fitness in so many other important areas of our lives, like our emotional well-being, our relationships, our professional success and growth? If there were a Fitbit-like device I could wear to track my temper flare-ups, sarcastic remarks, or misaligned prioritization decisions, I’d strongly consider wearing it daily, even though the readings might be daunting. As a society, we’re not shy about announcing to our friends and colleagues when we’re trying to “get fit” or “in shape.” We post details about our amazing workouts and clean eating recipes until even our real-life friends want to unfriend us. But, when it’s our attitudes, emotional intelligence, or ability to manage stress that is in most need of improvement – mum’s the word. And that’s too bad, because our hesitancy to be open about these universal struggles is causing us to miss out on the proven benefits of fresh starts.

It’s time for a mindset reset. Let’s take a cue from my friend Lynette and more frequently start our accounts anew. For those of you who don’t know Lynette, here are more reasons: In his book “Understanding the Entrepreneurial Mind,” author Alan L. Carsrud states that negative thinking from entrepreneurs in a negative mood could lead to decisions which are more likely to be poor for their venture. The book also highlights that positive-thinking entrepreneurs who have direct contact with their customers are more likely to persuade a potential customer to try a new product. That’s because positivity is contagious. In an article published in
NMB Solutions works with Dynamics AX partners and clients internationally. Our reputation for excellence is based upon our professionalism, expertise, and dedication to client satisfaction. It is our pleasure to assist you in reviewing your Multi-Carrier parcel and LTL integration requirements and demonstrate the benefits of our solution.

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SEPTEMBER 2013 by the Vancouver Sun, Joe Kelly reported that “being positive with others – by sharing positive words and actions – has the effect of releasing the chemical oxytocin into the recipient’s bloodstream. This chemical reaction floods their body with positive feelings of love, joy, and connection.”

Take these two simple steps to get fresh start movements going in your workplace:

» Bring behavioral fitness out of the shadows by simply being open about it – At the beginning of new projects, quarters, fiscal years, or review cycles, state out loud a few of these things you’re working on, and encourage others to do the same. You’re probably used to stating the new process disciplines you and your colleagues have vowed to follow to improve outcomes on a new project. So, why not make room for at least stating some attitudinal and behavioral goals out loud? The sooner we lift the stigma from these topics, the sooner we can all benefit from one another’s approaches and learning.

» Make more room for fresh starts by recognizing that every week – heck, even every new day – presents a do-over opportunity – If you’re a project or team leader, start weekly meetings with statements like, “it’s a new week, so let’s make the most of it by getting our hardest work done early so we have time for that research project we’ve been talking about.” Or, “last week was tough, and I lost my cool, but this week is going to be great!” Regardless of your role, spread hope and motivation (and maybe even a healthy spirit of competition) by making daily declarations like, “today I’m going to tackle this project I’ve been avoiding” or “this is the day I get to a decision point with Sandy – I can just feel it.”

And if these reasons and simple steps don’t work, there are always baby goats.

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**OUR MISSION**

Red Maple’s Advanced Credit Cards provides comprehensive credit card functionality to companies around the world.

**Multiple Processors & Gateways**

With direct support for over 16 different processors & gateways, your company can seamlessly transition to a new provider or leverage your existing business relationship.

**Powerful “Omni-Channel” Functionality**

Red Maple provides processing from both the standard AX client & Retail, so your company can experience a true “Omni-Channel” experience.

**Native Integration Without Hidden Costs**

All Red Maple solutions are native extensions of Microsoft Dynamics AX and Dynamics 365. And unlike many “generic” credit card solutions, we do not charge “per transaction” fees.

**Designed to Fit Your Business**

Our software is open source, so your company can customize it to support your business goals.

**Proven Solutions**

Red Maple has provided software to Microsoft AX customers 15 years. With hundreds of implementations over every version of Microsoft Dynamics AX and Dynamics 365 for Operations, our software supports your version of AX.

For more information:

http://www.redmaple.com

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**CALL CENTER**

Integrated with your fulfillment workflow, Red Maple’s Advanced Credit Cards can support standard Call Center (2012 R3 CUB+) or a stand alone process that does not require Call Center.

**Supports:**

Tokenization | Hosted Pay | Split payments | Call Center

Split shipments | Back orders | Automatic re-authorizations

Returns management | Project Invoices | Service Orders | Free-Text Invoices | Customer payments

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**E-COMMERCE**

Red Maple’s Advanced Credit Cards has been integrated with numerous eCommerce engines and provides back end support to make fulfillment of orders easier.

**Supports:**

Tokenization | Hosted Pay*

Fulfillment of web authorizations | Re-authorization of back orders

Web services | AIF | Integration services (D365)

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**RETAIL**

Red Maple’s Advanced Credit Cards works with ePOS and mPOS and numerous processors. Our software supports EMV by leveraging semi-integrated devices provided by the processor.

**Supports:**

*Omni-channel | International support

Off-line support | Voice authorizations | EMV and PinPad support*

Gift Cards
Today’s business leaders recognize that building a healthy, financially sound organization isn’t just about selling the most widgets. Being successful in the long run requires relationship building. This welcome evolution has brought us back to a society where trust and community are paramount in the minds of both buyers and sellers.

Companies that are serious about their integrity won’t compromise it to make a sale. Part of their ethical underpinning is an inherent desire to only sell their products if they’re the right fit for a prospect. Organizations that keep their moral compass focused will build a loyal clientele who are thrilled to share their experiences and provide spontaneous testimonials, participate in case studies, and offer ongoing referrals.

Countless resources speak to the mechanics of producing solid case studies. It’s certainly necessary to know the bones, but you can do so much better than that. When you fill in the gaps that leave the prose mundane, your clients will be engaged in the process, and your case studies will be lively and infinitely more compelling.

GO FOR THE TRIPLE CROWN

Success stories, tales of happy customers, and lead magnets each appropriately describe what case studies should be. To me, they’re simply, remarkably, the graddaddy of testimonials.

Executives consider many factors when they need to make a significant buy. Is this the right product? Will this be a band-aid or a true solution? What’s my ROI going to be? What if this doesn’t work, what’s my plan B? And who are these guys who I’m calling? Has anyone ever heard of them?

This is where case studies work their magic. A conference attendee who downloads your smartly written and designed case study receives your calling card and then some. If it ticks all the boxes and helps her understand you and your company better, you may be on your way to a sale. Helping others recognize that another solution may be more appropriate for their startup is just as valuable. You’ve saved yourself and your team the time and effort of pursuing the wrong lead.
WANTED

FOR KILLING CASE STUDIES
$1 MILLION REWARD

Dust off Sherlock Holmes cape
Board Meeting
Finish TPS Report
Write better case study
Turn this guy in!
Know, like, and trust are burned into the marketer’s soul. Case studies build awareness of your company, brand, and products. The voice and tone of the writing reveal your brand’s personality. Is the writing strictly business, and they’re all about fun? When the piece is fact, fact, fact, or is too playful for the reader, they’ll get a sense of whether your companies are a good fit for each other.

Trust is a big one. The case study, that granddaddy of testimonials, blossoms here. Someone is clearly enthusiastic about the results they’ve achieved after choosing to work with you and your firm. This social proof can’t be overestimated. You’ve now hit the trifecta. They can trust you. If the company profiled is a big brand or someone they have things in common with, they’re now more at ease. Seeing another company flourish reduces a prospect’s sense of risk that they’d make an error buying if they work with you. They’re left wanting to know more.

**DUST OFF YOUR SHERLOCK HOLMES CAPE**

Your biggest client is happy to provide you with an interview and be profiled with their remarkable results. They’ve transitioned to Microsoft Dynamics and worked with your implementation and training teams. They’re beyond the honeymoon period and know that their results of saving time and money, then re-allocating it to grow their revenue, have paid off and are sustainable.

The basics are available to you in Dynamics 365 (aka Microsoft Dynamics CRM). You know what product configuration your customer bought, when they made their decision, and how long you’ve been working with them. You know which product they left behind, the topics they’ve raved about, and who they’ve referred to you. Now, it’s time to dig deeper.

Your interview question template is your starting point. You need to learn the nuances about your client and what makes them stand out. Carefully read their websites, press releases, and their social media profiles and the content they’re publishing. Understand what they pride themselves in and how their business is structured. What are they known for? Have they received any awards? Are they pillars in their communities for continually donating their time and money toward their local elementary school or animal shelter? Have they formed their own non-profit foundation? Is there a company milestone or anniversary that they’ve just hit or that is approaching?

Do they have global operations and work in multiple currencies? What are their priorities? Interview your lead trainer and the support staff that worked directly with this customer. What stood out when they worked together? What was their biggest concern going in? Did they put a lot of time in prior to meeting with you to understand the details of the Microsoft Dynamics product, or did they learn everything from you? What capabilities were their end users excited about getting? Are there any red flags to avoid? Stumbling blocks with scheduling, or APIs that needed extensive troubleshooting?

When you customize your interview question template with specifics to their company, they’ll notice. Ask them about an interview their CEO recently did. Congratulate them on their 75th anniversary or their move across town to a larger facility that can better support their growth. Interviewing your customer with them realizing that you’ve put time in to study their company provides you with better content and builds a fast relationship with your interview subject. That rapport pays dividends in openness during the interview while providing you with great content for your case study.

**WRITTEN, BUT NOT DONE**

Your diligent sleuthing, meticulous editing, and a great graphic design have produced a powerful case study that you’re eager to get out into the world. The press release celebrating the publication of your case study goes through each marketing channel you work in.

Next, go back to your notes. The research you did on your client. What trade shows do they go to? What magazines do they read? Send that press release to their local papers and TV stations. What associations do they belong to? Whether it’s the Shipbuilders Council of America (SCA) or the Association of Healthcare Internal Auditors (AHIA), there are people just like your customer who are hoping to find a solution to their software deficiencies. You’ve still got capacity? Go to the next level. The SCA is one of 260 members in the Council of Manufacturing Associations. Members of the AHIA are also often members of one or more of 114 other associations for professional auditors.
When you look carefully, leads are often very easy to find. Having an intern or virtual assistant spend his/her time preparing lists of associations affiliated with your customer to send your press releases and case studies can be fruitful. Ninety-five percent of the associations are likely to have their own websites, newsletters, and trade magazines that they need relevant content for. It’s a win-win.

**WELL-SPENT TIME AND MONEY**

Customers who are delighted to tell their stories will love being celebrated for their own achievements. Integrating your customer’s uniqueness within your case studies and your marketing shows them off as industry leaders and as being stand-out models for their peers. Your relationship with them grows stronger, and their direct referrals will continue. Leads you develop by sharing your well-planned, well-written, and well-marketed case studies will multiply your reach into their industries exponentially – and grow your business ever stronger.

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**The Bones of a Case Study**

Case studies can be written as simply or as complex as you want. Keep their reader in mind. Typically, marketing pros want to know the stories, and accountants want to know the facts. Tailor the work to your buyers.

- **TITLE** – Concise and punchy are great. Include the relevant product benefit (use an effective SEO term) within the first few words if you can make it read well. Add a fact (number/metric) and use action or emotion-filled words to draw readers in.

- **ABOUT** – Pull information from the “About” section in your customer’s press releases or their website, or from their LinkedIn page. Highlight factors that your prospects will identify with. These could be: Industry, geographic location, or the size of the business (revenue or number of employees). Ideally, also include something specific to your product, such as the software your client’s system integrates with.

- **PSR - PROBLEM, SOLUTION, RESULT** – Regardless of whether you use a traditional layout or go for a magazine-article format, the crux of a case study describes the problem and pain the client endured, how your product or service resolved their agony, and how much better things are now.

- **VISUALS** – Eyes are drawn to visuals. Captivating pictures, charts, and call-out quotes are perfect. Including elements like bullet points, white space, and sidebars adds interest while making it easy for readers to skim and absorb exactly what you don’t want them to miss.
To close our 14th year in publication, we look back to where it all started: What’s keeping you up at night?

Tell us, what’s keeping you up at night? Is it work? A child? Bad dreams?

Email your caption to Jenny at Jenny@thepartnerchannel.com. Submissions will be judged on creativity, relevance, and sense of humor. The prize for this contest is two (2) tickets to your local cinema.
Waaah, wuuuh. No entries. We’ll try not to take it personally.
Jeffrey Porter is a well-known name in the Microsoft Dynamics Partner community, being part of the channel for 17+ years. He resigned from his long-standing role as CEO of RockySoft two years ago and has since considered his passions and knew he was in the right industry and profession, setting the stage for a remarkable journey.

In 2015, Jeffrey teamed up with two of his previous colleagues from RockySoft who had formed their own company and had devoted a year to developing a new inventory planning solution for the Microsoft Dynamics market: StockIQ.

Jake Latham, StockIQ CEO, brings 17 years of supply chain experience and 20 years of software development experience. Curtis Glesmann, StockIQ CTO, brings 20 years as an architect and developer of enterprise software, as well as a background in business and finance. The three of them banded together, and in October 2016, StockIQ brought its solution to market.

“Not everyone gets the opportunity to hit the reset button, but we get to start over, doing what we all love to do, with the benefit of two decades of experience to guide us,” Jeffrey shares. These last few years have allowed the trio to define StockIQ’s strategy and core values. Even though the company itself is new, their 60 years of combined experience, along with the opportunity to start fresh, have put them in an ideal position.

Jeffrey explains, “We began with a wonderful opportunity to focus 100 percent on development of an application from the ground up. We’ve combined our industry experience and background with new state-of-the-art technology to come out of the gate with a market-ready, deployable, and feature-rich supply chain planning application for distributors and manufacturers.”

This unique opportunity to start fresh has also reminded each of them of their passion for partnering with clients and developing those relationships. Jeffrey says, “Helping our clients is why we are in business. One of the core values we have for StockIQ is focusing on the customer. Our belief is that partnering with our customers is a recipe for success.”
The Partner Channel (TPC): How did you know partnering with Jake and Curtis was going to be a good fit?

Jeffrey Porter (JP): Jake was one of the very first employees of RockySoft. We have a 17-year history both personally and professionally and have developed a healthy respect for each other. Curtis came on board for the last two years at RockySoft, and it was immediately clear that his drive and skillset were of the caliber of somebody I'd want to partner with.

We all share a profound sense of professionalism, desire to achieve, and are never satisfied with the status quo. We’re all passionate and competitive by nature. Curtis is a basketball coach, Jake races cars, and I’m a mountaineer. At the same time, we bring different but complementary skillsets to the table, which gives StockIQ a wide range of proficiencies with which to develop the business.

That drive to be better brings us together and makes us ideal partners, especially in a continually evolving marketplace.

TPC: How has that drive come into play with reaching your early goals as a new company?

JP: Our main intention for the first year was to develop a feature complete application that benefited from all the lessons learned over the past 15 years, while also applying new ideas and technologies to create a unique offering in the marketplace. Now in our second year, having released the product to market, we are already at 75 percent of our 2017 implementation goal and plan to have reached it by the end of May.

TPC: What are your plans moving forward? How do you hope to serve the supply chain industry for the remainder of the year and beyond?

JP: We have laid out strategic objectives, one of which is to focus on setting ourselves up in the Microsoft Dynamics channel as a thought leader committed to the Microsoft Dynamics marketplace. This is where I began those 17 years ago. We know the needs customers have, and we plan to be an education force that users and Partners can turn to. Our past success has always been rooted in listening to what our customers want, and we intend to continue that approach with StockIQ.

We are focused on establishing a repeatable and consistent experience with our clients; one that provides ultimate client satisfaction. Part of this includes being very intentional and selective when onboarding new employees. Once they’re hired, they’ll go through an intense training program to build their skillset so they are able to serve the needs of our clients to the same standard that we ourselves would.

And, of course, as a software development company, we will always be adding to and improving our product. Topics like promotion planning, omnichannel planning, rough-cut capacity planning, and machine learning are just a few of the topics that make the rounds in our weekly meetings.

TPC: What has made you stick around the Microsoft Dynamics channel?

JP: It’s a tight-knit community, and that has been demonstrated to me over and over again throughout the years. In the early days it was Stampede, then Convergence, and now that same tight-knit feel is recreating itself in user groups. The Microsoft Dynamics channel is strong, and it’s vibrant. Users and Partners have passion in what they do with their skills, which is something I haven’t found in any other channel. The Microsoft Dynamics community is special.

TPC: Where can Partners find you to learn more?

JP: I’m proud to say, we’re in The List and are already receiving leads from being out there. Thank you to The Partner Channel!

We are also sponsoring GPUG* Summit and AXUG* Summit in Nashville, at which I will present a few sessions, and I would love to reconnect with users and Partners there.

Also, I’m lined up to speak at the August GPUG chapter meeting in Denver, and we will continue to be involved there to share our knowledge with the community.

And of course, feel free to check out our website (www.stockiqtech.com) or reach out to me via email at Jporter@stockiqtech.com.
I Don’t Fit In:

HOW TO DETERMINE THE RIGHT CULTURAL FIT

What do you do when you find the culture of your new company or your company culture is changing, and you don’t seem to fit in? As a leader in the company, what do you do when you realize the culture isn’t working to deliver business results anymore and or to attract the right talent? As an employee, what do you do if the way you “used” to get things done is not working anymore because people expect you to behave in a different way? You are probably experiencing a culture dilemma, where your experiences and values are bumping into a new set of expectations on how to behave.

Culture is the keeper of behavior. Values are how you behave toward each other to get the work done. Results are what and how you get the work done, regardless if the actual work you are doing remains the same. So, what do you do? Do you just quit? Ignore the problem? Manage forward? Or change? The proverbial answer is, “it depends”.

Before making any decisions, it is wise to understand common cultural myths:

» **There is no perfect culture** – Each company has cultural strengths and weaknesses.
» **One size does not fit all for culture** – Culture needs to drive your strategy, guide the type of people you need to hire, and resemble the personality of the top leadership.
» **Culture never needs to change** – All culture needs to adjust to the marketplace. If there is a culture of relaxed work at home, mobile workforce expectations, and low unemployment, you should adjust to the market variables.
» **Culture problems stem from employees not doing what you want them to do** – Most culture flaws stem from leadership who mistreat, are untrained in leadership and management, or don’t have the resources to properly manage and lead.
» **Culture will just happen** – Culture is like strategy. If you don’t thoughtfully plan the culture of your team, your company, or your division, it will take a life of its own. Rarely does it take shape and drive strategy and employee retention.
» **Culture will only happen if you have a culture team or culture program** – Although both a culture team and a culture program are not bad ideas and may be necessary throughout the process of culture development, they are not the place to start. The place to start transforming your culture is with the leadership team and defining the mission, vision, values, and strategic anchors. Once they are defined, the senior leadership team
needs to act in accordance with the values so the company sees them role modeled.

» **You can ignore culture changes because they will never get rid of you; you are too important to the bottom line** – Although they may keep you around for a while, once they find a new replacement that fits the culture, you are probably unexpectedly job hunting.

» **You can fight to keep the old culture because this is just a fad** – In some cases, companies do have unsuccessful attempts to change their culture; however, typically when culture changes for strategic reasons with thoughtful leadership, it will "not" go back to the normal. It is the new normal.

Also, before you decide your next steps, be clear about what you can and can't be accountable for in the change. Your accountability depends on what level and layer you are addressing the culture change from. You may be a new senior leader in a company that doesn't have the same culture as your old experience and previous jobs; you may be a front-line employee just wanting to fit in. The list is endless. Regardless of the list, there are three layers to culture assessment. The first layer is “where do I personally fit, and what type of culture do I thrive in the best?”. The second layer is "I'm a manager; how do I represent the culture values and behaviors on my team and help my team live the values". The third layer is "I'm a senior leader; how do I define the values with my senior leader team based on my personal beliefs, philosophies, and market drivers".

So, when answering the question, “I just don't fit in the culture; what do I do?”, first, understand the myths, second, analyze what layer you are at in the process from individual to corporate, and third, ask yourself some of the following questions:

» Who is rewarded in the culture, and for what are they rewarded?
» If I want to come to work every day for 60 hours a week, do I want to contribute to these cultural norms?
» Do these cultural norms fit with my personal beliefs and philosophies?
» As a senior leader, how would I describe these cultural norms in three anchor words? (Anchor words are words like grit, humility, and heart is the center of our culture, etc.)
» How far off am I, or is my company, from living the values on most days? If so, where are we most off?
» How can I teach my team the culture and the values in team meetings, one-on-one meetings, and with my own personal choices?
» Why does this culture need to be the way it is, and how is it serving the customer and the strategy?
» How can I consciously market the cultural anchors in print, electronic, website, stories, and recognition of employees for results when they applied the cultural values?
» As an individual contributor to the culture values, how can I feel good about what they are and embed them in my own style and beliefs?
» Do I need to examine whether I can work in this new culture (whether a new job or a shifting culture)? Am I willing to learn new skills that are required to behave in the new culture?

Some of those questions will help you decide if you are willing to fit into the culture. Sometimes cultural fit is so counter-intuitive to who you are that it is best you start looking for another company or another job. If you don’t, most days going to work will feel like you are wearing your shoes on the wrong feet. On the other hand, if you find the parts of the culture that you adapt to and maybe even thrive at, you will probably be rewarded and regarded as a high performer. It takes work, but cultural behaviors are learned – if you want to.

You can learn new cultural behaviors by finding a mentor, watching the “all stars” that are getting recognized by top management, and watching top management and finding out what is important to them by reading between the lines in their emails and by listening with both ears for what is said and unsaid in their company addresses. To fit in to a culture is a choice – and the choice is yours. There is good to all cultures, and all cultures have flaws.

You know if you fit, you know if you want to fit, and you know if you don’t fit. The real issue is what are you are willing to do and not to do to stay in a culture, or what you are willing to risk if you leave. Staying is not bad and leaving is not bad – what is bad is not recognizing the choice. You deserve to work in a company that values you and your values; and the company has every right to foster the culture it wants to drive business results. It is not an issue of right or wrong; it is an issue of choice. Culture trumps strategy every time, whether it be winning in the marketplace, creating bold companies, or just keeping your job.
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docAlpha from Artsyl Technologies eliminates data entry, increases data accuracy, automates approvals and matching, and delivers instant audit trails for:

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Let’s face it: We all want easy answers. This is especially true in the complex (and ever-changing) world of B2B (business-to-business) marketing. We crave that quick template we can use for a great marketing plan. We want that one “magic” tactic that will bring us new leads (tomorrow, if possible). We hear the only strategy that works is inbound, so we rush to implement our inbound plan before we fall behind. And we want to know what works for other technology marketers.

Unfortunately, this won’t always lead to your best prospects. Why? Simply put, one size doesn’t fit all in marketing. What works for a competitor may not work for you. Even with a direct competitor, there are significant differences to consider:

» **Every business has different resources** – Whether it’s your budget, the number of people on your marketing team, or even their skillset, different resources mean different approaches in how you go to market. Even when you are looking at Partners similar to you in terms of size and focus, your sales plan and goals will likely be very different. A company with a strong inside sales team will have a go-to-market approach to take advantage of that resource. It works for them, but unless you are looking to make a big shift in your organizational structure, it may not work for you.

  
  EXAMPLE: One of our clients had tremendous success with inbound marketing, and most of it was through organic search. They happened to have an internal resource with strong writing skills and a passion for their industry who cranked out e-books, white papers, case studies, and blogs like a machine. Taking that approach to SEO might be a mistake for you because replicating that content machine would be incredibly costly. Of course, that doesn’t mean content and inbound aren’t good tactics for you; just don’t expect the same results unless you are making those same investments.

» **Who (and where) you are targeting matters a lot** – And that’s not only the industry, but also the size of that marketplace and even how long you have been marketing to them. Niche markets will benefit from a very different approach than targeting CFOs in distribution. Marketing in New York IS different from marketing in Montana. Unlike a mature market where you have a solid list of customers and proof points behind you, new markets will require a different set of tactics. I give these examples because this is the place where many Partners fail when adopting a competitor’s tactics.

  
  EXAMPLE: Another of our clients weighted their marketing much more toward outbound, mostly through emails. Additionally, they had great success with in-person events. But, they also
had a database of more than 9,000 names who they had been marketing to for two years and a defined geography where networking through local groups was a big part of day-to-day business. Their success with events would be difficult to replicate in a major metro area, and their email success rate would be impossible to achieve with a purchased list.

Okay, you get there are differences between companies, but what about the tactics themselves? Surely there are tactics every marketer needs to use? Yes, to some extent. No B2B marketer will be successful without a strong online presence, quality content, and the right vehicle to get that content into their prospects’ hands.

The mistake too many marketers make is not looking at HOW to deploy those tactics or what weighting you should give them in your marketing plan. For each tactic you consider, try to answer these questions:

» Have we used it?
» How have we used it?
» What were our results?
» How did we weight them within our marketing?
» If we haven’t used it, would it fit into our marketing plan?

Given this, let’s look at some common, important, and newer tactics to see how they may or may not work for you.

» **Your Online Presence** – Depending on your market, organic search tactics won’t always be enough to help you build a robust pipeline. Let’s go back to that niche market. Depending on the size of the market, you might struggle to find search terms that are getting enough traction to bring you the number of leads you need. Maybe it’s a market where there is a proprietary system, and you need to focus on competitive searches (and creating competitive content), OR maybe it’s a market that is simply so niche a better strategy is to go to THEM rather than hoping they will find you.

  **TIP:** Working with an SEO company to do a comprehensive keyword analysis can help you determine how effective SEO is going to be in your marketing plan. It doesn’t mean you won’t invest, but you may not invest the way someone in a broad industry such as food distribution might. In fact, you could decide it’s more valuable to put your dollars into very targeted online advertising or a social media advertising platform that allows for deeper targeting, like LinkedIn.

» **Content** – We ALL need valuable content to attract and convert customers. There is simply no way around it. What is different from company to company is how much content and what type of content you will need. It’s unlikely you’ve attended any recent inbound or content marketing training that didn’t talk about the importance of blogs. And for most companies, that’s probably true. But even in the case of something we accept as the “rule,” there might be exceptions.

  **TIP:** If you decided you will have limited success with organic SEO strategies, then blogging frequently may not be critical to your success. It doesn’t mean you won’t maintain a blog, but perhaps you should spend more of your content resources creating valuable thought leadership pieces that will lead to downloads and clicks. Or, if you have multiple targets and some do well with organic search, your blogs should be heavily focused on those target markets.

» **Third-party Marketing** – Working with organizations already targeting your industry (such as associations or publications) is a great approach. In some cases, when entering a new market, it might be your single best option – giving you credibility and access you couldn’t quickly replicate with any other marketing tactics. The same could be true with smaller or more niche markets. On the other hand, if you’re focusing on a broad industry (such as distribution), you don’t want to get lost in a slew of sponsors and messages from others targeting the industry. The benefits these associations offer should also be considered.

  **EXAMPLE:** I worked with a sales team that insisted we had to join a few big local business associations. After a year of debate, we made the investment. The end result? Nothing. Because the “value” those particular associations provided was regular networking sessions in the evening, when our sales team was unable to attend.
Account-Based Marketing (ABM) – The newest buzzword in marketing is actually a strategy that has been around for years. Originally intended as a way to sell (and cross-sell) into the many different titles and departments in enterprise companies, elements of ABM are now being used to target companies in the SMB space as well. We are including it because there will likely be marketers adopting this strategy, and a lot of others asking if it will work for them. ABM requires a strong database of targeted prospects, the ability and resources to create and customize messages just for them, and a strong sales team to do the one-to-one follow-up.

_TIP:_ While ABM is the hot topic in marketing right now, do not get distracted by the latest “bright shiny object.” Educate yourself on the newest tactics, of course, but take time to really vet them and consider how well they will work for YOU.

**KEY TAKEAWAYS**

» For any marketing tactic, don’t think in absolutes. It’s not simply a question of will it or won’t it work. Think through how much weight it deserves in your plan, how and where you will implement it, and how you will measure success.

» Be critical when looking at what works for others. Dig deep enough to understand the investment it took them to get there and be honest enough about whether you will really be able to make that same investment.

» And the biggest takeaway? There is no magic marketing bullet, and a one-size-fits-all approach might be easier, but it could hurt you more than it will help.
User Group Summit Nashville is the can’t-miss conference for learning and networking, and Nashville knows how to party. Expect a good time.

At Summit Nashville each fall, Dynamics partners, customers, and Microsoft professionals join together for intense knowledge-sharing, industry-leading innovation, conversations and roundtable discussions.

We know it’s time away from the office, but the ROI is undeniable. Here are the top 5 reasons you will want to attend as a Dynamics partner:

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- **Enhance your professional skills:** Choose from hundreds of product sessions to build your knowledge and discover best practices from the experts.

- **Explore solutions:** Use this premier opportunity to explore Microsoft Dynamics solutions, ISV products and learn about future roadmaps.

- **Exhibit leadership:** Build your personal and corporate brand as a thought leader and expert in your field or industry.

- **Improve customer satisfaction and ROI:** Meet with your customers face-to-face in one convenient location, reducing travel costs and time. Invite your clients to join you at Summit Nashville to maximize their investment in Microsoft technologies using your unique 10% off coupon code.*

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The Genius Series is a learning and networking opportunity for Microsoft Dynamics professionals to develop marketing skills. Over the course of nine months, students have the opportunity to...

» Connect with like-minded peers and community members
» Build a master-mind group to bounce ideas off of for trying new marketing activities
» Dive deeper into their everyday tasks, optimizing on best practices
» Learn from experienced marketing professionals
» Expand their knowledge and network within the Microsoft Dynamics community

THANKS to the Experts Who Make It All Possible

MAY
Presenter
Jon Powell, NextAfter
Topic
Digital Marketing Conversion Formula

JUNE
Presenter
Katie Propati, Allbound, Inc.
Topic
ISV and VAR Relationship
Mentors
Brett Hensley, Technology Management Concepts (TMC), and Minerva Thai, Avalara

The Genius Series
Class of 2016-2017 Graduates!
June marked the final class for the second year of The Genius Series and therefore marks graduation for our students. Check out “On the Homefront” on page 12 to read one student’s essay and visit the website listed below to read about other students’ experiences.

Congratulations to this year’s graduates, and thank you for your attention, thoughtful questions, and dedication to becoming even more fantastic in your role as marketers!

UPDATE 2016
Registration for The Genius Series: Marketers Excel Into Geniuses, class of 2017-2018, is now open and only a few spots remain. Visit www.thepartnerchannel.com/the-genius-series for more information.
Thank You for Your Membership!

Thank you to the Microsoft Dynamics Partners who have joined The Partner Channel's community. Your engagement and participation in the channel are what makes this community so great! For information on The Partner Channel Membership Rewards Program, please contact Jasmine at 701-526-3531 or Jasmine@thepartnerchannel.com.

The following Microsoft Dynamics Partners are celebrating their membership anniversary with The Partner Channel this quarter:

**2005**

- **JULY**
  - k-eCommerce
- **AUGUST**
  - Solomon Cloud Solutions

**2006**

- **JUNE**
  - Vicinity Manufacturing
- **AUGUST**
  - Encore Business Solutions Inc.

**2009**

- **JULY**
  - Joesoftware Inc.
- **AUGUST**
  - T3 Information Systems

**2010**

- **JUNE**
  - Blue Moon Industries

**2012**

- **AUGUST**
  - TechVisions, LLC

**2015**

- **JUNE**
  - Encore Business Solutions Inc.

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Our valued Members get the best of what The Partner Channel has to offer through...

- Bi-monthly Member calls
- Extra issues of The Partner Channel Magazine each quarter
- Discounts of 10 percent for Partner events and training, such as The Genius Series
- Company listing on The Partner Channel website
- Tipville, our special Member newsletter, LinkedIn group access, and more

Congratulations!

**What activities do you enjoy during the summer months?**

When I’m not working, I enjoy spending time with my family, crafting, gardening, and vacationing.

**What do you like most about working in your role?**

The best part is the variety of opportunities presented every day and the people I get to interact with. Each person, and business, has a different story to tell and yet all have similar goals – run efficiently, be profitable, and grow. It’s that warm feeling you get when your team delivers a superior solution to a complex issue. You know you’re doing the right thing because they bring you repeat business.

**What are some sales, marketing, and leadership tips that you follow?**

**Sales**

- Immediate follow-up on leads exponentially increases your chance of connecting and ultimately closing a lead. Be persistent in your follow-up. It takes five to eight contacts on average to connect with a prospect. Perseverance wins you business.
- Don’t aim to sell, aim to help.
- When you meet with a prospect, let them talk 90 percent of the time and listen to understand before you reply. Listening is crucial to understanding their pain points and gaining their trust.

**Marketing**

- Invest the time necessary to create an integrated digital marketing and content plan and implement the necessary workflows and checkpoints to ensure the plan is executed effectively.

**Leadership**

- Plan the work. Work the plan.
- Listen attentively.
- Demonstrate integrity in every interaction.
- Be authentic.
- Lead by example.

**Do you typically experience a summer slowdown or speed up? And how do you plan for that change of pace?**

What slowdown? 😊

In this business, six months is a long time. When you provide consulting services, there is an expected “ebb and flow”. The hard thing is predicting it. We take a two-deep approach: 1) Put customer requests first and staff for the predicted load, and 2) Have internal projects in the queue to work on when things are slow. This balances the load across the year.

**What is the most beneficial aspect of The Partner Channel’s membership program for your company and why?**

Being on the pulse of what is currently happening in the Microsoft Dynamics community and having the information necessary to prepare for the changes coming in the community. Change is constant, and embracing change is necessary.

---

Ruth Ann Ellerbrock, President

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