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DYNAMIC BUDGETS
ON THE COVER

Ever wonder where “square peg in a round hole” came from? Turns out it was originated by Sydney Smith in “On the Conduct of the Understanding”, one of a series of lectures on moral philosophy that he delivered at the Royal Institution in 1804–1806.

Cover illustration by John Holland for The Partner Channel®.

WILEYTHE ONE ABOUT CHANGE

While at the User Group Summit this fall, Bethany, Jane, and I had the opportunity to visit with quite a few Partners. The prevailing theme of those conversations was around change, in one form or another.

Many Partners had trepidation over what to do about Convergence based on the changes happening to the event (check out page 12 to learn more about what this means). Many others are looking to build additional Microsoft or competitive product competencies in order to evolve their businesses. Others are experiencing change as it comes to their own employment, moving to another Partner organization or seeing a shift in their day-to-day focus at the same company.

These changes are either the result of or forcing function for tough decisions. Is it the right move? What will we gain from making this switch? What’s at jeopardy?

This issue addresses change, from the “why” (as shared in Chris Elmore’s article on page 18) to the “how/where/when” (in Adrianne Machina’s article on page 38) to the “who/what” (according to Pam McGee on page 14).

You’ll also read a summary from the change-based sessions we led at PreGAME to Summit and see the changes that are happening to our students in The Genius Series.

Thank you to my team, the advertisers, and participants in The List. I can’t believe how quickly a quarter flies by; you are the reason this magazine hits a mailbox four times a year. To those facing tough decisions or big changes this year, I hope you read something here that resonates with your situation. And if you don’t find just quite what you’re looking for, go with your gut!

Jenny Davis
President at The Partner Channel
Carbonite, Inc. (NASDAQ:CARB), a leading provider of cloud and hybrid business continuity solutions for small and midsize businesses (SMBs), announced an enhanced portfolio of software and hardware disaster recovery solutions featuring server image backup and bare metal recovery. Included in the new disaster recovery portfolio are five new backup appliances ranging in size from four to eight terabytes, and a new version of Carbonite Server Backup – Carbonite Server Advanced. With multiple form factors, including software-only, hybrid solutions, and all-in-one mini-towers and rack-mounts, Carbonite’s new disaster recovery solutions provide the ultimate flexibility for small and midsize businesses. Visit www.carbonite.com to learn more.

Paystream Advisors, a research-based provider of content focused on financial thought leadership, recently released its latest study on Microsoft Dynamics GP and payables integration. Once reserved only for larger companies with ERP systems, paperless automation can now be embraced by mid-tier and smaller companies using Microsoft Dynamics GP. The study helps guide users through the daunting task of finding an AP automation solution and features insights on: Common AP pains among all organizations, the advantages of an integrated AP automation solution, and automating AP as a Microsoft Dynamics GP user. Visit www.acom.com to download a free copy.

QGate Software Ltd, specialists in Computer Telephony Integration (CTI) and CRM, has launched the latest version of its CTI solution – intelli-CTi for Microsoft Dynamics CRM v.1.6.0 with improved and configurable Unified Service Desk (USD) client integration support. QGate intelli-CTi™ for Microsoft Dynamics CRM enables businesses to optimize their investment in Microsoft Dynamics CRM and telephone infrastructure by providing a seamless telephony integration with Microsoft Dynamics CRM delivered in a cost-effective and user-friendly manner. To read the full press release, visit: http://uk.prweb.com/releases/2015/09/prweb12945969.htm.

Tradeshift, the fastest growing global network and platform that connects buyers and suppliers, announced that customers of the new Microsoft Dynamics NAV 2016 rollout will automatically have free access to the Tradeshift e-invoicing solution. Microsoft Dynamics NAV customers can now take advantage of the visibility that Tradeshift provides into the invoice approval process to reduce exceptions and resolve discrepancies in real-time. Customers are now able to send invoices directly from Microsoft Dynamics NAV 2016 to the Tradeshift platform. For more information, visit www.tradeshift.com.

Members of the TrinSoft Microsoft Dynamics GP consulting team recently attended reIMAGINE in Fargo. reIMAGINE is a premier event for Microsoft Dynamics GP Partners to share ideas, form partnerships, and get the latest details about the road ahead for Microsoft Dynamics GP. Several key announcements were made about the new Microsoft Dynamics GP 2016 release and the cloud. For more information, visit trinsoft.com, trindocs.com, or trinsoft-it.com.

CPA.com announced a strategic alliance with Vertex SMB, a leading provider of cloud-based sales and use tax solution for small to midsize businesses. Vertex SMB’s tax calculation and returns platform helps CPA firms and their clients manage their tax compliance obligations. Vertex SMB will become part of CPA.com’s Partner Solutions, a lineup of best-in-class tools and services that CPA firms can offer clients seeking business efficiency, flexibility, and better financial insight into their operations. Learn more at www.cpa.com/salestax.

WatServ is pleased to announce that the company is now backed by the private equity arm of Brookfield Asset Management, a leading global alternative asset manager. With Brookfield’s support, WatServ will continue to expand its business as one of the largest, most experienced providers of cloud computing solutions for expert operational management. Visit www.watserv.com to learn more.
**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.

**January**

**CRM Accelerate for Microsoft Dynamics CRM Online Deployment Exam**
January 4-20 | Online
Every Monday and Wednesday

**CRM Accelerate for Microsoft Dynamics CRM Installation Exam**
January 4-20 | Online
Every Monday and Wednesday

**AX Accelerate for Microsoft Dynamics**
January 4-February 11
Virtual and Chicago, IL

**CRM Accelerate for Microsoft Dynamics CRM Application Exam**
January 5-21 | Online
Every Tuesday and Thursday

**CRM Accelerate for Microsoft Dynamics CRM Customization and Configuration Exam**
January 5-21 | Online
Every Tuesday and Thursday

**Microsoft Dynamics AX Fast TrAX**
January 11-29 | Fargo, ND

**Microsoft Dynamics US Industry Summit 2016**
February 29-March 2
Rancho Palos Verdes, CA
www.usdynamicsevents.com

**February**

**CRM Accelerate for Microsoft Dynamics CRM Online Deployment Exam**
February 1-17 | Online
Every Monday and Wednesday

**CRM Accelerate for Microsoft Dynamics CRM Installation Exam**
February 1-17 | Online
Every Monday and Wednesday

**Customizing and Deploying Microsoft Dynamics CRM Mobile**
February 2-3 | Online

**CRM Accelerate for Microsoft Dynamics CRM Customization and Configuration Exam**
February 2-18 | Online
Every Tuesday and Thursday

**Advanced Workshop: Unified Services Desk for Microsoft Dynamics CRM**
February 8-18 | Online

**Microsoft Dynamics US Technical Conference**
February 23-25 | Seattle, WA
www.microsoft.com/dynamics/techconference

**March**

**Microsoft Dynamics AX Fast TrAX**
March 7-25 | Fargo, ND

**Build 2016**
March 30-April 1 | San Francisco, CA
www.buildwindows.com

**April**

**Convergence 2016 New Orleans**
April 4-7 | New Orleans, LA
www.microsoft.com/dynamics/convergence

**Microsoft Dynamics AX Fast TrAX**
June 6-24 | Fargo, ND

**Microsoft Worldwide Partner Conference**
July 10-14 | Toronto, Canada
https://partner.microsoft.com/en-us/wpc

**Microsoft Dynamics AX Fast TrAX**
July 11-August 5 | Fargo, ND

**September**

**Microsoft Ignite**
September 26-30 | Atlanta, GA
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TWITTER Adriannemachina
WEBSITE www.tornado-marketing.com

Adrianne Machina is the chief velocity officer of Tornado Marketing and an in-demand copywriter, speaker, and consultant with a special focus on online marketing. Adrianne 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. Adrianne has worked in the Microsoft Dynamics channel since 2000 and teaches marketing to entrepreneurs at the University of Wisconsin–Madison.

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Amber Barnes has nearly two decades of customer service experience and more than a decade of leadership and employee development experience from small business to Fortune 50 companies. She worked as director of operations for a family-owned and operated corporation, overseeing 11 locations before spending five years as a learning and sales development consultant designing and implementing sales, service, and development programs for employees and leaders at Wells Fargo Bank. In her work as a leadership consultant and entrepreneur, Amber has worked with companies such as Adobe, Intuit, and MGM as well as progressive small and medium-sized organizations in Nevada, California, Washington, and New York.

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TWITTER Partnermktgrp
BLOG https://community.dynamics.com/b/thepartnermarketinggroup/default.aspx

Cheryl Strege knows how to help the technology channel achieve marketing brilliance. She has 25 years of experience to share, including 16 years as a senior marketing manager for Great Plains Software and Microsoft where she developed turnkey marketing programs and the Inner Circle program. An accomplished speaker, Cheryl works with leading software publishers, hardware manufacturers, VARs, and ISVs. Cheryl’s relentless passion is one of the many reasons she was named a Partner Marketing Advisor for Microsoft and why she has been nominated two years running as one of the most influential people in Microsoft Dynamics. A talented writer and editor, Cheryl develops marketing plans, manages projects, trains project teams, and finds new sales opportunities.

pam mcgee
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Pam McGee is the principal of pMcGee Consulting and specializes in helping businesses get to the future instead of having their future get to them. Specialty areas that clients can count on Pam for are building a culture, defining shared values, coaching, leadership, and basic HR practices. Pam has more than 20 years business experience, 10 years consulting experience, and strong leadership and management skills.

Through real-world experience, Chris has gained an invaluable perspective on automation that has enabled him to develop unique ways to communicate the need for vision and planning when automating the accounts payable process. His books, “The 8 Pitfalls of Accounts Payable Automation for Dynamics Users” (April 2011), and “The Argument to Automate – How Innovation Can INSPIRE – Not Fire” (April 2012) are the culmination of his rich experiences. Since 2000, Chris has helped more than 500 companies transition from a paper-based process to an automated process and has worked in a variety of roles, including: Help desk support, training, project management, consulting, product design, QA testing, sales, and strategic management.
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Contact Emily Roen at eroen@njevity.com, 720-870-9700 x102 or www.njevitytogo.com/partner
LIKE A Snow Globe

story by JENNY DAVIS

I mentioned in the Notes (page 7) that a big topic at Summit was Convergence. I had at least three or four conversations about the event with Partners and customers each day, and that may be on the conservative side.

ISVs wondered if the event, formerly one of their biggest business drivers for the year, will still hold that potential. VARs wondered if they should recommend the event to their customers. Users wondered if they will still find the value they’ve enjoyed over the years.

Think about a snow globe for a moment. You cradle it in your hands and give it a gentle shake. The snow pools at the top of the globe and gently falls to the ground, landing in spots that are different from where they were to start.

You don’t know where the snow will land when it’s in the air, but you do know that it will land.

Right now we don’t know what the future of Convergence will hold for the Microsoft Dynamics community, but we do know that life will go on and Partners will still have products to sell and service.

I feel that good will come out of this change. I feel as though more customers will band together to share best practices through user events and that online forums will become even more popular for questions, answers, and tutorials. Partners will be a vital part of those activities, helping to build the knowledge base of product information with what they live and breathe each day.

I feel that Convergence will become a place where Microsoft showcases the “what if” and “what’s next”, which will create even more energy in the community as people dig deeper into their businesses without getting fully entrenched in the details. Partners will be a vital part of those conversations, helping to answer the questions of “when” and “how”.

A lot is changing this year, and The Partner Channel will still be here. We’ll report your successes and proven strategies in the magazine, we’ll share your solutions and services with fellow Partners and customers in The List, and we’ll help to cultivate the talents of Partners who enroll in The Genius Series.

Change can be unsettling, but it can also be exhilarating. We have the opportunity to see where the new snow will land shortly; let’s enjoy the view.

A lot is changing this year and The Partner Channel will still be here.
arianne Williamson says, “Love is what we were born with. Fear is what we learned here.” I remember reading that the only two fears we are born with are the fear of falling and the fear of loud noises. If we only have two innate fears, why does fear sometimes cripple us from changing, letting go, trying new things, speaking in public, losing money, making a wrong choice, speaking up in a meeting, challenging the bully in the board room, admitting our mistakes, asking for what we want, etc. etc. etc.? The list can be daunting. Think a moment about what scares you. I am not talking about the “jumping out of a plane” fear. I am talking about the day-to-day fears we carry around in our workplace, communities, neighborhoods, churches, schools, and families. Think about the nagging habit, your repeatable 10 mistakes you keep choosing to make (yes, you choose to make them), and something you would like to do or change. For me, I want to change my reaction when I am asked to work on a high-level, high-impact, and senior leader project. My reaction is always to be very flattered, excited, and giddy. And then reality sets in, and I start to ask myself, “Why did they pick me? I don’t know if I can do this. What if they find out that I am not as good as they think I might be? What if this is the time I totally screw up and embarrass myself and get the infamous ‘black mark’ in my permanent file?” By the way, has anyone ever seen their permanent file? I doubt it, yet it continues to have a lot of power over choices.

As you read this article, think about three things: 1. What self-defeating habit do you want to let go of or at least let go of its control over your success? 2. What one thing at work would you like to try that may be a stretch, a risk, a new idea, challenging? 3. What do you honestly fear will happen if you let go?

Often the number one reason a person stays stuck is because of fear. In a study of risk-taking, participants who were fearful consistently made judgments and choices that were relatively pessimistic and amplified their perception of risk in a given situation, in contrast to happy or angry participants who were more likely to disregard risk by making relatively optimistic judgments and choices (Lerner and Keltner, 2001). Similarly, individuals who are more fearful – those who tend to have personality characteristics that are dominated by the emotion of fear – will avoid taking risks that are generally perceived by others as relatively benign (Sylvers et al., 2011).

If you are going to dare to let go, the first step is being transparent with yourself regarding what your real fear is. You might tell yourself that it’s money, time, fear of failure, that you don’t know how to behave differently, etc. Those all potentially have an element of truth. But what we are typically afraid of is a few double-clicks beneath the first story we tell ourselves and others. For example, as a leader, you may want to let go of the habit of keeping poor performers around too long. You potentially tell yourself that the reason you can’t let “them” go is because the business would fall apart, there is no one else you can hire right now, the labor pool is slim, etc. When I talked to team leaders after they had let someone go and had told themselves all those familiar excuses, the most common fear (in this situation) was twofold: 1. What if I am wrong, and this person is not as “bad” as I think, and I have just not managed them well? 2. I am afraid of the conversation as it might be ugly. Both of those sets of reasons require
drastically different troubleshooting to address the fear. In set number one, you would focus on hiring someone new right away, getting the work distributed among other individuals, etc. In set number two, you would focus on ensuring that you have set clear expectations with the employee, assist in removing obstacles, and train yourself on how to have difficult conversations.

It isn't necessarily what the fear is that matters; it is being honest with yourself and preparing yourself in the best way to manage the outcome of the fear. All fear, which we often don't realize when we are in the middle of it, is normal, even if you feel like this could only be happening to you.

How do you get honest with yourself and address the underlying fear? Most people who are skilled at addressing the underlying fear have told me they do one or more of the following:

» Don't overthink: They don't overthink the silent conversation in their head (no, you are not crazy if you do this), but they go with their intuition. They may sit "still" and just let the answer come to them while they are gardening, watching "I Love Lucy" at midnight, or exercising.

» Morning pages/journaling: They write three pages of longhand on the situation. Julia Cameron states that three pages of handwritten streams of conscious thoughts can open many doors and windows. (Visit www.juliacameron.com or www.artistsway.com to learn more.)

» Ask a trusted friend: They find someone that knows them inside and out and that has their best interest in mind, and they ask him/her, “What often holds me back, and what do you really think I am afraid of, despite what I say?” And then they shut up and listen without any defensive words, judgments, or need to explain.

» Just jump: They didn't wait to have all the answers or the perfect timing or the perfect data or the perfect relationship or the perfect financial situation. They were not reckless, but they also were not paralyzed.
» Chunk it: They broke the daunting situation into bite-size chunks and had a small action item each week that helped them let go and head in another direction. For example, one leader who wanted to stop getting defensive with certain people on her team started using one phrase when she found herself wanting to fire back. She would say, "Thanks for sharing; let me think about that more," or "Wow, you are so excited about this. Thanks for your passion; let me see where my head is at on this issue and get back to you so we can both share the same excitement." Not perfect words, but words that allowed her to deflect the conversation so later it could be productive, which often it was.

So as you consider daring to let go of old habits that are holding you back, the first step is to be honest with yourself on what you want to and are willing to invest time in to change. If you find yourself saying, "I should... change...", that is a clear indication that you are feeling pressure to change but may not be ready. Instead, if you find yourself saying, "I've always wanted to do, be, etc." or "I am ready to go and willing to invest time," those are indicators that you might not know what to do, but at least you have the desire and are willing to invest time to "let go". The second step is to be honest with yourself on your hidden fears. Lastly, the final step is to start. Create a list of what you can do to change or need to learn in order to change or what you need to plan for in this change. We're not talking a complicated project management RFP list, but rather a small three-bullet point list (okay, maybe five, but no more). When you start, treat this like a "practice". If you were to learn to play piano, you would sit down and "start" with the expectation that you would miss some notes along the way. As you dare to let go, start and reposition your hands, heart, and your mind when you miss a note. Life is rich when we, as Ralph Waldo Emerson said, "Always do what you are afraid to do." 😊

Want to talk about letting go? Contact Pam at Pmcgree2@hotmail.com.
Why Change

story by CHRISTOPHER ELMORE

illustration by DAVE SWANG

I have a unique perspective on change. On one hand, I counsel salespeople to help their clients make a big change in the way they do business. On the other, I help accounting and finance people change a process they have known their entire business life. Given those facts, my professional life is dedicated to helping people change. Personally, I don't like change and find it very difficult. Until recently, whenever change came up in my personal or professional life, my initial reaction was simply, “NO!”

AND THEN...

It all started with a simple request by a local university to teach a course on entrepreneurship. My company was doing well and getting a lot of attention in the community, so I thought this would be a great way to give back a little and influence the next generation. The funny thing is I got more out of teaching the class than my students. It came all around one word: “Why.”

IN THE PROCESS...

While I was teaching a section on messaging, I came across Simon Sinek’s Ted Talk on what he referred to as “The Golden Circle.” I know; hang with me here. Now, I had heard about this and had known about the idea for years, but for some reason I had never connected the principles of The Golden Circle with change management. I think one of my hang-ups was the name. For some reason it seemed like a scheme or a network marketing program. The Golden Circle has three levels of understanding: What, how, and why. It struck me that knowing why you need to do something, or why something is being done, is the key to change management. The problem is, on the list of what, how, and why, most people tend to spend the majority of time and effort on “how.”

HOW?

In corporate America, we are such “doers”; doers to the point that we have a tendency to forget about why we’re doing what we are doing. It’s kind of like the Hatfield-McCoy feud that lasted almost 30 years. When it ended, the families were asked why they fought each other; no one could remember. Why we do what we do – our mission – is an important reminder that helps the tasks have meaning and purpose. How we do what we do is the means to an end and can help our tasks be as efficient as possible.

BIG FINISH!

To make a point (you are welcome) and to be very clear about change and the importance of doing change well, I think we have put change behind the wrong noun. When you think of helping people change, most think “change management.” Management will help you with the “how” and not the “why.” Leadership points to “why.” I did a study
on 400 companies that changed their accounts payable process. Each company was successful, but 10 percent of these companies changed faster and easier than the other 90 percent. When I looked deeper into the 10 percent, I found that the difference was those companies had what I like to call a natural “advocate.” This was a person or group of people that were leaders in the organization, and when, during the change, times got tough or out of focus, the advocate would rein them back in with a reminder of “why” the change was being made. In the 90 percent group, there wasn’t as strong of an advocate. Even worse, there were people that were reluctant leaders that didn’t want to be leaders.

TO CHANGE

Good change management isn’t change management at all; it’s change leadership. The core principle of leadership is knowing why – not how – something needs to change.

Christopher Elmore has written eight books and countless articles, lectures at UNC – Charlotte, and travels around the country speaking on the topics of startup success, sales, presentation skills, change, entrepreneurship, accounts payable, and payment automation. Having deep startup and entrepreneurial experience, Christopher was one of the six people that started AvidXchange™ in 2000, and he continues working in the business today. For more information, visit www.avidxchange.com or www.apautomationnews.com.
Ladies and Gentlemen, we have a winner!

Congratulations to Ildiko Kemp of Freedman HealthCare for winning our Fall 2015 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.
One of the characteristics of great leaders is their ability to visualize their future. Whether it’s Richard Branson or James T. Kirk (one of my personal favorites), they always have their eyes on the prize.

As marketers, we often work in short spurts – quarter by quarter, sometimes month by month, on “tasks”. There’s no doubt that we have plenty to get done, it all needs to be done quickly, and all of it is important (or we wouldn’t be doing it).
WHAT WILL BE DIFFERENT A YEAR FROM TODAY?

Now imagine that you’re sitting at your desk. It’s January of 2017. The sales pipeline is nicely full, your customer advocate program is humming along, the well-populated blog site is attracting visitors that turn into leads, and your efforts are rewarded with a nice increase in the marketing budget for the upcoming year along with a bonus for you, of course.

That means you probably spent 2016…

» Renovating the website to ensure that it not only attracts prospects, but also CONVERTS them into opportunities.

» Creating original content (e-books, infographics, whitepapers, blog posts, social media posts, videos, etc.) that prospects eagerly consumed and shared.
Launching and growing your customer advocacy program so you always have a wealth of testimonials, case studies, references, social media content, and referrals from your core advocates.

Planning your events (Convergence, seminars, and other conferences) down to the nth detail to ensure positive ROI.

Nurturing prospects and customers in the database on a consistent basis with relevant and important content that ensures their next purchase will be from you.

Implementing a marketing automation system that does most of the “heavy lifting”.

Tracking your results and regularly reporting them to the leadership team so they’re well aware that marketing is spearheading the lead generation effort (not just following the pack).

IN A PERFECT WORLD...

In a perfect world, you would have time, budget, and more people to help you accomplish the list above (which isn’t all inclusive, as you know). So which are the highest priority items, which have the highest ROI, and which drive the most revenue?

Unfortunately, the answer is all of them, although not all at the same time. For example, if you just refreshed the website, populating it with original content – industry-specific is ideal – might be the highest priority. If you last refreshed the website in 2010 (believe me, prospects can tell), then a new website should be number one on your list.

If you struggle to find enough content, which is an ongoing challenge for most of us, check out some of the resources on the opposite page. Use a combination of Microsoft-created content, curated content, and your original content to fill your content needs. And while you’re at it, prioritize the content needs. According to Gartner, the number one source for understanding the differentiation of a technology provider was peers of the same size in their industry (60 percent). That means you need content that appeals to SMBs (if you target SMBs), content that’s suited for large enterprises (if that’s your target), content for distributors, manufacturers, non-profits, professional services firms, for CEOs/CFOs/CEOs/etc., and the list could go on and on. Determine which prospects are your sweet spot and go after the content most suited to them first, then expand your content needs to the next tier of fitting prospects.

WORK BACK TO MOVE FORWARD

Just as you might use a work-back schedule to plan a big event such as your Convergence presence or annual customer conference, use the same principle when determining your 2016 priorities. For example, if one of your 2017 goals is to look back at 2016 and see 12 referrals from your customer advocacy program with six closes, start designing your program NOW. (If you need guidance, download the e-book from the key resources, on opposite page.) Work back from January 2017 using a timeline to determine if your goals are reasonable.

For example, it may take you a month to design your program (give, gets), another month to obtain approval and budget, and another month to recruit advocates into the program, so you might be rolling things out in the April/May timeframe if you start now. You may start out with four or five advocates, working up to 10 to 12. If so, is the goal of 12 referrals with six closes realistic?

This could be one of the highest ROI programs you launch during the year – but only if you take the time to do it right, learn from your advocates, and closely monitor the results.

SUMMARY

Visualize the end game. What should your marketing results look like 12 months from now? What about 2021? (Yikes! That’s only five years from now.) My advice is to work back from your “2017 accolades” – what do you want to be known for a year from now? An amazing Convergence marketing campaign that generated the most leads ever? A customer advocate program that produces consistently, month after month? An industry-specific focus that makes your firm the go-to leader in that vertical?

P.S. I found a fantastic business/marketing plan outline in the Microsoft templates. If you want me to email you a copy, drop me a note at the alias below.

Cheryl Strege is not a Trekkie but is a fan of sci-fi, Richard Branson, and customer advocate programs. She can be reached at 605-574-9432 or Cheryl@thepartnermarketinggroup.com.
KEY RESOURCES

» Download “Beyond the Referral” (www.thepartnermarketinggroup.com/marketing-resources/), the free e-book on creating an effective customer advocacy program.

» Monitor the Microsoft Smart Partner website (http://smartpartnermarketing.microsoft.com/) for usable content.


» Use ContentMX, formerly Butterfly Publisher, to bring curated content into your social media feed (www.thepartnermarketinggroup.com/social-media/content-mx-formerly-butterfly-publisher/).

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TPC: Tell us about Innovia. What products and services do you offer?
Tom Doran (TD): We’ve been in business for 30 years and have focused exclusively on Microsoft Dynamics NAV for the last 15 years. We also offer Microsoft Office 365 and the Microsoft Cloud.

TPC: Why did you decide to focus solely on Microsoft Dynamics NAV?
TD: We decided that we couldn’t be experts at everything. We want to be really good at one thing versus trying to know it all.

TPC: You recently went through a major rebrand and name change from ABC Computers to Innovia. Walk us through that decision. Were there any factors that persuaded you one way over another?
TD: We had talked about it over time. ABC Computers was fairly well-established and people knew us, but it was becoming increasingly difficult to recruit new professionals. That was our first sign that something wasn’t working with our current brand. We brought in consultants to figure out why we were having such trouble recruiting and realized more and more that the name, ABC Computers, no longer represented what we do. Recruiting drove the decision, and once we peeled back the onion, there were a lot of other areas that our name and brand no longer represented.

TPC: I can imagine that’s a pretty enormous project. How long did it take?
TD: Yes, we knew it would be big as we had to redo everything from the ground up, from every single document to a total redesign of the website. I think, in total, we had to update about 1,200 items, and all in all, it took us nine months.

It ended up being great timing with User Group Summit in Reno. It was our goal to launch our new name at the conference, and we achieved that. It was a great week, and really, what better way to let everyone know there’s a new name?

TPC: What do you hope to accomplish with this branding shift?
TD: The very nature of IT has changed since our inception in...
1984. Back then, computers were hip and cool, and today, the word “computer” is dated. When people saw the name, ABC Computers, it didn't represent what we wanted them to think and feel about our company.

With the rebrand, we want to convey innovation and confidence. We strive to be and continue to be people Users can depend on, and the new name and brand portray that much better than before.

**TPC:** You spoke on a panel at our PreGAME to Summit session about VAR and ISV relationships. I think everyone in that room agreed that you had some important aspects figured out. Can you share any of those best-practice tips with our readers?

**TD:** It needs to be a partnership with the end customer in mind. Anything we do, we first put it through the customers' lens to get a feel for what they think about it. Customers depend on us to bring solutions to solve their business issues. The best way to help our customers is to bring ISVs in as a PARTNER, not as a vendor, to answer the question, “How can we each help our mutual customers?” When we approach it as a collaborative effort, we see a lot more success, and customers are happier with the end solution.

**TPC:** Did you experience any “aha” moments from being a part of that session?

**TD:** I was very surprised to hear that more Partners aren't working with ISVs like we do. We have a core group of ISVs that work best for our customer base and communicate regularly with them. It’s worked so well for us; I was surprised to hear that Partners could do it any other way.

**TPC:** Does Innovia work well in one specific industry?

**TD:** We work heavily in manufacturing and a fair amount in distribution. We are targeting a new vertical that's directed to power sports dealers who sell ATVs or snowmobiles, that sort of thing.

**TPC:** What's next for Innovia in 2016 and beyond?

**TD:** Microsoft's direction is clear for us to focus vertically. In 2016, we're going to spend a lot of time and energy going out to the broader market for the power sports industry. We'll be attending and sponsoring two major conferences offering up a strong promotion that allows Users to try before they buy. We've focused immensely on reducing the risk for customers to make a decision to move forward. The first 25 dealers that sign up with us get Microsoft Dynamics NAV at zero cost for six months, and that includes no service fees.

**TPC:** Why that amount of time?

**TD:** You see a lot of 60-day or 90-day trials, and that's just not long enough for Users to get comfortable with the solution. We believe that ERP adoption happens after the six-month mark. At that point, they're used to it, they like it, and they are comfortable with moving forward.

**TPC:** Anything else you want to share with our readers about making big changes as a company?

**TD:** We are undergoing a lot of change lately. In addition to the rebrand, we've really ramped up our staff, seeing about 40 percent growth over the past three years. We’re now at 53 employees and growing. We find it’s very difficult to offer successful implementations when we don’t have dedicated support people and onsite teams that can handle the volume. Having a team of more than 50 people helps make us a more sustainable and successful Partner.

---

“With the expertise of Innovia Consulting and the capabilities of Microsoft Dynamics NAV, we've continued to be very competitive in the market while saving a huge amount of operational costs by automating our business. We couldn't have done it without their guidance and owe much of our continued success to the Innovia Consulting team.”  

– Mary Lowe, vice president of finance, Lowe Manufacturing Company
PARTNER-TO-PARTNER
Learning at PreGAME to Summit

Clockwise from top left: Brooke Webb, Tom Doran, Mark Rockwell, Amber Barnes, Jon Rivers
he Partner Channel had the opportunity to prepare, present, and moderate a couple sessions at PreGAME to Summit in Reno this past October, tackling the topics of marketing and ISV/VAR relationships. Read on for a few of the top takeaways from both sessions.

SESSION 1: MARKETING TO THE ONLINE ATTENTION THRESHOLD

Social media is free but is reaching a level of saturation that might not all be positive. How do you make your message stand out and stay relevant with your target audience without becoming noise? Conversely, how can you reach your audience when they’re not online, either by personal or work choice, without resorting exclusively to mailers? This session will look at tried-and-true methods of providing value while considering the attention that customers (and fellow Partners) are both willing and able to provide.

Two panelists, Brooke Webb, director of sales and marketing for Vicinity Manufacturing, and Jon Rivers, president and social media disruption expert for Marketing Monarchs, joined us to share how they connect with their respective audiences in meaningful ways to provide value, breaking through all the clutter that is online today.

BROOKE WEBB, VICINITY MANUFACTURING

“We continue to gain followers, but are the right people listening? We keep posting. Social media does not necessarily generate leads, but after leads come in, our presence on the social platform helps legitimize our message and brand.”

JON RIVERS, MARKETING MONARCHS

“I wouldn’t say a communications vehicle is not successful; I believe it’s more down to the messaging.”

The main takeaway from the session is that standing out from the online clutter doesn’t happen with one secret weapon. It’s a combination of a few important basics. These basics of defining a value proposition, focusing on the benefits, and providing a clear call to action rang true in the examples shared by Brooke and Jon.

SESSION 2: DECODING THE ISV/VAR RELATIONSHIP

Developing strong relationships with other Partners in the Microsoft Dynamics channel takes trust, and sometimes, it just simply doesn’t work out. There are, however, some tried-and-true ways to find the right Partners that match your strategic goals AND to build mutually beneficial partnerships...we have a panel of ISVs and VARs to prove it! In addition to a panel undergoing a “marriage counseling” of sorts, we’ll also have an industry expert share tactical tips and best practices on cracking the ISV and VAR code.

Our panelists, Tom Doran, customer engagement director for Innovia Consulting, and Mark Rockwell, president of Rockton Software, hit the stage with a business relationship expert, Amber Barnes (see her article on page X), to dig deeper into the common challenges for ISVs and VARs and how to take a new approach to those challenges moving forward.
TOM DORAN, INNOVIA CONSULTING: VAR FOCUSED ON MICROSOFT DYNAMICS NAV

With pains like how to onboard a first deal successfully and dealing with a lack of formal training programs from ISVs, Tom (and attendees!) learned how to make it a win-win-win scenario by keeping customers in mind when defining the relationship with ISVs.

MARK ROCKWELL, ROCKTON SOFTWARE: ISV FOCUSED ON MICROSOFT DYNAMICS GP AND MICROSOFT DYNAMICS CRM

Dealing with VARs changing prices without discussing it and complaints about low margins, Mark (and attendees!) discovered a few new ways to communicate with VARs and set expectations from the very beginning without playing the blame game.

The most common theme throughout the session was recognizing if a partnership honors your brand to predict if that relationship is going to work out. By simply identifying your morals as a company, you can pick and choose your Partners wisely based on those objectives, ultimately setting the stage for a mutually beneficial relationship.

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A\n\nAlliance Castings Company, LLC is a high-quality supplier of railroad bogie assemblies and coupling device castings to the U.S. and foreign markets. Alliance was bogged down with an inefficient paper process when it came to their 6,000+ purchase orders (PO) per year. They struggled with incomplete and often times inaccurate purchase order details in their Microsoft Dynamics GP solution. Their procedural approval processes were not streamlined, and they sometimes missed approvals altogether. David Goodwin, director of finance, says, “We needed a new method to efficiently create PO requisitions in a near-paperless environment to not only ensure things wouldn’t get lost, but also to ensure all PO line item details were recorded.”

The DynamicPoint solution addressed all of Alliance’s issues by providing fully integrated requisition management capabilities within Microsoft Dynamics GP, allowing for customized templates, buying thresholds, and more.

The templates allow routine, standardized requisitions to be copied and submitted quickly by updating only certain information to the order. David shares, “This saves our users time in creating and approving the orders because key inputs are already transferred in the template.” Alliance users can also quickly access information for the historical lookup of past purchases as a reference. In the end, they have the controls needed to ensure that purchases fall within their company policy and are approved by management in a timely manner.

By using DynamicPoint’s Expedite feature, certain Alliance users can approve requisitions and create purchase orders up to threshold limits set to their profile. This allows off-shift users a tool to order critical supplies in quick fashion as needed by bypassing the normal approval steps. Notifications that an expedited order was created – along with the details of that order – are then sent to all downstream approvers.

“DynamicPoint has been great throughout the development and implementation of the customized requisitioning software,” David concludes. “They took the time to understand our model for purchasing and provided us with the right software to effectively solve all of our requests.”

JACQUI GONZALEZ
vice president of fund management
Inglewood Park Cemetery

SOLUTION:
DynamicPoint Expense Management

Inglewood Park Cemetery, an endowment care cemetery, is located in California and handles approximately $70 million in investment monies. Inglewood Park Cemetery and its sister company, Park Lawn Cemetery, have several funds in addition to the state-required endowment care fund, the earnings from which are used to maintain the cemetery grounds and facilities. The other funds include commodities and services purchased in advance by their clients, the earnings from which offset the price increases over time. Jacqueline Gonzalez, vice president of fund management, works directly with the companies’ investment committee in managing these investments.

Inglewood Park Cemetery formerly leveraged AS400 CCMS software, which had a general ledger (GL) package designed for cemeteries. This meant that any asset reporting had to be processed manually using Microsoft Excel spreadsheets. Jacqui recalls, “This worked fine in the ‘80s when we had just four or five investment managers and 10 investment portfolios, but we’ve grown into a well-diversified operation with thousands of investments, such as equities, real estate, fixed income, mortgage-backed securities, and much more, across our 42 portfolios.”

Its month-end and year-end processes became very tedious to get through. In fact, it would take a full month to get through month-end processing, reporting, and reconciliations. The organization was also very prone to error when dealing with its manual processes. “What we put in, we got out, and too much of our time was dedicated to checking and reconciling reports,” Jacqui shares.

The volume of work required to handle monthly amortizations and interest accruals made it necessary for those entries to be captured on a year-end basis. Due to the manual reporting of investments, the preparation for yearly audits was extremely time-consuming. “Our auditors needed to do more testing on our investment holdings to make sure the information we were using was accurate,” Jacqui says.

ICAN Software Solutions came to Inglewood Park Cemetery’s aid, and everything changed. The organization went live on Microsoft Dynamics GP with ICAN InvestmentAssets in 2012 and now has complete and accurate tracking and history of each investment holding, complete with customizations specific to the industry and so much more.

Closing books each month is now accomplished in approximately 10 days. “We can pull monthly amortizations, interest, and income accruals. The reconciliation process is so smooth; it takes literally a push of a button to initiate a reconciliation report back to our statements. I’m still amazed and still enjoy learning all the ways ICAN is able to help us,” Jacqui concludes.

SOLUTION:
InvestmentAssets from ICAN Software Solutions

DAVID GOODWIN
director of finance
Alliance Castings Company, LLC
Want to see your company here?

The Solution Spotlight is a new endeavor for The Partner Channel Magazine, with the goal of highlighting customer success stories from use of Microsoft Dynamics add-on products and services. The customers you will read about here were selected by their Partners, but the interviews were conducted by us, so the commentary - and success! - is genuine.

Contact Jane Olson at 701-526-1829 or Jane@thepartnerchannel.com and ask about the Solution Spotlight.
### ACA Compliance, Fuss-Free

**Form 1095-C**

**Department of the Treasury**
**Internal Revenue Service**

**Employer-Provided Health Insurance Offer & Coverage**

Information about Form 1095-C and its separate instructions is at [www.irs.gov/taxforms](http://www.irs.gov/taxforms)

**Part I**

**Employee**

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<th>State or province</th>
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**Part II**

**Employee Offer and Coverage**

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**Part III**

**Covered Individuals**

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With all the practice we’ve had in communication over our lifespan, you’d think that it would come to us easily once we entered the “real world” of work. Most of us learned to speak as toddlers, we were taught to read and write as we went through grade school, and some of us may have even taken communications classes in college. Should be a piece of cake, right? Unfortunately, my experience in business (and for that matter, in life) has been a resounding and hearty “No.” But, why? If we’ve put so much of our time into practicing, why is it that a majority of our communication doesn’t work the way we expect or need it to?

In business, if a process or strategy isn’t working, it’s a wise practice to reflect on what’s missing. When it comes to communication, maybe it’s time to consider the fact that we’ve been practicing all the wrong things.

(Warning: The practice prescriptions I’m about to share with you will definitely work in your office and among your business partners. They will also work in your personal life and the community at-large. Symptoms may include nodding heads, improved productivity, and “getting it right the first time.”)

**USING FUZZY LANGUAGE**

Google the word “culture” and take a quick look at the number of results that come back. Each result has a different take and a different perspective about what the word means. Same rings true for most words, processes, and ideas. What we practice, however, is normally not a reflection of this truth but the exact opposite. Instead, we use:

» His definition of “professionalism” is the same as mine.
» Her understanding of what a sales process looks like mirrors mine exactly.
» My channel Partner should know what “customer service” means.

Does this sound about right? The problem is, when we use fuzzy language or vague words and assume others have the same definition of something that’s important to our work, we are immediately setting the stage for miscommunication and a lack of clarity.
Practice Prescription

Use the “STRAM” Model. Similar to SMART (but smarter), the STRAM model, used by Ken Blanchard as a goal-setting tool, can also be refurbished for communication. When you’re starting out a business relationship or project, ensure your communication with all parties is:

» Specific (Everyone agrees on what a good job looks like.)
» Trackable (How are we going to measure progress?)
» Relevant (Why is this important to the bigger mission or vision?)
» Attainable (Can we all agree that what we are communicating is realistic?)
» Motivating (Will our message create energy in our receiver or zap it?)

Leave no expectation unset by being crystal clear about what your words mean to you. Expect a follow-up from your channel Partner? Let them know exactly what that means to you on the onset of your relationship and why it matters that it happens that way. Have you been given an assignment? Ask the question: “What does a good job on this assignment look like?”

The power of bagging fuzzy language and taking time to clarify and align on a shared definition of success cannot be underestimated.

MAKING ASSUMPTIONS

This may sound strange, but we constantly practice telling ourselves stories about the way things are. Naturally, we rely on our own perspective to make sense of situations we face in business and in life – but our storytelling ability goes way beyond that. We are such good storytellers that we don’t just make up stories for ourselves. We make up stories for others, too.

» My channel Partner only cares about the bottom line, and that’s why he’s lacking in customer service.

» This team member is lazy, and that’s why he doesn’t follow-up the way he should.

Our thoughts and assumptions are so powerful that we can create full-blown lives, thoughts, and intentions of those around us...without ever asking them. This causes us to miss out on important information and insights.

Practice Prescription

This Rx is two-fold. The first and easier part is to learn to recognize and test your assumptions. When that voice in your head starts storytelling, take a moment to figure out where the story is coming from. Make it a game to poke holes in your story to see how it holds up in your mind’s court of law.

The second half is a little more difficult and may take some getting used to: Ask questions. Once you’ve realized that you’re making up a story, the next step is to fact check. If you’re feeling as though your channel Partner is lacking in customer service, but you’ve checked your story and know they value it, ask them what’s going on. The only way to truly gain insight and full perspective is to know the stories of others. Even better, pose your questions with the intention that everyone should win, and watch how that changes your mindset.

Naturally, we rely on our own perspective to make sense of situations we face in business and in life – but our storytelling ability goes way beyond that.
Say it with me folks: Constructive criticism is a facade. That’s right. We’ve been practicing “constructive criticism” for our entire adult lives, and it’s been the wrong practice. Constructive criticism is nothing more than judgment with a little lipstick on it. And nobody wants to be judged.

To figure out why this is, we call on neuroscience research dating all the way back to our more primitive years and the idea of fight, flight, or freeze. The reason “criticism” immediately makes you bristle is because it’s inherently negative and almost always given in a way that’s personal as opposed to objective. To say it in another way: Our brain reacts to criticism the same way it would to being chased by a saber-toothed tiger. It puts us on the defense almost immediately.

Practice Prescription

The new and improved word and process for criticism is “feedback.” I define feedback as information about the past or present that influences change in the present or future. Before you go thinking this is semantics, notice I also said process. There are proven and specific methods to give both positive and constructive feedback in a way that our brains are wired to hear more easily than others.

Truly effective feedback must:

» Include facts or data (objectivity)
» Be relevant (needs to matter in context)
» Be an actionable request (a specific behavior)

Depending on the situation, you can also add your point of view – feelings, thoughts, assumptions, judgments, etc. Most people just give their point of view and skip the rest.

So much of our communication pitfalls stem from our belief that, since we’ve had so much practice, communication doesn’t need to be planned. This couldn’t be further from the truth. A little planning goes a long way. Start incorporating the above prescriptions into your daily communication practices, and watch as your words become more and more easily understood.

Amber Barnes has nearly two decades of customer service experience and more than a decade of leadership and employee development experience from small business to Fortune 50 companies. She can be reached at www.starthuman.co and Amber@starthuman.co.
marketing is always a trade-off. No one has unlimited time and budget, not even the biggest of companies. Several years ago Pepsi pulled out of doing Super Bowl ads to instead invest those millions in its Pepsi Refresh Project social media campaign. That switch was a bold move, and I suspect the marketing team had quite a few impassioned meetings to make that shift from the status quo. As a smaller company, you face even tougher decisions because you don’t have millions of dollars and an army of resources with which to work.

How do you decide? Where should you be spending your limited marketing resources? When should you say YES, and when should you say NO? Here are seven questions to ask when evaluating marketing opportunities.

» **Have we done this before?** If not, can we create a test campaign? Testing is a very important part of marketing, and it’s equally important that you have a test-sized budget. Before you invest big money on a campaign, test out headlines and offers using pay-per-click ads. Small improvements can make a huge difference in results. For example, let’s say you want to run an ad in The Partner Channel Magazine. You could create a series of pay-per-click ads that tests your headline, image, and offer, and then see what pulls the best results. Not only will you get better results from your magazine ad, you might even pull in leads from your online campaign.

» **Does this marketing opportunity provide us with a target-rich environment?** Meaning, is your list or event targeted specifically at the ideal client you most want to attract? The more you can focus your marketing dollars on the right people, the less you’ll spend and the greater return you’ll see. This is one of the main challenges many Partners have when it comes to investing in Convergence. Most of the Microsoft Dynamics customer attendees are already “married” to another Partner. There are other reasons to participate in Convergence, of course – like the opportunity to connect with other Partners, Microsoft, and ISVs, get face-to-face time with existing customers, and maybe pick up an orphan or two – but most VAR Partners are not going to pick up much net-new business. That fact needs to be considered when deciding how much to spend on Convergence activities. Things might change with Convergence now being aimed at Microsoft customers beyond just Microsoft Dynamics, but we’ll have to test it out and see how that goes.

» **Is there a way to get new business from this activity?** Small businesses can’t afford to spend a lot of time and money on awareness campaigns. If an awareness campaign isn’t costing you much and it gets you in front of your target market, it might be worth it. Or if your awareness campaign is really a charitable campaign, go for it! But in general, I’m not a fan of gaining awareness. Ask yourself, is there a way you could get leads from this same activity? Typically that means you need to have some sort of low-risk, high-perceived value offer available that someone could request – an e-book, a checklist, or an instructional video are all great freebies. If you make a major goal to get people onto your list, you can continue to market to them from there. Look for ways to create re-useable marketing assets so you can stretch your budget even further. If you can create an e-book for a campaign sponsored by one of your Partners, ask if you can then reuse that e-book in multiple ways down the road.
» Do I have the ability to do this right? Let’s say you plan on hosting a live event or webinar. Do you have enough time to create and send the invitations, make reminder calls, create the landing page, build beautiful graphics, run all the event logistics, prepare the presentations, and send after-event follow-up emails? A lot of time and effort goes into each piece. If you can’t do it all, maybe you shouldn’t do this event – at least not right now. You are far better off doing fewer things 100 percent of the way than being half-committed to a whole bunch of activities.

» How will we know if this activity has been successful? Success measurements are an area where marketing and sales need to get on the same page. Marketing will consider a campaign successful if it gets a significant number of downloads, whereas sales might think the campaign is a failure because no leads converted into opportunities. Set up success criteria at the beginning of the campaign. Make sure sales and marketing personnel each know their roles and how this campaign fits into the overarching goals of the sales/marketing department.

» How long are we going to be committed to this endeavor? What’s the level of effort required? Relationship marketing and content marketing are marathons, not sprints. If you are going to commit to producing a blog or podcast, you need to stick with it. Be realistic about your expectations. Don’t be discouraged when people don’t show up in droves right away. Last year, I helped a company get really consistent with their blogging and social media. I told them they had to commit to at least a year, and I’m glad I did, because it took some time to figure out what really resonated with their audience. A year later, their sales are up 30 percent, and the only thing we changed was their online presence. Give yourself time to learn what it takes. If something still isn’t producing results for you a year down the road, then it’s time to re-evaluate.

» Do we have money for this in the budget? If not, what will we have to give up to do this? Sometimes marketing involves not just the trade-off of one marketing activity for another, but rather this marketing activity versus hiring another person or purchasing equipment or software. Because marketing is often treated as an expense (versus an investment), it’s often the first department to get its budget re-allocated to something more pressing. That’s one of the reasons I recommend clients have a committed marketing budget. You absolutely cannot have professional, ongoing marketing activities if your marketing team always has to run to finance to ask for spending approval. Set an amount. Stick to it. If you don’t know what your marketing budget should be, budget for a marketing consultant who can help you figure it out.

Marketing is constantly evolving, so it’s important to try new things. Asking these seven questions will help reduce your risk and get you a positive return on your marketing investments. I also recommend you give yourself a little wiggle room. Write your budget “in pencil” so you can shift dollars around and have some cushion for when Microsoft or another Partner comes up with a brilliant idea that you want to participate in. Keep your eyes and ears open for opportunity, but don’t be afraid to say NO if the fit isn’t right.

Need a little velocity added to your marketing projects? Contact the marketing tornado at Amachina@tornadomktg.com.
find the logo

contest

WINTER 2016

Ah, shucks. Nobody found the hidden logo in Peter Joeckel’s “A Cautionary Tale” article on page 22 of the Fall 2015 magazine.

Let’s give it another try. The submission rules for this quarter’s contest are the same – log on to www.thepartnerchannel.com/magazine under “Find the Logo Contest” to let us know where you think the logo is located. A winner will be drawn at random and will receive a cool gift that’s sure to point you in the right direction every day!

Here’s a list of places where our logo usually appears, thus making them null and void when it comes to this contest:

- Table of Contents
- Sales, Marketing & Leadership Intros
- Photo Caption Page
- The End of Each Article

Any graphics that have the TPC logo as a main element
Since 1996, Data Masons Software has specialized in simplifying electronic data interchange (EDI) by providing tight integration and compliance management services. Data Masons’ EDI Made Simple® approach offers advanced turnkey EDI solutions.

The Partner Channel (TPC): How did Data Masons Software get its start?
Dennis Bruce (DB): In 1996, we started as a consulting company focused on EDI integration for enterprise resource planning (ERP). Then in the early 2000s, the decision was made to take our efforts and turn it into a product to sell. In 2004, we started to work on Microsoft Dynamics, and finally in 2007, we decided to heavily focus on the Microsoft Dynamics AX, Microsoft Dynamics GP, and Microsoft Dynamics NAV markets.

TPC: “EDI Made Simple” is your tagline. In what ways do you make EDI simple?
DB: We have three main ways to simplify EDI for our customers. 1. We focus on Microsoft Dynamics. 2. We manage integration and compliance work for the trading partner’s documents and a customer’s ERP. And 3. We automate the entire EDI process, taking error-prone manual processes out of the equation.

TPC: Walk us through how this is all done for your customers.
DB: Our solutions sit outside of ERP. We don’t customize the ERP but integrate EDI at a deep level. We simplify the approach so customers don’t have to modify their ERP to accommodate EDI. This way users can take advantage of new ERP functionality immediately after a new upgrade from Microsoft and not worry about its effect on EDI.

Data Masons handles all the nuances of the trading partner relationship so that our customers don’t have to. Each trading partner has their own way of doing business, so we standardize and normalize their data before passing it back and forth within our customer’s ERP. Customers don’t have to jump through hoops for every single trading partner. When trading partners make changes, Data Masons will manage all those compliance changes at no additional cost to the customer.

TPC: What industries need EDI the most?
DB: EDI was born out of the automotive industry and blossomed out into areas such as consumer packaged goods and other industries. Each vertical segment relies heavily on EDI, but the requested document sets are typically different for each niche.
Data Masons has internal teams that specialize in each Microsoft Dynamics ERP as well as each unique vertical segment. For example, there are very different requirements in apparel and footwear versus food and fresh produce or the automotive supply chain. Our internal experts can speak to those areas and understand the requirements when it comes to EDI in a specific industry segment.

**TPC:** When customers rave about you, what do they say?
**DB:** They love that we deliver a complete EDI solution that is totally focused on their ERP. We are an EDI company, and our niche in the market is our focus on Microsoft Dynamics, providing deep and broad integration for Microsoft Dynamics AX, Microsoft Dynamics GP, and Microsoft Dynamics NAV. We have no interest in integrating with 32 different ERPs. Each ERP has different features, processes, and requirements. We have chosen a select few to be the knowledgeable experts. That level of expertise along with our industry experience is appreciated by our customers and Partners and really sets us apart from other EDI companies.

**TPC:** Taking a look back at 2015, what was the hardest decision you made?
**DB:** We have been engaged with potential clients that weren’t a good fit for us. We had to walk away from the business, based upon a misalignment of what we thought it would take to be successful versus what the customer thought. Ultimately, we felt the project wasn’t going to end successfully. Data Masons would rather walk away versus making a mess. Our reputation is just as important as revenue. If we can’t deliver what we promise, that will eventually catch up with us. One of the main reasons I love working here is that we’re always thinking long term about what’s best for the customer, because that’s ultimately what’s best for us.

**TPC:** What do you have coming up for Partners in 2016?
**DB:** Our sales team will begin to work at a deeper level with Partners this next year, and we’ll be expanding our footprint in Asia Pacific and Europe. Partners are our best advocates, and we are committed to working with the Microsoft Dynamics Partner channel. Helping Partners win their ERP deals is at the core of what we do.

**TPC:** What is your favorite thing about the Microsoft Dynamics Partner channel?
**DB:** I’ve been involved in the channel since 1999 and have seen the changes of faces, processes, and products. After 16 years, the one thing that has stayed true is that it’s a Partner-driven model. It’s about the product to a point, but the success of the channel really depends on the Partners delivering that product. Their knowledge, experience, and comfort level of sales and delivery are so impressive. I’ve been able to work with Partners from different angles and really appreciate just how sharp Microsoft Dynamics Partners really are.

“Data Masons has created an **amazing** EDI solution that makes it easy to **implement new processes** and trading partner relationships with **Microsoft Dynamics AX**. They do all of this without **Microsoft Dynamics AX customizations**, which is a **key value** proposition to Chobani.”

– Maureen Hurley, vice president of IT strategy and architecture, Chobani
The Genius Series is an exclusive learning opportunity for Microsoft Dynamics Partners that includes a nine-month curriculum around sales, marketing, or leadership topics.

Not only has connecting online each month given students access to valuable tips, tricks, and resources, but they have also connected at community events and developed deeper professional relationships after just four months, sharing best practices and providing support to each other where needed.

If you’re interested in participating as a presenter and/or a mentor for future sessions, please contact Bethany Foyt at Bethany@thepartnerchannel.com.
The fall 2015 sessions of The Genius Series covered video marketing, list management, and social media, while also motivating students to take a more introspective look at their day-to-day projects. Here’s what the first trimester has meant to a few of our students:

**LINDY BELLEY**  
marketing coordinator at Integrity Data

“I seriously get a boost of energy after we have our meetings. On Wednesday afternoon 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. I felt like I accomplished something useful and forward-thinking.”

**AYNSLEY KELLER**  
marketing director at SK Global Software

“I just have to say WOW. I was so REVVED up from that session that I practically planned my 2016 marketing strategy in the wee hours of last weekend’s nights because I was so encouraged by everyone’s input. This Thanksgiving, I am totally thankful that I signed up for The Genius Series!”
Here’s a look at what our students will experience during their second trimester:

**DECEMBER**

**PRESENTER**
Linda H. Yates,
Linda H. Yates Consulting

**TOPIC**
Marketing Budgets and Planning

**ROUNDTABLE MENTORS**
Frances Donnelly, Horizons International;
Cheryl Salazar, The Partner Marketing Group; Jeff Wedren, PowerObjects

**JANUARY**

**PRESENTER**
Anya Ciecierski, ERP/CRM Software Blogs

**TOPIC**
Content Creation and Curation

**MENTOR**
Liz Anderson, Avalara

**FEBRUARY**

**PRESENTER**
Jenny Davis, The Partner Channel

**TOPIC**
Event Management

**MENTOR**
Kate Pinyan, Lanham Associates

A profound thanks to the experts who are making it all possible!
Could you - or somebody you know - benefit from The Genius Series?

The application process for the 2016-2017 classes will start in May 2016.

Visit www.thepartnerchannel.com/the-genius-series for more information.
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.

PHOTO CAPTION contest

Is there a doctor in the house? The User Group Summits feature “medics” that help answer user questions. What do you think is the most popular question this group of medics received?
Thanks for playing the Fall 2015 contest!

Our winner is Donna Krizik Parsons of Crestwood Associates LLC:

“Dang I’m tired, but the guy behind me just starting playing YMCA. That’s my JAM!”
T3 Information Systems is a leading provider of software and services for the nonprofit community. Headquartered in Washington, D.C., the company has worked with hundreds of nonprofits throughout the United States to enable technology for improved efficiency and delivering on their missions. T3 Information Systems offers a full spectrum of financial software solutions for nonprofits, including Full Circle Budget, which simplifies and automates budgeting from Microsoft Excel to Microsoft Dynamics. To learn more about Full Circle Budget and Partner opportunities, visit www.fullcirclebudget.com. For more information on T3 Information Systems, visit www.t3infosystems.com.

What do you most enjoy about the winter months in Washington, D.C.?

The beauty of a fresh snowfall means less traffic on the roads.

What is your favorite thing about working in your role?

Successfully implementing software or processes at clients’ companies that ultimately save them time and improve their lives.

What tips do you have for making tough company decisions?

Trust your instincts and don’t overthink. Seek advice from a few close colleagues or friends.

What are your company resolutions for 2016?

Keep learning and focus on growth through our fellow Partners.

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

It is a great way to promote our ISV product Full Circle Budget and grow it through other Partners.

Congratulations

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

2006
JANUARY
» The TM Group Inc.

2008
JANUARY
» Dynamic Communities
» Lighthouse Business Information Solutions, LLC

2009
JANUARY
» Eclipse Computing, Inc.

2012
JANUARY
» NetStandard, Inc.

2014
FEBRUARY
» InfoGrow Corporation

The Partner Channel Membership Rewards

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

Contact Jasmine McNellis via the information shared to the right if you want to benefit from these rewards.

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.
Thank You Sponsors!

We truly appreciate your support of reIMAGINE 2015. This year’s event would not have been the same without your support!

PLATINUM SPONSORS

Binary Stream
Binary Stream develops enterprise-grade, add-on software that enhances Microsoft Dynamics® ERP GP and AX. It’s scalable and fills the gaps for users, saving them time and money.

Blue Moon Industries
We provide essential business functionality for Dynamics GP, including credit card processing, consignments, warehouse management, 3PL, and EDI integration, chargeback management, manifest entry and tracking.

eOne Solutions
eOne Solutions is a leading creator of innovative solutions for Microsoft Dynamics GP including SmartConnect, SmartPost, NodeBuilder, Extender, SmartView, Flexicorder, and SmartList Builder.

Greenshades Software
Simple, cost-effective solutions for tax compliance, benefit management and employee self-service. For over 20 years, Greenshades has helped make payroll and HR easier.

Integrity Data
Integrity Data is committed to creating great Microsoft Dynamics GP Payroll solutions, delivering highly reliable software, expert services and top-notch services.

NjevityToGo
The NjevityToGo Partner Program will help you obtain Dynamics GP/CRM Cloud customers with recurring revenue streams. YOU Brand, Bill and Control YOUR Cloud Offerings!

GOLD SPONSORS

Altec
Altec’s doc-link™ integrated document management and workflow solution for Microsoft Dynamics takes companies paperless in any department, any process and anywhere by automating paper-intensive processes.

GoiWX, Inc.
GoiWX is an experienced cloud Managed Hosting Services Company dedicated to improving the security, stability and availability of ERP, CRM and line of business applications.

HighJump
HighJump is a global provider of supply chain management software and trading partner network technology, streamlining flow of inventory and information from supplier to store shelf.

Infiniti Integrator by Sikich LLP
Sikich is a leading professional services firm specializing in accounting, technology and advisory services. Our technology practice delivers leading ERP solutions, including the Infiniti Integrator.

Nexonia
Nexonia offers highly configurable web and mobile solutions for expenses, timesheets, POs and AP that integrate with Microsoft Dynamics GP and your existing business systems.

Nolan Business Solutions
NOLAN Business Solutions is an INTERNATIONAL SOLUTION PROVIDER who has helped thousands of companies solve their business problems for over 25 YEARS.

Rockton Software
Are you ready to work simpler & easier® with Rockton Software? Extend the power of Microsoft Dynamics GP with tools that will rock your world.

RoseASP
RoseASP provides hosted Microsoft Dynamics GP, AX, NAV, SL, CRM available on Azure, and in RoseASP’s Private Cloud, specializing in FDA, SOX, HIPAA cloud compliancy.

Thomson Reuters
Thomson Reuters, a Microsoft Global ISV, provides cloud-based sales, use, and value-added tax calculation, reporting, exemption certificate management and returns for companies of all sizes leveraging Microsoft Dynamics ERP (GP and AX).

SILVER SPONSORS

ACOM Solutions
Designed specifically for Microsoft Dynamics GP, ACOM provides groundbreaking ERP integration, delivering "real-time" payables automation from purchase order through completed GP transactions and secure archival.

DiCentral
DiCentral is a preferred EDI provider for Microsoft Dynamics users; our EDI integration offerings simplify the way customers do business through supply chain integration.

EthoTech, Inc.
Help your customers see their Commissions reIMAGINED! COMMISSION PLAN from EthoTech will automate commission calculations, payouts, and distribution of personalized commission reports. Contact Sales@ethotech.com 678.384.7500

Fastpath, Inc.
Simplify Dynamics AX, GP, NAV or CRM security with Fastpath – learn more at www.gofastpath.com

Horizons International Inc.
Horizons International is celebrating 20 years providing functionality that meets the needs of both process and discrete manufacturing, including lot and quality management.

Journyx
Journyx enterprise time and expense tracking software integrates with Microsoft Dynamics GP, AX, NAV and SL. For more, visit www.journyx.com.

Manufacturing Resource Partners
Manufacturing Resource Partners is a manufacturing and field service consulting firm with a primary business model of partnering with Dynamics GP VARS.

Nodus Technologies Inc.
Nodus Technologies is a leading provider of PA-DSS Certified electronic payment, e-commerce, and A/R automation software for Microsoft Dynamics GP and CRM.

Victinity Manufacturing
Victinity Manufacturing™ develops software exclusively for the process manufacturing industry. Our clients include manufacturers from the food, beverage, chemical, paint, coatings, cosmetic, and pharmaceutical industries.

WalServ
WalServ is one North America’s largest, most experienced providers of Cloud Computing services for hosted Microsoft Dynamics ERP solutions. Ask us how we can help you.

BRONZE SPONSORS

Ariett Business Solutions, Inc.
Ariett Cloud Purchase and Expense provides mid-enterprise organizations with one spend management platform for every requisition, contract, invoice and expense report. See Ariett Live: http://www.arieht.com/events-and-webinars.

Carpenter & Associates, Inc.
CAI excels at supporting resellers in implementing and supporting HR and Payroll solutions for their clients as well as training and integration for Dynamics GP/SL.

Dynamics GP User Group (GPUG)
GPUG®, the official Microsoft Dynamics® GP User Group, engages individuals and companies using Dynamics GP in value-added networking and knowledge sharing.

ImageTag
KwikTag by ImageTag is the market-leading powerful, practical and proven ERP-embedded content management solution. KwikTag delivers one system for any department for any process.

JOVACO Solutions
JOVACO Project Suite is a fully integrated project accounting and project management solution which is fully integrated into Microsoft Dynamics GP and Dynamics CRM.

Sierra Workforce Solutions
Sierra Workforce Solutions has a product to fit your business needs: from MS Dynamics time and attendance ERP software integrations to time clock hardware.

We look forward to seeing you in Fargo at reIMAGINE 2016: Sept 19–21 #reIMAGINE2016
Who can you trust to help your Dynamics® GP clients use barcoding for inventory and asset management?

Trust Panatrack.

When a company selects our PanatrackerGP inventory and asset barcode tracking solution for its simplicity and ease of use, they may not be thinking of where their business will be in one, five or ten years.

But we are.

So no matter how advanced your clients’ needs become, we help you meet them by adding modules and features, taking them from simple inventory tracking to full warehouse management system (WMS) capabilities. And whether Dynamics GP is on premise or in the cloud, you can rest assured that PanatrackerGP is futureproof and ready to perform for them.

Executive Brief: RFID versus Barcodes — which is best for Dynamics GP?
The List from The Partner Channel® is your tool for finding the solutions available from Microsoft Dynamics® Partners. Review the various industry, horizontal, and service offerings available and you may just find exactly what you've been looking for! The List is unique in that it shares only those solutions and services that work with the Microsoft Dynamics product line. We want you to spend time using the solution, not looking for it. If you have a product or service that you would like included on The List, please contact Jane@thepartnerchannel.com.

NOTE: The Partner Channel offers no expressed or implied warranty or guarantee for any of the products included in this directory. Support and quality assurance of these software products and services are solely the responsibility of each Microsoft Dynamics Partner.

*Due to the nature of the “classified” format used for The List, Microsoft Dynamics brand guidelines may not have been followed. We encourage Partners NOT to follow the example we are setting!"
Industry

Agriculture

SCALABLE
Scalable Data Systems  AX  GP  NAV  SL
http://www.scalableax.com  •  714-594-7690
Commodity Trading
Complete Solution for Commodity Trading: Manage all aspects of physical contracts from agreement to execution including: Contract Management, Logistics, Risk Management, Invoicing, Cost tracking and Accuracies.

Apparel/ Footwear

Lanham Associates  NAV
http://www.lanhamassoc.com
678-379-4200  ext. 105
EDI  CRM  EDI
In-house control, collaborative, or outsourced. Total solution, AS2, and VAN for lower cost of ownership. Seamless simplicity EDI designed specifically for NAV. More documents and users than any other NAV provider.

Commodity Trades

SCALABLE
Scalable Data Systems  AX  GP  NAV  SL
http://www.scalableax.com  •  714-594-7690
Commodity Trading
Complete Solution for Commodity Trading: Manage all aspects of physical contracts from agreement to execution including: Contract Management, Logistics, Risk Management, Invoicing, Cost tracking and Accuracies.

Construction

ipm Global Pty Ltd  AX  CRM  GP  NAV  SL
http://www.ipmglobal.net  •  321-368-2489
IPM Project Management
IPM Project Management is a purpose built XRM Solution that delivers a fresh approach to Project Management in the Construction / Engineering sectors. Incorporating Comprehensive Contract and Cost Control.

Consumer Packaged Goods

Data Masons Software  AX  GP  NAV
http://www.datamasons.com  •  866-575-1631
Vantage Point EDI for Dynamics
Tightly integrated EDI for Dynamics without customizations.

Chemicals

Horizons International  AX  GP  NAV
http://www.qualityessentialsuite.com  •  866-949-9504  ext. 811
Quality Essentials Suite
Quality Management System integrates to all Dynamics products. Used in chemicals, food and other regulated industries. Control layouts for certificates of analysis, comply with ISO standards, manage lot holds.

HighJump

HighJump Software  AX  GP  NAV  SL
http://www.highjump.com  •  888-403-4489
HighJump TrueCommerce EDI Solutions
Scalable & affordable EDI solutions for Microsoft Dynamics. A managed service approach, from one trusted source, helps lower your fulfillment & procurement costs & connects you to an expansive global trading network.

Lanham Associates  NAV
http://www.lanhamassoc.com
678-379-4200  ext. 105
ACE - Advanced Commerce ERP  CRM  EDI, ASN, Shipping, Carrier Manifest, Labels, Barcoding, TP Compliance, WMS, Forecasting & Replenishment.
Best of breed built inside NAV replacing 7 disparate solutions. Seamless simplicity, 110,000+ users worldwide.

RedTail Solutions  GP  NAV
http://www.redtailsolutions.com  •  508-983-1900
RedTail EDI
Freedom to Do Business: Stick to what you do best - our cloud service manages your EDI. Integrated with ERP/WMS/3PL systems. Lowest total cost.

Cross Industry Solution

ACOM Solutions, Inc.  GP
http://www.acom.com/solutions/ms-dynamics-ggpreact-plains  •  800-699-5758
Automated Payables, Sale Order Processing & Document Management
Designed for Dynamics GP
Securely manage the capture, workflow, & storage of invoices, documents & all vital business information. 3-way matching, live accrual reporting & the ability to complete transactions directly from workflows.

Altec  GP  NAV  SL
http://www.altec-inc.com
800-997-9921  ext. 1255
doc-link, Integrated Document Management
Capture, workflow, output & archive w/doc-link, Doc. Mgmt. for Dynamics.

Arbela Technologies  AX
http://www.arbelatech.com  •  949-291-4777
Master Data Centralization For Dynamics AX
Arbela's Master Data Centralization for Dynamics AX manages product, customer, vendor, employees, and COA master data and their fields across multiple companies for better shared services. Gain from our experience!

Concur  AX  GP  NAV  SL
http://www.concur.com  •  425-590-5020
Travel Expense and Invoice Management
Integrated travel expense and invoice software for Microsoft Dynamics.

DATABASICS, Inc.  AX  GP  NAV  SL
http://www.databasics.com  •  314-282-9561
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**Industry**

**ReQuLogic** - A browser-based employee self-service portal, offering integrated expense and travel management, HR self-service, and entitlement management solutions.

**Gorilla Expense** - A comprehensive expense management solution for small to medium-sized businesses, providing automatic expense capture and reporting.

**Greenshades Software** - Provides automation and integration solutions for businesses, focusing on software integration and data management.

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JBC communicates enrollment data to carriers and insurance providers.

MetalFile Information Systems, Inc.
AX
http://www.metalviewers.com • 507-286-9232
MetaViewer Paperless ERP for Microsoft Dynamics
Enhance your AX, GP, NAV & SL solutions by adding integrated scanning, OCR, invoicing, workflow, and AP/AR Automation.

Check Printing
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Liaison Messenger EDD
Batch email password protected Direct Deposit Statements to Employees.

MHC Software, Inc.
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Check Printing
MICR checks print to blank stock from standard Dynamics output. Ideal for unique customizations- print virtually any data available in Dynamics on checks. Digitized signatures, positive pay, secure remote printing.

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The leading cloud-based community platform used by organizations worldwide to bring people together in secure communities designed to ignite knowledge sharing, drive content creation and solve problems.

Commissions
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678-384-7500 ext. 1
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Calculate, pay and track all variable compensation, including Sales Commissions, Bonuses, Royalties, Rebates and SPIFFS. Effortlessly create and modify commission plans, and then quickly distribute reports by e-mail.

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Red Maple’s Advanced Commissions
Adv Commissions is flexible and handles complex commissions. Commissions can be calculated based on many criteria and can be paid at invoice, upon payment or periodically. It can be used in SO, Projects, AR & AP.

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ACOM Solutions, Inc.
http://www.acom.com • solutions/ms-dynamics-ggpreat-plans/ • 800-699-5758
Integrated Document Management and Process Automation for Dynamics GP
Direct and control the entire lifecycle of your documents and unstructured information, while protecting the information within them & keeping you within compliance mandates.

Arbela Technologies
http://www.arbelatech.com • 949-291-4777
Arbela Security Manager
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From tracking eligibility and enrollment requirements to producing and filing 1095-C returns, Greenshades has Affordable Care Act requirements under control. Request a demo today and take the pain out of ACA.

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http://www.integrity-data.com/software/aca-compliance/ - 888-786-6162  
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A 360° reporting engine that makes ACA tracking and compliance a non-issue. With deep BI capabilities, this tool automatically tracks eligibility and tests affordability, and generates and prints Form 1095-C.

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http://www.rocktonsoftware.com  
877-476-2586  
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25 helpful tools in one convenient package! Just when you thought it couldn’t get any better.

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Red Maple’s Advanced Credit Cards  
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http://www.redmaple.com - 972-980-6963  
Red Maple’s Advanced Credit Cards for Retail  
Adv. CC for Retail allows you to process credit cards in retail environments and directly integrate into AX. PCI validated CC solution native to AX. Red Maple has many processor options for CC for Retail.

**AbleBridge**  
http://www.ablebridge.com/products-project-management.htm - 877-600-2253  
Project Management for Microsoft Dynamics CRM  
Easy to use Project Management integrated with Microsoft Dynamics CRM.

**eBridge Connections**  
http://www.ebridgeconnections.com  
800-755-6921  
eBridge for CRM  
Cloud solution for seamless integration of customer & opportunity data.

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http://crm-rules.com - 877-276-1942  
CRM Rules for Microsoft Dynamics CRM  
Easily configure dynamic CRM forms. More powerful than Business Rules.

**Ebridge Integration Solution**  
http://www.ebridgeintegration.com  
ActiveConnect  
Integrate data from your website, SQL Server, or Excel up to 20x faster and more easily than with Integration Manager, for less cost. Also send data directly from Excel to Dynamics with a click of a button.

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Our specialties can align with all your industry-specific and evolving business needs. With minimum customizations, we tailor AX and CRM to effectively reduce costs and improve efficiency. Gain from our experience!

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PaperSave 877-727-3799 PaperSave is a complete document management, electronic workflow and invoice automation solution, Certified for Microsoft Dynamics GP, SL, AX, & CRM.

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http://tax.thomsonreuters.com/DynamicsTax
888-885-0206

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Thomson Reuters ONESOURCE Direct
Tax for all companies leveraging Microsoft Dynamics provides cloud-based services, use, and value-added tax calculation, reporting, exemption certificate management and returns.

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http://www.VertexSMBCoList.com
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AX | GP
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EDI Streamline communications between customers/vendors. Key Features: Auto transfer between parties, Orders, Invoices, ASNs & Multi-location.

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Rockton has made reporting so fast & easy, you’ll want to send us flowers.

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Powerful and user-friendly maintenance software. Control budget and reduce maintenance and unit cost. Increase efficiency and reduce downtime.

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http://www.ariett.com - 781-826-1120
Ariett Cloud Expense Reporting with Corporate Credit Cards, Travel Approval, Receipt Capture and Mileage Calculator on Any Device
Empowers employees to submit expense reports on the go & stay within policy.

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SSRS, Crystal)
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SharePoint Expense Reimbursement Solution
Exclusively for Microsoft Dynamics
One Time Cost and No Per User Fees.
Leverage DynamicPoint’s SharePoint Product at a fraction of alternative solution costs to effectively integrate and streamline employee expense reimbursement with Dynamics.

**eRequester by Paperless Business**
AX | CRM | GP | NAV | SL
http://spendwise.ly/eRequester-EM
206-256-0771 ext. 123
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Use eRequester Travel & Expense Management to automate and expedite expense processing. Improve visibility over discretionary spending.

**Gorilla Expense**
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http://www.gorillaxpense.com
877-973-6731
Gorilla Expense
The Gorilla Expense T&E solution includes mobile apps, purchase card & corporate card reconciliation, project accounting expenses, multi-currency, VAT/GST capture & robust integration with GP, NAV, AX & SL.

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AX | CRM | GP | NAV | SL
http://www.kwiktag.com - 888-KWIK-TAG
KwikExpense
KwikExpense automates and accelerates expense reporting, receipt capture and the report approval process, while making credit card reconciliation a breeze!

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AX | CRM | GP | NAV | SL
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http://www.nexonia.com - 800-291-4829
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Highly-configurable cloud-based expense reports and timesheets solutions, seamlessly integrated with MS Dynamics, incl. VAT & multi-currency. With mobile apps for iOS, Android, BlackBerry 10 & Windows Mobile phones.
Fixed Assets

Panatrack, Inc. [AX]
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PanatrackGP for Fixed Assets
Bar Code data capture extending GP Fixed Asset module to manage assets.

General Ledger

Admiral Consulting Group [GP]
http://www.admiral-west.com/
advancedallocations/index.html
866-794-1275 ext. 101
Advanced Allocations for Dynamics GP
You can easily allocate entire departments, perform tiered allocations, and even allocate transactions. Advanced Allocations also allows you to preview allocation entries before committing them to your ledger.

Corporate Renaissance Group [GP]
http://www.crgroup.com/reformerat
613-232-4295
CRG Re-Formatter
CRG Re-Formatter is the only tool currently available to help companies quickly & easily modify the account framework of Microsoft Dynamics GP after the initial installation.

Corporate Renaissance Group [GP]
http://www.crgroup.com/AAtools
613-232-4295
AA Tools for Analytical Accounting

HR Management

Corporate Renaissance Group [AX]
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877-711-0367
emPerform
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ReLogic’s Expense Management module enables employees to enter expense reports using a browser or phone interface, or import expense transactions from a bank or credit card account. Real time integration.

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Highly- configurable cloud-based expense reports and timesheets solutions, seamlessly integrated with MS Dynamics, incl. VAT & multi-currency. With mobile apps for iOS, Android, BlackBerry 10 & Windows Mobile phones.
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View, print and pay invoices by ACH or credit card securely from a website with real time fund recognition.

Nodus Technologies, Inc.
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909-482-4701
ePay Advantage - Online Bill Pay
Automate A/R, improve cash flow, and provide security and convenience to your customers with an online bill pay portal. Optional recurring/subscription billing. AutoPay, payment plans and remote order entry.

Red Maple
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Red Maple’s Advanced Trade and Pricing
Adv Trade extends pricing capabilities to include complex pricing structures, extends billing, billing schedules and revenue recognition of complex transactions. Contracts can be generated and managed easily.

Concur
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425-590-5020
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Integrated travel expense and invoice software for Microsoft Dynamics.

DynamicPoint
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SharePoint Invoice Automation Solution Exclusively for Microsoft Dynamics
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Extend Dynamics AX to nearly any mobile device. More than 75 standard DAX functions with and without barcoding. Custom transactions available.

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http://www.kwiktag.com  •  888-KWIK-TAG
NEW: KwikPayables
KwikPayables automates the process of invoice transactions being captured, coded, routed, approved, stored and audited.

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KTL FastAP
Brings distribution window and payment terms directly to the 1st screen.

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800-811-4618  ext. 201
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Electronic Payment Notifications
Email and/or fax remittance advices to vendors rather than printing and mailing. System also can be used for employee reimbursements. Huge cost and time savings. Fast ROI.

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http://www.reqlogic.com  •  734-302-2316
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http://www.checkfactory.com  •  800-749-2335
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Check Factory® Visual Series is a MICR check and forms printing software solution designed to completely replace the need to purchase pre-printed checks and forms.

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http://www.aatrix.com/dynamics
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Complete eFiling and plain paper printing W-2 & 1099 solution. Unemployment, withholding, & new hire reports for all 50 states are completed automatically from your Microsoft Dynamics GP payroll data ready to eFile.

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877-968-4440
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ePaystub for Canadian Payroll
ePaystub for Canadian Payroll is a seamless extension to Microsoft Dynamics GP Canadian Payroll that allows users to email out employee Payslips with an email that is password protected.

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Let us handle the hassle of your payroll tax filings. Greenshades helps facilitate payroll tax returns, deadline management, tax payments, and other reporting requirements.

Integrity Data  AX  G/P  NAV  SL
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Synpio ACA Compliance Solution -powered by Integrity Data
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Batch email password protected Direct Deposit Statements to Employees.

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Electronic Direct Deposit Delivery
Email direct deposits to employees rather than printing/distributing. Password protected PDF attachments are emailed to employee. Fast ROI.

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Over 50 add-ons to enhance CDN and US Payroll; multi-batch processing, vacation audit and more.

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KTL PR Security
Allows you to restrict access to employee info based off of user ID.

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PayStub Viewer
A web-based app that provides employees online access to their pay stubs. Employees can be notified through email when their pay stub is available online. Configuration tool allows control to information.

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Employee Services
Streamline your HR processes. Our Employee Services module makes benefit sign-up easy and our web based portal eliminates the need to print employee documents and paystubs.

Sana Commerce  AX  NAV
http://www.sana-commerce.com
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Sana Commerce
Sana delivers fully integrated B2B e-commerce solutions for Microsoft Dynamics NAV & AX that help wholesalers and manufacturers to grow online.
Encore Business Solutions GP
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Subscription Billing (formerly called Recurring Contract Billing) Automates & manages cyclical & subscription-based billings by generating invoices, quotes or orders in GP SOP based on the billing date & billing frequency assigned to the customer contract line item.

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Easily & quickly print/email Crystal/SRS/Excel reports directly from Dynamics GP. Replace existing GP reports, link reports directly to GP and 3rd party windows, pass parameters to reports directly from fields in GP.

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Pantrack, Inc.
http://www.pantrack.com • 262-361-4950
PantrackerGP Field Sales & Inventory Extend GP to capture sales transactions at the point of activity.

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Rockton Software
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Omniprice Manage nearly every pricing situation you can think of, and a bunch you haven’t.

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http://tax.thomsonreuters.com/DynamicsTax
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CRM: Customer Relationship Management
RMS: Retail Management System
POS: Point of Sale
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Halo BI  AX  CMD  GP  NAV  SL  http://www.halobi.com - 888-300-0219  Halo BI
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Let us handle the hassle of your payroll tax filings. Greenshades helps facilitate payroll tax returns, deadline management, tax payments, and other reporting requirements.

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Thomson Reuters ONESOURCE
Thomson Reuters ONESOURCE Indirect Tax for all companies leveraging Microsoft Dynamics provides cloud-based sales, use, and value-added tax calculation, reporting, exemption certificate management, and returns.

Vertex SMB  AX & GP  http://www.VertexSMB.com/TheList  855-221-5885  Vertex SMB
Sales & use tax automation with pay-as-you-go pricing and PDF returns.
**Gorilla Expense**

The Gorilla Expense T&E solution includes mobile apps, purchase card & corporate credit card reconciliation, project accounting expenses, multi-currency, VAT/GST capture & robust integration with GP, NAV, AX & SL.

**ImageTag, Inc.**

NEW: KwikExpense

KwikExpense automates and accelerates expense reporting, receipt capture and the report approval process, while making credit card reconciliation a breeze!

**Nexonia**

Highly-configurable cloud-based expense reports and timesheets solutions, seamlessly integrated with MS Dynamics, incl. VAT & multi-currency. With mobile apps for iOS, Android, Blackberry 10 & Windows Mobile phones.

**Red Maple**

Red Maple’s Warranty Management

Red Maple Warranty Management allows companies to automatically track the purchase and sales of items from vendor to distributor to end user. Generated claims can be tracked and managed.

**ImageTag, Inc.**

NEW: KwikTag KwikApps

KwikApps automate any document, any department and any process with ONE SYSTEM that integrates directly with Microsoft Dynamics GP, NAV and CRM.

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KTL Solutions, Inc. CRD GP
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http://www.insideview.com/microsoft/the-list
Find and win deals with InsideView market intelligence from 30,000 sources inside CRM – current, complete company and contact data, news, social feeds, and a comprehensive connections network.

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KTL Solutions, Inc. CRD GP
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http://www.insideview.com/microsoft/the-list
Data Resolution, LLC AX
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ERP Clouds
Data Resolution is dedicated to delivering private ERP cloud services branded as the partners brand. We keep all of our cloud customers optimized & working 24 hours a day, worldwide for the last 12 years.

Dexterity Development

DexPros GP
http://www.dexpros.com • 623-535-9216
Microsoft Dynamics GP Development
Professionally designed & developed GP enhancements/integrations/upgrades supported by experienced Dexterity/SQ/L/.NET/VB developers.

KTL Solutions, Inc. CRM GP
http://www.ktlsolutions.com • 866-960-0001
Development - Microsoft Dynamics GP/CRM/xRM
15 yrs developing GP customizations (Dexterity, Net), Source Code Developers, Experts with CRM/xRM as a platform creating customized experiences. Sub-contractor rates to other resellers.
**Managed Services**

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RedTail EDI
Freedom to Do Business: Stick to what you do best - our cloud service manages your EDI. Integrated with ERP/WMS/3PL systems. Lowest total cost.

**Marketing Planning & Services**

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http://www.lookingglassmarketing.com
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Tornado Marketing, Inc.  AX CRM GP  
http://www.tornado-marketing.com
608-213-0377
Marketing Consulting Tornado Marketing offers high-impact, highly effective marketing consulting. 10+ years in the channel. Websites. SEO. Copywriting.

**Member Organizations**

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http://www.groupbloggers.com
888-800-0999
ERP Software Blog/CRM Software Blog Group blog sites for VAR/ISV partners to increase SEO, web traffic, leads.

**OnDemand Trials**

RoseASP  AX CRM GP NAV  
http://www.goERPcloud.com  - 855-ERP-CLOUD
ERP Cloud Trials Test drive preconfigured Microsoft Dynamics industry specific demo environments with integrated ISV solutions built for the web. goERPcloud trials help users understand the power of Dynamics and the cloud.

**Sales Tax Management Service**

Avalara, Inc.  AX CRM GP NAV  
http://www.info.avalara.com/TheList
877-780-4848
Avalara for Sales Tax Automation Use Avalara to automate and eliminate the complexity of sales tax management with Avalara. A cloud-based sales and use tax calculation, exemption certificate management, filing and remittance solution for Microsoft Dynamics.

**Upgrades**

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http://www.csgax.com  - 216-524-2574
Dynamics AX Done Right! CSG has proven expertise in: AX Performance Tuning, Business Intelligence, and AX 2012 Upgrades.

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