

Business Central Alignment Email Guide



Microsoft Dynamics 365
Business Central

Breaking the Imbalance of Power

There is often an imbalance of power between buyers and seller at the beginning of each engagement cycle. Buyers typically have all the information, control and power, and sales professionals come in largely blind. You must find the way to the “truth” that lies behind each project. The sooner you correct the imbalance of power, the sooner you place yourself in a position to change some material aspect of the selection process (scope, stakeholders, business case, decision criteria, etc.).

Unfortunately, project leads (the technical buyer) and sales professionals possess very different behavioral profiles:

Most project leads tasked with running business solution selection processes are characterized as:

- Structured
- Pragmatic
- Thorough
- Detailed
- Logical
- Deliberate
- Methodical
- Analytical
- Skeptical

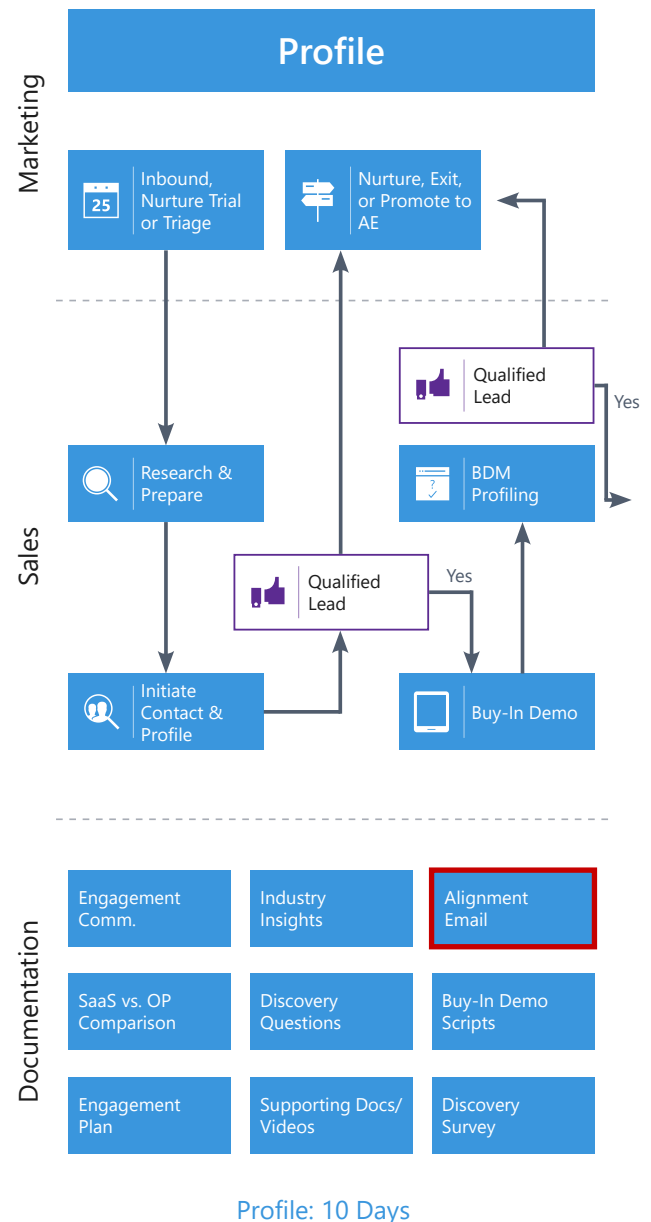
Most sales professionals charged with selling business solutions are characterized as:

- Disorganized
- Optimistic
- Forgetful
- Vague
- Emotional
- Hasty/Impulsive
- Undisciplined
- Self-oriented
- Unprepared

While these generalizations may not accurately reflect the characteristics of all project leads, nor of all sales professionals, they clearly demonstrate that a significant gap exists between the two personality styles.

Buyers will prefer to work with sales professionals who listen, understand their business challenges, and have experience working within their industry. They will also unconsciously develop preferences for those who share their own behavioral traits. The greater the similarity, the greater the connection and affinity. Unfortunately, this alignment does not happen that frequently.

Alignment Emails will help structure your understanding of your prospect's project in a format they can understand and validate. More importantly, this approach helps create a positive bias early in the opportunity engagement cycle.



Creating Buyer/Seller Alignment

Send your Alignment Email at the end of the Profile phase, cc'ing each of your prospect stakeholders. The primary objective of the Alignment Email is to confirm your understanding of key elements of your prospect's project. However, its underlying, emotional purpose is to demonstrate that you:

- listen
- understand the prospect's BUSINESS drivers, as well as the operational challenges and functional requirements
- are structured, organized and expedient
- clearly understand your prospect's industry/workload

The Alignment Email has four brief sections, sequenced in a specific order:

1. **Business Pain** - summarize your understanding of your project's business and operational drivers. These are documented using prospect language, not industry jargon. For greater impact it should be written in the "negative" (i.e. declining project profitability vs. improve project profitability). The business pain section must clearly articulate the specific challenges your prospect is experiencing. These are summarized in a financial/risk impact statement at the end of the bullet points. The Alignment Email opens with business pains because they will **EMOTIONALLY** resonate with both the project lead and business decision maker. The business pain section must capture the "why" behind your prospect's search for a new business system.
2. **Desired Capabilities** - summarize the primary capabilities your prospect feels they need to address their project objectives and eliminate their business pain. The objective of this section is to mirror back "their" language, not introduce yours. Do not use solution functionality verbiage unless your prospect specifically calls it out as a key requirement. The desired capabilities should align with the business drivers. These primary capabilities represent your prospect's "how" and will likely form the base of the solution demonstration.
3. **Impact Measurements** - summarize your prospect's anticipated project business benefits. This is **the** most important information to collect, as early as possible in the engagement cycle. Prospects will inevitably compare project benefits to costs throughout their buying journey, and most certainly in advance of their funding decision. Identifying a clear gap between the two allows you to introduce an Educational or Disruptive Insight, that could potentially lead to a favorable scope change. Document everything the prospect shares that is related to business benefits, impact or ROI, using **their** language. While measurable business case elements are best, (the more specific the benefits, the greater the impact), all references to value are relevant and important. If you don't collect this information during the discovery process, the Impact section will have to be removed from the Alignment Email and the overall effect of the communication will be significantly reduced.
4. **Next Steps** - document the high-level project and decision time frame. Be prescriptive. If the prospect does not have a documented selection process, you should recommend the three most logical next steps based on your optimal sales process and strategy. Position "next steps" in prospect benefit terms and personalize by referencing specific names and titles.

Educational Insight: "new" positive information that (typically) leads to greater value realization – establishes industry credibility and thought leadership.

Disruptive Insight: "new" information that surprises the prospect. It often disrupts their current view of their scope, selection process, business case or risk profile.

Sample Alignment Email

Dear <BDM>,

Cc: <PL, SME>

Thank you again for taking the time to share your business objectives and project goals with me today. Based on our discussion, and those I had with <Project Lead> and <Subject Matter Expert/IT> I have summarized my understanding of <Prospect Company's> <ERP/CRM/XXX> project for your team's review.

I understand the primary business challenges behind your initiative are:

- Geographical expansion – outgrown current system
- Inaccurate demand forecasts
- Volatile raw materials prices
- Inaccurate data/reporting
- Lack of measurement and allocation of environmental cost per finished goods produced
- Decreasing gross margins
- Inability to open new distribution channels
- Increase in returned goods
- Increase in inventory write-offs
- Increasing regulatory and compliance requirements
- Inability to manage multiple manufacturing sites within a single system
- Inability to integrate with customers, suppliers & shop floor technologies
- Inconsistencies between procurement, warehouse, production, finance and sales data
- Decreasing MTBF

Negative "Why"
Challenges

The above challenges are impacting client relationships, and your ability to properly plan production resources, maximize plant capacity and capitalize on your recent expansion/acquisition. While nothing has been documented, the economic impact of the above challenges is estimated to be in the hundreds of thousands of dollars annually.

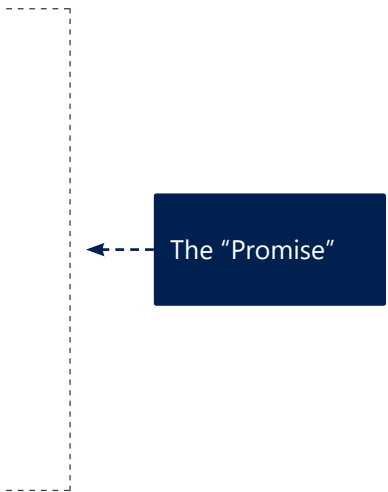
To address these challenges, you stated that <company name> is looking for these new capabilities:

- Improved visibility into scheduling and capacity availability
- Improved inventory management
- RFID (receipt to ship)
- Materials and finished goods inventory consumption reports
- Batch and series traceability throughout the entire supply chain
- Compliance governance and quality management
- Aggregated production and procurement scheduling
- Integration to artificial intelligence and robot systems
- Integration to 3D and Nano printing
- Capture and transfer customer specific BoMs into the net requirement process
- Improved BI/reporting capabilities
- Automated and finite machinery and location maintenance planning
- Quality management
- Ability to rapidly respond to changes in demand, stock levels and production surprises
- Pegging

"How" and
"What"

With these new capabilities in place, I understand the anticipated impact to be:

- Improved capacity utilization (13% improvement target)
- Greater visibility into project and client profitability
- Improved estimate compliance and accuracy
- Fewer (quality related) returns
- Reduction of unrecoverable unscheduled overtime (8% target)
- Reduction in raw materials inventory levels
- Improved management reporting related to OTD, margins, customer credits, stock outs, sales forecasts and capacity availability
- More control over finished goods profitability
- Improved compliance accuracy
- Higher OTD compliance
- Improved and accelerated board reporting
- Significant reductions in stock outs

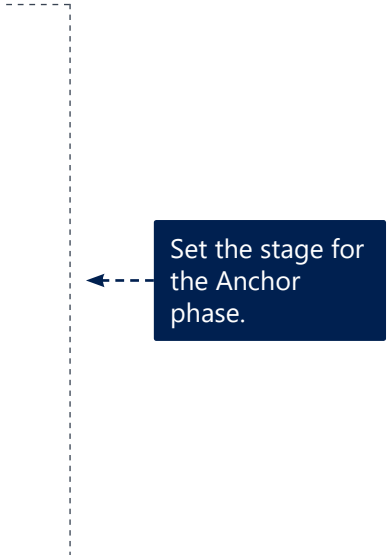


The "Promise"

Based on your project timeline, we will be working together over the next 16 weeks to ensure <Partner Industry Solution> addresses each of your project objectives.

The next steps in this process are:

- February 24th – on-site meeting with the Project Lead <name> and Controller <name> to review the project objectives, business case elements, anticipated project risks, key milestones and overall timeline. <Partner> will provide a summary of our understanding of the business and project drivers, anticipated solution scope and critical project objectives. We would also like to share our experience implementing Microsoft Dynamics Business Central in similar discrete manufacturing organizations.
- March 02nd – on-site meeting with CIO <name> to discuss Contoso's cloud strategy, integration framework and data transformation strategy.
- March 16th – on-site meeting with CFO/FD <names> to discuss project-related business risks, data sovereignty and financial consolidation as well as compliance reporting requirements.
- March 26th – on-site meeting with the VP of Manufacturing <name> to discuss business case expectations, long-term business disruption/change events, requirements prioritization and the shop-floor change management strategy.



Set the stage for the Anchor phase.

Please confirm the above captures the purpose, scope and objectives of your ERP upgrade project. Additionally, please forward any information you feel would best prepare my team for our onsite meeting with you and your project team next week.

Best Regards,
Lukas Keller
MFG Industry Specialist

The above sample assumes a very high level of remote prospect disclosure and may not necessarily reflect the quantity and quality of information typically uncovered during the Profile phase. The intent in providing a robust Alignment Email is to demonstrate the wide range of content that COULD be collected through a series of engaging and effective discovery calls.

Collecting the information required to populate an accurate and compelling Alignment Email takes preparation, focus and a solid understanding of your prospect's industry challenges and core business processes. It also requires discipline. Prospects will inevitably compare your structured, thoughtful and succinct project summary to the follow-up emails they receive from competing vendors. The primary objective of the Alignment Email is to clearly communicate and confirm your deep understanding of your prospect's industry, priorities and desires. The secondary objective is to ensure your prospect forms a conscious (or unconscious) bias prior to meeting with you for the first time.

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