Microsoft

ERP
Sales Engagement Playbook

Developed for Microsoft by Neural Impact

How to use this Playbook

How to Use This Playbook

This playbook is designed to help you effectively engage ERP buyers, compete against SAP and Oracle, and drive successful sales outcomes. It provides a structured approach to navigating ERP sales engagements by aligning with key industry priorities, decision-maker concerns, and competitive strategies.

Playbook Structure

The playbook is organized into four key sections:

1. **ERP Sales Engagement Strategies** – Learn how to position Dynamics 365 effectively in ERP compete scenarios.
2. **SAP and Oracle Compete Playbook Addendum** – Gain insights into SAP's sales tactics and how to counter them with Microsoft's unique value proposition.
3. **Industry Engagement Frameworks** – Discover industry-specific insights for Retail, CPG, and Manufacturing to tailor your approach to each.
4. **Industry Engagement Appendix**– Detailed tactics for competing against SAP and Oracle on equal industry footing (not specific to any one industry).

Making the Most of This Playbook

- **Use It as a Live Sales Guide** – Refer to key sections before prospect meetings to refine your approach.
- **Leverage Industry Specific Discovery Questions** – Structure conversations to uncover business challenges and position Microsoft as the best-fit solution.
- **Align with Competitive Insights** – Anticipate and counter SAP and Oracle sales plays to stay ahead in the deal cycle.
- **Customize for Your Customer** – Adapt the frameworks to match specific customer priorities and industry dynamics.
- **Supporting Assets & Resources** – Take advantage of the included links to relevant Microsoft assets as well as accompanying CIO TDM Positioning and BDM Project Impact presentations.

How to use this Playbook

How to Navigate the Playbook

- **Seller's Secrets -** Throughout the playbook, be sure to check out the 'Seller's Secrets'—these provide insider tips, best practices, and tactical insights to help you execute strategies more effectively in real-world sales scenarios.
- **Understand "Why It Matters" and "The Challenge"** – Each section begins with a high-level explanation of why the topic is important as well as the common obstacles a seller may encounter in executing this step in a sales cycle.
- **Apply the Competitive Insights** – Use the SAP and Oracle compete sections to proactively address objections and shape decision criteria in Microsoft's favor.

Finding Key Information Quickly

- **Competitive Strategies** – Located in the SAP and Oracle Compete Addendum, this section details how to shift project scope, influence selection criteria, and position Microsoft as the superior choice.
- **Industry-Specific Sales Plays** – Retail, CPG, and Manufacturing frameworks provide the top industry drivers, challenges, and Dynamics 365 solutions to reinforce your messaging.
- **Discovery Questions & Objection Handling** – Use the discovery questions in the persona engagement sections to drive meaningful conversations and handle common SAP/Oracle objections.

By using this playbook effectively, you'll be better equipped to navigate complex ERP sales cycles, differentiate Microsoft from competitors, and drive meaningful customer engagement that leads to successful outcomes.

ERP Sales Engagement Playbook

Click to return

ERP Compete Playbook Overview

Why does this matter

AI has created a massive inflection point in the world of business and Microsoft now has a unique opportunity to transform the ERP space with Dynamics 365 Finance and Supply Chain. Powered by AI innovations like Copilot, it empowers organizations to streamline operations, enhance decision-making, and improve resilience in a rapidly changing market. Competitors like SAP and Oracle have long-standing footholds in the ERP space, but often lack the intelligence and agility modern businesses need. With Dynamics 365, Microsoft enables companies to uncover actionable insights, predict trends, and empower their workforce to focus on high-value initiatives, positioning itself as the leader in intelligent ERP solutions

The Challenge:

Many ERP customers are emotionally attached to legacy providers like SAP and Oracle, believing these solutions are essential to their success. This deep-seated loyalty, combined with the complexity of ERP decision-making, creates significant barriers to change.

To overcome this, Microsoft must address customer fears of disruption while delivering industry-specific solutions that reduce risk, provide greater clarity and control over operations, and enable efficient, scalable growth. Winning these customers requires demonstrating how Dynamics 365 Finance and Supply Chain outpaces legacy systems in delivering measurable business outcomes.

What You Will Learn

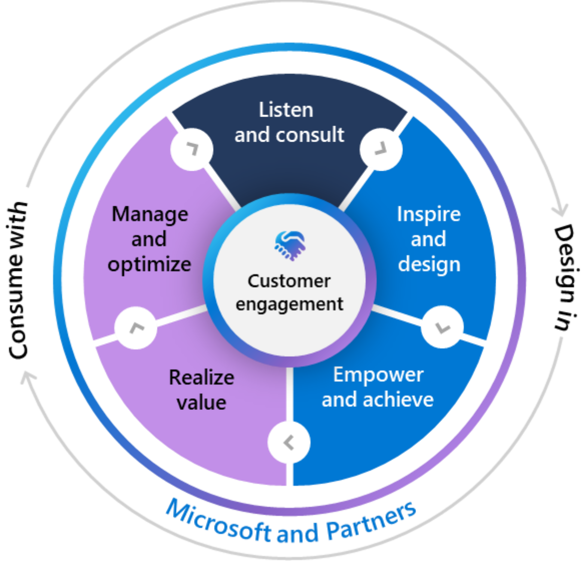
This playbook equips you to compete more effectively in Dynamics 365 Finance and Supply Chain opportunities. You'll learn how to:

- Engage industry decision-makers like COOs and CFOs with compelling, business-focused conversations.
- Leverage repeatable frameworks to qualify opportunities, accelerate sales cycles, and improve forecast accuracy.
- Differentiate Microsoft from SAP and Oracle with modern, AI-driven solutions that reduce risk, enhance control, and drive growth.
- Execute tailored strategies for Retail, CPG, and Manufacturing industries to influence key personas and deliver measurable business outcomes.

Modern Buying is Emotional

The ERP compete sales guidance described in this playbook aligns with and supports the Microsoft Customer Engagement Framework (MCEM), while addressing the emotional needs and decision-making behaviors of modern ERP buying teams. It is specifically developed to differentiate Microsoft from SAP and Oracle, creating an emotional Strategic Tipping Point early in the customer engagement cycle.

The sales guidance and supporting assets listed here are designed to help you drive effective ERP compete, and SAP surround-and-replace sales motions. These motions consistently lead to greater executive access, increased deal clarity, faster sales cycles, fewer no-decisions, and more decisive go/no-go outcomes.



Vendors Selection Has Changed

Most business application projects pivot on a single Strategic Tipping Point—a moment in the buying journey when the prospect consciously or unconsciously decides to choose one vendor over all others. In the traditional on-premises, perpetual licensing world, this decision typically occurred near the end of the buying process, often during product demonstrations or proposal reviews.

However, in today's fast-paced, AI-driven business environment, buyers are more informed, more self-sufficient, and increasingly focused on solutions that deliver agility, insights, and measurable outcomes.

Sellers must now create bias and influence early in the process by bringing AI-enabled insights, addressing business fears like disruption and uncertainty, and demonstrating how their solution empowers nimbleness and growth. Winning today requires doing your best work at the beginning of the sales cycle—not the end.

Seller's Secrets

Winning in the ERP space requires a deliberate and strategic approach. While many factors contribute to success, 3 essential techniques stand out:

1. **Bring Industry Expertise**: Collaborate with partners who have deep industry knowledge to compete effectively against SAP and Oracle's focus on industry-specific solutions.
2. **Leverage Microsoft Sales Assets**: Maximize Microsoft's MCEM sales motion and Deal Boost tools to qualify opportunities, accelerate cycles, and build confidence in Dynamics 365 solutions.
3. **Establish Early Bias**: Influence the buying vision early by delivering insights that resonate with customer pain points and emphasizing measurable business outcomes that reduce risk and drive growth.

MCEM Journey

Listen & Consult

Prepare engagement

- Review your customer accounts in ERP Compete SPA
- Research customers to detect their challenges and opportunities See Compete Summary in LXP for incumbent ERP
- Review the OneBVM Program, -Walking Deck and –Academy
- Learn the Modernize ERP Solution Play pitch and Industry narratives, find supporting Customer Stories (ERP Themes)
- Understand the available Programs and Offers; Deployment Vouchers; Accelerate ERP, FastTrack and PQA

Inspire & Design

Select the right partner, align on engagement and pitch

- Use MSX to find partner or use Modernize ERP Compete Partner List and Catalog (*links TBD*)
- Generate and deliver a BVI using the OneBVM Tool
- Align with partner on ERP Vision & Value workshop delivery
- Provide your pitch to customer with partner

Empower & Achieve

Establishing competitive differentiation

- Align with partner on ERP Tailored Demo delivery and BVA co-creation using the OneBVM Tool. Ask for BVM support via OneBVMProgram@microsoft.com
- Leverage Sales Programs to accelerate the customer commitment
- Position FastTrack and PQA Enhanced Solutions to accelerate time to value

Initiating Conversations In ERP Compete Scenarios

Why does this matter

Your initial prospect interactions often shape the tone of your entire sales process. To help make better decisions, ERP buyers' brains often lean on a mental shortcut called "primacy." As a result, they will remember, prioritize, and over-value information they encounter early in their buying journeys over what they learn later.

Additionally, due to the magnitude of SAP and Oracle's influence, it is likely the customer is already more than 50% through their buying journey before Microsoft is engaged. This makes it critical to be extremely well-prepared for your early prospect discovery and positioning calls.

The Challenge:

When engaging ERP prospects, sellers face deeply ingrained perceptions that SAP and Oracle are the gold standard. SAP and Oracle also position their solutions as innovative and AI enabled with Copilot like features (SAP Joule), downplaying Microsoft's AI advantages. Competitor sales plays such as SAP Rise and SAP Grow are marketed as ready-to-run, and tailored for industry, creating the perception their solutions are modern, adaptable, and superior. These polished narratives reinforce customer biases. This presents challenges for sellers, who must overcome emotional attachment to competitors and the illusion that legacy solutions offer equivalent innovation, while contending with sophisticated marketing appealing to customer fears and aspirations.

What You Will Learn

This section of the playbook equips you to excel in ERP compete scenarios by providing:

- Strategies to prepare for and lead impactful discovery conversations that resonate with business executives.
- Methods to research and address prospects' current challenges while identifying desired business outcomes.
- Tools to conduct credentialling discovery that surfaces operational risks and clarifies potential solutions.
- Insights to position Dynamics 365 Finance and Supply Chain as the superior choice, leveraging AI and business outcomes to differentiate.

Understanding Industry Drivers

To create a personalized and impactful first-contact discovery experience, it's essential to research the external industry drivers shaping your prospect's business environment. These drivers often create emotional trigger events that compel organizations to consider ERP investments. Key external factors to investigate include:

- **Macroeconomic Shifts:** Changes in inflation, labor costs, or economic instability impacting profitability and growth.
- **Competitive Pressure:** Market disruptions caused by competitors adopting innovative technologies or transforming their operating models.
- **Regulatory Change:** New compliance requirements or shifting industry regulations introducing operational risks.
- **Supplier Dynamics:** Disruptions in the supply chain affecting cost, efficiency, or continuity.
- **Customer and Consumer Behavior Changes:** Evolving expectations for faster service, personalization, or B2B relationship dynamics.

Understanding how these external forces impact your prospect's key operating metrics will help you uncover pain points that drive their emotional decision to modernize their ERP solution.

Identify Potential Desired Outcomes & Capabilities

Next, research your prospect's website for investor presentations, recent press releases, new product launches and current financial summaries. Look for insights into potential business challenges, strategic priorities and capability requirements. Examples might include:

Core Business Challenges

- Lack of AI-enabled processes or integrated workflows.
- Operational risks due to disjointed systems and siloed data.
- Poor customer satisfaction and rising churn rates.
- Employee disengagement or high attrition threatening productivity.

Common Project Trigger Events

- Regulatory non-compliance or audit risks.
- Revenue loss due to poor data accuracy or delayed reporting.
- Supply chain disruptions impacting service delivery.

Common Desired Business Outcomes

- Mitigated compliance risks and improved audit readiness.
- Increased system reliability and reduced downtime.
- Enhanced visibility for proactive risk management.

New Desired Capabilities

- Unified and accurate customer data to avoid decision-making blind spots.
- AI-driven risk assessments for better strategic planning.
- Real-time monitoring to identify and respond to potential threats.

Seller's Secrets

To create a strong emotional bias in Microsoft's favor during initial calls:

1. **Prepare Thoroughly**: Research your prospect's current state, industry drivers, and potential challenges before the first call.
2. **Develop a Strong POV**: Build an initial point of view (POV) that positions Microsoft as a serious contender. Use external sources like industry reports and internal tools like Deal Boost to uncover insights that resonate with your prospect's pain points.
3. **Focus on Discovery, Not Pitching**: Approach the first call as a discovery session to uncover your prospect's business challenges and goals. Ask thoughtful, business-oriented questions that build trust and provide the foundation for shaping their buying criteria.

Conduct Credentialling Discovery

The first call with your prospect must focus on understanding their business needs and challenges—not pitching Microsoft solutions. To make the most of this call, come prepared with questions that surface insights into their current systems, pain points, and desired outcomes.

Current System Assessment:

- How quickly can your IT team adapt your current ERP to changes in your operations or industry?
- Are you confident in the accuracy and reliability of the data your system provides?

Pain Points and Challenges:

- What challenges or inefficiencies in your current ERP system have prompted you to explore alternatives?
- Are there specific risks, such as compliance or operational failures, that your current system doesn't address?
- Where are you experiencing delays or miscommunication between departments?

Ideal Solution and Desired Outcomes:

- How do you envision a new system helping to mitigate risks and improve operational control?
- What outcomes would you expect, such as improved efficiency, reduced costs, or better decision-making?

Operational Bottlenecks:

- What are the biggest bottlenecks slowing down your operations?
- Are there areas where you're losing visibility or control over key business processes?
- Do you feel your current system limits your ability to respond quickly to market or supply chain changes?

Making the Right BDM First Impression

Why does this matter

ERP decision-makers—COOs, CFOs, and VPs—prioritize business outcomes, operational risk, and control when evaluating solutions. SAP and Oracle excel at framing their offerings as transformative and tailored for industry, crafting compelling narratives around money, risk, and control that resonate deeply with these decision-makers.

In contrast, Microsoft and its partners often focus too heavily on technical details, platform capabilities, and ERP features. While these elements are important, sellers must translate them into clear business outcomes that directly address the customer's key objectives, mitigate risks, and deliver measurable results.

The Challenge:

Getting access to the BDM is critical to ERP sales cycle success, as they are the individuals focused on why their organization needs to invest in a new ERP solution and the outcomes it will deliver. Additionally, competitors like SAP and Oracle excel at building BDM trust early through narratives centered on transformation, risk reduction, and industry relevance.

Sellers also face the risk of losing trust if early BDM conversations feel like a Microsoft pitch rather than a meaningful business discussion. To counter this, instead of talking about Microsoft solutions, sellers must ask thoughtful, business-focused questions in the first BDM meeting. This approach establishes credibility, builds trust, and positions you as part of their tribe.

What You Will Learn

This page of the playbook equips you to make a favorable bias first impression when you meet with the BDM by telling you how to:

- Position yourself as a trusted advisor by focusing on business challenges and outcomes.
- Open early BDM conversations with credentialing questions that establish credibility and build trust.
- Conduct emotional discovery to uncover critical risks, opportunities, and decision-making priorities.

Open with Credentialing Questions

Leverage your understanding from your research (Initiating Conversations in ERP Compete Scenarios) of the customer's industry and business drivers to craft thoughtful discovery questions that demonstrate your expertise and relevance.

Grounding yourself in their challenges and operational realities will create early trust and engagement.

Sample Credentialing Discovery Questions:

- Credentialing Statement: "Many companies in [industry] struggle with siloed systems impacting visibility and decision-making. Is this a concern for your organization?"
- Industry Driver Question: "How is your organization managing disruptions like rising supplier costs or regulatory changes in your operations?"
- Risk-Focused Question: "We often hear businesses worry about delayed reporting impacting audits. How confident are you in the accuracy of your current ERP data?"
- Operational Efficiency Question: "With the rise of AI-driven solutions, how are you evaluating new capabilities to reduce costs and improve agility?".

Seller's Secrets

You only get one chance to establish a primacy bias in your favor with the BDM. To make the right first impression in your first BDM meeting:

1. **Open Credibly:** Lead with credentialing questions that demonstrate you understand their industry challenges and priorities.
2. **Listen for Risks:** Uncover emotional triggers like fears of operational failures, compliance risks, or competitive pressure.
3. **Focus on Outcomes:** Keep the conversation centered on business goals, risk reduction, and measurable impacts—not technical capabilities.

Conduct Emotional Discovery with BDMs

To establish business relevance and further differentiate you from your competitors, it's critical to facilitate an emotional discovery process with Business Decision Makers that focuses maniacally on their pain points and desires, which will almost always be anchored in situations related to "money", "risk", and "control".

1. **Understand their business objectives and desired outcomes,**
2. **Identify their current challenges and specific areas for improvement,**
3. **Clarify their expectations of the new capabilities they'll have (not functionality)**
4. **Tease out their anticipated project risks (very important).**

This approach can be further enhanced by sequencing your questions into "what, how, and why" discovery chains. Sequence your questions into the following framework asking a "what" question then a "how" question and then a "why" question for each of these important areas (in this order):

Emotional Discovery	Practical (What) Direct the Discussion	Functional (How) Refine the Focus	Emotional (Why) Define the Impact
Project Objectives	What are your top project objectives for this initiative?	How did the organization land on those as the key priorities?	How are these goals tied to growth, cost reduction, or operational improvements?
Current Challenges / Pain	What aspects of your current ERP system create inefficiencies or concerns?	How is the group working around those bottlenecks/issues today?	Where do you see the biggest risks—compliance failures, data inaccuracies, or supply chain disruptions?
New Capabilities	What capabilities are you missing today that could help you make faster, better decisions?	How would access to real-time insights or predictive capabilities impact your operations?	Once the new system is up and running, what impact do you expect it to have on your ability to grow your business?
Risks	What are the biggest risks in changing systems, and how do you plan to address them?	Have you thought about how you will mitigate those risks?	Why is it so important to focus on reducing that risk?

Driving Business Value with Whiteboard Project Discovery Sessions

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Whiteboard Structure

Whiteboarding is a far more effective discovery method than traditional interviews because it breaks down the "us vs. them" dynamic often present in discovery. It leverages the *picture superiority effect*, where visuals are easier to digest and recall, and uses *progressive disclosure* to build curiosity and suspense. Paired with novel industry insights, this approach draws prospects in, enhances participation, and fosters greater collaboration, disclosure, and recall. A successful whiteboarding session follows a logical flow to drive engagement and uncover critical insights from your prospect:

1. Business Drivers and Project Objectives:

- What business priorities or challenges are driving the need for ERP transformation?
- Which key metrics or outcomes will define success for your organization?

2. Current Challenges:

- Where are inefficiencies, risks, or gaps in your current systems impacting operations?
- Are you struggling with disconnected workflows, manual processes, or data visibility issues?

3. New Capabilities:

- What capabilities would enable you to improve decision-making, reduce costs, or increase agility?
- How important are AI-driven insights, automation, and real-time reporting to achieving your goals?

4. Project Risks:

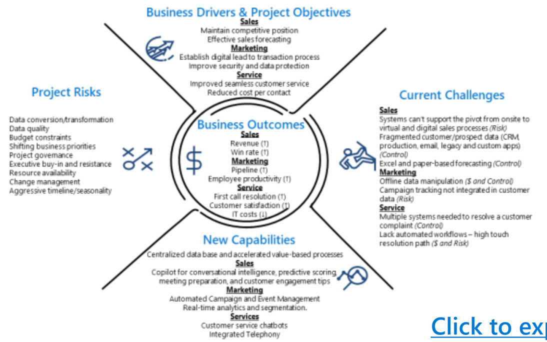
- What are the biggest risks in implementing a new ERP solution (e.g., disruption, compliance, or adoption challenges)?

Conduct Emotional Discovery with BDMs

Facilitating an effective project discovery whiteboard requires four key ingredients:

1. **Customer content:** You need a solid understanding of your prospects' business priorities, core business processes, common business challenges and key operating metrics.
2. **Facilitation skills:** Business acumen and solution knowledge provide the foundation for effective whiteboard deliveries, but facilitation skills make them memorable. To consistently drive an interactive and engaging whiteboard experience, you'll need to prepare discovery questions in advance, as well as introduce one or more new ideas (surprise elements).
3. **Preparation:** If you're new to whiteboarding, consider facilitating a dry-run first with your sales team. The dry run process cements the whiteboard format, section themes and content blocks in your working memory so that when you facilitate your first "live" project discovery whiteboard, your energy is focused on the audience, not the framework.
4. **Courage:** It's easy to schedule a project discovery call and stick to standard questions. However, stepping out of your comfort zone to try a new engagement approach can be more impactful, even if it feels risky without the usual safety net (PPT). From an engagement and neuroscience standpoint, our attention is naturally drawn to what's new or different. Your prospects are likely to embrace this novel project discovery method because it deviates from their usual expectations. Embrace the risk!

Example: A completed ERP project discovery whiteboard that captures some of the most common business drivers, challenges, new capabilities, project risks and anticipated business outcomes.



Click to explore

Seller's Secrets

To deliver a whiteboarding session that draws out important insights from customers:

1. **Don't Solution:** Avoid jumping into feature and function discussions when questions arise. Respond with brief, confident answers to confirm Microsoft's ERP capabilities, but redirect back to uncovering their business drivers, challenges, and priorities.
2. **Focus on Money, Risk, and Control:** BDMs care most about outcomes that impact their bottom line, mitigate risks, or improve control. If answers don't touch on risk or control narratives, keep digging.
3. **Lead with Insights:** Bring valuable, industry-specific insights to the discussion. Sharing knowledge builds credibility and positions Microsoft as an advisor they can trust.
4. **Guide, Don't Dictate:** Allow the conversation to flow naturally while keeping it structured. Encourage collaboration and dialogue, ensuring prospects feel heard and engaged throughout the session.

Securing CIO Buy-In

Why Does This Matter?

There are always a minimum of two critical decision makers who determine whether Microsoft, Oracle or SAP is selected. The first, the CIO or Technical Decision Maker (TDM), cares deeply about practical issues like governance, security, integration complexity and data, as well as emotional issues like losing control of applications, veering away from their IT strategy and being surprised by unforeseen project risks . To ensure your TDM decision-maker supports a Microsoft selection, you need to frame up and position your anticipated solution recommendation and Microsoft differentiation in the right context.

The Challenge

Coming out of your project discovery sessions, you will have clarity into your prospects' project objectives, anticipated scope, as well as some assumptions about how a Microsoft solution will fit into the existing application infrastructure and its potential impacts on the IT organization. Its now time to meet with the CIO/TDM to position Microsoft and discuss the implications this project will have on their role in deploying, securing, supporting and extending the solution, which includes application development strategies, integration, data management and anything related to AI. The CIO/TDM Positioning Deck is specifically designed to facilitate this discussion as well as surface any hidden IT related objections.

What You Will Learn

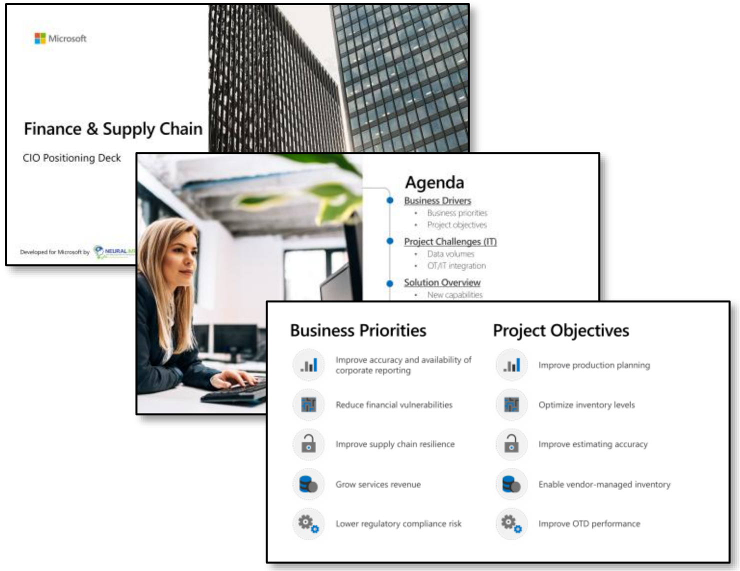
CIOs/TDMs expect Microsoft sellers to focus their meeting on technical topics like AI, Azure and the benefits of the Microsoft stack. While this conversation is important, you want to frame up this critical differentiation content in your prospects' business priorities. Anchoring your technical/IT discussion in the overarching strategic business drivers and how they are enabled by this project, then closing with the impacts or implications the project will have on the IT organization will keep your CIO/TDM audience fulling engaged.

Open With Business Priorities

Open the session with a review of the **business priorities** and **project objectives** that are aligned with the ERP initiative. This approach quickly demonstrates this is not just another technology "pitch".

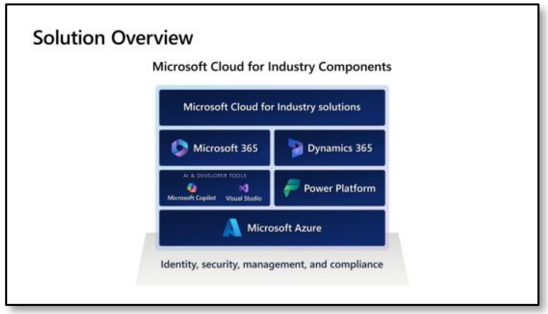
Then transition to an overview the anticipated **IT-related project challenges.** Establish a clear line-of-sight between their strategic priorities and the technology issues the CIO/TDM will need to address to ensure the project is a success.

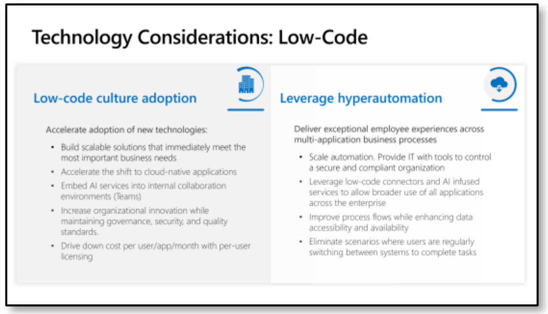
For clarity, this is NOT a "presentation". Engage the CIO/TDM after each slide to understand their perspective. They may not agree with everything that was shared with you by the project team during discovery.

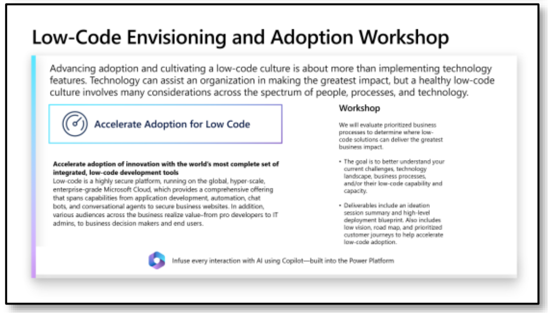


Focus on Risk Reduction

The second half of the discussion focuses on the three things CIOs/TDMs care about most: your recommended solution, how a Microsoft solution impacts and aligns with their current IT strategies and processes (there are often more than one technology consideration), and any risks that could undermine project success. They will be fully engaged during these discussions. And finally, end the session with a recommendation to engage in a collaborative activity with Microsoft and/or your industry partner to address one of the potential project risks. This last step is completely optional. If you haven't identified a significant technology risk, or you feel its better to have this conversation with the project business sponsor, then just skip it. But if you HAVE identified a critical technical risk, especially one that would impact all the project vendors, then you can position an MCEM engagement or relevant partner-led advisory service.







Seller's Secrets

Discovery Drives Impact: An effective CIO/TDM Positioning presentation begins with strong discovery. Look for all the reasons the project will fail (as well as the reasons Microsoft is a strong fit) so you can leverage it during this discussion.

Creating a Strategic Tipping Point

Why does this matter

ERP solutions inherently solve business problems and enable strategic business priorities. Therefore, negotiating access to the BDM and securing their support for a Microsoft solution is crucial, especially when competing against SAP and Oracle. Executives may have already formed a bias (premature cognitive commitment) or strong initial preference often based on limited information. This makes the first meeting with the executive critical; it must bring a unique, business-focused approach to counteract any negative preconceived notions. Otherwise, once a senior executive begins to favor one vendor over another, the other project team members, including the CIO, usually follow suit.

The Challenge:

So, how do you take your BDM meeting and turn it into a strategic tipping point experience that biases critical project stakeholders towards Microsoft? By focusing your discussion on what they care about most: business impact and project risk. Business leaders have been conditioned to expect very predictable discovery meetings with “IT” sales professionals, and they often expect as much from Microsoft. You need to quickly communicate you belong at the business table. The BDM Project Impact Summary framework is designed to help accomplish that goal and drive a “next-step” collaborative workshop designed to change the project scope or business impact expectations.

What You Will Learn

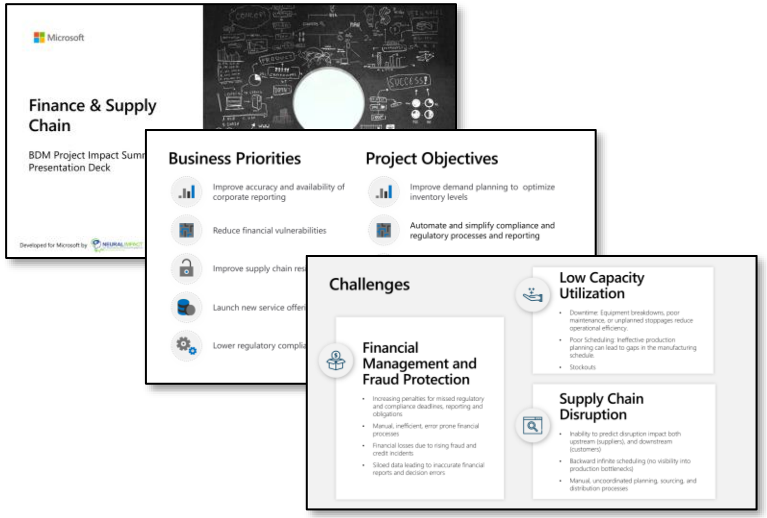
The purpose of the session is to 1) confirm and validate your understanding of the business drivers and anticipated business impacts of the ERP initiative and 2) position an MCEM engagement that enables you to influence/control the selection process and criteria. With your project discovery and CIO/TDM sessions completed, you understand the “what” and the “how” of the project. Now it’s time to focus on the “why”. That said, this discussion is much more than a credentialing exercise demonstrating your understanding of their business priorities and project objectives. You need to bring something “unexpected” to the meeting that compels them to step into an unplanned “vendor” activity; ideally a partner-led MCEM workshop.

Align the Project to Business Value

Your Project Impact Summary conversation opens with **“why”** content: your understanding of both the external and internal factors driving the initiative. This signals to the BDM the meeting focus is at the right altitude and that you are not going to interrogate them with BANT questions.

Next, you review **“how”** their business priorities are showing up as operation challenges. Bucket the challenges into three core categories (in the example on the right they are financial management and fraud, capacity utilization and supply chain disruption).

For clarity, this is not a “presentation”, it is a conversation. Confirm your interpretation of the business priorities and challenges is accurate and ask probing questions into the topics the BDM emotionally responds to.



Disrupt the Solution Vision

With clarity into the core project drivers, you then review your understanding of the **impact** the business challenges are having on key operating metrics (current situation). These represent the price the company will continue to pay if they choose not to move forward with the project.

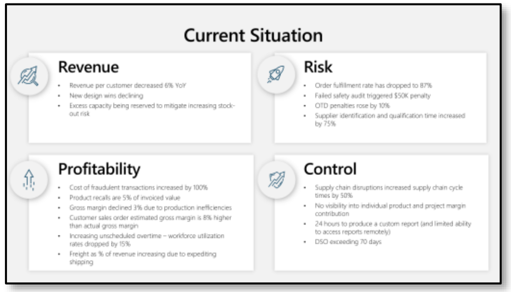
Next, pivot to the anticipated business benefits they expect from their ERP initiative. Be very careful with what you share. Only use data that was collected from the project team during your discovery sessions. The data **must** come from them, and it must be measurable. Be as specific as possible.

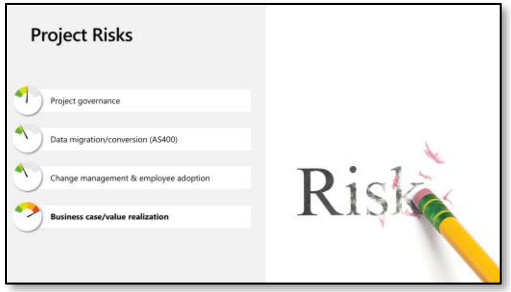
After you have confirmed the prioritized pain points, transition to a conversation focused on **your** anticipated project risks. Review the risks you feel could undermine project success, then call out the one **non-technical** risk that could be addressed through a structured MCEM engagement.

The last step is to provide a mechanism for Microsoft and/or your industry partner to lower the risk profile of the project (or expand the potential value of the initiative) via an accelerated workshop or advisory service.

This leadership-level project overview is specifically designed to:

1) demonstrate Microsoft’s understanding of the prospect’s industry-specific business priorities
2) disrupt the established buying process with an activity that enables you to influence/control the selection criteria and decision-making process.





Seller’s Secrets

Keep the conversation at the right altitude: “Business” Decision Makers (COO’s CFOs, SVPs, etc.) only speak three languages: money risk and control. Limiting your discussion to these three topics, while avoiding the temptation to explain how a Microsoft Dynamics solution could address their needs and challenges, will keep them fully engaged from start to finish.

Finance and Supply Chain Compete Playbook Addendum

Click to return

SAP's Sales Strategies

Why does this matter

Let's face it—SAP doesn't leave things to chance. Their sales strategy is built to dominate, using decades of experience to gain trust and shut out competitors. They thrive on selling risk reduction, positioning themselves as the "safe" choice while subtly casting Microsoft as risky. And here's the kicker: their approach taps directly into neuroscience. Fear—embodied as concerns about risk—is three times more powerful than Greed, which shows up as the pursuit of value. SAP understands this dynamic and skillfully exploits buyer psychology, making their pitch hard to counter. Their strategy isn't just polished—it's proven. If you don't recognize what's coming, you risk being blindsided by a narrative designed to win.

The Challenge:

SAP isn't just selling ERP—they're selling certainty, and they've mastered the art of exploiting buyer anxiety. They send in senior executives to engage directly with the C-suite, bypassing IT and line-of-business leaders, while their sellers reinforce credibility with industry references, pre-configured templates, and "best practices." Meanwhile, their relationships with GSIs, auditors, and selection consultants give them early influence over the customer's decision-making process. These strategies aren't just effective—they're designed to make it harder for you to gain traction. If you don't anticipate and counter SAP's playbook, you'll struggle to win.

What You Will Learn

This section will uncover SAP's most common sales tactics so you will be prepared for what is coming. You'll learn how to:

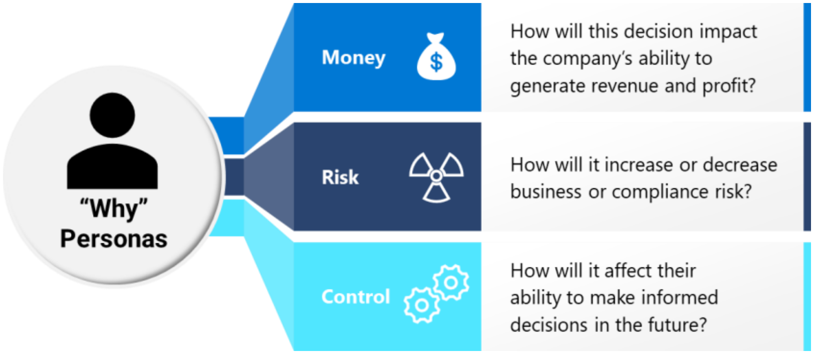
- Recognize and anticipate their risk-reduction narratives
- Leverage Microsoft's unique advantages, and
- Build a sales strategy that plays to Microsoft's strengths while diminishing SAPs.

In the next section, after you understand SAP's strategies, you will gain some tools and techniques to overcome SAP's positioning and set Dynamics 365 up as the superior choice.

Executive Engagement

While Microsoft often builds relationships with IT and operational users, SAP focuses almost entirely on the C-Level—the ultimate decision-makers who control ERP project budgets and to whom IT and operational leaders report. SAP executives frequently meet and entertain the C-Suite and Executive Board, leveraging these interactions to shape the sales cycle in their favor.

SAP understands that project stakeholders generally fall into three personas: "What" (IT, focused on technical details), "How" (operational leaders, focused on business processes), and "Why" (strategic decision makers, focused on outcomes). SAP prioritizes the "Why" personas who filter decisions through three emotional drivers: **Money, Risk, and Control.**



By engaging executives on topics impacting money, risk and control, SAP creates a strong bias in their favor. They systematically reshape decision criteria, business cases, and project priorities to highlight their strengths: industry references, business process excellence, and risk reduction. SAP always change something in their favor—whether it is the scope, priorities, or decision criteria—which is why they win more often than they lose.

Global System Integrators (GSI) Influence

SAP leverages its deep partnerships with GSIs to shape decisions in their favor. GSIs, often acting as auditors or consultants for the customer, hold substantial sway over the selection process due to their strong reputations, industry expertise, and perceived neutrality. These firms are frequently engaged to lead ERP evaluations, and their recommendations carry significant weight with decision-makers who view them as "safe" advisors. Additionally, many GSIs have extensive SAP implementation practices, creating a mutually beneficial relationship that reinforces SAP's position in the account.

Often decision-makers rely heavily on GSIs to mitigate risk, especially in large, high-stakes ERP projects. By aligning closely with GSIs, SAP ensures their messaging is woven into the consultant's narrative, making it challenging for competitors to break through. This symbiotic relationship allows SAP to embed their strengths—business process excellence, risk reduction, and industry expertise—into the customer's decision criteria, creating a formidable obstacle for Microsoft sellers.

Seller's Secrets

1. **C-Suite Access is Non-Negotiable:** Without engagement at the C-Suite level, you're unlikely to win competing against SAP. Use partners, ATUs, and Microsoft Executive Sponsors to secure access to these decision-makers before advancing the opportunity.
2. **Lock in References Early:** While references are typically saved for the late sales cycle, identify and validate them at the start of your pursuit. Partner references are often the most reliable, so proactively vet their credibility to avoid surprises later.
3. **Shape the Selection Consultant Narrative:** If a third-party selection consultant is involved, expect a features-and-functions focus favoring SAP and Oracle. Engage the consultant in a business-focused conversation to assess the selection process and criteria. Determine if it's a strict features-based bake-off or if there's room to influence the narrative to highlight Microsoft's platform-wide capabilities, AI leadership, and long-term flexibility. If you cannot reshape the process or criteria, be prepared to walk away—saving time and resources for more winnable opportunities.

Industry Expertise and the Power of Tribalism

SAP's industry-first approach is a cornerstone of their sales strategy, designed to position them as the safe choice. This strategy leverages **tribalism**, a psychological principle rooted in our evolutionary need for social connection and protection within a community. People naturally feel safer when surrounded by individuals they perceive as part of their "tribe," often defined by shared values or experiences.

SAP taps into this tribal connection by showcasing an extensive library of industry references, pre-configured templates, and industry experts. Their ability to introduce customer references early in a sales cycle–highlighting minimal risk and seamless implementation–resonates deeply with executives prioritizing risk reduction. This approach positions SAP as part of the customer's tribe, creating a powerful emotional bias in their favor.

Another component of the SAP strategy is robust **pre-configured industry templates**, which create the perception of tailored solutions perfectly aligned with a prospect's needs. SAP reinforces this by bringing in industry experts who speak the "tribal" language of the customer's business, further amplifying decision-makers' emotional confidence in selecting SAP.

Microsoft sellers must recognize that SAP's strategy is not just about functionality—**it's about creating emotional certainty through peer validation, risk minimization, and a strong sense of belonging**.

SAP Strategy Counter #1: Change the Project

Why does this matter

If you want to beat SAP, you only have two options: change the scope or change the decision criteria! Fail to change the project and decision criteria, and SAP wins—every time. SAP's sales strategy to the prospect's C-Suite executives locks customers into ERP-focused projects that play directly to their strengths—rigid business processes, pre-configured templates, and a powerful risk-reduction narrative. One strategy to win is to disrupt this SAP playbook by shifting the project focus to unique Microsoft capabilities like Power Platform, AI, and seamless integration. This strategy not only undermines SAP's perceived strengths but also elevates Microsoft's platform capabilities, which SAP does not have, as critical to the customer's success.

The Challenge

Changing the project scope presents several challenges. Many customers, often influenced by SAP, GSIs, and selection consultants, narrow their project vision to focus solely on implementing an ERP system in an effort to minimize risk. This limited perspective plays directly to SAP's strengths and makes it harder for Microsoft to shift the narrative. Additionally, SAP's relationships with the C-Suite and influential GSIs make it difficult to engage at the executive level—where the project scope must be redefined. Finally, Microsoft's key differentiators are frequently seen as IT-centric rather than as drivers of business outcomes, further complicating the task of positioning them as strategic, enterprise-level solutions.

What You Will Learn

This section will uncover SAP's most common sales tactics so you will be prepared for what is coming. You'll learn how to:

- Recognize and anticipate their risk-reduction narratives
- Leverage Microsoft's unique advantages, and
- Build a sales strategy that plays to Microsoft's strengths while diminishing SAPs.

In the next section, after you understand SAP's strategies, you will gain some tools and techniques to overcome SAP's positioning and set Dynamics 365 up as the superior choice.

Redefining the Project Narrative

When you change the customer's project scope, you shift Microsoft Dynamics beyond ERP-centric priorities and align it with broader strategic initiatives that ERP alone cannot address.

Changing the project has two key advantages. First, it redirects the customer's focus to Microsoft's unique capabilities—areas where SAP cannot compete. Second, it positions Microsoft as a partner in solving higher-value challenges, elevating the conversation to the executive level.

Shifting the project scope to align with organizational priorities is a powerful strategy, but it requires careful execution. Sellers must first gain access to the customer's executives (a group SAP likely has strong ties to) and uncover their overarching business challenges—not just those tied to ERP. To do this:

1. **Leverage ATU Relationships:** Microsoft's Account Team Unit (ATU) often has relationships beyond the stakeholders driving the ERP selection process. Tap into these connections to ask strategic questions and secure introductions to executives.
2. **Executive-to-Executive Meetings:** Arrange a meeting between the customer's executives and a Microsoft executive counterpart. These discussions build trust, demonstrate Microsoft's commitment to their success, and reveal invaluable insights into their strategic goals.

When to Shift Strategies:

Once you've gained these insights, evaluate whether the customer's strategic priorities align with a Microsoft solution. If their goals are narrowly ERP-centric or misaligned with Microsoft's unique strengths, pivot to a strategy that shifts the decision criteria instead.

AI as a Catalyst for Continuous Transformation

One of the most effective strategies for shifting the project narrative to favor Microsoft is to make the project about AI. AI's mainstream adoption has created an ERP inflection point, with customers eager to explore its transformative potential.

Microsoft's AI capabilities, deeply integrated with the Power Platform and Dynamics 365, enable intelligent, data-driven workflows. Coupled with Power BI, Microsoft delivers real-time insights and analytics natively embedded into ERP processes, making AI accessible and actionable. In contrast, SAP Joule lacks a robust ERP-focused AI model, leaving Microsoft significantly ahead in generative AI adoption and maturity.

- **AI as a Catalyst for Continuous Transformation:** Convince customers that AI is fundamentally reshaping business processes, driving continuous innovation, and transforming workflows. If they recognize AI as essential for future-proofing their business, they'll see the value in Microsoft's ability to deliver seamless, adaptable solutions. Unlike SAP, which often requires extensive modifications or redeployments, Dynamics 365 Finance and Operations (F&O) embraces transformation with minimal disruption. This continuous change management capability ensures businesses can evolve alongside shifting market demands, making Microsoft the clear choice for forward-thinking organizations.
- **Microsoft's Strength in AI-Driven Automation:** While SAP excels in business process execution, Microsoft leads in automation and innovation. Power Platform and Azure AI enable companies to streamline operations, enhance decision-making, and deliver measurable business outcomes. Sellers should emphasize these advantages to position Microsoft as the leader in efficiency.

By reframing the project narrative, sellers can elevate the conversation from ERP implementation to a broader, innovation-driven vision. This approach highlights Microsoft's AI and integration strengths, differentiating it as the superior solution for organizations prioritizing future growth and adaptability.

Empowering Transformation with Power Platform

When competing against SAP and Oracle, the Power Platform offers a unique opportunity to reframe ERP projects as dynamic, business-wide transformation initiatives. By emphasizing its deep integration, accessibility, and cost-effectiveness, sellers can position Power Platform as a catalyst for agility and innovation, breaking away from traditional, rigid ERP narratives. While Power Platform embeds innovation directly into ERP workflows, creating unparalleled synergy across the organization, SAP struggles to connect low-code tools to a broader suite of business solutions.

- **Empower Every User to Drive Change:** Position Power Platform as a tool that empowers everyone in the organization—not just IT—to drive innovation. Highlight its intuitive, familiar interface, which leverages tools like Excel, Teams, and Power BI, enabling business and operational users to create low-code solutions tailored to their unique needs. Use customer scenarios to illustrate how this democratization of technology reduces the need for specialized skills, accelerates adoption, and delivers measurable outcomes. In contrast, SAP and Oracle's solutions often require technical expertise, reinforcing the perception of ERP as complex and high-risk.
- **Scalable Innovation, Tailored to Any Business:** Craft a future-focused vision, positioning Microsoft as the partner for agile, future-proofed ERP innovation that delivers immediate impact while providing the flexibility to evolve with changing business priorities. Highlight the Power Platform's flexible licensing and scalable model to appeal to cost-conscious and growth-focused decision-makers. Explain how businesses can adopt only the capabilities they need, scaling solutions as they grow—whether automating processes, creating custom apps, or building analytics tools. This modular, transparent approach contrasts with the high upfront costs and rigid structures of SAP and Oracle.

SAP Strategy Counter #2: Change the Decision Criteria

Why does this matter

Selection criteria often favor SAP's process-oriented narrative, creating a significant disadvantage for Microsoft. If you are unable to change the project scope and don't disrupt SAP's grip on the decision criteria, you will lose. SAP thrives when decisions are narrowly focused on features and functionality. To win, you must reframe the criteria around Microsoft's unique strengths: platform flexibility, AI innovation, data integration, and ease of customization. Shifting the conversation to long-term adaptability and tailored business outcomes is the only way to level the playing field and highlight why Microsoft—not SAP—is the superior choice for lasting success.

The Challenge

Changing the decision criteria is inherently difficult because SAP's process-driven narrative is deeply ingrained in how many organizations approach ERP decisions. Customers, often guided by selection consultants, default to evaluating features and functions, which plays directly to SAP's strengths in business processes and pre-configured templates. Shifting the focus to Microsoft's advantages requires sellers to engage with decision-makers at a strategic level, where they must challenge entrenched perceptions of what defines ERP success. Compounding this challenge is the need to influence selection consultants to ensure broader, more strategic criteria—like adaptability, integration, and long-term value—are prioritized.

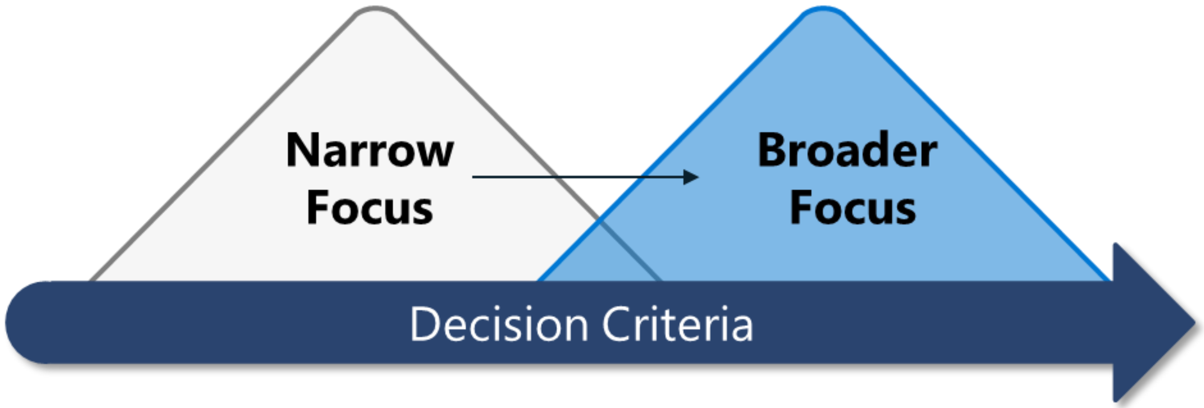
What You Will Learn

This section will equip you with strategies to shift the decision criteria in your favor. You'll learn how to:

- Redirect the conversation from process maturity to innovation and flexibility.
- Position Microsoft's platform, AI, and data capabilities as game-changers.
- Leverage executive and consultant engagement to influence criteria and break SAP's bias.

Reframe the ERP Decision Criteria

When you Change the Decision Criteria, you shift how ERP competitors are evaluated—away from narrowly focused features and functions to a broader set of criteria that emphasize Microsoft's platform advantages: adaptability, integration, and innovation. This improves Microsoft's chances of winning (we rarely win feature bake-offs) but also exposes SAP's limitations.



This is a powerful and often necessary strategy when competing against SAP, but it requires thorough discovery, deft communication and, when applicable, strategic engagement with third-party consultants. To execute, you must elevate Microsoft's platform and ecosystem as critical decision criteria. Focus on positioning the following priorities as essential to a prospect's evaluation:

- **Adaptability and Future-Proofing:** Use discovery to uncover pain points where adaptability can deliver benefits. Highlight how a flexible, scalable platform supports business transformation, lowers total cost of ownership, and evolves alongside the customer. Then, showcase Dynamics 365's seamless integration with existing systems, third-party tools, and industry-specific workflows. Share examples of customers that have successfully adapted Dynamics to meet changing demands, demonstrating how the platform enables continuous innovation and empowers strategic growth.
- **Extensive Partner Ecosystem:** Reframe Microsoft's partner ecosystem as a unique advantage that reduces risk and accelerates success by providing deep industry and technology expertise. Emphasize the breadth of pre-built solutions, templates, and industry-specific IP available through Microsoft's partners. Explain how this ecosystem enables faster, more tailored implementations compared to SAP's rigid, one-size-fits-all templates.

Engaging Selection Consultants Strategically

When a third-party selection consultant leads the ERP selection process, it often signals that the decision criteria will be heavily focused on features and functions—a scenario that typically favors SAP. To improve your chances of winning in these situations, you need to take a strategic approach to shift the focus away from feature-function comparisons and toward more strategic outcomes that align with Microsoft's strengths. Here's how:

- **Engage in a Business Conversation with the Consultant:** Initiate a business-focused conversation with the selection consultant. Ask questions to determine if the process is strictly feature-focused, whether the selection criteria can be adjusted, and how Microsoft is perceived. Explore opportunities to embed Microsoft's unique selling points into the criteria. By understanding the consultant's perspective and biases, you can help ensure the selection process is aligned with the customer's strategic priorities and delivers the best value.
- **Build Relationships and Challenge Where Needed:** Most selection consultants are eager to collaborate with Microsoft. Leverage this by offering to meet with them—whether at a Microsoft office or their location—to educate them on the value of the Microsoft platform, innovation, and ERP flexibility. At the same time, don't hesitate to challenge them if their approach is rigid, biased, or too focused on features and functions. Guide them toward a broader perspective by emphasizing long-term business value.
- **Be Willing to Walk Away:** If you cannot influence the selection process or criteria, you must be prepared to walk away. This can serve as a powerful last-resort tactic to encourage the consultant to reconsider their approach. If they remain inflexible, the likelihood of winning was slim. Remember, there are always two winners in an ERP selection process: the one who wins the deal and the one who walks away early, saving time and resources for better opportunities.

SAP Strategy Counter #2: Change the Decision Criteria (continued)

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Empower Buyers with Data Driven Control

One of the **most powerful emotional motivators for BDMs is control**—control over their business, processes, and decisions. Strong data and reporting capabilities provide executives with the clarity they need to make better decisions, giving them confidence and command over their business operations. Failing to elevate this motivator as a critical ERP decision factor is a missed opportunity to highlight a key Microsoft strength and break the ERP feature-function evaluation cycle that favors SAP.

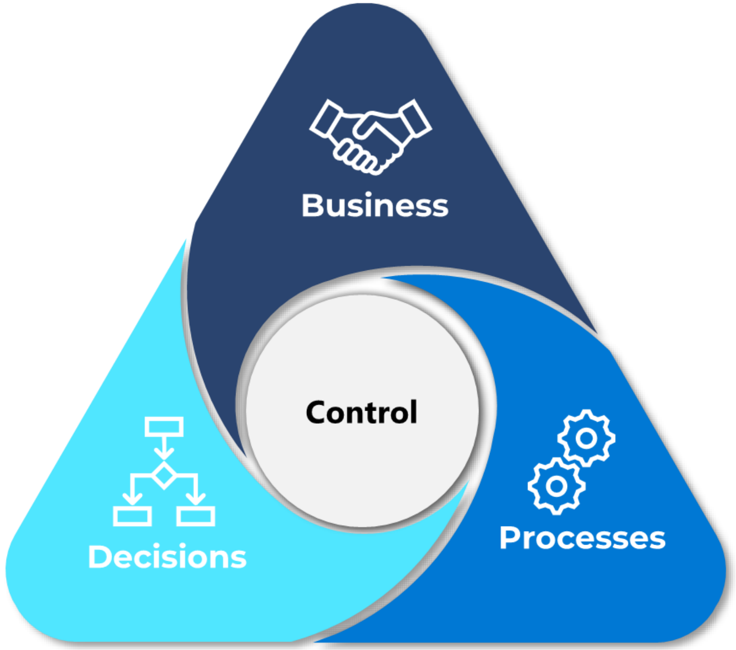
While SAP thrives in process-driven conversations, Microsoft's strength lies in unlocking the power of data—an ERP decision criterion that sellers must elevate to win. By positioning Microsoft as a data-first organization, you can shift the decision-making focus to favor data-driven insights and outcomes, positioning Microsoft as the clear choice for informed leadership.

- **Deliver Actionable Insights That Drive Growth:** Demonstrate how Power BI and Azure enable predictive analytics and AI-driven forecasting that empower executives to make informed decisions. Show BDMs how real-time insights can help them identify opportunities, minimize risks, and improve overall performance—framing data as the enabler of business control and growth.
- **Break Down Silos for Unified Decision-Making:** Highlight Dynamics 365's ability to unify data across ERP, CRM, and other systems, providing a single source of truth for decision-making. Explain how this eliminates the inefficiencies and risks associated with fragmented data architectures, which SAP and Oracle often struggle to overcome.
- **Empower with Data Ownership and Flexibility:** Reinforce Microsoft's approach to giving businesses full control over their data. Unlike SAP and Oracle, which frequently lock customers into rigid, proprietary architectures, Microsoft ensures flexibility and compliance by enabling organizations to use their data on their terms. Position this as a critical capability for businesses seeking long-term adaptability.

Seller's Secrets

- **Leverage Customer Pain Points to Redefine Criteria:** Use in-depth discovery to surface customer frustrations with processes. Reframe these pain points as opportunities for innovation, shifting from feature comparisons to strategic outcomes that resonate with BDMs.
- **Demonstrate Flexibility with Proof Points:** Prepare examples and success stories where Microsoft solutions have adapted to meet unique customer needs or outpaced rigid SAP implementations. Use these to emphasize Microsoft's ability to deliver long-term adaptability and innovation, ensuring the criteria favor transformation and scalability over rigid processes.

Executive Control Motivators



SAP Surround Strategies

Why does this matter

When SAP customers are satisfied and experiencing no friction with their ERP, Microsoft faces an uphill battle in competing directly. These customers often perceive SAP as the “safe” choice, making it nearly impossible to displace their ERP. In such cases, Microsoft sellers must decide whether to disengage or adopt an SAP Surround strategy. The Surround strategy has proven highly effective, not only in generating immediate revenue through ERP adjacent solutions but also in creating a foundation for broader ERP replacement opportunities. By addressing urgent business challenges and building strong relationships, sellers can shift the narrative over time, paving the way for Microsoft to replace SAP as the core ERP provider.

The Challenge

Executing a Surround strategy requires a deep understanding of the customer’s pain points and strategic priorities beyond their ERP system. This can be particularly challenging because SAP often maintains strong relationships with the C-Suite and key decision-makers, making it difficult to gain executive access.

Additionally, the Surround strategy is a long-term approach that demands patience, persistence, and precise execution. Sellers must effectively position solutions, such as warehouse management, AI, or Power Platform, as immediate value drivers while building a pathway to a larger ERP replacement opportunity. The strategy’s success hinges on developing trust, aligning with customer goals, and challenging SAP’s entrenched position.

What You Will Learn

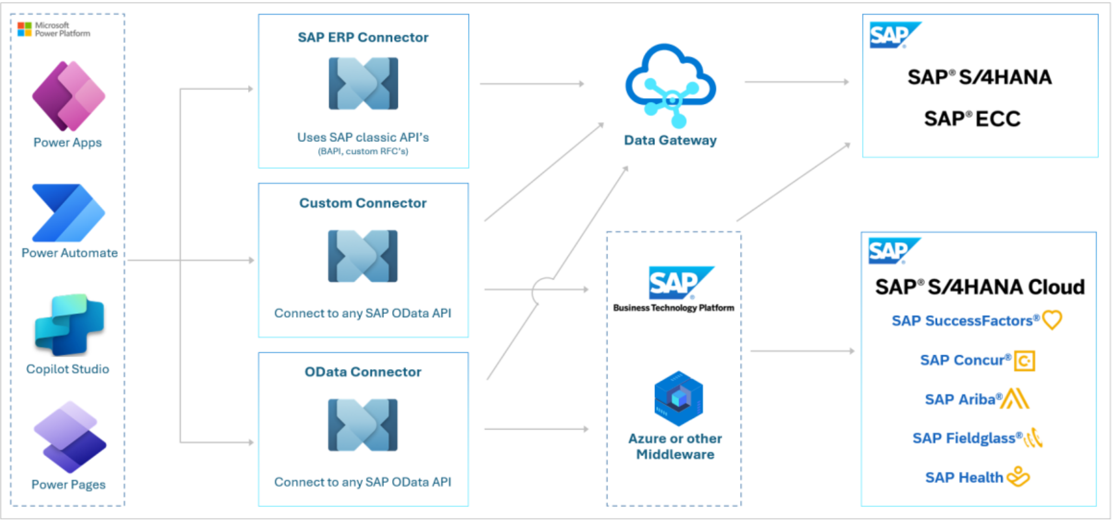
This section will equip you with the tools and strategies to execute an effective Surround strategy—a proven approach to building trust, generating revenue, and creating a long-term pathway for ERP replacement opportunities. You’ll learn how to:

- Develop a long-term plan to replace SAP by identifying key entry points for non-ERP solutions to deliver immediate value and establish credibility.
- Discover opportunities to align Microsoft’s unique capabilities with broader organizational priorities and strategic goals.
- Execute critical Surround strategy sales activities, including tailored discovery, compelling demonstrations, and impactful proposals.

Execute Surround Strategy for Long-Term Success

Executing a Surround strategy requires patience and persistence. SAP customers are often deeply loyal, so success depends on building trust, maintaining consistent engagement, and taking a deliberate, long-term approach to expanding Microsoft’s footprint. Success lies in leveraging key entry points, cultivating champions, and ensuring alignment across account teams. Here’s how to execute an effective long-term Surround strategy:

- **Uncover Strategic Priorities and Pain Points:** Begin by understanding the customer’s broader business challenges and strategic goals—not just those tied to ERP. Leverage relationships with AEs and other stakeholders to secure executive access and conduct deep business discovery. This insight will reveal where Microsoft solutions can address critical pain points and deliver value.
- **Cultivate Internal Champions:** Identify influential stakeholders within the customer’s organization who can become advocates for Microsoft’s solutions. Build relationships with these individuals to create momentum and internal support for future projects.
- **Capitalize on Entry Trigger Events:** Look for key moments to position Microsoft solutions as replacements or alternatives to SAP. Subsidiary spin-offs, acquisitions, or leadership transitions provide opportunities to demonstrate Microsoft Dynamics 365 as a faster, more adaptable, and lower-risk ERP solution.
- **Engage in Strategic Account Planning:** Active participation in account planning is critical to executing a successful Surround strategy. Work with ATUs to identify customer pain points, prioritize Surround entry points, and align strategies with AEs and SSPs. Bring proactive insights to planning meetings, such as specific friction points or examples of successful Surround strategies from similar customers. Equip the account team with the knowledge needed to engage effectively, ensuring a unified, coordinated approach to winning and expanding the account.



Seller’s Secrets

1. **Compete Strategically:** When SAP dominates core ERP or industry-specific conversations, pivot to Microsoft’s differentiators like Power Platform, AI, and Azure.
2. **Engage Decision-Makers:** Leverage account planning to uncover friction points and surround opportunities. Align with your team to prioritize shared goals.
3. **Look Beyond Renewals:** Don’t limit your focus to ERP renewals—actively seek surround opportunities to expand Microsoft’s footprint.

Surround Solutions: Entry Points to Build Trust

The surround strategy focuses on solving immediate business challenges with Microsoft’s complementary solutions. Start by addressing high-impact areas outside of SAP’s core ERP capabilities. Some examples that have proven successful include:

- **Warehouse Management:** Highlight Microsoft solutions like advanced warehouse management systems, which often serve as natural entry points. Share examples where starting with warehouse solutions led to broader ERP replacement opportunities.
- **Power Platform Solutions:** Use Power Platform tools, such as invoice automation and workflow optimization, to address specific pain points. These targeted applications solve pressing challenges while showcasing Microsoft’s unique ability to enhance business processes.
- **AI Capabilities:** Leverage Microsoft’s AI tools, such as Copilot, to deliver immediate productivity gains. Demonstrate how AI solutions streamline forecasting, reporting, and customer service, differentiating Microsoft from SAP’s limited capabilities.

Overcoming Common SAP Biased Objections

Why does this matter

Handling objections effectively is critical to competing against SAP, particularly given their strong reputation and entrenched relationships with customers. Many objections are rooted in real fears and perceived risks—concerns about industry alignment, scalability, references, and change management can feel overwhelming to decision-makers. Customers may also view Microsoft Surround strategies as complex and disruptive. These objections are often emotionally charged, driven by the fear of disruption or failure, and must be addressed with empathy and a clear demonstration of Microsoft's unique strengths. If left unaddressed, these barriers reinforce SAP's narrative and can prevent prospects from seeing how Microsoft delivers superior value, innovation, and long-term growth potential.

The Challenge

Objection handling against SAP presents unique challenges. SAP's strong relationships at the executive level create a deep sense of emotional loyalty among customers, making it difficult to disrupt their entrenched position. Additionally, many objections are rooted in emotions—fear of disruption, change, or making the wrong decision—which cannot be countered with logic alone.

Successfully addressing these objections requires more than logical arguments; it demands an empathetic approach that acknowledges these fears and reframes the conversation. Overcoming these objections requires a disciplined approach that combines empathy, trust, and collaboration to create a win-win scenario.

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Empathy Objection Handling (Emotional)

Many sales professionals struggle with objection handling because they rely on logical arguments to address what are often deeply emotional concerns. ERP-related objections are rarely about functionality alone—they are anchored in fears of business disruption, risk, and change management. Sellers often respond with technical justifications or feature comparisons, but this approach seldom works. To effectively overcome ERP objections, you need an empathy-based approach that follows five key steps:

Document and Understand Common Objections

1

Identify the typical objections you will encounter when competing with SAP, such as concerns about scalability, industry alignment, or change management complexity.

Identify the Core Objection

2

Use thoughtful probing questions to surface the underlying emotional concerns, which are often hidden beneath surface-level statements.

Acknowledge & Empathize

3

Validate the objection as reasonable. ERP changes can be daunting, and prospects' concerns about risk and disruption are often valid.

Establish Common Ground

4

Align your goals with the customer's priorities by demonstrating how Microsoft solutions can mitigate risks or address their strategic challenges.

Build a Bridge

5

Propose an interim step that allows the customer to explore Microsoft's capabilities in a non-threatening way, such as introducing a Surround solution or a pilot project.

Objection 1: Microsoft lacks industry presence (e.g. Trade shows, industry templates)

Identify the core objections:

- What specific aspects of industry involvement do you value most in a technology partner?
- What are the primary industry capabilities you are looking for in a new system?
- Are you look for specific knowledge or skillset from an industry partner?

Objection 2: Dynamics cannot scale for a business my size

Identify the core objections:

- That's interesting, we have many customers of similar size running Dynamics. What are you basing that statement on?
- Are there particular operations or workflows where you anticipate scalability issues with Microsoft solutions?
- Can you share specific concerns about how scaling has been a challenge for your business in the past?

Objection 3: Microsoft does not have strong references of companies like mine

Identify the core objections:

- When you say "companies like mine," what specific characteristics or challenges are you referring to (e.g., size, industry, geographic location)?
- How important are industry-specific references compared to overall solution capabilities in your decision-making process?
- Beyond references, are there other ways Microsoft can demonstrate its ability to deliver value for your business?

Objection 4: The Microsoft Surround approach is too complex to implement

Identify the core objections:

- Have you experienced challenges with implementing new solutions in the past? If so, what worked well or didn't work?
- Could incremental deployment or phased implementation ease the burden on your teams?
- What level of support or resources would help you feel confident in managing this transition?

Oracle Sales Strategies

Why does this matter

Unlike SAP, Oracle's strategy doesn't leave room for a surround approach—it's ERP or nothing. Oracle competes aggressively in compliance heavy industries like energy, government, real estate, and financial services, positioning its ERP as the safest solution. By emphasizing AI-driven automation, end-to-end integration, and a single-vendor model, Oracle creates a powerful perception of certainty and risk reduction. This taps directly into buyers' core emotional motivators—particularly risk aversion and tribalism. Decision-makers feel safer choosing a familiar, industry-specific solution with a direct vendor relationship. To win, you must proactively reframe risk—not as avoiding change, but as failing to future-proof the business.

The Challenge:

Oracle's competitive strategy creates significant challenges for Microsoft sellers. First, their specialization in verticals like energy, government,, and financial services reinforces the perception they are the "safe" choice, backed by pre-configured industry templates and a long-standing sector presence. Second, Oracle's direct-sales model positions them as the only vendor customers need—minimizing perceived complexity and reinforcing a sense of security, in contrast to Microsoft's partner-led approach. Finally, Oracle's messaging of "autonomous" capabilities leads buyers to believe their ERP requires minimal customization and management. Together, these strategies create both a psychological and practical lock-in, making it difficult to shift customers toward Microsoft's more flexible, innovation-driven model.

What You Will Learn

This section will provide you with strategies to counter Oracle's core messaging and reposition Microsoft as the superior choice. You'll learn how to:

- Position Microsoft's flexibility and partner model as a competitive advantage rather than a liability.
- Showcase Microsoft's AI leadership with real-world, actionable examples that differentiate from Oracle's theoretical automation claims.
- Shift the conversation from industry lock-in to adaptability and extensibility, demonstrating how Microsoft delivers rapid time-to-value and long-term agility.

Countering Oracle's Compliance Vertical Message

Oracle thrives in industries with complex regulatory and compliance needs. Their industry-focused approach is designed to tap into deep psychological motivators, particularly **risk aversion** and **tribalism**. When buyers perceive a solution as "built for their industry," it creates a sense of **certainty and security**, reducing the fear of making the wrong choice. Microsoft sellers must break this perception by:

- **Highlighting Microsoft's adaptable platform approach:** Showcase how Dynamics 365 and Power Platform enable industry-specific customization without the rigidity of Oracle's model.
- **Leveraging Microsoft's compliance leadership:** Emphasize Microsoft's global compliance standards, including security, data governance, and regulatory certifications across industries.
- **Bringing in industry-focused partners:** Demonstrate how Microsoft's partner ecosystem accelerates vertical implementation while maintaining flexibility and cost control.

Reframing Oracle's AI & Autonomous Claims

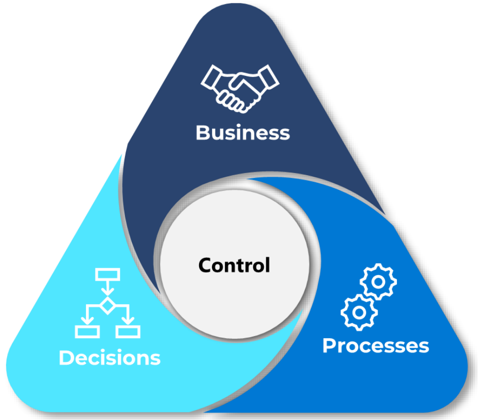
One of the most powerful emotional motivators for BDMs is **control**—control over their business, processes, and decisions. Oracle exploits this by marketing its **autonomous database** and AI-driven automation, suggesting that Microsoft lags behind. This messaging gives executives confidence that Oracle will provide **greater operational control**. To neutralize this narrative:

- **Showcase real AI-driven business impact:** Demonstrate how Microsoft Copilot and AI-powered automation are delivering tangible value today—moving beyond theoretical claims to proven outcomes.
- **Differentiate marketing hype from real-world AI execution:** While Oracle sells the idea of "autonomous" solutions, Microsoft delivers working AI that enhances decision-making, streamlines workflows, and boosts productivity.
- **Position Microsoft as the AI innovation leader:** Reinforce Microsoft's unmatched investment in AI, including Azure OpenAI, Copilot, and machine learning—capabilities that Oracle struggles to match at scale and in real-world application.

Turning the Partner Model Into a Strength

Oracle reinforces emotional bias through direct vendor engagement, signaling reliability and expertise. Their **"one-stop-shop"** messaging strengthens customer loyalty by framing Oracle as the safest choice, suggesting that consolidating IT investments under a **single vendor minimizes risk**. Additionally, Oracle attacks Microsoft's partner-led approach as inconsistent and fragmented. Counter this narrative by:

- **Positioning the partner ecosystem as a force multiplier:** Highlight how Microsoft's global scale, combined with specialized local expertise, enables faster, more tailored deployments than Oracle's rigid, one-size-fits-all model.
- **Showcasing partner-driven success stories:** Share case studies of organizations that leveraged Microsoft's partner ecosystem to achieve industry-specific solutions and faster, safer implementations.
- **Emphasizing long-term flexibility:** Unlike Oracle's "one-size-fits-all" model, Microsoft's partner network allows customers to adapt their ERP investment over time, thus enabling continuous business transformation.



Seller's Secrets

1. **Don't Compete on Features—Compete on Agility:** Oracle thrives when the selection process focuses on predefined vertical requirements. Shift the discussion to adaptability, extensibility, and integration—areas where Microsoft has a distinct edge.
2. **Use AI as a Differentiator, Not a Buzzword:** Oracle will push its "autonomous" narrative hard, but AI without tangible business impact is meaningless. Show customers how Microsoft AI is actively transforming business operations today.
3. **Proactively Address the Partner Model Concern:** Oracle will try to make Microsoft's partner-led approach seem like a weakness. Flip the script by highlighting how it allows for greater specialization, faster implementations, and long-term flexibility.

Retail Industry Engagement Framework

Click to return

Industry Engagement Framework - Retail

Why does this matter?

When selling into an SAP dominated industry, its critical to understand the big picture. The retail industry is driven by a blend of consumer behavior trends, technological advances, economic conditions, and competitive pressures. Retailers need to adapt to these ever-evolving drivers and market forces to stay competitive and responsive to consumer demands. By aligning their strategies with these factors, retailers can navigate the complex landscape of the modern retail environment successfully. The core industry drivers and market forces that shape the dynamics, consumer behavior and overall performance of the retail industry directly impact retailers' strategic decisions, operational effectiveness, and growth potential.

The Challenge

Strategic priorities drive funding allocation. So, anchoring your Microsoft solution in what your prospects' leadership team wants to achieve (strategic objectives) and what they want to solve (challenges) is critical to securing their endorsement and support.

For large retailers, strategic priorities typically revolve around optimizing operations, enhancing customer experience, expanding market share, and adapting to technological advancements. These priorities help large retailers stay competitive, achieve long-term growth, and meet the evolving demands of consumers.

What You Will Learn

This section will equip you with the strategies needed to position Microsoft as a credible Retail industry solution provider. You'll learn how to:

- Align with Retailers' Strategic Priorities by mapping Microsoft solutions to the core objectives retailers care about.
- Shift the Conversation from Features to Business Impact by reframing ERP discussions around measurable business outcomes.
- Leverage Industry Drivers to Strengthen Positioning by using key industry market forces to create urgency and establish Microsoft as the best-fit solution.

Industry Drivers

The Retail industry solution alignment template on the right:

- Identifies **five top strategic retail priorities** and the business/operational challenges that undermine them.
- Maps **Microsoft solution capabilities** to these priorities, illustrating how they address key retail pain points.
- Outlines the primary **business benefits** customers will realize after implementing a Microsoft solution.

Understanding how these strategic priorities and challenges align with Microsoft solutions allows you to engage customers more effectively, particularly when their initiatives connect to key solution plays like **Optimize Supply Chain**.

Most importantly, many of these priorities stem from broader industry drivers that put pressure on retailers' business performance—economic shifts, regulatory changes, supplier disruptions, competitive actions, and evolving customer behavior—all of which frequently drive large ERP investments.

Seller's Secrets

1. **Industry-Specific Proof Wins:** Retailers prioritize risk reduction and proven results. Lock in industry-specific references early and showcase AI and Power Platform-driven success stories to reinforce Microsoft's impact.
2. **Leverage the Playbook to Influence Selection:** Many of the best strategies for competing in Retail against SAP and Oracle are in the SAP Compete Addendum of this Playbook. Use it to sharpen your approach—securing C-suite access, reshaping decision criteria, and shifting feature-focused bake-offs toward AI innovation, agility, and industry-specific insights.

Microsoft Industry Solution Alignment

Industry Drivers	Strategic Priorities (WHY)	Business Challenges (HOW)	Microsoft Solution Alignment (WHAT)	Project Impact
x Competitors offering new click & collect service	✓ Launch BOPIS service	x Manual logistics coordination x Disconnected systems x Inconsistent pricing across sales channels	✓ Advanced logistics (curbside pickup)	↑ Avg. transaction value ↑ Revenue ↓ Customer churn ↑ CUSAT/loyalty/CLV
x Customers replacing brick and mortar shopping with online	✓ Deliver omni-channel buying experience	x No cross-channel inventory visibility x Disconnected systems	✓ Real-time cross channel stock availability and order confirmation ✓ Intelligent distributed order management	↓ Return visitors/customers ↑ Merchandising costs ↑ Customer acquisition cost ↑ Year over year growth
x Persistent global supply chain disruption x Port congestion	✓ Improve supply chain resilience	x Inaccurate demand forecasting x Limited inventory visibility x Manual (Excel) forecasting x Inaccurate supplier ETAs	✓ Real-time cross channel stock availability and order confirmation ✓ Supplier collaboration ✓ Demand forecasting	↓ Supplier lead time ↓ Stockouts and backorders ↑ On-time delivery rate ↑ Supply chain efficiency
x Customers demanding shorter lead times	✓ Improve inventory management	x No cross-channel inventory visibility x Inaccurate inventory data x Limited inventory visibility	✓ Automatic replenishment ✓ Predictive re-ordering ✓ Demand-driven replenishment	↑ Inventory turns ↓ Inventory carrying costs ↑ Order fulfilment time ↓ Obsolete inventory ↑ On-time delivery rate
x Increasing COGS x Increasing imports taxes/tariffs	✓ Improve cost controls and operational efficiency	x Manual (Excel) forecasting x Limited inventory visibility x Manual stock allocations	✓ Dashboards and analytics for real-time monitoring of revenue, costs, and profitability ✓ Warehouse automation	↑ Cost of goods sold (COGS) ↓ Labour costs ↑ Inventory carrying costs ↓ Compliance costs

Click to explore

Industry Persona Engagement - Retail

Why does this matter?

There is an imbalance of power between buyers and sellers at the beginning of every sales pursuit. The sooner you make yourself an equal and remove your prospects' negative bias, the sooner you will uncover what is truly driving the project. There are a minimum of three decision makers in every deal (business, financial, technical), and therefore three critical conversations you need to navigate and control in every F&SC sales pursuit. You need to bring the right message/content to the right persona. Altitude is everything. Buyers reward sellers who understand their unique needs, pains and desires. But they also punish or avoid sellers who accidentally or unconsciously communicate they don't belong in the room.

The Challenge

If you bring the wrong conversation to the right persona, they will quickly decide you don't understand their role or what they care about. And it will be difficult to secure the next meeting, especially if they fall into the operational management and leadership categories. Unfortunately, the sheer scope and breadth of Microsoft's F&SC solution often makes it difficult to decide which specific customer pains, business processes and solution capabilities to focus on. Emphasizing Microsoft technology advantages to a supply chain leader will cause them to emotionally (and unconsciously) disengage as they struggle with assigning meaning to language they don't fully understand.

What you will learn

This section will equip you with the strategies to effectively engage Retail project stakeholders by aligning your messaging to their specific priorities, challenges, and success metrics. You'll learn how to:

- Navigate conversations at the right altitude by tailoring discussions to leadership, operations, and IT personas.
- Drive stakeholder engagement and decision-making by leveraging persona-based insights to structure discovery, presentations, and demonstrations for maximum impact.

Persona Engagement

ERP project stakeholders reward sales professionals who demonstrate a **clear understanding of the business drivers** fueling the project, the high-impact processes influencing competitive advantage and operating margin, and the key metrics they monitor religiously. More importantly, senior leaders engage with sellers who can **communicate at the right altitude**—inventory constraints and stockouts, for example, mean very different things to a CIO versus an SVP of Supply Chain.

Before every meeting, **align your approach to the specific stakeholder** by preparing with likely business challenges, relevant use cases, and core KPIs that matter most to them. The Retail Persona Profile overview on the right maps current retail industry objectives, challenges, use cases, and key impact metrics to the most relevant ERP project stakeholders. Use this as a foundation, but customize it to reflect the actual decision-makers in your sales pursuits. Ensure that IT, line-of-business, and executive-level conversations happen at the appropriate depth and strategic focus.

Finally, anchor BDM discovery calls in high-probability core objectives and challenges, validating them through prospect analyst presentations, earnings reports, and MD&A filings.

Seller's Secrets

1. **Share this summary with the project BDMs (Leadership, LoB & IT)** at the end of Listen & Consult to validate and confirm your understanding of their respective strategic project priorities.
2. **Organize your solution demonstration around the core business objectives/challenges and priority use-case scenarios** of the most senior demonstration participants. Embed the priority use case scenarios in a demonstration plan and share with participants in advance to secure agreement.

Retail Persona Profiles

	Role and Key Stakeholder	Core Business Objectives/Challenges	Priority Use Case Scenarios	Key Impact Metrics
	**Leadership** Owner/CEO Chief Retail Officer COO CMO CFO	• Sustain competitive advantage • New market entrants/competitive threats • New business models/innovation • Increasing fraud risk (internal/external) • Growth, profitability, and ROI • Anticipating trends and capitalizing on opportunities • Operational inefficiencies • Resource and asset management • Responding to and satisfying the board • Reporting and Business Insights • Technology is driving rapid pace of change • Expanding into new markets	• Profitability Analysis: analyze the financial performance of different product categories, channels, and locations to ensure the business is operating efficiently and profitably. • Cash Flow and Capital Allocation: manage cash flow to ensure funds are allocated appropriately for investment in inventory, marketing, technology, and other strategic initiatives. • Financial Planning and Budgeting: create financial forecasts and budgets that align with strategic goals. • Regulatory Compliance: ensure the business complies with local, national, and international laws related to pricing, product labeling, tax laws, labor laws, and environmental regulations	• Revenue growth • Same-store sales (SSS) • Average transaction value (ATV) • Sales per square foot • Customer retention rate • Profitability • Regulatory compliance/penalties (GDPA/PII) • Customer lifetime value (CLV) • Customer satisfaction (CUSAT) • Net promoter score • Gross profit margin • Inventory carrying costs • Cost of goods sold (COGS)
	**Operations** VP Retail Operations VP Supply Chain General/Operations Manager VP Procurement & Warehousing VP Finance/Controller VP Merchandising	• Inefficient and error prone financial processes • Visibility into real-time data for payment predictions, forecasting and cash flow management • Ability to respond to supply chain disruptions • Manual or uncoordinated distribution Inventory balancing/visibility • Inaccurate forecasting • Fulfilling customer demands • Omni-channel sales • Carrying a relevant and current assortment • Matching the assortment to demands across channels • Responding to and satisfying the CxO team	• Demand Forecasting: predict future product demand using historical sales data, market trends, and external factors. Products are available when customers want them without overstocking. • Supplier Relationship Management: ensure timely delivery of goods, favorable terms, and collaboration on product development or special promotions. • Logistics and Distribution: manage the flow of goods from manufacturers to warehouses and then to retail stores or customers (in the case of e-commerce). • Inventory Management: optimize stock levels, reduce excess inventory, and manage stockouts. • Replenishment: automate inventory replenishment based on demand forecasts, sales trends, and historical data.	• Online sales • Order cycle time • Operating expenses ratio • Average days to close books • Stock outs • Inventory turnover • Days sales of inventory (DSI) • Shrinkage rate • Fill rate • Forecast accuracy
	**IT BDM** CIO CTO CSO	• Security/risk management • Escalating IT costs • Modernizing a challenging network of legacy technologies • Securing a complex supply chain • Mobile interaction • System architecture and cloud integration • Manageability of IT systems/applications • Suppliers • Budgeting • Responding to and satisfying the CxO team • Reporting and business insights (BI)	• E-commerce Platform Management: oversee and secure the digital storefront, which includes product listings, digital marketing, customer interactions, online payment systems and mobile optimization. • Data Analytics and Insights: use data from online interactions, customer behaviors, and purchase patterns to gain actionable insights into product demand, customer preferences and marketing effectiveness. • Technology Integration: leverage the latest technologies such as artificial intelligence (AI), Internet of Things (IoT), and machine learning to optimize retail processes, enhance customer experience, and improve decision-making.	• Uptime percentage • Mean time between failures • IT spend as % of revenue • Cost per user transaction • Number of security incidents • Time to resolve security incidents • Compliance with data privacy regulations (GDPR, CCPA, PCI-DSS) • Security audit score (avg.) • Adoption rate of new technologies • Cloud utilization rate

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Industry Persona Engagement – Retail Discovery Questions

Technical Decision Maker

CIOs aren't just evaluating an ERP—they're managing IT risk, security, compliance, and integration complexity while driving digital transformation. Your goal is to uncover their biggest IT constraints, how they define ERP success, their integration strategy, and where they perceive risk. Frame your discovery around broader transformation goals, security and compliance concerns, and integration challenges rather than just ERP features. Below are strategic discovery questions to help uncover key technical, operational, and organizational requirements, ensuring your solution aligns with the prospect's IT strategy.

Financial Decision Maker

CFOs aren't just evaluating ERP—they're assessing financial visibility, cost control, budgeting, and compliance while ensuring financial strategies support business growth. Your goal is to uncover their biggest financial pain points, how the new system will deliver measurable financial benefits, as well as how it aligns with and supports the company's financial strategy. Focus your discovery on how the ERP can drive profitability, enhance financial controls, improve cash flow management, and reduce financial risk. Below are strategic discovery questions designed to surface key financial challenges and align Microsoft's solution with their financial strategy.

Business Decision Maker

Engaging retail ERP stakeholders effectively requires a tailored discovery approach for each persona. This section provides strategic discovery questions designed to help you:

- Align your discovery with CIOs by focusing on IT risk, security, compliance, and integration challenges.
- Surface CFO pain points around financial visibility, cost control, and risk management to position Microsoft as a strategic enabler.
- Engage COOs by uncovering supply chain inefficiencies, inventory risks, and operational roadblocks to drive business value conversations.

Retail CIO/CTO

Data Security and Privacy:

- **How does the ERP system need to safeguard sensitive customer data, including payment information, personal details, and purchase history?**
- What access control mechanisms do you need in place to ensure that the right users have the right levels of access to financial, inventory, and customer data?
- How will the ERP system help you ensure compliance with privacy regulations in different regions, particularly when handling customer data across multiple touchpoints?

Data Analytics and Decision-Making

- What types of real-time data and analytics are required for decision-making across retail functions (e.g., inventory management, sales, customer behavior)?
- **How do you envision the ERP system empowering leadership with actionable insights, such as predictive analytics, demand forecasting, and trend analysis?**
- What data visualization features will be essential for different teams to interpret complex data and make informed decisions?

Customization and Flexibility:

- **What level of customization will be needed to ensure that the ERP system meets the unique needs of your retail operations, such as multi-channel retailing, global operations, or product segmentation?**

Retail CFO

Financial Visibility & Reporting

- What financial reporting challenges do you face with your current system? How do you envision the ERP system improving financial transparency and visibility across departments?
- **What key financial metrics (e.g., profit margins, cost of goods sold, ROI, cash flow) do you want the ERP system to track in real-time?**
- How do you expect the ERP system to streamline and improve the accuracy of financial reporting for key stakeholders (e.g., board members, investors, department heads)?
- How important is it for the ERP system to provide a consolidated view of financial data across multiple channels (e.g., online, in-store, third-party vendors)?

Budgeting & Forecasting

- How will the ERP system support your budgeting and forecasting processes, particularly for inventory, labor, and overhead costs in retail operations?
- **What improvements are you hoping to achieve with the ERP system in terms of demand forecasting, sales forecasting, and aligning budgets with actual performance?**
- How do you see the ERP system enabling more accurate and data-driven financial forecasts across departments such as merchandising, supply chain, and marketing?

Cost Control and Profitability

- **How do you see the ERP system helping to identify and address inefficiencies in cost control, such as waste, inefficiencies in the supply chain, or excessive stockholding?**
- How will the ERP system help you track and analyze product margins and profitability across different retail segments or sales channels?

Compliance and Risk Management:

- How do you expect the ERP system to help maintain compliance with financial regulations (e.g., tax laws, IFRS, GAAP)?
- **What role do you expect the ERP system to play minimizing fraud, ensuring data accuracy, and managing financial controls?**
- How will the system help ensure compliance with consumer protection laws, product pricing regulations, and other retail-specific financial regulations?

Seller's Secrets

1. **Practice 3-layer discovery techniques.** Ask a question. Ask a question about the answer to question #1. Then ask a question about the answer to question #2. Answer #3 (almost) always surfaces critical information.

Retail COO

Operational Efficiency and Process Optimization

- What are the key operational challenges you're facing today? How do you expect the ERP system to address them?
- **What areas of your business (e.g., inventory management, order fulfillment, procurement) are you looking to optimize through a new ERP system?**
- How do you see the ERP system supporting the coordination between stores, warehouses, and distribution centers?

Inventory Management and Supply Chain Optimization

- What improvements are you hoping to achieve with the ERP system in terms of inventory visibility and stock control?
- **How do you plan to use the ERP system to enhance demand forecasting to reduce issues like stockouts and overstocking?**
- How does the ERP system need to support real-time inventory updates across multiple locations?
- What role do you see the ERP system playing in improving supply chain visibility, supplier performance, and order lead times?

Data Visibility and Decision-Making

- What types of data and reports are most critical for you to make strategic operational decisions?
- How do you envision the ERP system enhancing real-time data visibility for store managers, regional managers, and executive leadership?
- **What KPIs do you want the ERP system to help you track across your retail operations (e.g., sales per square foot, stock turnover, fulfillment accuracy)?**
- How do you see the ERP system helping you identify operational inefficiencies and areas where cost savings can be realized?

Consumer Packaged Goods Industry Engagement Framework

Industry Engagement Framework - CPG

Why does this matter?

The Consumer Packaged Goods (CPG) industry operates in a highly competitive, fast-moving environment, shaped by shifting consumer preferences, supply chain complexities, evolving retail partnerships, and increasing regulatory demands. To remain competitive, CPG companies must continuously optimize operations, improve demand forecasting, and accelerate product innovation to meet evolving market expectations. Most strategic priorities stem from industry-wide pressures—fluctuating raw material costs, sustainability regulations, supplier volatility, and omnichannel distribution shifts—all of which frequently drive large-scale ERP and digital transformation initiatives. Below is a comprehensive list of the key industry drivers, market forces, and KPIs shaping IT investments in CPG today.

The Challenge

Strategic priorities drive funding allocation. So, anchoring your Microsoft solution in what your prospects' leadership team wants to achieve (strategic objectives) and what they want to solve (challenges) is critical to securing their endorsement and support.

For large CPG companies, strategic priorities typically revolve around accelerating product development, optimizing operations, expanding customer reach, improving customer experience, growing market share, and adapting to technological advancements. These priorities help large CPG organizations stay competitive, achieve long-term growth, and meet the evolving demands of consumers.

What You Will Learn

This section will equip you with the strategies needed to position Microsoft as a credible CPG industry solution provider. You'll learn how to:

- Align with CPG Companies' Strategic Priorities by mapping Microsoft solutions to the core objectives they care about.
- Shift the Conversation from Features to Business Impact by reframing ERP discussions around measurable business outcomes.
- Leverage Industry Drivers to Strengthen Positioning by using key industry market forces to create urgency and establish Microsoft as the best-fit solution.

CPG Industry Drivers

The CPG industry solution alignment template on the right:

- Identifies **five top strategic CPG priorities** and the business/operational challenges that undermine them.
- Maps **Microsoft solution capabilities** to these priorities, illustrating how they address key retail pain points.
- Outlines the primary **business benefits** customers will realize after implementing a Microsoft solution.

Understanding how these strategic priorities and challenges align with Microsoft solutions allows you to engage customers more effectively, particularly when their initiatives connect to key solution plays like **Optimize Supply Chain**.

Most importantly, many of these priorities stem from broader industry drivers that put pressure on CPG companies' business performance—economic shifts, regulatory changes, supplier disruptions, competitive actions, and evolving customer behavior—all of which frequently drive large ERP investments.

Seller's Secrets

1. **Industry-Specific Proof Wins:** CPG executives prioritize risk reduction and proven results. Lock in industry-specific references early and showcase AI and Power Platform-driven success stories to reinforce Microsoft's impact.
2. **Leverage the Playbook to Influence Selection:** Many of the best strategies for competing in CPG against SAP and Oracle are in the SAP Compete Addendum of this Playbook. Use it to sharpen your approach—securing C-suite access, reshaping decision criteria, and shifting feature-focused bake-offs toward AI innovation, agility, and industry-specific insights.

Microsoft CPG Solution Alignment

Industry Drivers	Strategic Priorities (WHY)	Business Challenges (HOW)	Microsoft Solution Alignment (WHAT)	Project Impact
New online/specialty entrants	Expand Direct-to-Consumer (DTC) channels	No cross-channel inventory visibility Inaccurate inventory data Manual logistics coordination	Real-time cross channel stock availability and order confirmation Intelligent distributed order management	↓ Customer acquisition costs ↑ Revenue ↓ DSO ↑ Order velocity
Recurring revenue driving higher valuation multiples.	Launch new "subscription" (aas) service offering	Current finance system cannot accommodate recurring revenue requirements	Customer service chatbots Logistics optimization Subscription licensing	↓ Customer acquisition costs ↑ Avg. transaction value (CLV) ↑ Business valuation ↑ Recurring rrevenue
Unpredictable OTD Availability and cost fluctuations	Improve supply chain resilience	Inaccurate demand forecasting Limited inventory visibility Manual (Excel) forecasting Inaccurate supplier ETAs	Intelligent forecasting Container tracking Supplier collaboration Demand forecasting	↑ Supplier lead time ↓ Inventory carrying cost ↑ On-time delivery rate ↑ Supply chain efficiency
Increasing penalties for missed OTD commitments	Improve inventory management	No cross-channel inventory visibility Inaccurate inventory data Limited inventory visibility	Real-time visibility into avail/committed inv. Proactive stock transfer planning Advanced W/H capabilities	↑ Inventory turns ↓ Stockouts and backorders ↑ Order fulfilment time ↓ Obsolete inventory ↑ On-time delivery rate
Competitors launching new/enhanced products (smart)	Accelerate and improve product development	Multiple disconnected systems Increasing supplier participation in business processes	Azure	↓ Cost per security incident ↓ Incident resolution time ↓ Data privacy compliance (GDPR, CCPA, PCI-DSS)

Click to explore

Industry Persona Engagement - CPG

Why does this matter?

There is an imbalance of power between buyers and sellers at the beginning of every sales pursuit. The sooner you make yourself an equal and remove your prospects' negative bias, the sooner you will uncover what is truly driving the project. There are a minimum of three decision makers in every deal (business, financial, technical), and therefore three critical conversations you need to navigate and control in every F&SC sales pursuit. You need to bring the right message/content to the right persona. Altitude is everything. Buyers reward sellers who understand their unique needs, pains and desires. But they also punish or avoid sellers who accidentally or unconsciously communicate they don't belong in the room.

The Challenge

If you bring the wrong conversation to the right persona, they will quickly decide you don't understand their role or what they care about. And it will be difficult to secure the next meeting, especially if they fall into the operational management and leadership categories. Unfortunately, the sheer scope and breadth of Microsoft's F&SC solution often makes it difficult to decide which specific customer pains, business processes and solution capabilities to focus on. Emphasizing Microsoft technology advantages to a supply chain leader will cause them to emotionally (and unconsciously) disengage as they struggle with assigning meaning to language they don't fully understand.

What you will learn

This section will equip you with the strategies to effectively engage CPG project stakeholders by aligning your messaging to their specific priorities, challenges, and success metrics. You'll learn how to:

- Navigate conversations at the right altitude by tailoring discussions to leadership, operations, and IT personas.
- Drive stakeholder engagement and decision-making by leveraging persona-based insights to structure discovery, presentations, and demonstrations for maximum impact.

Persona Engagement

ERP project stakeholders reward sales professionals who demonstrate a **clear understanding of the business drivers** fueling the project, the high-impact processes influencing competitive advantage and operating margin, and the key metrics they monitor religiously. More importantly, senior leaders engage with sellers who can **communicate at the right altitude**—inventory constraints and stockouts, for example, mean very different things to a CIO versus a COO.

Before every meeting, **align your approach to the specific stakeholder** by preparing with likely business challenges, relevant use cases, and core KPIs that matter most to them. The CPG Persona Profile overview on the right maps current CPG industry objectives, challenges, use cases, and key impact metrics to the most relevant ERP project stakeholders. Use this as a foundation but customize it to reflect the actual decision-makers in your sales pursuits. Ensure that IT, line-of-business, and executive-level conversations happen at the appropriate depth and strategic focus.

Finally, anchor BDM discovery calls in high-probability core objectives and challenges, validating them through prospect analyst presentations, earnings reports, and MD&A filings.

Seller's Secrets

1. **Share this summary with the project BDMs (Leadership, LoB & IT)** at the end of Listen & Consult to validate and confirm your understanding of their respective strategic project priorities.
2. **Organize your solution demonstration around the core business objectives/challenges and priority use-case scenarios** of the most senior demonstration participants. Embed the priority use case scenarios in a demonstration plan and share with participants in advance to secure agreement.

CPG Persona Profiles

	Role and Key Stakeholder	Core Business Objectives/Challenges	Priority Use Case Scenarios	Key Impact Metrics
	Leadership BDMs CEO COO CMO CFO	• Sustain competitive advantage • New market entrants/competitive threats • New business models/innovation • Customer-centric innovation • Supply chain optimization • Cost management and efficiency • Growth, profitability, and ROI • Anticipating trends and capitalizing on opportunities • Consumer engagement • Regulatory compliance & risk management • Sustainability • Retail partnership innovation • Expanding into new markets	• Expand Direct-to-Consumer (DTC) channels to increase revenue and improve customer relationships. • Omnichannel Strategy: create a seamless customer experience across retail stores, e-commerce platforms and mobile apps. • Profitability analysis: analyze the financial performance of different product categories, channels, and retailers to ensure the business is operating efficiently and profitably. • Cash flow and capital allocation: manage cash flow to ensure funds are allocated appropriately for investment in product development, inventory, marketing, technology, and other strategic initiatives. • Financial planning and budgeting: create financial forecasts and budgets that align with strategic goals.	• Revenue growth • Profitability • Regulatory compliance/penalties (GDPA/PII) • Customer satisfaction (CUSAT) • Gross profit margin • Inventory carrying costs • Cost of goods sold (COGS) • Operating margin
	Line of Business BDMs VP Retail Operations VP Supply Chain General/Operations Manager VP Procurement & Warehousing VP Finance/Controller VP R&D	• Workforce management • Responding to supply chain disruptions • Inventory balancing/visibility • Inaccurate forecasting • Fulfilling customer demands • Omni-channel sales • Logistics efficiency • Cost reduction initiatives • Production scheduling & demand forecasting • Quality control & continuous improvement • Resource utilization (people/assets) • Retailer and distributor requirements:	• Supply chain optimization: ensure inventory levels are optimized to meet consumer demand without overstocking or understocking • Demand Forecasting: predict future product demand using historical sales data, market trends, and external factors. • Resource utilization: Efficiently utilize workforce and equipment resources to maximize productivity. • Logistics and distribution: manage the flow of goods from manufacturers to warehouses, retail stores and customers. • Inventory management: optimize stock levels, reduce excess inventory, and manage stockouts. • Trade and promotions management:	• Production yield • On-time-delivery • Cost/unit • Defect rate • Average days to close books • Stock outs • Inventory turnover • Days sales of inventory (DSI) • Order fulfillment rate • Forecast accuracy • Recall rate • Labor costs
	Technology Decision Makers (TDM) CIO CTO CSO	• Cybersecurity and data privacy • Supply chain visibility • Automation of operations • Collaborative supply chain platforms • Customer support automation (AI/chatbots) • Mobile and IoT integration • Escalating IT costs • Securing a complex supply chain • Regulatory compliance • System architecture and cloud integration • Manageability of IT systems/applications • Ecommerce and digital transformation • Reporting and business insights (BI)	• E-commerce platform management: oversee and secure the digital storefront, inclusive of product listings, digital marketing, customer interactions, online payment systems and mobile optimization. • Data Analytics and Insights: use data from online interactions, customer behaviors, and purchase patterns to gain actionable insights into product demand, customer preferences and marketing effectiveness. • Leveraging AI and machine learning models to enhance demand forecasting, production optimization, supply chain management, and consumer insights. • Protecting sensitive data (e.g., customer data, financial records, and intellectual property) from breaches and complying with all industry standards (e.g., GDPR, CCPA).	• Uptime percentage • Mean time between failures • IT spend as % of revenue • Cost per user transaction • Number of security incidents • Time to resolve security incidents • Compliance with data privacy regulations (GDPR, CCPA, PCI-DSS) • Security audit score (avg.) • Adoption rate of new technologies • Cloud utilization rate

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Industry Persona Engagement – CPG Discovery Questions

Technical Decision Maker

CIOs aren't just evaluating an ERP—they're managing IT risk, security, compliance, and integration complexity while driving digital transformation. Your goal is to uncover their biggest IT constraints, how they define ERP success, their integration strategy, and where they perceive risk. Frame your discovery around broader transformation goals, security and compliance concerns, and integration challenges rather than just ERP features. Below are strategic discovery questions to help uncover key technical, operational, and organizational requirements, ensuring your solution aligns with the prospect's IT strategy.

Financial Decision Maker

CFOs aren't just evaluating ERP—they're assessing financial visibility, cost control, budgeting, and compliance while ensuring financial strategies support business growth. Your goal is to uncover their biggest financial pain points, how the new system will deliver measurable financial benefits, as well as how it aligns with and supports the company's financial strategy. Focus your discovery on how the ERP can drive profitability, enhance financial controls, improve cash flow management, and reduce financial risk. Below are strategic discovery questions designed to surface key financial challenges and align Microsoft's solution with their financial strategy.

Business Decision Maker

Engaging CPG ERP stakeholders effectively requires a tailored discovery approach for each persona. This section provides strategic discovery questions designed to help you:

- Align your discovery with CIOs by focusing on Innovation, security & privacy, and data analytics.
- Surface CFO pain points around cash flow and financial management, cost control, and compliance.
- Engage COOs by uncovering operational inefficiencies, inventory risks, and operational roadblocks to drive business value conversations.

CPG CIO/CTO

Innovation & Competitive Advantage

- **How do you expect the ERP system to support innovation in your business processes, such as by improving supply chain efficiency, product development, or customer service?**
- What role do you see the ERP system playing in helping the company maintain a competitive advantage, particularly in the fast-changing CPG market?
- How will the ERP system enable the company to respond to new consumer trends, such as increased demand for sustainability, personalization, or omni-channel shopping?

Data Security and Privacy:

- What are the key security requirements for the ERP system with regard to protecting sensitive business data, customer information, and intellectual property?
- **How will the ERP system address data privacy and confidentiality, particularly with sensitive manufacturing, financial, and customer data?**

Data Analytics and Decision-Making

- How do you envision the ERP system enhancing real-time reporting and analytics across departments (e.g., production efficiency, supply chain visibility, financial forecasting)?
- **What specific key performance indicators (KPIs) and metrics do you want the ERP system to track to drive data-driven decision-making?**

CPG CFO

Cash Flow and Working Capital Management

- How will the new system need to support financial reporting across different product lines, regions, or business units?
- How do you envision the ERP system enhancing your ability to track and report on your key financial metrics and KPIs in real-time?
- **What specific financial reports or dashboards are most critical for you? How do you expect the new system to streamline the generation of these reports?**
- How do you anticipate the new system improving financial forecasting and budgeting processes to provide more accurate predictions for revenue and expenses?

Inventory and Supply Chain Financial Management

- What improvements do you expect from the ERP in terms of cost accuracy, inventory valuation, and obsolescence?
- **How will the ERP system help you optimize your supply chain operations from a financial perspective? (reducing excess inventory or improving order lead times, etc.)**
- How do you plan to use the ERP system to improve the accuracy of cost of goods sold (COGS) and manage margins more effectively?

Cost Control and Profitability

- What are the key cost drivers within the business (e.g., raw materials, labor, distribution) you want to control and monitor with the new system?
- **How do you envision the system reducing waste, inefficiency, and operational costs throughout the supply chain and production processes?**
- How will the ERP system help you track the profitability of individual products, customers, or channels?

Compliance and Regulatory Reporting

- **How does the new system need to help ensure compliance with regulations such as product labeling, safety standards, and financial reporting requirements?**
- How will the ERP system streamline the preparation of regulatory filings and reports (e.g., tax filings, SEC reports, customs documentation)?

CPG COO

Operational Efficiency and Process Optimization

- **What key operational challenges are you facing in manufacturing, distribution, and logistics? How do you see your new system improve efficiency and reduce costs?**
- What specific processes (e.g., production planning, quality control, order fulfillment) need to be automated or improved to improve overall operational efficiency?
- How will the ERP system help you streamline communication and coordination between production, warehousing, and logistics?

Supply Chain Optimization and Inventory Management

- How does the new system need to support better demand forecasting?
- **What are the key challenges you face with inventory management (e.g., stockouts, overstocking, obsolete inventory)? How do you see the new system addressing these issues?**
- How do you see the ERP system improving your supplier relationship management and ensuring that you can track the performance and delivery of raw materials in real-time?

Inventory Planning & Management

- **How will you leverage a new system to improve planning and scheduling, so that inventory is aligned with demand?**
- How do you see a new system optimizing inventory costs and resources (e.g., labor, materials, machinery)?
- How will the ERP system help manage the lifecycle of products, from production through to distribution, improve quality?
- How do you envision a new system improving tracking and traceability for compliance and quality assurance?

Seller's Secrets

1. **Practice 3-layer discovery techniques.** Ask a question. Ask a question about the answer to question #1. Then ask a question about the answer to question #2. Answer #3 (almost) always surfaces critical information.

Manufacturing Industry Engagement Framework

Industry Engagement Framework - Manufacturing

Why does this matter?

The manufacturing industry is undergoing rapid transformation, driven by automation, supply chain resiliency, shifting labor dynamics, and increasing cost pressures. To stay competitive, manufacturers must modernize production, optimize resource allocation, and enhance operational efficiency while adapting to fluctuating demand, geopolitical uncertainties, and sustainability regulations. Most strategic priorities stem from industry-wide pressures—rising material costs, supply chain disruptions, workforce shortages, and the push for smart factory initiatives—all of which frequently drive large-scale ERP and digital transformation investments. Below is a comprehensive list of the key industry drivers, market forces, and KPIs shaping IT investments in manufacturing today.

The Challenge

Strategic priorities drive funding allocation. So, anchoring your Microsoft solution in what your prospects' leadership team wants to achieve (strategic objectives) and what they want to solve (challenges) is critical to securing their endorsement and support.

For large manufacturing companies, strategic priorities typically revolve around optimizing production efficiency, enhancing supply chain resilience, reducing operational costs, driving sustainability initiatives, and accelerating digital transformation. These priorities help manufacturers stay competitive, meet evolving regulatory requirements, and adapt to shifts in market demand and technological advancements.

What You Will Learn

This section will equip you with the strategies needed to position Microsoft as a credible manufacturing industry solution provider. You'll learn how to:

- Align with Manufacturers' Strategic Priorities by mapping Microsoft solutions to the core objectives they care about.
- Shift the Conversation from Features to Business Impact by reframing ERP discussions around measurable business outcomes.
- Leverage Industry Drivers to Strengthen Positioning by using key industry market forces to create urgency and establish Microsoft as the best-fit solution.

Manufacturing Industry Drivers

The Manufacturing industry solution alignment template on the right:

- Identifies **five top strategic Manufacturing priorities** and the business/operational challenges that undermine them.
- Maps **Microsoft solution capabilities** to these priorities, illustrating how they address key retail pain points.
- Outlines the primary **business benefits** customers will realize after implementing a Microsoft solution.

Understanding how these strategic priorities and challenges align with Microsoft solutions allows you to engage customers more effectively, particularly when their initiatives connect to key solution plays like **Optimize Supply Chain**.

Most importantly, many of these priorities stem from broader industry drivers that put pressure on CPG companies' business performance—economic shifts, regulatory changes, supplier disruptions, competitive actions, and evolving customer behavior—all of which frequently drive large ERP investments.

Seller's Secrets

1. **Industry-Specific Proof Wins:** CPG executives prioritize risk reduction and proven results. Lock in industry-specific references early and showcase AI and Power Platform-driven success stories to reinforce Microsoft's impact.
2. **Leverage the Playbook to Influence Selection:** Many of the best strategies for competing in CPG against SAP and Oracle are in the SAP Compete Addendum of this Playbook. Use it to sharpen your approach—securing C-suite access, reshaping decision criteria, and shifting feature-focused bake-offs toward AI innovation, agility, and industry-specific insights.

Microsoft Manufacturing Solution Alignment

Industry Drivers	Strategic Priorities (WHY)	Business Challenges (HOW)	Microsoft Solution Alignment (WHAT)	Project Impact
x Customer demanding enhanced services	✓ New service offering	x No existing business processes x Accounting system cannot manage recuring revenue	✓ Field service management ✓ Contract management ✓ Recurring/annuity revenue management	↑ Revenue ↑ Gross margin ↑ Total contract value
✓ Increasing demand	✓ Improve production planning & increase capacity	x Manual production scheduling x Inaccurate inventory data x Stockouts	✓ Centralized inventory, procurement/replenishment ✓ Intelligent production scheduling ✓ Predictive maintenance	↑ Capacity utilization ↑ OTD compliance ↑ Project profitability ↓ Project/labour costs
x Increasing raw materials shortages/cost fluctuations	✓ Improve supply chain resilience	x Inaccurate supplier ETAs x Long supplier lead times	✓ Intelligent forecasting ✓ Container tracking ✓ Supplier collaboration ✓ Vendor managed inventory	↑ Supplier lead time ↓ Inventory carrying cost ↑ On-time delivery rate ↑ Supply chain efficiency
x Increasing customer OTD penalties	✓ Improve demand planning & inventory management	x Inaccurate demand forecasting x Limited inventory visibility x Manual (Excel) forecasting	✓ Real-time visibility into avail/committed inv. ✓ Proactive stock transfer planning ✓ Advanced W/H capabilities	↓ Stockouts and backorders ↑ Order fulfilment ↓ Obsolete inventory ↓ Safety stock
x New import taxes and tariffs	✓ Improve project profitability	x Data silos x No real-time reporting x Unplanned production downtime	✓ Export license management ✓ Quality management ✓ Robotic Process Automation ✓ Asset maintenance mgmt.	↑ Gross margins ↓ Scrap ↓ Transportation costs ↓ Labor costs

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Industry Persona Engagement - Manufacturing

Why does this matter?

There is an imbalance of power between buyers and sellers at the beginning of every sales pursuit. The sooner you make yourself an equal and remove your prospects' negative bias, the sooner you will uncover what is truly driving the project. There are a minimum of three decision makers in every deal (business, financial, technical), and therefore three critical conversations you need to navigate and control in every F&SC sales pursuit. You need to bring the right message/content to the right persona. Altitude is everything. Buyers reward sellers who understand their unique needs, pains and desires. But they also punish or avoid sellers who accidentally or unconsciously communicate they don't belong in the room.

The Challenge

If you bring the wrong conversation to the right persona, they will quickly decide you don't understand their role or what they care about. And it will be difficult to secure the next meeting, especially if they fall into the operational management and leadership categories. Unfortunately, the sheer scope and breadth of Microsoft's F&SC solution often makes it difficult to decide which specific customer pains, business processes and solution capabilities to focus on. Emphasizing Microsoft technology advantages to a supply chain leader will cause them to emotionally (and unconsciously) disengage as they struggle with assigning meaning to language they don't fully understand.

What you will learn

This section will equip you with the strategies to effectively engage Manufacturing project stakeholders by aligning your messaging to their specific priorities, challenges, and success metrics. You'll learn how to:

- Navigate conversations at the right altitude by tailoring discussions to leadership, operations, and IT personas.
- Drive stakeholder engagement and decision-making by leveraging persona-based insights to structure discovery, presentations, and demonstrations for maximum impact.

Persona Engagement

ERP project stakeholders reward sales professionals who demonstrate a **clear understanding of the business drivers** fueling the project, the high-impact processes influencing competitive advantage and operating margin, and the key metrics they monitor religiously. More importantly, senior leaders engage with sellers who can **communicate at the right altitude**—inventory constraints and stockouts, for example, mean very different things to a CIO versus a COO.

Before every meeting, **align your approach to the specific stakeholder** by preparing with likely business challenges, relevant use cases, and core KPIs that matter most to them. The Manufacturing Persona Profile overview on the right maps current Manufacturing industry objectives, challenges, use cases, and key impact metrics to the most relevant ERP project stakeholders. Use this as a foundation but customize it to reflect the actual decision-makers in your sales pursuits. Ensure that IT, line-of-business, and executive-level conversations happen at the appropriate depth and strategic focus.

Finally, anchor BDM discovery calls in high-probability core objectives and challenges, validating them through prospect analyst presentations, earnings reports, and MD&A filings.

Seller's Secrets

1. **Share this summary with the project BDMs (Leadership, LoB & IT)** at the end of Listen & Consult to validate and confirm your understanding of their respective strategic project priorities.
2. **Organize your solution demonstration around the core business objectives/challenges and priority use-case scenarios** of the most senior demonstration participants. Embed the priority use case scenarios in a demonstration plan and share with participants in advance to secure agreement.

Manufacturing Persona Profiles

	Role and Key Stakeholder	Core Business Objectives/Challenges	Priority Use Case Scenarios	Key Impact Metrics
 Why	Leadership BDMs CEO COO CMO CFO	• Sustain competitive advantage • New market entrants/competitive threats • New business models/innovation • Customer-centric innovation • Supply chain optimization • Cost management and efficiency • Growth, profitability, and ROI • Anticipating trends and capitalizing on opportunities • Regulatory compliance & risk management • Sustainability & environmental management • Expanding into new markets • Drive operational efficiency	• Cash flow and capital allocation: manage cash flow to ensure funds are allocated appropriately for investment in capital equipment, inventory, technology, and other strategic initiatives. • Financial planning and budgeting: create financial forecasts and budgets that align with strategic goals. • Using real-time data from production systems, machines, and supply chain software to monitor performance and take corrective action. • Implementing advanced forecasting and inventory management tools to reduce overstocking and stockouts. • Improving production cost visibility and implementing cost-to-serve models to identify inefficiencies.	• Revenue growth • Profitability • Capacity utilization • Overall equipment effectiveness (OEE) • Regulatory compliance (ISO), environmental, OH&S/penalties • Gross profit margin • Inventory carrying costs • Cost of goods sold (COGS) • Operating margin • New product revenue
 How	Line of Business BDMs VP Retail Operations VP Supply Chain General/Operations Manager VP Procurement & Warehousing VP Finance/Controller VP R&D	• Workforce management • Responding to supply chain disruptions • Inventory management (raw materials, work-in-progress, and finished goods) • Inaccurate forecasting • Ensuring product quality and consistency • Logistics efficiency • Cost reduction initiatives • Production forecasting & capacity planning • Demand planning • Quality control & continuous improvement • Resource utilization (people/assets) • Prevent downtime and maintenance issues	• Supply chain optimization: ensure inventory levels are optimized to meet customer demand without overstocking or understocking • Demand Forecasting: predict future production demand • Resource utilization: Efficiently utilize workforce and equipment resources to maximize productivity. • Logistics and distribution: manage the flow of goods from suppliers to manufacturing facilities and customers. • Inventory management: optimize stock levels, reduce excess inventory, and manage stockouts. • Analyzing and optimizing production processes and schedules to ensure maximum utilization of resources (machines, labor, materials).	• Production yield • Order cycle time • Downtime • On-time-delivery rate • Defect rate • Average days to close books • Stock outs • Order fulfillment rate • Forecast accuracy • Recall rate • Labor costs • Scrap rate • Defect rate • Labor productivity
 What	Technology Decision Makers (TDM) CIO CTO CSO	• Cybersecurity and data privacy • Supply chain visibility • Automation of operations • IT/OT integration • Collaborative supply chain platforms • Mobile and IoT integration • Escalating IT costs • Securing a complex supply chain • Improving manufacturing flexibility/agility • System architecture and cloud integration • Manageability of IT systems/applications • Ecommerce and digital transformation • Reporting and business insights (BI) • Smart manufacturing (RPA, IoT, AI)	• Leveraging AI and machine learning models to enhance demand forecasting, production optimization, inventory management and supply chain resiliency. • Protecting sensitive data (e.g., customer data, financial records, and intellectual property) from breaches and complying with all industry standards (e.g., GDPR, CCPA). • Using digital twins to simulate production processes and optimize workflows before implementing changes on the shop floor. • Implementing supply chain visibility tools that provide real-time data on inventory levels, supplier performance, and logistics. • Integration of ERP with MES (Manufacturing Execution Systems) and other production management tools.	• Uptime percentage • Mean time between failures • IT spend as % of revenue • Cost per user transaction • Number of security incidents • Time to resolve security incidents • Compliance with data privacy regulations (GDPR, CCPA, PCI-DSS) • Security audit score (avg.) • Adoption rate of new technologies • Cloud utilization rate

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Industry Persona Engagement – Manufacturing Discovery Questions

Technical Decision Maker

CIOs aren't just evaluating an ERP—they're managing IT risk, security, compliance, and integration complexity while driving digital transformation. Your goal is to uncover their biggest IT constraints, how they define ERP success, their integration strategy, and where they perceive risk. Frame your discovery around broader transformation goals, security and compliance concerns, and integration challenges rather than just ERP features. Below are strategic discovery questions to help uncover key technical, operational, and organizational requirements, ensuring your solution aligns with the prospect's IT strategy.

Financial Decision Maker

CFOs aren't just evaluating ERP—they're assessing financial visibility, cost control, budgeting, and compliance while ensuring financial strategies support business growth. Your goal is to uncover their biggest financial pain points, how the new system will deliver measurable financial benefits, as well as how it aligns with and supports the company's financial strategy. Focus your discovery on how the ERP can drive profitability, enhance financial controls, improve cash flow management, and reduce financial risk. Below are strategic discovery questions designed to surface key financial challenges and align Microsoft's solution with their financial strategy.

Business Decision Maker

Engaging Manufacturing ERP stakeholders effectively requires a tailored discovery approach for each persona. This section provides strategic discovery questions designed to help you:

- Align your discovery with CIOs by focusing on security & privacy, data analytics, and IT alignment with overall business strategy.
- Surface CFO pain points around cash flow and financial management, cost control, and risk management.
- Engage COOs by uncovering operational and supply chain inefficiencies, and decision making support needed to drive value.

Manufacturing CIO/CTO

IT Alignment & Business Strategy

- **How does the ERP system align with the company's broader business goals and IT strategy in the context of digital transformation and operational efficiency?**
- What are the key technology challenges you face in your current systems? How do you expect the new ERP system to address them?

Data Security and Privacy:

- What are your top security concerns when implementing the ERP system? How do you plan to ensure robust cybersecurity protocols and compliance with industry regulations (e.g., ISO, GDPR)?
- How will the ERP system address data privacy and confidentiality, particularly with sensitive manufacturing, financial, and customer data?
- **How will cloud-based or hybrid ERP systems impact your data governance, compliance, and latency requirements in manufacturing operations?**

Data Analytics and Decision-Making

- How do you envision the ERP system enhancing real-time reporting and analytics across departments (e.g., production efficiency, supply chain visibility, financial forecasting)?
- **What specific key performance indicators (KPIs) and metrics do you want the ERP system to track to drive data-driven decision-making?**

Manufacturing CFO

Cash Flow and Working Capital Management

- How will a new ERP system help you improve cash flow management, especially in relation to production and procurement?
- **How will a new ERP system help you better manage working capital by optimizing inventory levels, accounts payable, and accounts receivable?**
- How do you foresee the ERP system reducing inventory carrying costs and minimizing stock-outs or overstocking issues?
- What specific features of the ERP system will help improve supplier and customer payment terms?
- What impact will that improvement have on cash flow?

Inventory and Supply Chain Financial Management

- What improvements do you expect from the ERP in terms of cost accuracy, inventory valuation, and obsolescence?
- How will the ERP system help you optimize your supply chain operations from a financial perspective? (reducing excess inventory or improving order lead times, etc.)
- **How do you plan to use the ERP system to improve the accuracy of cost of goods sold (COGS) and manage margins more effectively?**

Cost Control and Profitability

- **How will the ERP system improve visibility into production costs, overheads, and margins?**
- How will the ERP system help you identify areas for cost reduction and efficiency improvements within manufacturing operations?
- What strategies are you using to manage raw material costs and production inefficiencies?

Risk Management & Financial Controls

- **How do you foresee the ERP system improving risk management, in relation to cost volatility, currency fluctuations, and supply chain disruptions?**
- How do you plan to ensure the ERP system can manage financial risks associated with global operations, such as international pricing and currency management?

Seller's Secrets

1. **Practice 3-layer discovery techniques.** Ask a question. Ask a question about the answer to question #1. Then ask a question about the answer to question #2. Answer #3 (almost) always surfaces critical information.

Manufacturing COO

Operational Efficiency and Process Optimization

- **Which manufacturing processes (e.g., production, supply chain, inventory, procurement) are you looking to optimize through this project?**
- How do you currently track and manage production schedules? How do you envision the ERP system improving this process?
- How do you plan to measure the success of the ERP project in terms of operational improvements and efficiency gains?

Supply Chain Optimization and Inventory Management

- What improvements are you hoping to achieve with the ERP system in terms of inventory visibility and stock control?
- What role do you see the ERP system playing in improving supply chain visibility, supplier performance, and order lead times?
- **How will the ERP system help you improve demand forecasting, reduce lead times, and optimize your supply chain operations?**

Decision-Making

- **How important is real-time data and visibility across operations (e.g., production status, inventory levels, sales) for your decision-making process?**
- How will the ERP system provide actionable insights that help optimize manufacturing operations, reduce downtime, and improve product quality?
- What data-driven insights would you like the ERP system to provide to help optimize decision-making and improve operational performance?

Appendix:
Finance and Supply Chain Industry Engagement Addendum

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Industry Engagement (The Why)

Why does this matter?

There's a reason Microsoft and Microsoft partner sales professionals (along with direct-selling ISVs) who focus on a small number of industries consistently achieve high win rates. Their deep understanding of industry-specific business challenges, pain points, needs, and project drivers enables them to quickly demonstrate their expertise and connect with prospects' current states, business processes, and future requirements. This knowledge positions them as "safe" or "low-risk" vendors, providing an immediate edge in competitive sales pursuits and makes accessing strategic stakeholders and BDMs significantly easier. While managing IT conversations requires less industry expertise, influencing legitimate BDMs demands a deep understanding of their business landscape and priorities.

The Challenge

Unfortunately, you're not always going to be pursuing opportunities that align with your industry knowledge and experience. At the business process level, there are clearly some finance and supply chain commonalities across retail, CPG, manufacturing and distribution, but when it comes to industry drivers, business models, regulatory compliance, and IT environments, they are radically different. The challenge then becomes, how do you quickly and accurately develop a solid understanding of an unfamiliar industry or vertical, and then convert that knowledge into engaging BDM conversations, memorable solution demonstrations and differentiating proposals?

What You Will Learn

Understanding industry drivers and market forces is critical to engaging business decision-makers effectively. This section will help you:

- Identify external forces shaping your prospect's priorities so you can align your sales approach to their most pressing challenges.
- Connect Microsoft's value proposition to real business impact by linking Dynamics 365 to key performance metrics.

#1 Understand the Industry Drivers/Market Forces Behind BDM Investments

The first step in developing conversational competence in a specific industry, is understanding the EXTERNAL industry drivers and market forces that are putting pressure on your customers' leadership team. This enables you to align your Dynamics F&SC solution to one or more of their strategic priorities AND prepare for engaging executive conversations.

EXTERNAL industry drivers and market forces are factors that executives must react/respond to because they are OUTSIDE of their locus of control. Organizational business objectives and operational challenges on the other hand, (which eventually turn into capital allocations and funded projects) are **INTERNAL** business drivers, and therefore INSIDE their locus of control. Understanding what is happening "to" your customer is equally if not more important that understanding what they are trying to achieve or change within their company.

Why is this so important? Because aligning your Microsoft differentiation and core value proposition with challenges that originate in industry drivers and market forces, is far more compelling than aligning them with operational challenges. Executives think deeply about industry drivers. Line-of-business leaders think deeply about business processes, and IT leaders think deeply about technology innovation. If you want be relevant to CEOs, COOs and CFOs, you need to be able to engage them at a strategic level and then clearly communicate how Microsoft can help inoculate them against what concerns them most….elements that are out of their control.

There are **six core industry driver/market force categories** you should research and explore in advance of every significant industry pursuit.

These include macroeconomic shifts, regulatory change, supplier actions, competitive activities, changes in customer behavior (B2B) and, if its relevant, changes in end consumer behavior.

#2 Understand how Industry Drivers Impact Key BDM Performance Metrics

The next step in developing your industry knowledge is understanding how these external forces are impacting your prospects' critical operating metrics. This information helps you determine the potential business impact of you proposed F&SC solution and informs the design of your discovery workshops.

Below are a handful of examples of industry-specific industry drivers as well as the impact they have on key performance metrics. A more comprehensive set of industry drivers and impacts are provided in the individual MFG, CPG and Retail playbook addendums.

Manufacturing Industry Drivers:

- New trade tariffs
- New environmental regulations
- Volatile cost of raw materials
- New emerging market competitors (lower cost)

Manufacturing Distressed Metrics/KPIs:

- Import taxes ↑
- Compliance costs ↑ Penalties/fines ↑
- COGS ↑ Gross margins ↓
- Discounts ↑

CPG Industry Drivers:

- Declining consumer confidence,
- Unreliable supplier delivery (port congestion)
- Competitors shipping direct to consumer
- Increasing penalties for late deliveries (OTD)

CPG Distressed Metrics/KPIs :

- Revenue ↓
- Fill rate ↓ Cancelled orders ↑ Stock outs ↑
- Order flow ↓ Inventory (DIO) ↑
- Transportation costs ↑ Safety stock ↑

Retail Industry Drivers:

- Inflation/declining consumer confidence
- GDPR/PII legislation changes
- Competitor offering click-and-collect
- New payment forms/digital wallets

Retail Distressed Metrics/KPIs :

- Sales per square foot/basket ↓
- Compliance/IT costs ↑
- Return visitors/customers ↓
- IT/operating costs ↑

Industry Engagement (The Why) - continued

Why does this matter?

Companies don't just randomly decide "today is the day to replace our ERP". Behind every (funded) ERP project is a very **emotional** business trigger event. It's the core motivation that moved your prospects' leadership into action. And uncovering that something, the project trigger event, is key to shaping your win strategy. So, with a solid understanding of the external industry drivers and market forces that are shaping executive attention, strategic priorities and project funding decisions, the next step is to identify your prospects' industry-specific business drivers/strategic priorities and operational challenges (which inevitably drive project scope and business case expectations).

The Challenge

Hidden somewhere in the hundreds (thousands) of RFI/RFP feature/function requests is the **ACTUAL** reason your prospect is looking to replace what is likely a suboptimal, but still functional ERP. Finding this needle in the haystack is critical because it will inform and shape your BDM conversations, your partner selection, your MCEM engagement recommendations, your demonstration strategy, your business case argument and your Microsoft differentiation narrative.

What You Will Learn

ERP projects don't happen in a vacuum—there is always a business trigger event or strategic priority that fuels the need for change. This section will help you:

- Identify project trigger events that signal an ERP investment, such as leadership changes, mergers, or compliance challenges, so you can align your approach early in the sales cycle.
- Prioritize business drivers across Growth, Risk, and Control categories to ensure your solution recommendation speaks to your prospect's most pressing needs.

#3 Identify Probable Project Trigger Events

The next step in your industry journey is identifying the potential business trigger events that led to the funding of your prospects' ERP initiative. Below are examples of common business/project trigger events. A more comprehensive set are included in the individual MFG, CPG and Retail playbook addendums.

Growth Project Trigger Events:

- New business model
- Change of control (new CEO/CFO/COO)
- Merger/acquisition/divestiture event
- Geographic expansion
- New product/service offering
- New distribution center

Risk Project Trigger Events:

- Workplace injury/death
- Large regulatory penalty/compliance violation
- Large inventory/project write-off
- Lost significant customer
- Recall
- Negative public relations event

Control Project Trigger Events:

- Security breach
- Significant forecast miss (internal or public)
- Strategic KPI threshold passed:
  - Operating expenses >30%
  - OTD rate <85%
  - DSO >80 days
  - Fill rate <90%

Seller's Secrets

1. **Identify project "trigger events":** This is difficult even when you deeply understand an industry. You'll often find trigger event indicators in your prospects' Management Discussion & Analysis (MD&A) and in their recent press releases.
2. **Leverage the Power of Whiteboarding:** Use whiteboarding to transform discovery from an interrogation into a collaboration. By visually mapping out challenges and solutions, you engage prospects more deeply, encourage disclosure, and create a shared understanding that drives stronger alignment and better insights. The 'Driving Business Value with Whiteboard Project Discovery Sessions' page of this Playbook provides more insights into why whiteboarding is so powerful and how to conduct a whiteboarding discovery session. .

#4 Prioritize Strategic (Industry) Business Processes

Next, identify and document your prospects' primary Growth, Risk and Control business drivers (+) and challenges (-), which you will often find in their publicly available annual reports and investor presentations. Aligning your solution recommendation with one or more of your prospects' strategic priorities is critical.

Growth Bus. Drivers/Challenges:

- Curbside pickup (new service)
- New distribution channel
- DTC (Direct to Consumer)
- Transform service center into profit center
- Improve worker/asset productivity

Growth Priority Capabilities:

- Advanced logistics
- Real-time visibility into available and committed inventory
- Online order-entry
- Recurring/annuity revenue management
- Robotic Process Automation

Risk Bus. Drivers/Challenges:

- Improve safety record
- Aging equipment (OT/IT disconnect)
- Inventory optimization
- Manual picking (paper-based)
- Increasing fraud

Risk Priority Capabilities

- Advanced warehouse capability
- AI based estimating
- Vendor managed inventory/portal
- RMA Management
- Advanced order management

Control Bus. Drivers/Challenges:

- Inaccurate inventory data (consistent stock outs)
- Inaccurate demand forecasting
- Inaccurate production forecasts
- Increasing regulatory scrutiny
- Limited procurement controls

Control Priority Capabilities

- Data sovereignty and regulatory compliance
- Centralized inventory management procurement and replenishment
- Master production planning
- Predicative maintenance

Industry Engagement (PoV) - HOW

Why does this matter?

BDM meetings, especially those with executive sponsors responsible for project funding, have a massive impact on which vendor is ultimately selected. SAP and Oracle have well-defined BDM engagement strategies that often extend beyond CxOs to include board members. Given their core differentiating narrative is anchored in "deep industry expertise", they will attempt to position Microsoft as a "product" company, and more aligned with the CIO than the business community. So how do you counter SAP's claims and reframe Microsoft differentiation (industry clouds, Data & AI capabilities, etc.)? By bringing a very industry-specific Point-of-View (PoV) to every BDM meeting.

The Challenge

Creating an engaging PoV is challenging because it entails aligning and combining three core elements.

1. What is happening TO the company (industry drivers/market forces) that are causing the leadership team existential anxiety?
2. Which strategic priorities (publicly stated goals and objectives) are being undermined by the industry drivers and market forces.
3. A business-level description of how Microsoft could potentially help address their challenges. Ideally, your Microsoft "solution" extends beyond Bus Apps, to include category leading capabilities like Data & AI that SAP and Oracle do not possess.

What You Will Learn

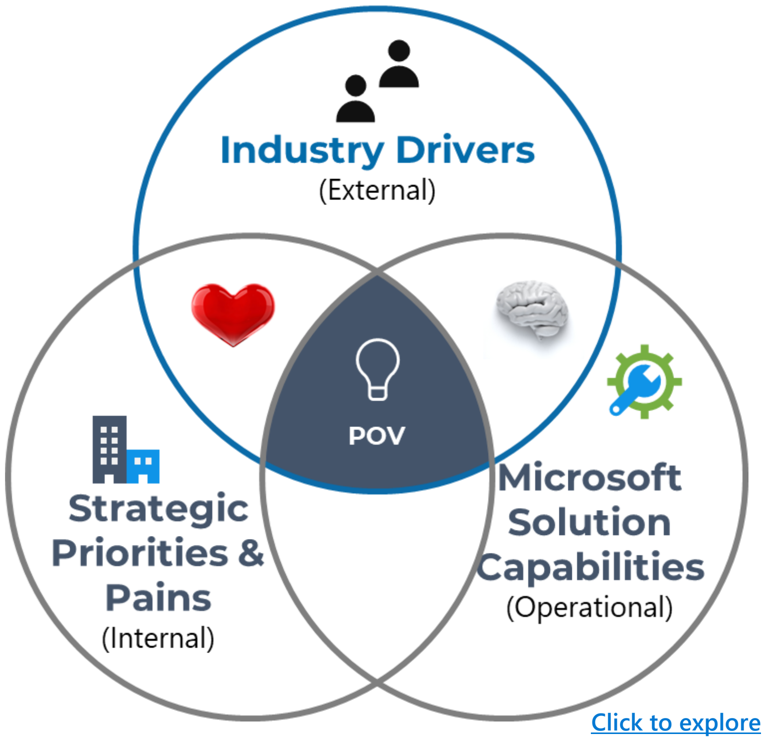
Developing a compelling industry Point-of-View (PoV) is essential for engaging BDMs and driving meaningful sales conversations. This section will help you:

- Align external industry drivers with internal business priorities to ensure your PoV resonates with executive decision-makers.
- Frame Microsoft's value in customer language by demonstrating how Dynamics 365 and AI capabilities address industry-specific challenges and deliver measurable business outcomes.

#5 Develop a Compelling (Industry) Point-of-View

The next step in your industry engagement journey involves combining **external** industry driver information with your prospects' **internal** business drivers/challenges and then align them with Microsoft solution capabilities. For clarity, capabilities are not F&SC features/functions, they are new abilities or outcomes your prospects will have after they implement a Microsoft solution. Capabilities must be described in customer language. For example, in a manufacturing scenario your Microsoft PoV could sound like:

1. **Industry Driver Opening:** Many of our manufacturing clients are seeing their customers demand shorter quoting and lead times, as well as greater insight into production and transportation status. Is your organization experiencing similar requests from your clients? (This is a logical "what" question). Your prospect BDM will very likely confirm they are experiencing similar customer demands. Ask secondary questions to fully understand the impact on their business. Then…
2. **Strategic Priority/Challenge:** Your recent 10K/MD&A suggested your leadership team is committed to improving its operational efficiency and operating margin based on a shop floor automation initiative. How do you see the customer requests for shorter delivery timelines and greater visibility into your production systems impacting this initiative? (This is a visual "how" question). Ask secondary questions to fully understand the extent to which the change in customer behavior is adding risk to their internal efficiency initiatives. Then…
3. **New (Microsoft) Capability**: We've heard very similar concerns from other discrete manufacturing clients. Many of them are now exploring Robotic Process Automation and Predictive Maintenance to increase capacity utilization ($), improve OTD compliance (risk), and reduce unscheduled downtime (control). Are those business impacts consistent with what you are expecting from this project? (This is an emotional "why" question). Is there a reason those capabilities were excluded from the project scope defined in the RFx?
4. **Conversation Question:** Based on what you just shared, it sounds like there may be an opportunity to significantly increase the business impact of your project without materially changing the current scope. Would you be open to exploring how RPM/Predictive Maintenance could potentially increase your capacity and improve production controls?



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Seller's Secrets

1. **Leverage Case Study:** Bring an example case study from within your prospects' industry to your BDM PoV meeting. Evidence increases your credibility, as well as the likelihood of the BDM agreeing to a recommended next step.
2. **Industry-Specific Proof Wins:** executives prioritize risk reduction and proven results. Lock in industry-specific references early and showcase AI and Power Platform-driven success stories to reinforce Microsoft's impact.
3. **Leverage the Playbook to Influence Selection:** Many of the best strategies for competing in against SAP and Oracle are in the SAP Compete Addendum of this Playbook. Use it to sharpen your approach—securing C-suite access, reshaping decision criteria, and shifting feature-focused bake-offs toward AI innovation, agility, and industry-specific insights.

Industry Insights (The How)

Why does this matter?

Prospects have access to an unlimited supply of online content to inform their ERP selection process. They self-educate via 3rd party consulting firms, product trials, product/solution videos, analyst reports, customer case studies/testimonials, product trials, social media and ChatGPT. By the time they reach out to actual ERP sales professionals they often feel like they have learned everything they need to know to craft an accurate RFI/RFP and run a "fair" and accurate selection process. With this dramatic increase in the quality and quantity of online content, sales professionals often struggle to provide prospects and 3rd party consulting firms with information and insights that have not already been surfaced during their online research.

The Challenge

Teaching your prospects something **new**, especially if the content relates to industry rather than solution functionality or capabilities, immediately establishes credibility, relevance and trust. Unfortunately, sales professionals, especially those selling unfamiliar industries, often struggle with identifying and/or developing **Industry Insights**. Developing truly surprising or enlightening Industry Insights is one of the most challenging tasks in a competitive sales pursuit. It is also one of the most important! Teaching prospects something they did not know that leads to a material change in how they structure or scope their project leads to a pro-Microsoft bias that influences the decision-making process.

What You Will Learn

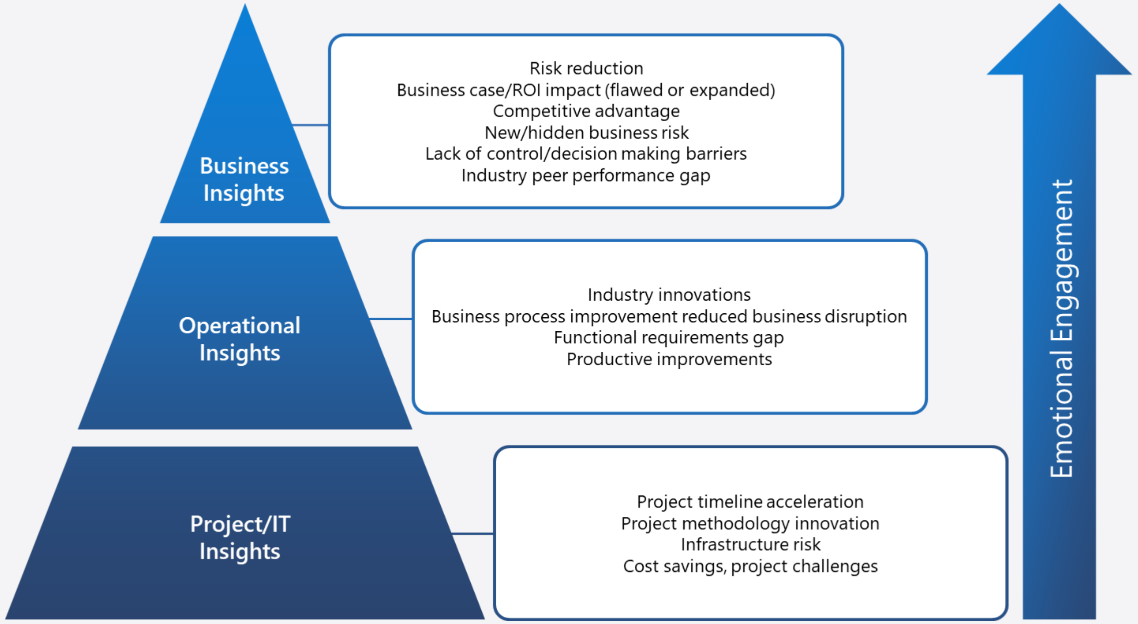
Bringing valuable industry insights into your discussions is key to influencing how prospects think about their ERP projects. This section will help you:

- Leverage industry insights to reshape project priorities by introducing new considerations prospects may not have uncovered themselves.
- Position yourself as a trusted industry advisor by demonstrating knowledge of industry risks and emerging trends.
- Use insights to guide the conversation toward Microsoft's strengths, shifting the discussion from a tactical feature comparison to a strategic business transformation.

#6 Bring Industry Insights into Your Discussion

Few sales professionals possess a deep enough understanding of their focus industry to teach prospects how to better run their businesses. But every sales professional can assemble a handful of insights that prospects will likely not uncover during their online research efforts.

Educational Insights are often found where a seller's industry experience and a prospects' emotional project drivers intersect. Industry insights can include new capabilities (enabled by AI, RPA, Power Platform), missing requirements (based on experience with similar projects), potential project risks (incomplete requirements, flawed project approach), customer stories (successes or failures), industry metrics (DSO, utilization, EBITDA, gross margins), industry analyst comments (opinions/industry observations) and/or SPECIFIC customer business impact (measurable benefits).



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The "industry insight" template below contemplates four conversation categories.

The first two focus on project risk and operational improvements, which are often the domain of the (tactical) project lead. The remaining focus on industry drivers and emerging trends, which are more aligned with (strategic) leadership.

Sales professionals that provide information resulting in some form of project change are viewed in a far more favorable light than those that assume the prospect is always "right". Educational Insights must be defined in advance, then shared with prospects early in their engagement cycle, ideally during the first discovery call. Passive discovery is replaced with active education, prospects become curious, and the "student" become the "teacher".

	Business Focus	Insight
Project Risk	• Selection process • Implementation approach • Change management • Governance	Your team has done a thorough job of defining your project objectives and functional requirements. But based on our experience working with many similar retail companies like yours, we believe your project has a higher-risk profile based on how you are approaching governance. Would you be open to scheduling some time to walk through how Microsoft typically addresses that risk?
Core Business Processes	• Sales and customer service • Real-time personalization • Seamless customer service • Marketing and promotion • E-commerce and omnichannel integration • Financial management & reporting	The RFI/RFP you shared with us covers all the elements that we typically see from retail organizations, but from a supply chain management perspective, we don't see anything related to the digital integration of suppliers. Most of the low-code retail projects we're seeing identify supplier integration as a key priority. Have we missed something?
Industry Drivers & Market Forces	• Switching brand loyalty • Declining customer demand • Supply Chain disruption • Building management optimization	We are seeing a significant increase in regulatory compliance scrutiny at many of our existing retail clients. Did you know that, on average, retail organizations are failing four security & compliance audits per year? Our current retail clients are implementing internal controls, compliance apps, and workflows to reduce this risk, but it has not come up in our discovery/scope discussions. Is this a concern for you as well?
Emerging Trends	• Demand for personalized online experiences • Contactless shopping and self-checkout options • Last-mile delivery • Greater visibility	We are currently working with an international organization that has stores in multiple countries. They have been able to significantly improve their contactless shopping and self-checkout processes that's led to a 28% improvement in customer loyalty. Would you be interested in seeing some of the workflows and apps we designed together with them?

Click to explore

Industry Persona Engagement

Why does this matter

There are three core narratives in every F&SC sales pursuit. You need to bring the right conversation to the right persona. Altitude is everything. Bring the right conversation to the wrong persona and they quickly decide you don't understand their role or what they care about. And it will be difficult to secure the next meeting, especially if they fall into the Operational Management or Leadership categories. Buyers reward sellers who understand their unique needs, pains and desires, and they punish/avoid sellers who accidentally or unconsciously communicate they don't belong in the room.

The Challenge

The challenge with selling Dynamics F&SC is that the sheer scope and breadth of the solution often makes it difficult to decide which specific customer pains, business processes and solution capabilities to focus on. Emphasize finance and reporting capabilities when the project drivers are anchored in supply chain optimization and your customer will emotionally (and unconsciously) disengage. Over-index on Microsoft technical (Power Platform/AI) or cloud capabilities outside of the IT community and you'll likely lose the audience. Business stakeholders will struggle to assign meaning to language they don't fully understand.

What You Will Learn

Successfully engaging ERP project stakeholders requires delivering the right conversation to the right persona. This section will help you:

- Understand the three core personas and how their priorities, challenges, and KPIs shape ERP decision-making.
- Tailor your messaging to align with each persona's focus.
- Communicate at the right altitude to ensure your insights resonate with decision-makers, avoiding technical overload for executives or business misalignment for IT leaders.

Technical (What)

Roles: CIO/CTO

Core business challenges:

- Securing and protecting IP and critical processes
- Integrating OT into IT systems
- Escalating IT costs
- Modernizing legacy technologies
- Ensuring a secure supply chain

Priority use case scenarios:

- Realtime worker communication
- Cybercrime/Ransomware protection
- Remote and frontline worker connectivity/productivity
- Identification and remediation of insider risks
- Regulatory compliance reporting and data protection
- Enterprise grade cloud security
- Leveraging AI to create business value
- Integration complexity

Key business impact metrics

- IT support costs
- Cloud consumption spend (budget : actual)

Operational Management (How)

Roles: Directors, VPs, Sr. VPs of Supply Chain, Procurement, Manufacturing, Finance

Primary business challenges:

- Manual (or inefficient/distributed) planning, sourcing and distribution processes
- Limited visibility into real-time data for payments predictions, forecasting and cash management
- Inaccurate engineering/estimating
- Inability to rapidly adjust to supply chain disruptions
- Increasing equipment, logistics and labor costs

Priority use case scenarios:

- End-to-end supply chain visibility that resolves supply/demand imbalances, and informs production and distribution optimization
- Optimize demand planning and inventory management
- Asset condition/health monitoring
- Forecasting cost of raw materials
- Shop floor performance monitoring
- Recall management
- Quality assurance
- Operational dashboards and decision support
- Project workbench (production dashboard)

Key business impact metrics:

- Manufacturing cycle time
- Customer fill rate/OTD delivery/perfect order percentage
- Production attainment
- Unscheduled overtime
- Stock outs
- Inventory turns/days of supply
- MTBF/MTTF
- DSO and DSI
- Customer rejects/returns, Material authorizations/return
- Maintenance costs
- Scrap material value

Leadership (Why)

Roles: CEO, COO, CFO

Primary business Challenges

- Sustain competitive advantage
- Supply chain integrity
- Declining margins
- Increasing regulatory and compliance requirements
- Diversify supply base
- New competitors/market entrants

Priority use case scenarios:

- Launching new service offerings (new business models)
- Improving worker safety
- Increase yield
- Optimize equipment, inventory, demand planning, fulfillment and workplace costs.
- End-to-end supply chain visibility
- Regulatory (and customer) compliance

Key business impact metrics:

- Market share
- Profitability (operating margin)
- Regulatory compliance/penalties
- CUSAT
- Overall equipment effectiveness (OEE)
- Inventory carrying costs
- Capacity utilization
- Net operating profit
- Return on assets
- Health and safety incident rate
- Reportable environmental incidents
- OTD to commit