CREATE A BUSINESS PROFILE THAT GETS YOU NOTICED
ATTRACTING CUSTOMERS STARTS WITH TELLING YOUR COMPANY STORY

You know that getting customers to notice you—and care—is critical to the success of your business. The first step to winning referrals is creating a business profile that highlights your areas of expertise. Successful profiles have a narrative that is crafted to connect to the right audiences. Here are a few things to consider when it comes to telling the story of your business:

• **Set up a LinkedIn Company Page.** Review profiles of companies you respect to get a better idea of how to use this valuable platform to your advantage.

• **Weave your brand story into your profile** by highlighting the customer needs you address.

• **Focus on your business offerings** and avoid using jargon.

• **Keep your profile up to date** to share the latest from your business.

• **Indicate accurate and detailed preferences in your profile** so you can better connect with potential customers through our customer search experience.
TURNING REFERRALS INTO RELATIONSHIPS

Maintaining a healthy network is more than just finding new referrals in Microsoft’s network and closing sales. It’s about understanding how to manage your relationships to create customer loyalty. Here are four keys to helping your business scale by turning referrals into healthy customer relationships:

1. **Be responsive**
   Getting back to customers quickly increases your chances of closing the deal, and improves your search ranking in the future.

2. **Only pursue the referrals you intend to actively engage**
   Carefully consider your response after finding a good match. But be sure to accept only the referrals you intend to actively engage.

3. **Update your status at each stage: New, Evaluating, and Negotiating**
   Doing this will benefit you in the long run, by enabling Microsoft to utilize the feedback and help drive your future search results and referral volume.

4. **Regularly evaluate your profile**
   If a referral didn’t work out, it’s the perfect opportunity to re-evaluate your profile and make necessary changes as needed.
BUILDING A BUSINESS PROFILE THAT LEADS TO SUCCESS

1. SIGN IN TO MICROSOFT PARTNER CENTER

2. UPLOAD LOGO

3. WRITE DESCRIPTION

4. ADD YOUR WEBSITE

5. CONNECT YOUR LINKEDIN COMPANY PAGE

6. IDENTIFY YOUR EXPERTISE

7. SET CUSTOMER PREFERENCES

8. SELECT LOCATIONS

SIGN IN TO MICROSOFT PARTNER CENTER

Already have a business profile? Access it here. (Contact support if you have trouble signing in.)

If your organization has a Partner Center account, but you haven’t yet created a profile, be sure that your global admin has provided:

- **Business profile admin privileges** to a marketing professional in your organization who manages the customer-facing business profiles.
- **Referrals admin privileges** to a sales or marketing professional in your organization who engages with customers who submit requests through your business profile.

After signing in to the Dashboard, navigate to View business profiles under Referrals. Select your country/region, then click Create a business profile.
It's best to use a simple, high-resolution, and professional version of your logo, since it will be displayed as a thumbnail. Also, it's not necessary for your logo to contain your company's name. You can upload your logo as a GIF, JPG, or PNG file, with a max width of 300 pixels.
Here are the best ways to target customers and enhance your visibility to Microsoft sellers:

- **Brevity is key** to a standout business description.
- **Huge blocks of text are hard to read online,** so consider breaking them up with groupings of three or four bullets.
- **Lead with your specialty and what’s most important** in the first couple sentences.
- **Give prospects a reason to keep reading** beyond the description.
4 ADD YOUR WEBSITE
Enter the URL for your business website. If you have multiple URLs, choose the one you think will make the best first impression for the most customers.

5 CONNECT YOUR LINKEDIN COMPANY PAGE
Enter the URL to your company’s LinkedIn profile. Don’t have one? Create one now. It’s easy—and a critical marketing tool.
**6 IDENTIFY YOUR EXPERTISE**

List your business specialties with a focus on your specific areas of expertise. Authenticity is key, so be thoughtful with your selections. Selecting every option will not necessarily help the right prospects find and get referred to you. In fact, if too many referrals coming your way don’t result in success, it might have a negative effect.

### a. For the first three fields, choose from the pre-selected dropdown menu.
We recommend allowing Microsoft to automatically add and remove tags based on your business activity.

### b. This is a free text field, so enter the content that will attract the right customers.

#### 6 Partner expertise

- Allow Microsoft to automatically add or remove expertise tags. [What’s this?](#)

<table>
<thead>
<tr>
<th><strong>Industry expertise</strong></th>
<th>Agriculture, Forestry, &amp; Fishing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product</strong></td>
<td>Azure</td>
</tr>
<tr>
<td><strong>Service Type</strong></td>
<td>Deployment or Migration</td>
</tr>
<tr>
<td><strong>Solutions</strong></td>
<td>Add a solution</td>
</tr>
</tbody>
</table>

**Skills and capability**

Add up to 30 solutions, skills, or capabilities.
**SET CUSTOMER PREFERENCES**

Be authentic and accurate when describing your preferences. If you don’t, customers coming your way may not be a good match for your expertise. Ultimately, this will have a negative impact on your search results.

### Customer preferences

Target customer organization size (Check at least one)

- [ ] 1-9 employees
- [ ] 10-50 employees
- [ ] 51-250 employees
- [ ] 251-1000 employees
- [ ] 1001-5000 employees
- [ ] 5001-10000 employees
- [ ] 10001-20000 employees
- [ ] More than 20000 employees
**SELECT LOCATIONS**

Only add legitimate business locations where you have proven your ability to deliver. Also consider creating a distribution email list to strategically specify who in your organization will receive referral notifications. Once you publish your profile, it will be ready to receive referrals within 24 hours.
THE THREE KEY STAGES TO MANAGING REFERRALS

HOW IT WORKS
Once you get the hang of it, referral management is easy. Here is a quick overview of the stages each deal may go through:

**NEW**
This first stage is where customer referrals are listed when they first reach out to you. From here, you have 72 hours to update the status of the referral before it moves to Archived. Think of it as the moment where you can choose customers whose needs align with your business offerings. Only move forward to the next stage if you wish to engage in the deal.

If the referral isn’t a good fit, you may want to use it as an opportunity to fine-tune your profile.

<table>
<thead>
<tr>
<th>Time remaining</th>
<th>Organization</th>
<th>Customer location</th>
<th>Interest</th>
<th>Thank you</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 day(s) and 0 hour(s)</td>
<td>Gekko &amp; Co</td>
<td>Chicago, IL, US</td>
<td>I'm interested</td>
<td>No thanks</td>
</tr>
<tr>
<td>3 day(s) and 0 hour(s)</td>
<td>Company LLC</td>
<td>Seattle, WA, US</td>
<td>I'm interested</td>
<td>No thanks</td>
</tr>
<tr>
<td>3 day(s) and 0 hour(s)</td>
<td>Acme Corp</td>
<td>Portland, OR, US</td>
<td>I'm interested</td>
<td>No thanks</td>
</tr>
</tbody>
</table>
THE THREE KEY STAGES TO MANAGING REFERRALS

EVALUATE

If you indicate interest in working out a deal, the referral moves to the Evaluating stage. From this point, you have seven days to update the status of the referral before it moves to Archived. Our data indicates that customers value fast responses. We recommend starting with a phone call, then following up by email to determine whether it’s a worthwhile engagement for both parties.

If you decide not to continue, decline the referral. Be sure to tell us why, so we can find you better matches in the future. If there’s no further action

<table>
<thead>
<tr>
<th>Referrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>New (3)   Evaluating (2) Negotiating (36) Archived</td>
</tr>
</tbody>
</table>

Contact the customer and work together to decide if your solutions are a good fit for their needs. We’ll archive the referral within seven days unless you edit it further. Our search algorithms give preferential treatment to partners who complete the evaluation, rather than archiving.

<table>
<thead>
<tr>
<th>Time remaining</th>
<th>Organization name</th>
<th>Customer location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 days and 0 hours</td>
<td>Wayne Enterprises</td>
<td>New York, NY, US</td>
</tr>
<tr>
<td>7 days and 0 hours</td>
<td>Microsoft</td>
<td>Redmond, WA, US</td>
</tr>
</tbody>
</table>
NEGOTIATE

Once a deal is accepted, the referral is ready for the Negotiating stage. This is your opportunity to demonstrate your expertise and unique offerings. It’s important to report the outcomes of all deals, win or lose, because it impacts your future search results. Losing a deal is not a reflection of your capabilities.

If you **Won** the deal, specify the details.

If you **Lost** the deal, explain what happened.

If a referral is moved to the **Archived** section at any stage, it cannot be engaged, and will become read-only.

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### THE THREE KEY STAGES TO MANAGING REFERRALS

#### Referrals

<table>
<thead>
<tr>
<th>Date accepted</th>
<th>Organization name</th>
<th>Customer location</th>
<th>Referal ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 26, 2017</td>
<td>WHITE-LEAGUE DEVELOPMENT</td>
<td>BOISE, ID, US</td>
<td>ed239253-974f-45d6-ad10-73e1d6873c13</td>
</tr>
<tr>
<td>Jan 27, 2017</td>
<td>Mt Super Bank</td>
<td>Kenmore, WA, US</td>
<td>398d8b5c-6781-4c11-9bed-829ed732ee7</td>
</tr>
<tr>
<td>Feb 15, 2017</td>
<td>Fourth Coffee</td>
<td>San Francisco, CA, US</td>
<td>44673ac-08a-40bb-bf12-530a130939b</td>
</tr>
<tr>
<td>Feb 21, 2017</td>
<td>Contoso 123</td>
<td>Sample City, OH, US</td>
<td>e3342b59-6f76-4f33-8f50-780f671f567d</td>
</tr>
<tr>
<td>Mar 16, 2017</td>
<td>Testcustomer</td>
<td>Redmond, WA, US</td>
<td>9111a95-9f92-4f04-a6c7-b71df933200</td>
</tr>
<tr>
<td>Mar 27, 2017</td>
<td>Fourth Coffee</td>
<td>San Francisco, CA, US</td>
<td>0014256d-8861-4099-a60b-83a77a347de5</td>
</tr>
</tbody>
</table>

Please continue engagement with your referral and report the outcome by clicking on the referral details below. We’ll want to know whether you won or lost the deal as well as the deal size if applicable. This helps us to improve the fit of the referral matches and contributes to your search ranking.
MAKE SURE CUSTOMERS CAN FIND YOU

Here are the steps your customers take when they perform a search to find a partner.

**Search**
When customers search using keywords, they get matched with partners whose business profiles contain similar tags and descriptions.

**Filters**
Customers use filters to narrow down their choices of partner based on location and customer size.

**Sort**
Partners are sorted into final results based on competencies.
GO GET ‘EM!

Now you’re not only on your way to building a business profile that attracts the right referrals, but you also know how to turn those referrals into happy, long-term customers.