Go to Market & Close Deals

Artificial Intelligence

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Microsoft Partner Network
Executive Summary

In previous sections in the playbook, we covered topics from how to build your practice by selecting products or services to specialize in, to building and training your team to help turn your ideas into reality, to bringing your special offering to market and finding and keeping great customers. So, what's left to do? In this section, we'll discover strategies to compel potential customers that may be sitting on the fence to take action, from creating a good value proposition to building marketing and sales materials that tell your story.

It has been said that your current customers are your best customers. Do you know who your best customers are? What do they have in common? And how do you find more like them? We'll start by helping you build foundational marketing materials such as marketing personas, points of differentiation, value propositions, and customer business needs.

Once you've built the foundation, we'll look at how you can put these materials to work. We'll go through the different ways you can attract new customers and look at best practices. How do you put it all together? We'll discuss why integrated marketing campaigns work the best, and the tools you need to run them, such as a CRM system and marketing automation.

But marketing is only half of the story. Your sales team is the other half. Don't forget how the two work together and what marketing can do to support sales. The job of the marketing team is to build out not only customer facing materials, but also compelling materials that can be used to train and arm your sales team.

The sales end of the bargain is to close the sale. One way to do this is by writing a winning proposal. Another way is to build a proof of concept or prototype of your product or service offering, which could help a prospect understand what it is you're offering, or solidify their vision of what you can help make possible. Microsoft is committed to helping your business grow, and provides both co-selling and co-marketing opportunities.

Finally, don't miss the Microsoft resources available in the Go-to-Market and Close Deals guide, which you can leverage to help build your marketing materials and campaigns, as well as resources to help your team close the deal.

Top 5 things to do

Add value to your practice and turn your prospective customers into lasting ones. These are the top 5 things you should do to go to market and get deals done.

- Identify your customer’s business needs
- Write a compelling value proposition
- Leverage marketing to find customers
- Build marketing and sales materials
- Collaborate with partners

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Marketing to the AI Buyer

Plan your customer’s journey to buying.

What is different about the AI buyer? According to the partners interviewed for this book, rarely is the buyer actively looking for AI. They are looking for partners to help them solve a domain specific problem. It is up to the partner to recognize the opportunity to apply and sell AI.

DO’s and DON’Ts for Marketing to the AI Buyer

**DO** target your existing customers with envisioning sessions and PoCs before marketing to win new customers

**DO** emphasize how the solution augments human ingenuity

**DON’T** lead with AI as the value proposition

**DO** help them envision the possibilities enabled with the use of intelligent technology

**DON’T** expect customers to ask for an AI solution

**DO** describe the benefits of in terms of the business needs (e.g., “Our technology helps you answer the questions: Who might drop-out of school? Why would they drop-out of schools? How and when can we intervene?”)

**DON’T** describe the benefits solely in terms of the “cool” technology (e.g., “Win with predictive analytics, deep learning, analytics and chat bots”)

**DO** provide realistic benefits based on your experience with your solution

**DON’T** overpromise the capabilities of AI

**DO** explain how AI might benefit the customer’s digital transformation (see illustration that follows)

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**Digital Transformation & AI**

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Buyer engagement

Buyers buy differently than in the past. With all the information on the internet, buyers tend to research and self-educate long before they engage with sales people. By the time they do engage with sales, they’ve already made some decisions.

To help illustrate this, just think about the way a buyer might go about buying a new car. Before going to the car dealership, the buyer will likely read about various car models on the internet, read reviews, and make some decisions. When the buyer is ready to visit a dealership, they already know what they want and how much they are willing to pay for that car. This poses a challenge for sellers. How can you get prospects to engage with you earlier in the process? Through marketing.

Another way partner businesses are changing is that when selling cloud-based solutions, you can gain recurring revenue streams. Recurring revenues provide business stability and confidence for business owners and managers, allowing them to make business decisions that may not be as easy when revenues are irregular and lumpy. While these recurring revenues are smaller on a per-transaction basis than buyers’ large capital expenditures, you adjust for this. You’ll need a higher volume of transactions.

To support that, you’ll need a higher volume of high quality sales leads (through modern marketing techniques) coming in to create larger sales pipelines. Clients who are buying on a recurring basis represent great opportunities for you to upsell and cross-sell additional products and services.

Marketing is not an option anymore. Marketing helps you educate, identify, and engage with prospects earlier in the sales process. By identifying prospects who indicate interest in your products and services via their behavior (website visits, clicks, downloads, etc.), marketing can deliver high-quality leads.

Inbound marketing techniques such as search engine optimization and pay-per-click advertising make it easy for prospects to find you. Outbound marketing techniques, such as e-mail and telemarketing, enable you to tell prospects about your company’s solutions.

Marketing is the toolset that addresses all these changes. Marketing today is digital and has the power to reach more people. Again, it’s not to say that more traditional, non-digital marketing is ineffective. But to be found by prospective buyers that you don’t have a relationship with, you need to employ digital marketing techniques. Modern marketing is focused on the prospects’ and clients’ views of the world.
Engage Technical Pre-Sales in Sales Conversations

Selling is Technical

How to be sure you talk to the technical and business decision maker.

From the very start of your engagement with a prospect, you need to be aware of the need for technical pre-sales assistance. Many times, you are dealing with business decision makers during the buying cycle. In that case, you are less likely to have a need for technical assistance. However more than ever before, technical staff are a part of decision making with AI practices. When the customer has one or more technical resources on the purchase committee, you need to engage technical pre-sales.

Your technical pre-sales staff should be very experienced users of your products and services. These employees need training or experience as a user of your products. Former support employees often make good technical pre-sales staff. The technical pre-sales staff is in place to explain technology, how it works, how it meets a business need and to answer any other questions. They should excel at the more complex issues that come from prospects, and be focused on pre-sales, working together with sales and marketing, who address the business benefits. One without the other cannot be effective. You need the sales staff to speak to business decision makers. Equally, you need pre-sales to answer all technical inquiries.

Examples of technical probing questions to ask during pre-sales conversations supporting an AI practice:

- What are the challenges you are looking to solve?
- Are you looking to improve communication, learn from your data or reason about events (such as predicting future events)?
- Do you have the data to help you approach these challenges? In what formats?
- Is the data generated and captured with your system or is it external and provided by 3rd parties?
- What application development and technologies are within your existing team’s comfort zone? Do you have any data scientists on the team?
- What application platforms would you like to target? Web, mobile, desktop, IoT, etc.
- Do you have any compliance or regulatory requirements that pertain to the handling of your data?
- Can you walk us thru the high level of where data enters your system and how it is ultimately consumed?

RESOURCES:

- Azure Briefing and Pitch Decks
- Azure Pre-Sales Resources
- Azure Training Resources
Microsoft Technology Centers

The Microsoft Technology Center (MTC) can help you find the right solutions to transform your customer’s business in a mobile-first, cloud-first world.

With over 40 locations around the globe, the MTCs bring together the right resources to help you accelerate your customer’s digital transformation.

- **People:** The MTC staff is comprised of experts in Microsoft solutions. Their tenure in the industry ensures they will effectively guide your team to rapidly find solutions to your technology challenges.

- **Partners:** The MTCs have formed alliances with industry leaders who provide comprehensive resources, including hardware, software, and services to explore during your engagements.

- **Place:** The MTC environment provides rich interactive and immersive experiences for you to learn first-hand how Microsoft and partner technologies can help you take on your most difficult challenges.

Start your digital transformation by experiencing the Microsoft cloud at one of the 40+ centers around the globe.

The MTC can work with you to help you close sales with these engagement offerings:

- **Strategy Briefing:** This one-day briefing starts by examining your current IT environment and business objectives. Then it moves into the Envisioning Center, where you’ll see Microsoft solutions in action through powerful demos and scenarios customized to meet your needs. The day includes mutual discovery, tailored product and technology drill-downs, and expert presentations. It culminates with the delivery of a clear and actionable picture of how Microsoft and partner technologies can help you reach your business goals.

- **Architecture Design Session:** This custom session focuses on your business objectives and aligns them with specific applications of Microsoft software to help you not only meet your goals, but also capitalize on them. We’ll provide architectural guidance, consultation on preferred practices, and risk analysis to chief technology officers, architects, and senior members of your development team.

- **Proof-of-Concept:** In this multi week, in-depth workshop, our architects work closely with key members of your technical staff to transfer knowledge and prove out customized solutions. This workshop may also include detailed demos and training sessions. Your team will have a private, secure, and fully loaded development suite that’s preconfigured prior to their arrival.

- **Workshops:** If seeing is believing, then imagine what a hands-on immersive experience can do! Attend a custom briefing that includes a facilitated, hands-on environment where you and your colleagues can experience the vision of Microsoft’s platform and solutions firsthand.
Architecture Design Session (ADS)

An architecture design session is a working session between your experts and the customer. It should follow the envisioning session and build on the customer's vision already established.

This intensive, two-day session delivers in-depth technical information on integrating data from across your customer's entire organization and delivering it in an analysis-ready form. Presentations, demonstrations, and whiteboard discussions are customized to address your customer's needs. In many cases, the design session is used to identify candidate proofs of concept. The primary audience includes architects, developers & data scientists, test and quality assurance (QA) engineers, and technical staff, and here are some potential topics to cover:

- **Document solution architecture**: Document how all the services and components fit together to deliver the complete AI solution, end to end.
- **Identify pre-built AI & custom AI**: Identify what components of the AI solution will integrate pre-built AI, and which will require custom modeling efforts to produce custom AI.
- **Catalog data assets**: Collect the catalog of data assets that will be needed for any custom AI efforts. Be sure to document the pipeline with which this data is collected, the anticipated quality of the data, and any other factors that can complicate preparing the data for modeling.
- **Hone in on missing data**: Attempt to identify situations where the vision requires data that the customer does not currently have. Identify how this missing data will either be procured, created or its absence worked around.
- **Discuss risk**: During the ADS, it may become apparent that parts of the AI solution have a high risk of failure or the client is skeptical about achieving the vision. Consider marking these parts as candidates for a PoC.
- **PoC or Pilot**: Consider if the solution should be delivered as one or more PoCs, or if it is more appropriate to prepare for production directly by delivering a pilot.

- **Post-production monitoring**: Work with the customer to define how the AI will be measured after production delivery. How do you continue to ensure on-going performance?

**Phases of a successful ADS**

**BEFORE THE ARCHITECTURE DESIGN SESSION**

Prior to performing the ADS, it is important to conduct a simple session with the customer to establish the scenario. This session is oftentimes referred to as ideation or opportunity definition. The goal is to establish the five Ws (who, what, when, where, and why) of their needs, which can be used as a guide for the ADS, streamlining the brainstorming process, and informing the agenda and milestone goals you will bring to the session.

- **Perform an envisioning session**: Prior to the ADS, perform an envisioning session to identify preliminary opportunities that would benefit from AI.
- **Schedule a time for the design session**: This is normally 1–2 days.
- **Schedule a location**: Ensure you have whiteboards and a projector.
- **Schedule resources**: This could include experts from your team and a cross-cutting panel of technical and business stakeholders from the customer.
- **Build an agenda**: Establish milestone goals in advance so that the ADS doesn’t get consumed discussing a single topic.
- **Prepare preliminary documentation and architectural diagrams**: Even if you only have the basic building blocks, it’s good to come prepared with something you can modify during or after the session.

**DURING THE ARCHITECTURE DESIGN SESSION**

Begin by reviewing requirements with your customer. As you conduct the design session, whiteboard the requirements and proposed solutions, and arrive at a consensus for each major topic. During this time, be sure to capture photos of the whiteboard so as not to lose your notes.

There are typically the following phases during an architecture design session: discovery, envisioning, and planning.
AFTER THE ARCHITECTURE DESIGN SESSION

During the ADS, you and your customer planned a high-level architecture framework and conceptual design for a solution that addresses their organization’s business goals and technical requirements. In addition to a summary of the engagement, you’ll deliver information about:

- Special areas of concern to your customer’s organization, such as security, compliance, and compatibility.
- Deployment scenarios that map to established deployment and practices and that cite specific examples where applicable.
- Familiarity with the Microsoft technologies proposed for the solution, in addition to any trade-offs among the differing technology options.
- The capabilities of your solution to deliver business performance on premises or in the cloud.

The outcome should be polished architecture diagrams that can be reviewed and signed off on by the customer. If one or more proof of concepts are desired or a pilot is determined to be the path forward, provide a plan and a timeline to deliver.
Go-to-Market and Close Deals Guide

Leverage the Microsoft resources available in the Go-to-Market and Close Deals guide, for details on marketing to the cloud buyer, aligning marketing goals with business goals, developing value propositions, and marketing and sales assets, resources, and best practices.