Dynamics 365 Salesforce.com Compete Playbook

Developed for Microsoft by Neural Impact

Salesforce Compete Playbook Overview

Why: Microsoft has an incredible opportunity to change the way we grow our business by competing and winning against Salesforce. However, the reality is Salesforce has had a head start, a strong foothold and a compelling vision. However, they have also missed the mark by setting customer expectations high and underdelivering. The market has realized that a group of companies with a common brand is not a platform, and the market needs a great data platform.

What: The Dynamics 365 Salesforce Compete Playbook is a powerful resource designed to equip you with the tools and insights you'll need to compete in three distinct Salesforce compete sales motions: New Logo Opportunities, Rip and Replace Opportunities and Defending Against a Salesforce Attack. The playbook is supported by sales assets specifically created for it, as well as those from the Microsoft Partner Sales Acceleration Program,. The content is organized into topics that have a material impact on the success of these sales motions::

- Establishing Competitive Differentiation
- Initiating Business Oriented Conversations
- Driving Effective Discovery
- Selling to Different Buyer Personas
- Qualifying Salesforce Compete Opportunities
- Overcoming Common Objections

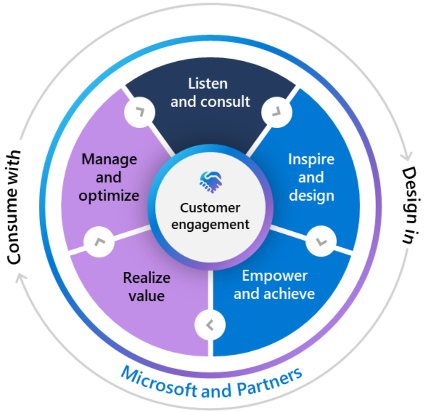
How: Each topic provides guidance and instructions that outline the significance of each activity, its core elements, and the optimal approach for execution. The supporting assets include preconfigured templates and comprehensive videos that dive deeper into each topic. Investing the time to explore these valuable resources and accompanying videos will help you quickly integrate them into your own personal selling motion. By doing so, you'll pick up some new ideas on how to approach and reframe both your existing and future Dynamics 365 opportunities that will lead to higher win rates, shorter sales cycles and, most importantly, greater customer value realization.

Redefining the Dynamics 365 CRM Salesforce Compete Motion

Modern Buying is Emotional

The Salesforce compete sales guidance described in this playbook aligns with and supports the Microsoft Customer Engagement Framework (MCEM), as well as the emotional needs and behaviors of modern SCE buying teams. It is specifically developed to **differentiate** Microsoft from Salesforce and create an emotional **Strategic Tipping Point** early in the customer engagement cycle.

The sales guidance and supporting sales assets listed here are designed to help you drive effective **compete**, **defend** and **rip-and-replace** sales motions that consistently leads to greater executive access, increased scope clarity, faster sales cycles, fewer no-decisions, and much clearer go/no-go discussions.



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 buy from one vendor over all the others. In an on-premise, perpetual licensing world, this moment typically occurred near the end of the buying process, often during product demonstrations or proposal reviews.

This enabled sales professionals to leverage long customer buying journeys to develop relationships and establish solution differentiation through multiple on-site meetings and comprehensive demonstrations. But in a world of self-educating buyers, trials and SaaS offerings, this old-school approach no longer works. Today's seller needs to show up and create bias and influence early. They need to do their best work at the beginning of their sales cycles, not at the end.

Supporting Assets

Listen & Consult

Initiating business conversations conversations

Qualifying Salesforce compete opportunities
- CE Qualification Scorecard

Driving an effective business discovery
- Emotional discovery video
- Logical discovery role play video (bad)
- Emotional discovery role play video (good)

Selling Dynamics 365 CE into industry
- Industry insights template

Inspire & Design

Whiteboarding your project discovery
- Project discovery whiteboard template (PPT)
- Project discover whiteboard overview video
- Project discovery whiteboard live demonstration

CIO/TDM engagement
- CIO/TDM project review presentation (PPT)
- CIO/TDM pitch deck overview video

BDM engagement
- BDM project impact summary (PPT)
- BDM project impact summary overview Video

Empower & Achieve

Reframing the PoC experience
- Proof-of-concept (PoC) plan template

Creating a compelling low-code closing pitch
- Proposal business review video overview
- Proposal business review (PPT)

Establishing competitive differentiation

Overcoming common objections
- Emotional objection handling overview video
- Logical objection handling role play video (bad)
- Emotional objection handling role play video (good)

What are the Dynamics 365 Competitive Differentiators

What: Selling Dynamics 365 requires demonstrating technical value to the customer's Technical Decision Maker (TDM) and, more importantly, business impact value to the Business Decision Makers (BDM). To succeed in a Salesforce compete scenario, it is critical to understand Dynamics 365's competitive differentiators and how they stack up against Salesforce's strengths. Additionally, knowing how Salesforce positions and sells their solutions is essential.

While Salesforce has made a considerable mark in the CRM space, customer feedback often points to overpromising and underdelivering. Microsoft approaches transformation differently—with an engineering mindset. This mindset is an advantage over Salesforce's "The Art of the Possible" approach, which creates captivating visions of transformative outcomes but often overlooks the practical considerations necessary to achieve those results.

Microsoft's engineering mindset is deeply embedded in our DNA and is reflected in our values, attitudes, and critical thinking skills. We focus not just on dreaming but on solving problems and creating value systematically. Our decades of experience ensure a more predictable and risk-mitigated digital transformation journey. While Salesforce may tout their leadership in customer experience, the risks associated with overpromising and underdelivering are significant.

Understanding our financial, platform, and product advantages, including specific workloads, will help you position Dynamics 365 effectively to both Technical and Business Decision Makers.

Clearly Communicate Microsoft Competitive Advantages

It is important to highlight how Dynamics 365, along with the broader Microsoft solution set, provides a more comprehensive and strategic "platform" that future-proofs the prospect's business and addresses high-priority IT and business concerns. Dynamics 365 connects seamlessly with the productivity tools customers use every day, offers enterprise-grade security protection at competitive pricing, and enables rapid application development with a limited IT staff. Copilot, embedded in Dynamics 365, further differentiates by enabling users to perform tasks more efficiently and with greater insight.

Platform Differentiators

- **Unified and Seamless Integration:** Dynamics 365 and Microsoft 365 offer a single, connected secure platform that enables teams to utilize familiar tools like Outlook, Word, Excel, LinkedIn, and Teams.
- **Data-Driven Decision Making:** Unified Dataverse spans Sales, Marketing, Customer Service, and self-service (Portals / Power Pages), improving decision making by providing data-driven insights to everyone.
- **AI-Powered Automation:** Dynamics 365, and the broader Microsoft workflow, harnesses the power of Generative AI to enhance both organizational and role-specific productivity.
- **Enterprise-Grade Security:** Built-in security, compliance, and privacy features help prevent data loss, reduce risks of attacks, and regulate access.
- **Reliable Infrastructure:** All built on an infrastructure with a 99.95% SLA.

Microsoft Advantages

- **Engineering Mindset:** Systematically addressing real-world business challenges, providing a reliable and innovative foundation for digital transformation by reinventing productivity and business processes, building an intelligent cloud and edge platform, and ensuring trustworthy computing with powerful AI capabilities.
- **Single Supplier Accountability:** Simplifies management and reduces complexity.
- **Change Management:** Faster innovation and less risk on complex projects.
- **Better Deals:** Cost advantages and price predictability.
- **Eliminate IT Skills Gap:** Technical resource availability and minimal training needed thanks to an intuitive drag-and-drop approach to building apps.
- **Rapid Application Development:** Quickly develop tailored applications and modernize processes with low-code solutions (Power Apps), reducing application development costs by 74%.

Salesforce Comparison

- Salesforce often relies on **third-party providers**, which can introduce complexity and risks associated with dependencies, whereas Microsoft's comprehensive platform reduces complexity and ensures sustainable and accountable changes.
- Salesforce project rollouts can be delayed whereas Microsoft benefits from a large community of skilled software engineers, and integration with familiar tools, reducing **project complexities**
- Salesforce AI (Einstein) often **requires additional data clouds** and isn't universally utilized across applications, whereas Copilot is integrated seamlessly with other Microsoft applications.
- Salesforce typically necessitates third-party connectors, which can be **costly and complex,** resulting in a more fragmented platform. Microsoft's cohesive platform eliminates the need for costly third-party connectors.

Understand Dynamics 365 Functional Strengths

While Dynamics 365 and Salesforce offer similar capabilities across core areas from a feature and functionality standpoint, it's important to note that Microsoft is recognized by analysts as a leader in CRM and Salesforce Automation. Furthermore, there are specific strengths in each business area that, when leveraged, can distinctly set Dynamics 365 apart from Salesforce.

Sales Differentiators

- **Copilot:** AI for conversational intelligence, predictive scoring, meeting preparation, and real-time customer engagement tips redefines sales excellence.
- **Teams Integration:** Integrated calling, channels, and alerts for contact knowledge enhance collaboration and connectivity within the CRM, streamlining workflows and increasing adoption rates.
- **LinkedIn Sales Navigator Integration:** Boosts lead generation and relationship building, providing valuable insights directly within the sales workflow.
- **AI-Driven Sales Insights:** Predictive analytics and sales forecasting powered by AI improve decision-making

Service Differentiators

- **Native Telephony Integration:** Unlike Salesforce, which relies on Amazon Connect, Dynamics 365 offers native telephony capabilities.
- **Integrated Knowledge Base:** Supports faster and more effective service resolutions, enabling agents to access relevant information quickly and efficiently.
- **Copilot:** Real-time assistance, providing conversational intelligence, automated responses, and actionable insights to improve service effectiveness, unlike Salesforce, which lacks a strong native chatbot engine.
- **Omnichannel Support:** A unified platform for managing customer interactions across multiple channels.

Marketing Differentiators

- **Marketing Copilot:** Real-time insights and recommendations, optimizing campaign performance, customer engagement, and demand generation.
- **Real-Time Customer Insights :** Real-time analytics and segmentation provide personalized marketing efforts.
- **Automated Campaign Management:** Advanced marketing automation and customer journey orchestration.
- **Event Management Module:** Supports high-volume demand generation and execution of marketing events, differentiating Dynamics 365 from Salesforce in cost and integration capabilities.

Why Dynamics 365: Business Impact Beyond Features

Why: Selling Dynamics 365 requires demonstrating technical value to the customer's Technical Decision Maker (TDM) and, more importantly, business impact value to Business Decision Makers (BDMs). Measuring customer impact shifts the focus from solution capabilities to tangible business outcomes. This approach aligns sales strategies with customers' strategic priorities, ensuring efforts are concentrated on what matters most to BDMs. By deeply understanding these priorities, sales teams can quickly build trust and establish credibility with influential project stakeholders.

Line of business leaders, who typically hold the budget and final decision authority, are driven by three key motivators: money, risk, and control. Dynamics 365 addresses these motivators with clear, tangible business impacts.

Dynamics 365 offers competitive pricing and robust capabilities, ensuring a strong return on investment. Its seamless integration with existing Microsoft tools reduces the total cost of ownership. Further, Microsoft AI is driving the future of Autonomous Automation, which will enable businesses to minimize costs while continuing to innovate.

With built-in enterprise-grade security, compliance, and privacy features, Dynamics 365 minimizes risks associated with data breaches and regulatory non-compliance. Its reliable infrastructure ensures business continuity and reduces project delays.

Finally, Dynamics 365 provides comprehensive visibility and control over business processes through unified dashboards and integrated data capabilities. This control extends to rapid application development, allowing businesses to quickly adapt to changing needs without relying heavily on third-party providers.

Money: Financial Efficiency and ROI

Cost Efficiency: Dynamics 365 doubles the pace of transformation at about half the cost of Salesforce. Its integration with existing Microsoft assets like Azure, Teams, and SharePoint reduces additional expenditures, delivering superior TCO.

AI-Fueled Automation: Dynamics 365's AI-driven automation allows businesses to scale without increasing headcount, preparing companies for efficient growth during economic recovery.

Streamlined Implementation: Accelerate time to value with Dynamics 365's seamless integration with familiar tools. Unlike Salesforce's higher costs (due to third-party connectors and premium pricing), Dynamics 365 offers cost advantages and price predictability.

Financial Flexibility: Our long-term licensing model includes the ability to scale down if needed, offering businesses financial flexibility.

Boosted Productivity: Reduce clicks and simplify user experiences with Dynamics 365. High user adoption rates are achieved through seamless integration with tools like Teams, Outlook and Copilot. Salesforce often requires additional training and lacks the same level of intuitive integration.

Clear Business Impacts: Proactive service capability reduces the need for reactive support, which lowers service costs. Marketing modules enhance campaign efficiency and effectiveness, leading to higher campaign ROI. This efficiency ensures businesses achieve the expected impact and address complex needs effectively. Salesforce's lack of a proactive service model and fragmented tools often lead to higher costs, and lower ROI.

Risk: Mitigating Risk with Dynamics 365

Robust Security and Compliance: Dynamics 365 offers enhanced data protection and privacy measures, which reduces the risk of data breaches and regulatory non-compliance. Salesforce's security measures often come with additional costs and complexities.

Single Supplier End-to-End Accountability: Microsoft's comprehensive solutions, from applications to intelligent edge devices and cloud infrastructure, eliminate dependencies on third-party providers. This reduces complexity and ensures sustainable, accountable changes.

Unified AI Integration: Dynamics 365 integrates AI into a single, cohesive space, reducing risks from fragmented AI solutions. This unified approach helps businesses leverage AI-driven insights for better decision-making, customer interactions, and process automation, all while maintaining control over a single tenant. Salesforce's AI capabilities are restricted to its own data and often require additional data clouds, which increases cost and complexity.

Omnichannel Support and Unified Customer Profiles: Dynamics 365's omnichannel support and unified customer profiles improve customer satisfaction and retention by delivering consistent, relevant messaging and faster issue resolution. Salesforce's fragmented systems can lead to inconsistent customer experiences and lower satisfaction.

Partnership and Industry Credentials: By combining efforts with partners and leveraging industry credentials, Dynamics 365 ensures successful deployment and ongoing support, which further mitigates risk. Salesforce's partner ecosystem often introduces additional complexity and risk.

Control: Enhanced Visibility and Decision-Making

Dynamics 365 not only improves decision-making and efficiency but also provides the tools necessary to maintain control over complex business processes, ensuring sustained success and growth.

Unparalleled Control and Visibility: Dynamics 365 empowers businesses with comprehensive oversight, enhancing decision-making and workflow management.

Accurate Sales Forecasting: Predictive analytics deliver reliable sales forecasts, enabling precise planning and resource allocation. Salesforce's forecasting can be manual and inconsistent, leading to planning challenges.

Personalized Marketing Efforts: Real-time insights drive targeted marketing strategies, improving customer engagement and campaign effectiveness. Salesforce often requires additional tools and integrations to achieve similar results, increasing both complexity and cost.

End-to-End Workflow Solution: Unlike Salesforce's fragmented approach, Dynamics 365 offers seamless integration across all business processes, ensuring team alignment and operational efficiency. Salesforce's lack of integration can result in data silos and misaligned teams.

Embedded AI-Driven Insights: AI and analytics bring crucial information to the forefront, enabling better decision-making and proactive management. Salesforce's AI capabilities are restricted to Salesforce data, often come with hidden costs and require additional data clouds.

How to Position Dynamics 365 Competitive Differentiators

How: Effectively positioning Microsoft Dynamics 365 against Salesforce requires a strategic approach that emphasizes unique strengths and addresses potential counterarguments. This section provides detailed strategies on how to leverage our key differentiators to build compelling value propositions for Business Decision Makers (BDMs). By understanding Salesforce's tactics and proactively countering them, you can confidently navigate competitive scenarios and showcase the superior value of Dynamics 365.

To successfully engage BDMs, start by clearly defining your prospect profile to craft your initial messaging and engagement narrative. Conduct thorough research before the first contact to understand the prospect's current state and potential needs. More specifically, what are your customers' investor presentations, financial reports and press releases telling you about their business priorities and growth strategies? Use this information to shape and tailor your initial mutual discovery call conversations.

Engage BDMs to understand their objectives, challenges, and needs, focusing on business differentiators related to money, risk, and control. This approach demonstrates your commitment to addressing their specific business challenges and helps establish credibility and trust.

By following these strategies, you can effectively position Microsoft Dynamics 365 as a superior, integrated alternative to Salesforce, emphasizing our strengths in integration, cost efficiency, productivity, and long-term partnership. In summary, position Dynamics 365 as the better **business** decision.

How to Position Microsoft Differentiators

To effectively position Microsoft Dynamics 365 against Salesforce, it is crucial to strategically engage with BDMs and highlight the unique advantages of Dynamics 365 that address executives' money, risk and control concerns. By leveraging thorough research, internal industry expertise, and a comprehensive discovery processes, you can present compelling value propositions that resonate with BDMs' business priorities.

Engage Business Decision Makers Early

- Gain access to BDMs directly or through IT introductions, emphasizing the criticality of understanding the business priorities driving the initiative.
- Conduct thorough research to develop an initial POV, using industry news, financial reports, and Microsoft's Deal Boost tools. The goal is to speak their language and present new (surprising) information that challenges their established buying criteria.

Conduct Comprehensive Discovery

- Focus on understanding your prospect's objectives, challenges, and needs. Then tailor your conversations to address their specific business priorities.
- Use the discovery process to identify business differentiators related to money, risk, and control. This approach ensures your message emotionally resonates with BDMs.

Emphasize Integration and Unified Solutions

- Highlight Dynamics 365's integration with tools like Outlook, Teams, and Azure, which improves productivity and lowers expenditures. This integration reduces the cost of ownership (money), ensures reliable and secure data management (risk), and provides comprehensive visibility and control over business processes (control).

Articulate Financial Benefits and Cost Efficiency

- Present the financial advantages of Dynamics 365, such as lower TCO and faster ROI (money) due to streamlined implementation and existing Microsoft asset utilization. Use case studies to demonstrate clear business impacts and how Microsoft achieves strategic priorities efficiently.

Leverage AI Capabilities for Enhanced Productivity

- Discuss the benefits of AI-driven insights and automation within Dynamics 365, which drive significant productivity gains (money) and improve decision-making (control).
- Highlight tools like Sales Copilot that offer AI-powered assistance, reducing administrative tasks and enhancing user adoption rates. This increases operational efficiency and reduces labor costs (money), minimizes the risk of human error and operational inefficiencies (risk), and enhances overall control through data-driven decision-making (control).

Promote Long-Term Partnership and Support

- Emphasize Microsoft's ongoing support and partnership, ensuring sustainable and accountable solutions. This long-term partnership offers predictable support costs and avoids additional charges (money), provides a reliable support system that mitigates risks (risk), and ensures sustained control over the implementation and evolution of the platform (control).

Countering Salesforce Tactics

Salesforce is widely recognized as the market leader in CRM, known for its "ease of use" and perceived low risk - earning the reputation "you don't get fired for choosing Salesforce." To effectively compete, we must not only mirror their successful strategies but also emphasize the distinct advantages of Microsoft Dynamics 365. By thoroughly understanding Salesforce's tactics and proactively countering them, we can position Dynamics 365 as the superior, more comprehensive choice.

Addressing Salesforce Bias

- Tactic: Salesforce's strong marketing and initial business conversation can lead to a pro-Salesforce bias.
- Counter: Address potential biases early by emphasizing Microsoft's integrated (platform) approach. Focus on the tangible business outcomes that Dynamics 365 delivers.

Salesforce's Focus on Business Decision Makers

- Tactic: Salesforce sellers often avoid IT and focus on the BDMs who hold the CRM budget (and the desired business outcomes)
- Counter: Leverage IT support to quickly secure access to project BDMs and ensure your message aligns with their strategic priorities. Highlight how Dynamics 365's technical strengths translate into real business value.

Salesforce's Industry Leadership

- Tactic: Salesforce leads with industry-focused messages
- Counter: Conduct thorough discovery to develop a unique point of view about the customer and their industry. Leverage partners and Microsoft industry experts to bring a strong industry perspective. Use envisioning workshops to demonstrate how Microsoft enables end-to-end customer experiences, speaking the right industry language throughout the process. Reference and showcase Microsoft's industry clouds.

Salesforce's Quick-to-Demo Strategy

- Tactic: Salesforce aims to get BDMs to a demo quickly using pre-built, industry-standard demos that highlight their "shiny" user interface and industry functionality.
- Counter: Ensure you are having business-oriented conversations to understand strategic priorities. Show you care about their business and are committed to delivering tailored solutions that address their challenges and meet their objectives, not just generic functionality.

Consistent Salesforce Messaging

- Tactic: Salesforce updates its pitch quarterly and requires sales reps to be certified on it, ensuring a consistent message.
- Counter: Stay current on the latest Dynamics developments and understand the Dynamics Pitch Deck. Deliver a consistent and compelling Pitch Perfect message that clearly articulates Microsoft's differentiators.

Initiating Conversations In Salesforce Compete Scenario

Why: Your initial prospect interactions often shape the tone of your entire sales process. To help make better decisions, your prospect's 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 Salesforce's marketing efforts focused on business leaders, it is likely the customer is likely more than 50% through their buying journey before Microsoft is engaged. This means it is critical to be extremely well-prepared for your early prospect discovery/positioning calls.

What: Developing a clear understanding of your prospect prior to engaging is crucial to crafting your initial engagement narrative, as is understanding the most likely Microsoft value propositions (given their industry and market segment). Conducting thorough research in advance of "first contact" develops an understanding of the prospect's current state as well as their potential needs and challenges, which is then used to shape and tailor your initial mutual discovery call conversations.

How: Customers are more likely to change their buying criteria and vendor biases when confronted with surprising information about their business. When engaging business executives, you need to develop an initial point of view (POV) that clearly communicates Microsoft is a serious contender. Prior to your initial discussion, research your prospect's websites, connect on LinkedIn, and search for relevant industry news that could establish common points of connection. Inputs into your POV should come from external sources (industry news, financial reports, website, etc.), customer insiders (IT, lower-level employees, end users, etc.), and Microsoft resources (Deal Boost). Additional resources and examples of a more comprehensive discovery process are available on the "Driving Effective Discovery" page of this playbook.

Research Prospect's Current State

To create a personalized and memorable first-contact discovery experience, you first need to research and understand your prospects' "probable" current state:

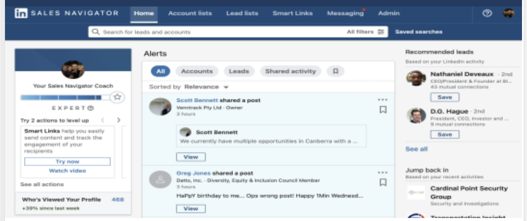
Industry/vertical:

- Financial Services
- Expanding or trying to compete with big banks leveraging customer experience
- Has contact center/service organization

Struggling with:

- Multiple systems driving business processes
- End-to-end workflow visibility and integration
- Fragmented data and customer picture
- Leveraging AI to drive productivity and innovation
- High costs and inefficiencies
- Low user adoption rates
- Lack of alignment between business and IT
- Integration challenges
- New business models (services)
- Lack end-to-end customer storytelling

LinkedIn Research



Explore

- Connections
- Industry
- Role history
- Employment history
- Posts

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. Also explore relevant industry news sources to identify external industry drivers and market forces that are likely impacting your prospect's business growth or risk profile. Examples might include:

Core Business Challenges

- No clear AI strategy
- Customer satisfaction declining
- Do not have a clear 360 view of customers
- Disjointed workflows – multiple systems
- Lack of integrated communication platforms
- Employee satisfaction and attrition rates
- New service agent training

Common Project Trigger Events

- Losing customers or market share
- Poor/costly business decisions based on inaccurate data
- Expanding operations
- Salesforce price increase

Common Desired Business Outcomes

- Higher user adoption/
- Lower employee attrition
- Increased customer satisfaction and sales

New Desired Capabilities

- AI driven workflows and customer insights
- One system of customer truth with integrated telephony
- Accurate real-time customer data
- Customer journey and engagement metrics

Conduct Credentialling Discovery

Develop and optimize an inventory of broad project-oriented discovery questions that drive meaningful project discovery calls.

Current System Assessment:

- What do you currently use to manage your sales, services and marketing operations?
- How well does that system meet your needs?
- How satisfied are you with how quickly IT makes changes to your business processes?

Pain Points and Challenges:

- What specific challenges or limitations have prompted your interest in exploring new solutions?
- Where are you experiencing issues in your sales/support processes?

Ideal Solution and Desired Outcomes:

- What would an "ideal" solution look like?
- How do you envision a new system improving your business processes and outcomes?

Operational Bottlenecks:

- What pain points or bottlenecks do you experience in your current sales/service/marketing process?
- Are there any specific areas where you feel efficiency could be improved?
- How comfortable are you with the accuracy of the customer/sales data to inform executive decision-making?

Risks :

- What do you perceive as the greatest risks or in your current sales/services/marketing operation(s)?
- If you are actively seeking a solution, what are your top concerns about implementing a new CRM system?

Selling to Multiple Buyer Personas

Why: Adapting your approach and messaging for different project stakeholders (based on their persona profile) is critical to fully understanding the project drivers, business case and buying criteria. Tailoring your communication to resonate with each stakeholder also establishes relevance and increases their perceived value of you as a sales professional. Further, in Salesforce compete opportunities the stakeholders for sales, service and marketing are likely different decision makers, requiring a multi-pronged stakeholder engagement strategy.

What: Stakeholders can be roughly categorized into "What," "How," and "Why" personas, with each possessing unique business priorities and project perspectives. "What" personas are often primarily focused on the project structure and the technology components. "How" personas are focused primarily on operational process improvements, whereas "Why" personas are almost always strategic thinkers concerned primarily with financials, risk, and control. While job titles may not always align perfectly with the chart on the right, almost all opportunities will inevitably involve one or more IT resources (what), a few senior line-of-business managers (how), and at least one senior executive/owner (why). You need to speak to them in their own language.

How: Leverage the persona framework to help map sales, marketing and service specific challenges, use-case scenarios, and key metrics to each project stakeholder. You can then drive structured discussions that resonate with each of them.

Understand Key Stakeholders Concerns

Crafting engaging and effective prospect discussions requires tailoring your messaging to common sales, service and marketing buyer personas. Configure the below framework to align with their specific challenges, use-case scenarios, and key metrics, (ideally within a focus industry).

Key Stakeholder	Core Business Challenges	Use Case Scenarios (desired)	Key Impact Metrics
Executive Management • **Owner** or CEO • CRO • VP of Sales • CMO • VP of Customer Experience	• Employee burnout and attrition • Sales / revenue forecasting • Declining sales or low win rates • Customer satisfaction • Engaging with customers in multiple channels • Sustaining competitive advantage • New market entrants • Declining margins • Remote work empowerment	• Manage the customer journey across every stage of the marketing, sales and service flows – with clear data from customer engagement with marketing content and sales channels including always-on service capability • Meet customer demands with more accurate forecasts due to increased user adoption, better data and AI infused forecast insights	• Revenue growth • Market share • Profitability (operating margin) • Customer satisfaction • Employee satisfaction / attrition • IT costs
Operational Management • Sales • Customer Service • Services	• Limited visibility into real-time data for marketing campaign effectiveness, sales performance, customer satisfaction and revenue forecasting • Manual, and inefficient customer service processes that increase time and costs • Inability to quickly create and execute highly targeted marketing campaigns • Pipeline hygiene • Sales rep performance	• Real-time pipeline management and AI created automated task reminders enable sales reps to prioritize high-value opportunities to close deals more effectively • Automated lead management and follow-up processes increase lead conversion rates and drive sales growth • Comprehensive customer view and integrated knowledge base improve first call resolution and customer satisfaction • Campaign management and lead scoring optimize conversion rates and reduce customer acquisition costs	• Forecast Accuracy • Cost of sales as a % of total revenue • % Revenue from new & existing customers • Win rate / pipeline aging • Quota attainment • First call resolution • Average handle time • Cost per contact • Customer acquisition cost • Marketing conversion rates • Lead generation
IT/End Users • **IT manager** • Internal IT Help desk	• Reliable, scalable and ethical AI • Maintaining security • Managing customer data in multiple locations (compliance) • Integrating into IT systems • Escalating IT and telephony costs • Managing a challenging network of legacy technologies	• Single enterprise AI platform • Modernize IT environment • Enterprise grade cloud security • Cybercrime protection • Identification and remediation of insider risks • Remote and frontline worker productivity • Regulatory compliance	• IT costs • IT budget as % of revenue • # of identified and defended attacks, breaches, fraud attempts • Remote/frontline workers security incidents (#) • Security audit score (avg.)

Make the Right BDM First Impression

Why: Customers and Microsoft often have contrasting perspectives when it comes to CRM projects. While Microsoft tend to focus on technical details and solution features, customers prioritize business drivers, project objectives, and project risks. This difference is critical in a Salesforce compete scenario. Salesforce is very effective at creating compelling narratives focused on business transformation and strategic vision. To effectively counter this, it's essential to align your approach with the customer's mindset, focusing on their business objectives and risks. By doing so, you build trust, establish rapport, and demonstrate your commitment to addressing their needs while highlighting how Dynamics 365 is better suited to meet their goal

What: Ask targeted questions about their business drivers, challenges, desired capabilities, and project risks. Prioritize your prospect's challenges and needs first, so you can establish a solid foundation for addressing their requirements throughout the sales cycle. To be most effective, the focus must shift from the strength of the platform to uncovering the business benefits provided by Dynamics 365. Emphasize how Dynamics 365 can mitigate their risks, offer a more tailored solution, and adapt more flexibly to their evolving needs compared to Salesforce.

How: Tailor your discovery questions based on your knowledge of your prospect, their priorities, and their industry. Focus on their business objectives, current challenges, desired capabilities, and perceived project risks to develop a complete picture of their project and (more importantly) business drivers and needs. Ensure your questions guide the conversation towards how Dynamics 365 can deliver superior value and address specific pain points that Salesforce might overlook.

Open with Credentialing Questions

Leveraging your understanding of your prospect's current state and industry, craft a targeted list of business-level discovery questions that drive meaningful, mutually beneficial conversations.

By grounding yourself in the prospect's industry drivers and market forces (and their impact on key operating metrics), you will naturally foster a deeper level of emotional engagement, forge stronger connections, and develop a deeper understanding of why your prospect is prioritizing this project over others.

One way of accomplishing this goal is to develop discovery questions that clearly communicate that you understand their industry. Some examples include:

Sample Credentialling Discovery Questions

- **Credentialing statement:** Did you know..... . XX**%** of companies experience customer service agent attrition greater than %?
- **Industry credentialing question:** How is your organization adapting its customer service process to account for the growing self-service trend?
- **Credentialing statement:** Did you know..... . XX**%** of companies are implementing AI to improve, meeting preparation, and provide real-time customer engagement tips?
- **Industry credentialing questions:** Have you identified any compliance or security risks within your legacy systems due to customer data residing in multiple (industry-specific) applications/locations?
- **Credentialing statement:** Did you know...by 202X, Y% of businesses plan to use Autonomous AI to improve operations and cut costs?
- **Industry credentialing question:** What impact has the move to work from home customer service agents had on your business? How is your organization working around those issues?

Conduct Emotional Discovery with Business Decision Makers (BDM)

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".

This approach can be further enhanced by sequencing your questions into "what, how, and why" discovery chains. Sequence your questions into the following framework:

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).**

Ensure the conversation remains focused exclusively on them, until they ask about how a Microsoft solution could address their business and project objectives.

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?	What are the expectations in terms of operational improvements and business impact?
Current Challenges / Pain	What aspect of your current system does your sales, and/or service/marketing, find most frustrating?	How is the group working around those bottlenecks/issues today?	Which operating metrics are being negatively impacted by these challenges?
New Capabilities	What are you looking to do with your new CRM system that you can't do today?	How will that change how you approach to <lead generation, pipeline hygiene and forecasting, marketing campaigns, etc.>?	Once the new system is up and running, what impact do you expect it to have on your ability to <increase win rates, improve customer satisfaction, grow pipeline, etc.>
Risks	What do you see as the biggest challenge to your organization in implementing a new CRM solution?	Have you thought about how you will mitigate that risk?	Why is it so important to focus on reducing that risk?

Differentiating with Industry

Why: Industry focused sales professionals typically achieve very high win rates. Anchoring your sales cycle in an industry narrative is crucial as it shows you understand how industry drivers are impacting your prospect and their unique business processes. Salesforce almost always leads with an industry credibility narrative, especially with CEOs and leadership teams. To compete, Dynamics 365 sellers must leverage an industry-focused approach that resonates deeply with business leaders. A compelling industry point of view allows you to challenge or disrupt the buying process, reinforcing Dynamics 365 as the superior choice.

What: To create industry differentiation, you first need to research and understand your prospects' industry drivers, common challenges, core business processes, and key metrics. Align your messaging with these pain points to ensure they resonate. Highlight how Dynamics 365 and Microsoft partners address industry challenges more effectively than Salesforce by emphasizing industry-specific workflows, customizable solutions, and integrated AI capabilities. Showcase Dynamics 365's ability to provide tailored solutions that evolve with industry needs.

How: Research and immerse yourself in the industries you frequently encounter. Stay current on industry news, trends, and emerging technologies. Utilize industry-specific resources, case studies, and success stories early in your sales cycle. Consistently incorporate industry language and references to reinforce your credibility. Use this knowledge to create compelling narratives that showcase how Dynamics 365's industry-focused solutions outperform Salesforce, addressing both strategic and operational needs. Additionally, strongly position strategic MCEM engagements (Envisioning, BVA, etc.) that involve the broader Microsoft ecosystem, including partners with industry expertise and IP, to position Microsoft as a transformative partner with a 'seat at the table' for generating ideas and influencing strategic roadmaps.

Define Common Industry Use Case Scenarios

The first step in pivoting to an industry narrative, is defining the core business drivers and corresponding industry use case scenarios you anticipate encountering most often. The next step is to map your use case scenarios to Dynamics 365 capabilities. The following chart provides examples of some of the most common business challenges and use case scenarios for both four different industries. **Action:** Develop similar content for your prospect's industry.

FSI Business Drivers:

- Know Your Customer (KYC) regs.
- Personalized customer experiences (new FINTECH entrants)
- Long-term relationship banking
- Increasing customer service expectations
- BASEL accord
- Increase in fraud
- Declining loyalty (churn)

Retail Use Case Scenarios:

- Conversational AI chatbots to provide instant responses to customer inquiries
- Customer self-service
- AI guided insurance claims process
- Using AI algorithms to detect and prevent fraudulent activities
- Streamline claims management (P&C Insurance)

Healthcare Business Drivers

- Increased security risks
- Patient privacy and security regulations
- Inaccurate or siloed patient data
- Shortage of physicians and nurses
- Healthcare reform
- Escalating medical delivery costs
- Declining public funding
- Shift to outpatient care
- Shortage of physicians and nurses

Healthcare Use Case Scenarios:

- Data sovereignty and regulatory compliance
- Patients' outreach and engagement (telemedicine)
- Health/care team collaboration
- Improved patient, clinical and operational insights
- Protect health information
- Customer portals (secure)

Bring Industry Insights into Your Discussions

Understanding what is happening within an industry (industry drivers, market forces, business challenges, core business processes, etc.) creates a foundation for driving meaningful prospect conversations.

You also want to bring new industry insights to your prospect conversations that result in partial or material changes to their project approach or scope.

The template covers four "industry insight" categories. The first two focus on project risk and operational improvements, which are often the domain of the (tactical) project lead.

The second two focus on industry drivers and emerging trends, which are more aligned with (strategic) leadership.

Action: Customize and refine these insights to align with your focus industries or vertical segments.

	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 unified commerce perspective, we don't see anything related to leveraging real-time omnichannel sales and cost data to centrally manage promotions across all channels. Most of the retailers we're working with have identified this 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 organisations 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?

Qualifying Dynamics 365 Opportunities

Why: Accurately qualifying new opportunities is crucial to avoid wasting time, scarce resources, and expenses on opportunities that may never close. When competing with Salesforce this is magnified as Salesforce often biases the customer in their favor before Microsoft engages. The risk that Microsoft is used as column fodder in a Salesforce compete deal is high. Mastering this skill, including identifying when an RFP was written for Salesforce, enables you to focus solely on opportunities that align with Dynamics 365 strengths and facilitate value-add conversations with stakeholders. The result is higher win rates, shorter sales cycles, and larger deals.

What: Effective qualification goes far beyond traditional BANT (Budget, Authority, Need, Timeline) criteria. It requires a clear understanding of the emotional business drivers and anticipated outcomes motivating decision-makers. It involves understanding the consequences for the prospect of not moving forward with a new solution and obtaining confirmation of the selection process and timeline.

How: Use a tailored scorecard to quantitatively measure opportunity qualification. This scorecard should assign ratings and weighting factors to each category, allowing for a calculated total score to determine the overall opportunity potential. Use this information to guide your decision to pursue or withdraw from the opportunity. Effective qualification starts with identifying and researching several target business contacts who can be strong champions within each account. Leveraging Microsoft team members and friendly IT contacts with the warmest possible relationships for initial referrals is crucial. At Salesforce, executive alignment happens in layers: Salesforce RVPs align with Customer Directors/VPs, AVPs with Customer VPs/SVPs, and SVPs with Customer C-level executives. Dynamics sales teams must mirror this strategy to build strong executive sponsorship.

1. Use a Scorecard to Qualify the Opportunity

Employ a scorecard not as a rigid measure, but rather as a guiding tool for collectively reviewing and analyzing the strength of your opportunity's qualification. Tailor the scorecard to the applicable workload and specific industries/verticals. Assign ratings and weighting factors to each category, calculate total scores, then determine the overall opportunity score. A low qualification does not necessarily mean you should disengage. In many situations it means there is an opportunity to change or reframe the project with the prospect to reduce their project risk.

Example of Scorecard Criteria	Score	Weighting	Score x Weighting
The prospect has over 50 employees and is in Microsoft strategic focus industry		2	0
Customer has outdated or siloed technology and is utilizing multiple systems or spreadsheets to drive business processes		1	0
Customer has compliance risks, such as HIPAA, GDPR, PII data requirements		1	0
Customer's IT group is Microsoft friendly		1	0
Customer has low user adoption		1	0
You and/or the partner bring significant industry experience with relevant referenceable customers		2	0
You have technical and industry expert bandwidth to properly pursue		1	0
Licensing and Implementation Costs will be competitive and within customer's spending range		1	0
We have access to Business Decision Makers to understand their expected business outcomes		2	0
Customer does not have status quo bias towards incumbent		1	0
RFP contains Salesforce-friendly verbiage (e.g. customizable user experience frameworks, robust training environments, and third-party app ecosystems)		-3	0
		Aggregate Total Score	**0**

2. Identify and Confirm Prospect's Timeline

A big part of your responsibility is to confirm the critical steps in the prospect's selection process and establish a corresponding timeline. Creating a simple one-dimensional timeline and discussing it with your prospect's coach and key decision-maker allows you to ensure alignment and avoid any surprises.

February 12th
Mutual discovery call to better understand sales, service and marketing team collaboration requirements.

March 7th
Business process review with functional leads.

March 30th
Project review and cloud security discussion with Director of Information Technology.

April 18th
Microsoft Dynamics 365 demonstration to selection team.

April 30th
Proposal and implementation approach review with CFO.

Driving Business Value with Whiteboard Project Discovery Sessions

Why: Once you and your prospect determine there is a good high-level fit between their requirements and Dynamics 365, it's time to deepen the discovery process with an interactive whiteboarding session that leverages Microsoft's Business Value Framework (BVF). Whiteboarding is an inherently collaborative experience that helps break down the "us vs. them" dynamic that is often present in the early stages of the sales cycle. This approach also leverages the picture superiority effect—pictures and images are more memorable than words, enhancing recall. Additionally, progressive disclosure creates curiosity and suspense as you reveal one segment at a time, drawing your prospect into the discussion and reinforcing the positive bias established during earlier discovery calls.

What: The purpose of the whiteboarding session isn't just to collect the same information that's been shared with Salesforce. You need to uncover new information that can be leveraged to influence and control the buying process, selection criteria, and stakeholder priorities. The BVF walks your prospect through five critical project conversations: business drivers and objectives, current challenges, new desired capabilities, project risks, and finally, the anticipated project outcomes. The BVF is designed to alternate between positive topics (project objectives) and negative topics (current challenges) to create a "pressure on", "pressure off" experience that will keep your audience deeply engaged.

How: Rather than agree to a "traditional" project discovery session with the IT (what) and functional subject matter experts (how) resources, instead position a collaborative discovery workshop that includes the BDMs (why) as well, early in the sales cycle. Ideally this exercise should be completed during Listen & Consult but could also be used to expand the potential value realization during Inspire & Design.

Whiteboard Structure

The CRM project discovery whiteboard guides your prospects through five critical conversations:

1. The business drivers and project objectives driving the initiative.
2. The current business and operational challenges aligned with the project.
3. The business or technical capabilities they expect to have after they have deployed the sales/service/marketing solution.
4. The potential project risks that could undermine project success.
5. The anticipated business outcomes/impacts of their CRM investment.

Capturing this content in a collaborative, interactive manner allows you to pivot from section to section in a way that's simply not possible in a Teams call or a guided PowerPoint session. For example, you will often surface additional business drivers during your current challenges discussion. Or you might need to expand some of the new capabilities once you fully understand the business outcome expectations.

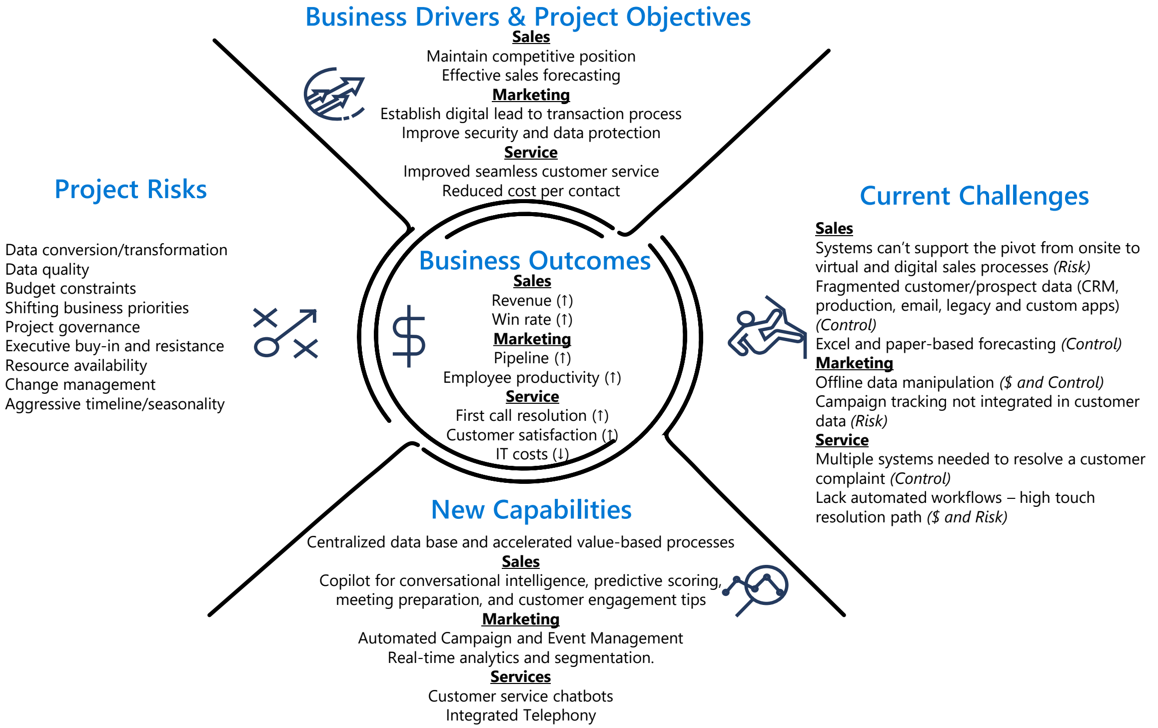
Whiteboarding (virtually or onsite) allows you to shift between topics and uncover new, strategic project information. This non-linear approach drives greater prospect disclosure, open, transparent communication and it often leads to game-changing "educational insight" opportunities.

Facilitation Preparation

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!

Below is an example of a completed CRM project discovery whiteboard that captures some of the most common business drivers, challenges, new capabilities, project risks and anticipated business outcomes.



Engaging the CIO/TDM

Why: There are always two critical decision makers who determine whether Microsoft or Salesforce is selected. The first, the CIO or Technical Decision Maker (TDM), cares deeply about issues like governance, security, risk, costs, and often losing control of applications. To ensure this decision-maker supports a Microsoft solution, you need to frame up and position your anticipated solution recommendation and Microsoft differentiation in the right context.

What: Coming out of your project discovery sessions, you will be clear on your prospects' project objectives, anticipated scope 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, supporting and extending the solution, which includes application development strategies, integration, data management and anything related to AI. The CIO/TDM Project Review is specifically designed to facilitate this discussion.

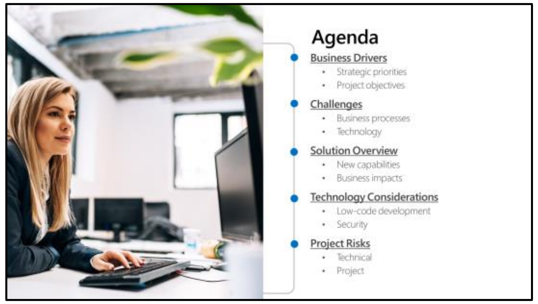
How: The CIO/TDM Positioning Presentation covers eight important topics:

- Business drivers
- Current challenges
- Project objectives
- Business impact
- Microsoft solution overview (high-level)
- Technology considerations
- Project Risks
- Workshop (or next step) recommendation

Facilitating a conversation anchored in these critical topics demonstrates to the CIO/TDM that Microsoft understands both the business and technical priorities of their low-code initiative.

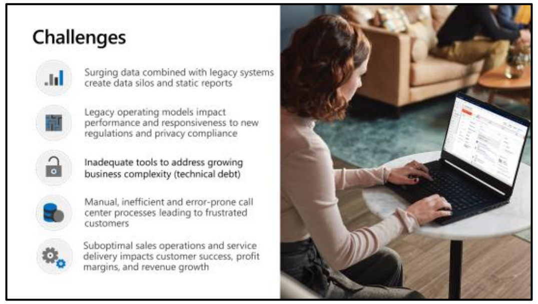
Focus on Business Impact

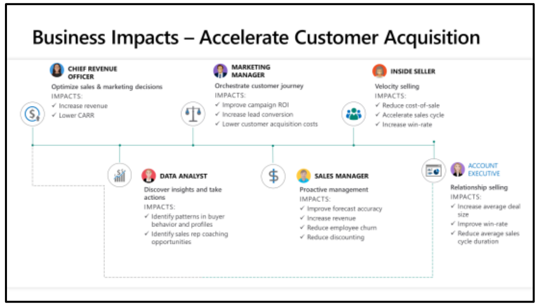
Open the session with a review of the **business drivers** and **challenges** that are aligned with the CRM initiative. This approach quickly demonstrates this is not just another technology "pitch". Then shift over to the **project objectives** and **business impacts (benefits)** their organization expects from their CRM project investment. Establish a clear line-of-sight between their strategic priorities and Microsoft's understanding of the project. For clarity, this is NOT a presentation. Engage the CIO/TDM after reviewing each slide to hear their perspective. They may not agree with everything that was shared with you during discovery.

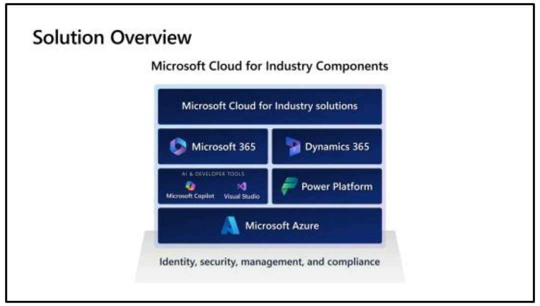


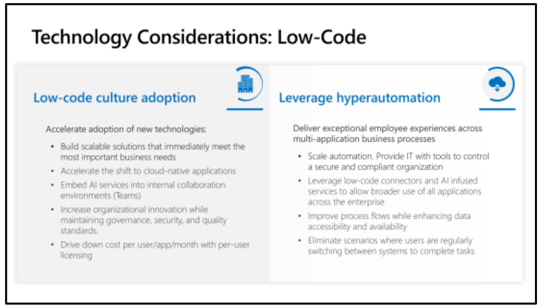
Lower Project Risk

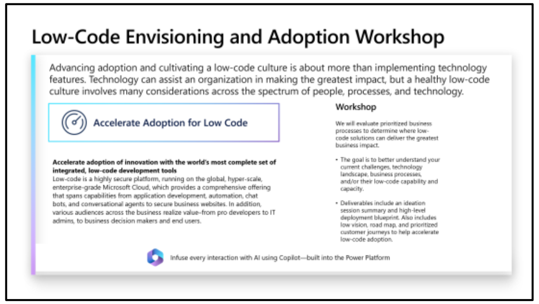
The second half of the discussion focuses on what CIOs/TDMs care about most: your recommended solution, how a Microsoft solution impacts and aligns with their current IT strategies and processes, and any potential risks that could undermine project success. Rest assured they will be fully engaged during these topics. And finally, end the session with a strong recommendation to engage in a collaborative activity with Microsoft and/or the chosen partner to address one of the potential project risks. This approach clearly shows that your sales and project strategies are guided by the prospects' interests.











Creating a Strategic Tipping Point

Why: CRM 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 Salesforce. Executives may have a premature cognitive commitment, forming a strong initial preference often based on limited information, for Salesforce. 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.

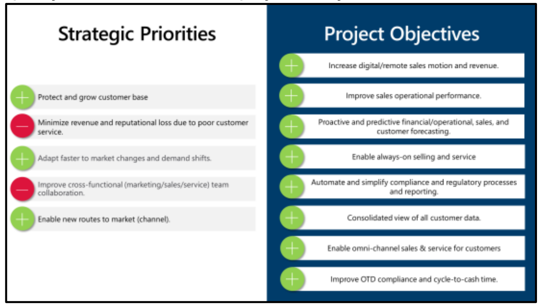
What: So, how do you take your BDM meeting and turn it into a strategic tipping point experience that biases that critical stakeholder towards Microsoft? The answer is to focus your discussion on what they care about most: business impact and project risk. Business leaders have been conditioned to expect 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.

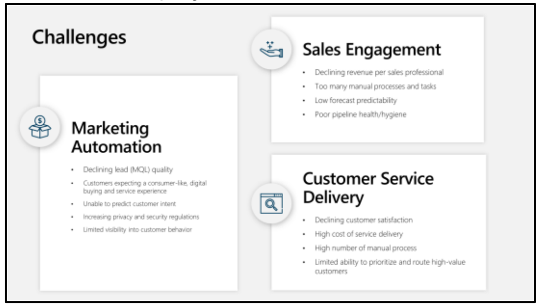
How: With your project discovery and CIO/TDM sessions completed, you understand the "what" and the "how" of the project. Now it's time to validate and confirm the "why". It's also time to bring something new and unexpected to the BDM that potentially opens the door to a collaborative MCEM engagement, such as an Envisioning workshop or BVA. The BDM Project Impact Summary covers six important topics:

- Strategic priorities and project objectives
- Challenges
- Current situation
- Business impacts
- Project risks
- MCEM or Partner engagement recommendation

Align the Project to Business Value

The purpose of the session is to 1) confirm and validate your understanding of the business drivers and anticipated business impacts of the CRM initiative and 2) position a potential MCEM engagement that enables you to influence/control the selection process. The discussion starts with the **"why"**, the internal and external factors driving the initiative. It then moves on to **"how"** their business challenges show up operationally, followed by the **impact** they have on key operating metrics (Current Situation). The impact represents the price the company will continue to pay if they choose not to move forward with the project.





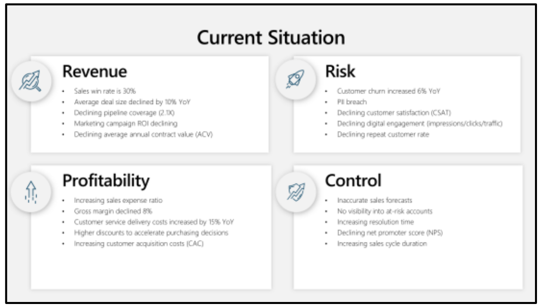
Disrupt the Solution Vision

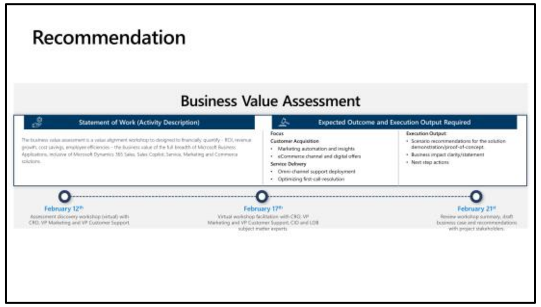
You then pivot to the anticipated business benefits they expect from their CRM initiative. Only use information that was collected from the prospect during your discovery sessions. The data **must** come from them, and it must be measurable. Be as specific as possible.

Next, discuss the project risk profile. Review any risks that could undermine project success and identify the one **non-technical** risk that could be addressed through a structured engagement with Microsoft or your chosen Microsoft partner.

The final step is to provide a mechanism or a way for Microsoft and/or your industry partner to lower the risk profile of the project or expand the potential value of the initiative. For example, if the project does not contemplate AI, you can recommend a focused Envisioning workshop to prove out the economic and strategic impact of including it in the project.

This leadership-level project overview is specifically designed to 1) demonstrate Microsoft's understanding of your prospect's business priorities and 2) position a collaborative "event" , ideally a partner advisory service or MCEM engagement, that enables you to influence/control the selection criteria and decision-making process.





Reframing the Demo Experience

Why: Taking a "less is more" approach to solution demonstrations challenges the common misconception that the more functionality you show, the more likely it is you will be selected. Unfortunately, the opposite is often true. Overwhelming prospects with too many new capabilities frequently leads to confusion and a negative Microsoft bias. Salesforce excels at quick, visually appealing demos that captivate business users early in the sales cycle. To compete, it is crucial to adopt a lean, value-focused approach that emphasizes the unique benefits of Dynamics 365. Demos will always play a role in the selection process, but adopting a streamlined strategy focused on key business outcomes will more effectively differentiate Microsoft from Salesforce.

What: The Demonstration Plan has three key objectives: 1) limit your demonstration to the critical functional requirements that will deliver most of the business value, 2) demonstrate a clear understanding of your prospect's business challenges, and 3) showcase any industry-specific functionality, including partner-developed IP that will accelerate value realization. The Demo Plan validates key emotional elements such as core business challenges, costs associated with doing nothing, and risks. More importantly, aligning key functional requirements with primary business challenges underscores your business acumen and industry knowledge. Given Salesforce's tendency to showcase industry-standard demos quickly, your approach should highlight tailored solutions that address your prospect's specific needs and pain points.

How: Populate the Demonstration Plan using the insights you gained from your stakeholder discovery conversations and industry research. Share and confirm the Demo Plan with the project lead and BDM in advance, then reference it at the beginning of the demonstration to anchor the session in what they care about most, their core emotional business priorities. This approach ensures your demonstration resonates on a deeper personal level, than Salesforce's more generic approach.

Build a Demonstration Plan Based on the Core Project Priorities

1. Create a focused Demonstration Plan that links your prospect's desired functionality (what they want to see) directly to their most important business priorities, objectives and challenges. It is critical to call out both the current impact (negative) of current state, as well as the anticipated benefits (future state) they would realize after they implement a Microsoft solution. The plan should:

a) Focus on important functional elements that address your prospect's challenges, and clearly demonstrate how these new capabilities are connected to specific needs.

b) Highlight how key Microsoft strengths, such as advanced AI, platform integration, and unified customer profiles drive efficiency, better business outcomes and higher customer retention rates.

c) Leverage unique partner-developed solution elements (IP) that differentiates Microsoft from Salesforce. For clarity, the overarching purpose of the Demonstration Plan is to limit the solution demonstration to the core functionality that will deliver most of the project benefits.

Value Chain Step	Business Challenge	Current Impact	Demonstration Requirement	Anticipated Benefits	Comments
Customer Service	• Long Handling Times • Dissatisfied Customers	• Customer satisfaction with how their issue is resolved is less than 70% • Costly overtime is increasing per contact cost by 15% • Contact Center morale is at an all-time low resulting in high employee turnover	• AI conversational knowledge base • Automated case resolution workflow	• 90% Customer satisfaction • Reduce cost per contact by 25% • Reduce turnover to less than 5% annually	• Currently reps must access multiple systems
Pipeline Management / Forecast	• Sellers are not entering data or keeping opportunities current	• Limited visibility into opportunities and forecasted revenue commitments • Senior management is making forecasting, scheduling and planning errors due to poor data quality	• Outlook and Teams integration • AI guided insights for sellers • Sales dashboard	• Increase in quarterly forecast accuracy to 90% • Increase win rate by 15%	• CFO believes there is a hidden pipeline that he/she cannot quantify when reporting results

2. Share Demo Plan with Decision Makers for Confirmation After you've drafted your Demonstration Plan, share it with the Project Lead (IT) and Business Sponsor (BDM) for feedback and approval. Encourage them to provide their comments directly in the document or provide a link to a shared file to drive greater ownership of the demonstration flow and focus.

To jsmith@contoso.com

Cc

Demonstration Plan Confirmation

Draft saved at 11:41

contoso demonstration plan.xlsx
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John,

Thank you again for bringing together your sales, service, and marketing team members to help us better understand your current business process challenges. The discovery session provided the depth of detail we needed to prepare for next week's demonstration.

To ensure we focus on the new capabilities that address Contoso's customer relationship management and marketing objectives, I have attached a demonstration plan that captures our understanding of your critical functional requirements and their alignment with your current business challenges. Please confirm this summary accurately reflects your priorities.

Lastly, there are a few data points in the demonstration plan that we have not discussed. Please take a few minutes to fill in the missing information, and I'll ensure we include it in the demonstration plan.

Thanks in advance,

Creating a Compelling and Differentiating Pitch

Why: Landing a compelling "pitch" is critical to reinforce a strong pro-Microsoft bias at the end of your prospect's buying journey. A strong pitch focused on business outcomes and Microsoft's long-term customer partnership model differentiates Microsoft from Salesforce. Your business discovery and industry research enables you to position your solution in relation to the challenges, objectives, priorities, risks and emotional triggers your prospect is facing. This approach allows you to guide the project BDMs through an emotional journey that compels them to move forward with a Microsoft solution.

What: The Proposal Business Review is a leadership-level project proposal review that aligns your recommended Dynamics 365 solution with your prospect's strategic business priorities, operational challenges and desired outcomes. The content follows an intentional emotional arc, that first introduces tension, then provides relief (in the form of a Dynamics 365 solution and anticipated project/economic impact). Sequencing your content in the right order is critical.

How: Open by revisiting the project business drivers and objectives driving the initiative. Then, review the operational challenges at the root of their pain and confirm the impact on current state (through the emotional lens of money, risk, and control). Provide a high-level overview of the solution, including a powerful dashboard image representing business insights they **do not have** today and can only achieve with the Dynamics 365 Data Platform. Additionally highlight how Copilot will innovate and improve the efficiency of their business processes. Review the project risks then finish with anticipated business impact/Return On Investment (ROI).

Deliver an "Emotional Journey" Proposal Business Review Presentation

The Proposal Business Review strategically aligns your prospect's business and operational challenges, desired outcomes and risks with the unique capabilities of your recommended Dynamics 365 solution. For clarity, this is a business discussion summarizing what your prospect has shared with you during the sales process. **Below are some common Dynamics 365 examples:**

Business Drivers

- Inflation changing customer behavior, leading to margin pressure
- Leverage technology to maintain competitive advantage and enable new business models
- Increasing compliance, regulatory oversight and sustainability legislation
- Customers demanding self service capabilities
- Inaccurate forecasting

Project Objectives

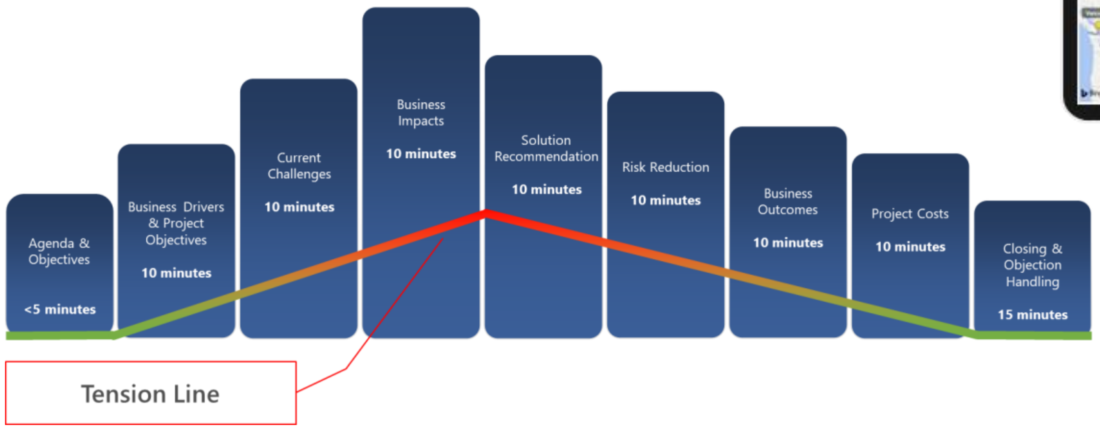
- Optimize and automate (digitize) the contact center
- Reduce customer service costs with AI Chatbots and an integrated knowledge base
- Automate compliance and regulatory processes and reporting
- Increase year over year sales revenue and gross margin

Challenges

- Limited governance around customer data security and compliance
- Disparate systems and multiple data silos
- Disconnected business processes
- Time-consuming knowledge base
- Delayed reporting impacting decision-making

Business Outcomes

- Increase customer satisfaction
- Reduce customer service costs and handling times



Focus on Risk, Control & Project Impact ($)

When it comes time to discuss how Dynamics 365 can solve your prospect's project problems, always provide a clear overview of your solution, including a visual dashboard (see example below) that demonstrates how leadership will be able to make better decisions and improve their control of the business.

Review and address all legitimate project risks, then highlight how the proposed project approach, or unique capability/expertise, mitigates them. End with a review of the anticipated business case and establish a clear connection between the Dynamics 365 solution and the prospect's Return on Investment (ROI).

Overcoming Common Objections

Why: Overcoming objections is critical to sales success, particularly when competing against Salesforce, which is often perceived by prospects as the safe choice. Unfortunately, few sales professionals understand that objections come in two very different forms. The first, logic-based objections, are relatively easy to address by providing new information that corrects a misunderstanding or bridges a knowledge gap. The second, emotional-based objections, are often anchored in resistance that requires a very different approach. Salesforce's strong brand presence, executive relationship building, and market reputation can create emotional barriers that need careful navigation.

What: Prepare objection handling strategies for two different objection categories: logical and emotional. Logical objections require sales professionals to provide new insights and reframe misinformation. Emotional objections require sales professionals to ask several very specific questions to get to the core of the (unspoken) resistance. Only when the actual objection is surfaced can "new information" be considered and heard. In the context of CRM, addressing objections effectively can demonstrate the superior capabilities and benefits of Dynamics 365 in sales, service, and marketing scenarios.

How: The first step is to create an inventory of thoughtful questions you can easily ask when encountering what you feel/know is an emotional objection. Watch the two role-play videos to better understand the key differences between handling logical and emotional objections, then practice in a "safe" environment with your colleagues until you feel you can confidently execute this approach in a prospect scenario. Additionally, leverage case studies and success stories to provide concrete examples of how Dynamics 365 has successfully addressed similar objections and delivered tangible business value.

Empathy Objection Handling (Emotional)

Many sales professionals struggle with objection handling because they try to bring logical arguments to emotional situations. More importantly, they adopt a blunt force two-step objection handling process. For example, they ask a project gatekeeper or CIO to facilitate an introduction to the business sponsor, and the request is denied. Sellers often respond by attempting to convince the CIO to change their mind. Which never works. To predictably and effectively overcome difficult objections and resistance, you need to adopt a new approach that follows five important steps.

1. **Document and understand the common objections** you will typically encounter in most sales cycles.
2. **Identify the core objection** using an inventory of thoughtful probing questions designed to surface the "real" (hidden) objection.
3. **Acknowledge the objection is valid** and **empathize** with the gatekeeper/CIO. In most cases, their concerns are valid.
4. **Establish common ground** by aligning what the gatekeeper/CIO prospect is trying to accomplish with what you are trying to accomplish (by asking for access to the BDM). In most situations the "common ground" is anchored in mitigating risk or creating value.
5. After determining you are both trying to achieve a similar goals, but coming at it from two different perspectives, the last step is to **build a bridge**. Suggest an interim step through which both parties can further explore each other's concerns and ideate on a potential compromise. Below is an example of how to navigate one of the most common, and most frustrating objections: “you can’t speak to the business sponsor/BDM)”.

Objection

You can’t speak to the TDM or BDM

Identify the Core Objection

That’s not something I hear very often, what is it about the timing of the request that concerns you?

When will the business community be available for discovery?

How will the business sponsor be engaged in the selection process?

How did you land on that approach?

What are the primary capabilities the business sponsor is looking for in this new system?

What economic or strategic impact is the leadership team expecting from this initiative?

To be honest, given the strategic nature of the project, I’m a little surprised to hear the business sponsor isn’t participating in the early discovery process. Has he/she been through this kind of project before?

Acknowledge & Empathize

I completely understand how you feel, in fact, many of the manufacturing clients that I’ve worked with in the past have shared similar concerns with me. The truth is, many of them were instructed by their leadership to keep project teams at a distance until the end of the evaluation process.

Given what you just shared, I completely understand where you’re coming from, and if I were in your shoes, I’d likely feel the same way.

Establish Common Ground

What I am hearing though, is that both of us seem to be trying to reduce project risk but we’re coming at it from two very different directions.

Based on your organization’s past experiences, you feel removing your business community from the early stages of the selection process reduces project risk.

Based on our experiences with challenged projects, especially ones with complex supply chains, we know that engaging the business community as early as possible in the discovery process accelerates our understanding of your project objectives, which we know significantly reduces project risk.

I think we’re both trying to accomplish the same thing, but with different approaches.

Would you be open to working together to find a way to satisfy both of our concerns?

Build a Bridge

I would like to suggest that you and I spend some time together discussing the project business drivers, the business case expectations and any business constraints that may have an impact on the project timeline so that we all have a shared understanding of the main business risks and how to best structure the project.

If we still have some open switches after that discussion, we can then schedule some time with the project business sponsor to walk through a very specific agenda. If we committed to that approach, would you be more comfortable scheduling some time for us to meet with the project sponsor?

To better understand how the emotional objection handling approach unfolds in the above customer scenario, **watch the two role play videos** that were developed to demonstrate what to do, and what not to do, when faced with an emotional “gatekeeper”.

Strategies for Building Salesforce Rip and Replace Pipeline

Why: Customers are often falsely comfortable with their existing Salesforce system due to a phenomenon known as status quo bias and therefore resist switching to Dynamics 365. This bias can be a significant barrier, as the fear of losing what they have with Salesforce may outweigh the perceived benefits of migrating to Dynamics 365. To overcome this, it is crucial to demonstrate how Dynamics 365 can address their biggest challenges and provide a more efficient, cost-effective solution. Highlighting the specific pain points and limitations of their current system and showcasing the benefits of Dynamics 365 can help disrupt their status quo bias and motivate them to change.

What: Rip and replace opportunities start with identifying companies that are experiencing pain or limitations with their current Salesforce system. Your approach should focus on uncovering emotional dissatisfaction, such as high costs, fragmented data, low user adoption, and lack of integration. By targeting these specific challenges, you can position Dynamics 365 as the solution that addresses their existing issues and provides additional benefits like advanced AI capabilities, seamless integration with existing Microsoft tools, and a unified platform for enhanced business operations.

How: To build a robust rip and replace pipeline, start by identifying potential candidates through market research and existing customer insights. Engage early with BDMs and executives, not just IT. Don't wait for them to reach out, especially if a Salesforce renewal is approaching. Proactively initiate contact to plant the seed for change. Leverage warm introductions from IT allies. Conduct thorough discovery sessions focused on their current pain points, needs, and business objectives, then use these insights to craft a compelling narrative on how Dynamics 365 can streamline processes, reduce costs, and provide actionable insights, as well as lay the groundwork for future engagement and transformation.

Identify Rip and Replace Targets

Many companies resist change due to the comfort and familiarity of their current system (status quo bias). Customers often fear losing the perceived benefits of their current system more than they value potential gains from a new one (loss aversion). To overcome these emotional hurdles, use market research to identify companies where you believe Salesforce's pain points, costs, and limitations may be causing significant operational challenges of cost issues. **Listen For:**

Renewal Periods: Monitor when Salesforce contracts are up for renewal. During this critical time, companies often reassess their investments and explore alternatives.

High Costs: Complaints about Salesforce's pricing, especially with recent price hikes or additional costs for AI and other features.

Fragmented Data: Issues with data integration, leading to an incomplete view of the customer.

Low User Adoption: Challenges with the team not fully adopting and effectively using Salesforce.

Business Changes: Companies undergoing major changes, such as mergers, acquisitions, or leadership changes, are often open to reconsidering their CRM strategy. These transitions disrupt the status quo and make them more receptive to new solutions.

Industry-Specific Challenges: Certain industries face challenges that Salesforce doesn't address well. For example, industries with tight margins like AEC or retail are more sensitive to high costs and inefficiencies.

Engaging the Right Leaders

Replacing Salesforce involves many emotional factors related to both fear of change and the perceived risk of a new system. Therefore, engaging the right leaders and focusing on their strategic priorities is crucial for successful rip and replace initiatives. You'll need to address the "why" for senior motivated line-of-business executives and the "what" with Microsoft-friendly IT managers to build a compelling Rip and Replace case.

Build a Compelling Case: Equip these leaders with the information they need to make a compelling case for Dynamics 365. Focus on how the change aligns with and supports strategic advantages like improved decision-making, increased efficiency, and cost savings.

Overcome Attachment: Use compelling business benefits and success stories to help senior executives and line-of-business leaders overcome their attachment to Salesforce.

Identify IT Allies: While senior executives focus on the "why," IT leaders concentrate on the "what" — the specifics and details of the transition. Find supportive, credible IT leaders who can facilitate introductions to key BDMs and advocate for change.

Collaborative Technical Approach: Develop a comprehensive migration plan with IT leaders. Highlight Dynamics 365's seamless integration with existing Microsoft tools like Azure, Teams and SharePoint, as well as Microsoft's AI leadership.

Initiate Rip and Replace Conversations

Initiating rip and replace conversations requires a strategic and empathetic approach. Start by reaching out to business decision-makers early, particularly when a Salesforce renewal is approaching. **How to Initiate Conversations:**

Warm Intros: Leverage existing IT contacts or Microsoft team members (ATU/CSU) to facilitate introductions to key business decision-makers.

Tailored Outreach: Develop a tailored POV based on thorough research of the prospect's industry, business challenges, and strategic goals. Use this POV to craft a compelling outreach message that both addresses their specific pain points and showcases the unique (relevant) value of Dynamics 365.

Emotional Engagement: Address the emotional aspects of switching from Salesforce, such as fear of change and attachment to the current system, by highlighting the clear business benefits and reduced risks of a Dynamics 365 solution. Speak to their biggest challenges and priorities that trigger emotions strong enough to overcome their hesitation.

Partner Collaboration: Work closely with Microsoft partners to provide a comprehensive solution as well as industry expertise.

Executive Sponsorship: Secure executive sponsorship early in the process to build credibility and lower organizational resistance.

By combining these strategies, you can effectively initiate rip and replace conversations and position Dynamics 365 as the superior choice for businesses looking to enhance their CRM capabilities. This proactive and personalized approach increases the likelihood of engaging potential customers and guiding them towards a successful migration from Salesforce to Dynamics 365.

Discovery Focused on Rip and Replace "Why Change" Factors

Why: Understanding the underlying reasons why a company might consider changing from Salesforce to Dynamics 365 is critical in rip and replace scenarios. By uncovering "why change" drivers, you can tailor your messaging to address specific pain points, risks, and goals thus breaking through the status quo bias and loss aversion that often hold companies back from making changes. By engaging in deep discovery, you want to identify fears of staying on the Salesforce platform that are greater than the perceived risks of migrating to Dynamics 365. These compelling reasons will resonate emotionally with decision-makers, positioning Dynamics 365 as the superior choice.

What: The Business Value Framework (BVF) whiteboarding session is an effective tool for uncovering "why change" drivers. It allows you to walk your prospect through five critical project conversations: business objectives, current challenges, desired new capabilities, project risks, and expected business outcomes. This structured approach ensures that all relevant factors are considered, providing a comprehensive understanding of the prospect's motivations and concerns. By alternating between positive (objectives and capabilities) and negative (challenges and risks) topics, you can keep the conversation engaging and insightful

How: To facilitate a successful BVF whiteboarding session focused on "why change" drivers, follow the previously illustrated order but emphasize the customer's Salesforce pain points. Concentrate on uncovering issues related to Salesforce costs and lack of integrated platform/data. Highlight the BDM's AI goals, challenges, and desired capabilities, as AI is a significant differentiator for Dynamics 365. Focus on the functional, technical, and strategic improvements they expect from the switch. Tailor your discovery questions based on your knowledge of the prospect, their priorities, and their industry.

Conduct a BVF Whiteboarding Focused on "Why Change" Drivers

1. Identify overarching business goals driving the consideration for change by asking questions that help uncover the high-level priorities and strategic initiatives
2. Delve into the specific challenges of the Salesforce system to understand operational, technical, and financial issues causing dissatisfaction or hindering progress.
3. Explore the new capabilities they wish to achieve focusing on the functional, technical, and strategic improvements they expect from a switch.
4. Discuss concerns about implementation, adoption, data migration, and other factors that are potential risks associated with the transition.
5. Finally, outline the anticipated business outcomes and impacts to help the prospect visualize the benefits of moving to Dynamics 365 in terms of efficiency, cost savings, risk reduction, and overall business growth.

Business Drivers & Project Objectives

Sales
Maintain competitive position
Effective sales forecasting
Marketing
Establish digital lead to transaction process
Improve security and data protection
Service
Improved seamless customer service
Reduced cost per contact

Project Risks

Data conversion/transformation
Data quality
Budget constraints
Shifting business priorities
Project governance
Executive buy-in and resistance
Resource availability
Change management
Aggressive timeline/seasonality

Business Outcomes

Sales
Revenue (↑)
Win rate (↑)
Marketing
Pipeline (↑)
Employee productivity (↑)
Service
First call resolution (↑)
Unscheduled overtime (↓)
Customer satisfaction (↑)
IT costs (↓)

Current Challenges

Growing IT costs with multiple components needed for Salesforce to provide baseline capabilities. *($)*
Lack of productivity gains from AI *($)*

Sales
Fragmented customer/prospect data (CRM, production, email, legacy and custom apps) *(Control)*
Marketing
Campaign tracking not integrated in customer data *(Risk)*
Service
Multiple systems needed to resolve a customer complaint *(Control)*
Lack automated workflows – high touch resolution path *($ and Risk)*

New Capabilities

Centralized data base and accelerated value-based processes
Sales
Copilot for conversational intelligence, predictive scoring, meeting preparation, and real-time customer engagement tips
Marketing
Automated Campaign and Event Management
Real-time analytics and segmentation provide personalized marketing efforts.
Services
Customer service chatbots
Integrated Telephony

Differentiating with Industry Cloud

Why: Salesforce heavily promotes its "industry cloud" narrative, showcasing several pre-built solutions tailored to specific industries, that are built on top of the core Salesforce platform. These "industry clouds" provide purpose-built apps with industry-specific data models and pre-built business processes. The portfolio includes clouds for communications, media, energy and utilities and public sector. This narrative, supported by industry-specific solution demonstrations lead customers to believe they can effectively implement these solutions almost "out-of-the-box". The truth, however, is these "industry clouds" are largely limited to Salesforce business applications. At Microsoft we need to, and can, tell a much more compelling "industry cloud" story.

What: Microsoft Fabric offers industry-specific data solutions that provide a robust platform for data management, analytics, and decision-making. These data solutions address the unique challenges faced by different industries, enabling businesses to optimize operations, integrate data from different sources, and use rich analytics. More importantly, they extend far beyond the limitations of a business applications suite. They encompass the entire enterprise data set.

How: When competing in one of Microsoft's strategic industries, such as Financial Services, Healthcare, Manufacturing, Nonprofit, Retail, and Sovereignty, it is essential, when engaging with customer business and IT leaders, to broaden the definition of an "industry cloud" to encompass both enterprise data and enterprise applications. This approach allows you to expand the potential solution scope to include cross-solution elements that leverage Azure, IoT, and AI—capabilities that Salesforce simply doesn't offer.

Research Cross-Solution Area Industry Cloud Scenarios

The first step in pivoting to an industry narrative, is defining the core business drivers and corresponding industry use case scenarios you anticipate encountering most often. The next step is to map your use case scenarios to Dynamics 365 and Microsoft "Industry Cloud" capabilities. The following chart demonstrates examples of common business challenges and use case scenarios for Microsoft's strategic focus industries. **Action:** Develop similar content for your focus industry or vertical segments.

Financial Services Industry Cloud **Outcomes:**

- Deliver differentiated experiences
- Empower employees
- Combat financial crime
- Security, compliance, and interoperability

Retail Industry Cloud **Outcomes:**

- Maximize the value of your data
- Elevate the shopping experience
- Build a real-time, retail supply chain
- Empower the store associate

Healthcare Industry Cloud **Outcomes:**

- Enhance patient engagement
- Empower health team collaboration
- Improve clinical and operational insights
- Improved data management

Manufacturing Industry Cloud **Outcomes:**

- Unlock innovation and introduce new products
- Enable intelligent factories
- Create resilient manufacturing supply chain
- Modernize manufacturing customer experience

Nonprofit Industry Cloud **Outcomes**

- Know your donors and supporters
- Deliver effective programming
- Accelerate mission outcomes

Sovereignty Documentation Cloud **Outcomes:**

- Address the rapidly evolving demands of citizens
- Protect sensitive data/deliver on promises of trust and security
- Modernize government services
- Improve user experiences for both citizens and government employees

Expand the /Scope Solution Requirements Beyond Salesforce's Capabilities

Differentiation strategy #1 - Microsoft's greatest strength lies in the breadth and depth of its solution offerings. The most effective way to disqualify Salesforce from a selection process is to shape the project objectives and functional requirements such that Salesforce cannot bring a viable solution to the table. And the most effective way to accomplish that is to position and facilitate an MCEM Envisioning workshop to a Rip and Replace candidate customer to include scope elements that can only be satisfied by incremental Azure, IoT, MW and AI capabilities.

Differentiation strategy #2 – Position Microsoft as the only legitimate "industry cloud" provider that contemplates not only front-office business application, but the entire enterprise application suite and data set. "Industry cloud" data models enable Microsoft's partners, ISV, GSIs and customers to extend the value of the platform with additional solutions that address each industry's unique and most urgent challenges. Thes Microsoft "industry cloud" capabilities will help organizations align to business and operational needs, and then deploy quickly to accelerate time to value. This strategy is designed to expand the scope of the conversation (with senior business leaders) beyond the tactical requirements of functional business processes (Salesforce) to include the overall business requirements of the enterprise. Because at the end of the day…it's all about the data, and business leaders' ability to make sound, informed, accurate business decisions.

Overcoming Customers Change Resistance

Why: Overcoming objections is critical to sales success, particularly when addressing the intense emotional barriers in Salesforce rip and replace scenarios. Unlike simple product upgrades or new implementations, replacing an entrenched CRM system like Salesforce involves deep-rooted emotional attachment and fear of the unknown, making objections more emotionally charged. The prospect's fear of disrupting their familiar processes, the potential risks involved, and the uncertainty of migrating to a new system like Dynamics 365 amplify these emotional barriers. Addressing these emotional objections requires a thoughtful and empathetic approach to break through the status quo bias and build trust in the new solution.

What: Prepare objection handling strategies for two different objection categories: logical and emotional. Logical objections require sales professionals to provide new insights and reframe misinformation. Emotional objections require sales professionals to ask several very specific questions to uncover the core of the (unspoken) resistance. Only when the actual objection is surfaced can "new information" be considered and heard. In rip and replace scenarios, addressing objections effectively involves demonstrating how the benefits of moving to Dynamics 365 and the risks of staying with Salesforce outweigh the perceived risks of making the switch.

How: The first step is to anticipate the emotional objections that might arise in a rip and replace scenario. Create an inventory of thoughtful questions designed to address these potential concerns. Leverage rip and replace case studies and success stories to illustrate how Dynamics 365 has proven to be less risky and more beneficial than staying with Salesforce. By preparing in this way, you can effectively navigate the emotional landscape of rip and replace objections, ensuring a smoother transition for your prospects.

Empathy Objection Handling (Emotional)

Many sales professionals struggle with objection handling because they try to bring logical arguments to emotional situations. More importantly, they adopt a blunt force two-step objection handling process. For example, when attempting to penetrate an existing Salesforce customer, they may get presented with a response like: "Dynamics is less expensive because it's a substandard CRM solution". Sellers often respond by defending the functionality and capabilities of CE. This seldom works. To predictably and effectively overcome difficult objections and resistance, you need to adopt an empathy-based approach that follows five important steps.

1. **Document and understand the common objections** you will typically encounter in most sales cycles.
2. **Identify the core objection** using an inventory of thoughtful probing questions designed to surface the "real" (hidden) objection.
3. **Acknowledge the objection is valid** and **empathize** with the CRM stakeholder. In most cases, their concerns are quite valid.
4. **Establish common ground** by aligning what the CRM stakeholder trying to accomplish with what you are trying to accomplish (by asking for an audience to present a Dynamics 365 overview). In most situations the "common ground" is anchored in mitigating risk or creating value.
5. **Build a bridge** by suggesting an interim step through which both parties can both explore each other's concerns and ideate on a potential compromise. Below is an example of how to navigate a common "change resistance" objection: "Microsoft's solution capabilities are incomplete/deficient)".

Objection

Microsoft: I'd like an audience with your organization's core CRM business stakeholders. I believe we can save your company a significant amount of money.

SFDC Customer: We're not interested.

Microsoft: Why is that?

SFDC Customer: To be candid, Microsoft CRM is cheaper because it's a substandard solution. We chose Salesforce because it's the industry leader.

Identify the Core Objection

That's interesting. How did you land on that position?

I'm curious, what capabilities did you feel were missing from the Microsoft CE platform.

And aside from the cost, what other considerations do you have that led you to believe Microsoft delivers less value than Salesforce?

How do you feel about the rest of the Microsoft technology your organization uses?

How do you see AI impacting your marketing, sales and service delivery business processes?

Given your existing commitment to Microsoft's cloud and the potential impact AI could have across your organization, I'm a little surprised to hear your organization still believes Microsoft is lacking in functionality. When was the last time your organization took a serious look at Dynamics 365?

Acknowledge & Empathize

Look, I completely understand how you feel, in fact, many of the Salesforce clients that I'm working with have shared similar concerns with me. The reality is, Salesforce licensing and implementations are extremely expensive, and making a recommendation to explore a new alternative after years of use can could cause some business disruption.

Given what you just shared, I completely understand where you're coming from, and if I were in your shoes, I'd likely feel the same way.

Establish Common Ground

What I am hearing though, is that both of us are trying to drive similar outcomes, but we're coming at it from two very different directions.

Based on your sunk-cost investment in Salesforce and the potential risks associated with changing to a new CRM solution, what I'm hearing is you feel Salesforce, even though it is more expensive, is the best business decision

Based on our experiences working with other Salesforce customers like you who are committed to the Microsoft cloud, we've discovered the benefits of deploying Microsoft CE and Copilot into an Azure, Modern Work and Microsoft AI environment is accelerating digital transformation initiatives and delivering meaningful business impact.

I think we're both trying to accomplish the same thing, but with different approaches.

Given how long its been since you last explored Dynamics 365, would you be open to working together to determine if the current version has the potential to both significantly lower your IT costs AND significantly deliver more business value?

Build a Bridge

I'd like to suggest, you and I spend some time together discussing how you see AI optimizing and enhancing your customer acquisition and service delivery business processes.

Based on what you share, I'd like to provide some clarity and insights into how Dynamics 365 and Copilot could potentially help accomplish those goals.

If, after that discussion, you feel there's merit in taking a deeper look at Dynamics 365, then I'd like to schedule some time with your broader CRM stakeholder group to provide an overview of how Dynamics 365 and Copilot is helping other <industry> companies like yours . If we committed to that approach, would you be open to scheduling some time to learn more?

To better understand how the emotional objection handling approach unfolds in the above customer scenario, **watch the two role play videos** that were developed to demonstrate what to do, and what not to do, when faced with an emotional "gatekeeper".

Strategies for Defending Against a Salesforce Attack

Why: Understanding the psychology of status quo bias is crucial in defending Dynamics 365 customers from Salesforce attacks. Status quo bias makes customers naturally resistant to change, which works in Microsoft's favor. However, this bias needs regular reinforcement, particularly with senior business leaders who are key decision-makers. Without continuous engagement, Salesforce's aggressive tactics and compelling narratives can sway these leaders, increasing the risk of losing the customer. Regularly reminding them of the value they have gained from Dynamics 365 and addressing any emerging needs or concerns helps maintain their confidence in the current solution and mitigates the risk of switching to Salesforce.

What: Defending Dynamics 365 customers involves three main strategies: detecting early signs of a Salesforce attack, engaging business leaders to reinforce value, and maintaining regular, proactive engagement. Detecting a Salesforce attack includes listening for specific signals and understanding common trigger events. Engaging with the right leaders focuses on building strong relationships with senior executives and leveraging IT allies. Regular engagement means aligning with the customer's evolving needs, highlighting improvements within Dynamics 365, and addressing concerns before they escalate.

How: To effectively implement these strategies, start by monitoring for signals that indicate Salesforce is targeting your customer. This includes comments on Dynamics 365's age, negative perceptions, and mentions of Salesforce solutions. Engage with senior business leaders early and often, emphasizing the strategic value and long-term benefits of Dynamics 365. Collaborate with partners and IT allies to reinforce the technical and operational advantages. Finally, maintain a regular cadence of communication, using updates on AI advancements and other new features to remind customers of the ongoing value of Dynamics 365, and addressing any emerging challenges to ensure their needs are met continuously.

Detecting a Salesforce Attack

Protecting Dynamics 365 customers from Salesforce's attacks requires keen observation and proactive engagement. Fortunately, the status quo bias is working in our favor. To reinforce this bias and prevent customer churn, we must be vigilant and recognize early signals of a Salesforce attack. By identifying these signs promptly, we can reinforce the value of Dynamics 365 and address any concerns before they escalate. **Listen for Key Indicators and Trigger Events:**

Reference to Dynamics 365 Age and History: Statements like "You are using an old product" or misconceptions that Dynamics 365 is only an on-premise solution suggest Salesforce may be undermining the current Dynamics 365 version.

Product Perception: Remarks such as "Your product looks terrible" or criticisms about the user interface, implying it is inferior to Salesforce even when functionality is equivalent.

Salesforce Superiority Statements: Assumptions that Salesforce is the superior solution, often fueled by attending their events.

Salesforce Product References: Mentions of Salesforce industry solutions, Einstein trust layer, or AWS or Google-based solutions.

Telephony Changes: Companies considering swapping their telephony systems may look to Amazon, which can pave the way for Salesforce.

Workforce Management and Contact Center Needs: Discussions about the lack of integrated Workforce Management or assumptions about Dynamics 365's capabilities in the contact center space may indicate Salesforce influence.

Engage the Right Leaders

When Salesforce attempts to replace Dynamics 365, they focus on business leaders and often bypass IT leadership. Consequently, IT is often the last to learn of Salesforce's influence. Salesforce understands Microsoft is typically preferred by IT, so they exploit BDMs' emotional factors related to the risks of Dynamics 365 to build a case for replacing it. To defend against such attacks, it's crucial to engage the right business leaders and leverage IT allies to reinforce the value Dynamics 365 provides in both business and technical terms.

Executive Engagement: Proactively engage senior executives to build strong relationships to counter Salesforce's influence. Interact with executives early and often to prevent Salesforce from gaining a foothold. Make interactions enjoyable and informative while emphasizing long-term relationship benefits and strategic alignment with Microsoft. Use compelling business benefits and success stories to help leaders overcome Salesforce's emotional messaging.

Partner Collaboration: Include partners in account engagement planning as they often have closer relationships with BDMs. Make partners the heroes in the customer journey, leveraging their credibility and influence. Highlight their successes and ensure they are well-equipped to advocate for Dynamics 365 to counter Salesforce narratives.

Leverage IT Allies: Engage supportive IT leaders with credibility amongst the business leadership to facilitate introductions to key BDMs and advocate for Dynamics 365. Provide them with Microsoft value messages focused on "money," "risk," and "control" to share internally to reinforce the benefits of staying with Dynamics 365.

Engage Regularly

Customers naturally exhibit a "Status Quo Bias," which is a natural tendency to resist change. This bias is advantageous when defending Dynamics 365 customers against a Salesforce attack. The strategy is to craft a narrative that emphasizes the value of the Microsoft partnership, highlighting continuous improvements and future innovations in Dynamics 365, while underscoring the risks, costs and potential disruptions of migrating to Salesforce. Proactive engagement is essential; waiting until Salesforce is being considered may be too late. Regularly align with the customer's evolving needs, showing how Dynamics 365 mitigates new challenges. Engage them emotionally and reinforce the concrete benefits of Dynamics 365. **How to Establish a Cadence:**

Collaborative Approach: Foster collaboration with the ATU and CSU to present a united front. Work with the ATU to examine customer data in MSXi and Power CAT telemetry, such as current usage and MAUs, and with the CSMs/CSAMs to understand the current state.

Start Conversations Early and Often: Engage Dynamics 365 customers regularly, ideally at least annually, to understand their needs better. At a minimum, initiate contact at least six months before renewal dates. Use AI advancements and new features as touchpoints to re-engage and remind customers of Dynamics 365's value.

Educate to Build a Compelling Case: Educate customers on the business impact of new capabilities or technologies. Highlight new AI features and how they meet the customer's evolving needs.

Regular Value Reinforcement: Maintain a consistent communication cadence to reinforce the ongoing value of Dynamics 365. Use impacted metrics to show tangible benefits.

Annual Business Value Acceleration Workshop

Why: It's a lot easier to defend against a Salesforce attack when they're on the other side of the moat than when they're inside the castle. To inoculate your Microsoft accounts against Salesforce, it's important to consistently remind key project stakeholders, especially the executives, of the value and business benefits they are experiencing because of their Microsoft Dynamics 365 investment, as well as its potential for solving future business challenges.

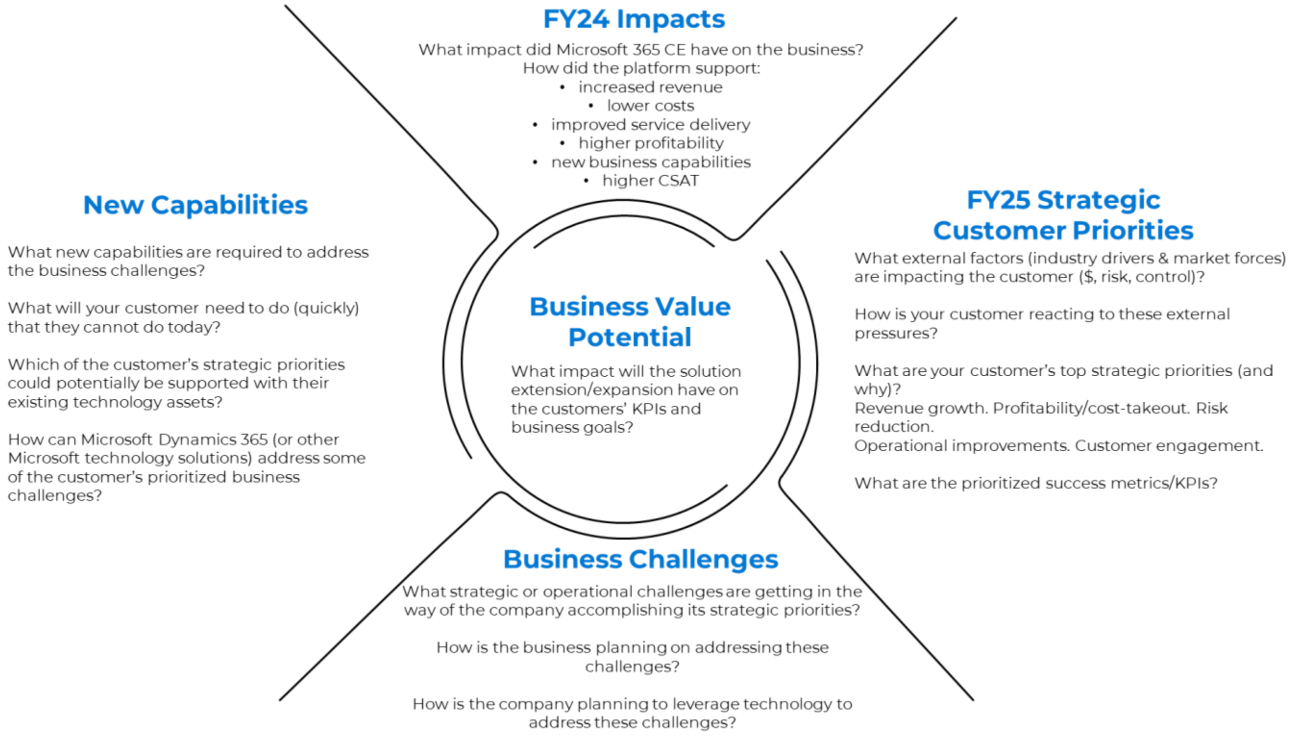
What: Far too often, Microsoft customer relationships are transitioned to Microsoft partners after the licensing agreements has been signed and the project implementation has begun. Unfortunately, most business applications projects run into unexpected challenges during deployment, resulting in higher costs, delayed go-live dates and frustrated business users. As a result, many customers lose their connection to the business objectives, business outcomes and business process improvements that compelled them to select Microsoft Dynamics 365 in the first place. To ensure this doesn't happen, it's critical the combined Microsoft/Partner team re-engage with the customer business stakeholders on an annual basis to revisit and revise the business benefits expectations and explore new opportunities to leverage their new "asset" to address additional business priorities.

How: Facilitate an annual project prioritization workshop with the key customer business and IT stakeholders that rely upon the Microsoft CE solution to accomplish their business objectives. Typically, this will include the executives responsible for sales, marketing, customer service and field service as well as key line-of-business managers and strategic subject matter experts. And ideally, it should include the Microsoft Dynamics services partner working with the customer.

Reinforce Realized Value

There are five critical conversation to facilitate during your annual Business Value Acceleration Workshop

1. **Previous year impacts:** Document all the measurable and strategic business benefits your customer realized because of their Microsoft Dynamics 365 investment. Filter the impact through the primary success criteria such as revenue growth, cost reduction, risk reduction and improved decision-making (and how those informed decisions benefited the business, as well as more operational benefits like improved service delivery, shorter sales cycles and more effective marketing campaigns.
2. **New year strategic customer priorities:** Begin the conversation by whiteboarding (or discussing) the industry drivers and market forces that are exerting pressure on the business. These external forces typically come via changes in the economy and regulatory compliance, as well as shifts in supplier, competitor and customer behaviors. With that clarity, you then review your customers' new strategic priorities as well as the projects they have planned to accomplish them. You will inevitably find many connections between the industry drivers and the strategic priorities
3. **Business challenges:** Next, you will transition from the strategic to the operational. Document the internal and external challenges your customer anticipates getting in the way of accomplishing their strategic objectives. Direct the workshop participants to consider both internal and external blockers, such as: labor/skills shortage, internal resistance to change, budget/resource limitations, unreliable supply chains, aggressive competitor discounting. Capture it all.
4. **New capabilities:** Then, what new capabilities (not functionality) does the organization require to overcome the business challenges and support the strategic initiatives. Resist the temptation to jump to Microsoft solutions. If you tease out enough "new" required capabilities, they will inevitably ask they could be provided through their Dynamics 365 CE solution. Brainstorm how they could leverage their existing Microsoft assets to enable the new capabilities, and then introduce additional functionality (like Copilot, which they have not yet licensed).
5. **Business value potential:** With clarity into the business priorities and challenges, and how they can further leverage their Microsoft assets to achieve their goals, the last activity is measuring the potential business impact these new capabilities would deliver to the customer.



Laying Landmines to Avoid Salesforce Migrations

Why: Leaving a positive impression is crucial in sales, as negative selling can damage relationships and reduce trust. A key psychological concept to understand here is the **negativity bias**, which suggests that people tend to focus more on negative experiences than positive ones. Negative selling can backfire by creating a negative impression of both you and Microsoft. Instead, focus on asking insightful questions and highlighting potential challenges to guide the customer to their own conclusions without having to provide direct criticism. This approach maintains a positive relationship and builds trust.

What: Laying landmines involves subtly highlighting potential pitfalls and risks associated with migrating to Salesforce. The goal is not to directly criticize Salesforce but to use strategic questions that lead the customer to consider the drawbacks and challenges they might face. This strategy ensures your customer feels informed and supported rather than attacked.

How: To effectively lay Salesforce landmines, you should follow a structured approach that begins with identifying the common challenges and risks associated with Salesforce migrations. Craft insightful, open-ended questions that subtly highlight these potential pitfalls, encouraging the customer to think critically about their decision. During conversations with the customer, thoughtfully present these questions by weaving them into your discussions and using real-life examples and case studies to reinforce your points. Throughout your interactions, maintain a positive and supportive tone, emphasizing the benefits of Dynamics 365 and how it effectively addresses the customer's needs and challenges. This approach helps customers recognize the risks of migrating to Salesforce while reinforcing the value of staying with Dynamics 365, all without resorting to negative selling tactics.

Potential Landmines and How to Evoke Them

Objective: The goal is to subtly highlight the potential pitfalls and risks associated with migrating to Salesforce without engaging in negative selling. This can be accomplished by asking insightful questions that lead the customer to consider these risks themselves. Below are some **common Salesforce Migration Landmines** and suggested questions to help you raise them in the customer's mind**:**

Cost Overruns and Hidden Fees:

Landmine: Salesforce often has higher overall costs due to hidden fees and the need for additional third-party integrations.

Questions to Ask:

- "Have you considered the total cost of ownership, including any hidden fees or additional costs for third-party integrations?" or

Copilot vs. Einstein:

Landmine: Dynamics 365's Copilot offers advantages over Salesforce's Einstein, focusing on ease of use and underlying Azure services.

Questions to Ask:

- "How do you find the ease of use and integration capabilities of Salesforce's Einstein compared to Dynamics 365's Copilot?" or

Complexity of Integration:

Landmine: Integrating Salesforce with existing systems can be complex and time-consuming.

Questions to Ask:

- "What is your plan for integrating Salesforce with your existing systems and workflows?"

User Adoption Challenges:

Landmine: User adoption can be a significant hurdle, especially if the new system is not as intuitive as expected.

Questions to Ask:

- "What strategies do you have in place to address potential resistance from your team?"

Data Migration Risks:

Landmine: Migrating data to Salesforce can result in data loss or corruption if not managed properly.

Questions to Ask:

- "What safeguards do you have in place to prevent data loss or corruption during the migration?" or

Integrated Telephony and Azure Story:

Landmine: Salesforce's telephony and cloud solutions may not be as seamlessly integrated as Dynamics 365's.

Questions to Ask:

- "How do you plan to integrate your telephony systems with Salesforce, and what challenges do you anticipate?"

Customization and Low-Code Solutions:

Landmine: Customizing and scaling Salesforce to meet specific business needs can be challenging and costly compared to the extensibility of Dynamics 365 with low-code solutions.

Questions to Ask:

- "What are your plans for extending your CRM capabilities, and have you explored the low-code solutions available?"

Leveraging IT Relationships:

Landmine: Dynamics 365 can leverage existing IT relationships and strengths, which may be disrupted by switching to Salesforce.

Questions to Ask:

- "Have you considered how maintaining your Dynamics 365 system can leverage your existing IT strengths and relationships for better outcomes?"

How to Present Landmines

When discussing the potential switch from Dynamics 365 to Salesforce with your customers, it's crucial to highlight potential pitfalls without coming across as negative. Focus on asking thoughtful questions that prompt the customer to consider the risks themselves. This method encourages them to think critically about the decision and understand the value of staying with Dynamics 365. Use real-life examples and case studies to reinforce these points and showcase the tangible benefits of Dynamics 365.

Lead with Curiosity: Approach the conversation with genuine curiosity. Ask open-ended questions that encourage the customer to think critically about their migration plans.

Provide Context: When asking questions, provide context based on industry standards or common experiences. This helps the customer understand why the question is relevant.

Share Insights: Use case studies or examples of other companies that faced similar challenges during their migration to Salesforce. This can help illustrate potential pitfalls without directly criticizing Salesforce.

Highlight Benefits of Staying: Subtly compare the potential risks of migrating to Salesforce with the benefits of continuing with Dynamics 365. Focus on the positive aspects of Dynamics 365 rather than the negatives of Salesforce.

By using these strategies, sellers can effectively lay landmines that prompt customers to reconsider their decision to migrate to Salesforce, all while maintaining a positive and professional tone.

Overcoming Common SFDC Attack Objections

Why: Overcoming objections is critical to sales success, particularly when addressing the intense emotional scenarios presented when Salesforce is attempting to replace an incumbent Dynamics 365 customer. Salesforce will inevitably introduce significant fear, uncertainty and doubt in their attempt to plant suggestions that Dynamics 365 is a substandard solution and that all the customer's project challenges, and end-user resistance will disappear after they change to a more functionally complete, visually appealing, industry leading solution. You need to be prepared with responses to Salesforce's most common competitive differentiators.

What: Prepare objection handling strategies for two different objection categories: logical and emotional. Logical objections require sales professionals to provide new insights and reframe misinformation. Emotional objections require sales professionals to ask several very specific questions to uncover the core of the (unspoken) resistance. Only when the actual objection is surfaced can "new information" be considered and heard. In Defend scenarios, addressing objections effectively involves demonstrating how the perceived benefits of moving to Salesforce do not outweigh the risks of transitioning away from Dynamics 365

How: The first step is to anticipate the emotional objections that might arise in a Salesforce attack scenario. Create an inventory of thoughtful questions designed to address these potential concerns. Leverage customer case studies and success stories to illustrate how Dynamics 365 has consistently delivered measurable business value to similar customers in their industry. By preparing in this way, you can effectively navigate the emotional landscape of Defend objections.

Empathy Objection Handling (Emotional)

Many sales professionals struggle with objection handling because they try to bring logical arguments to emotional situations. More importantly, they adopt a blunt force two-step objection handling process. For example, when attempting to defend against a Salesforce pursuit, they may get presented with an objection like "Microsoft has a terrible user interface" (which is often code for the end users don't like it or use it"). Sellers often respond by defending the UI and suggesting the adoption challenges are due to poor change management; which is either a partner or customer responsibility. Which never works. To predictably and effectively overcome difficult (Salesforce planted) objections, you need to adopt an empathy-based approach that follows five important steps.

1. **Document and understand the common objections** you will typically encounter in most sales cycles.
2. **Identify the core objection** using an inventory of thoughtful probing questions designed to surface the "real" (hidden) objection.
3. **Acknowledge the objection is valid** and **empathize** with the CRM stakeholder. In most cases, their concerns are quite valid.
4. **Establish common ground** by aligning what the CRM stakeholder is trying to accomplish (increase value realization from their CRM investment) with what you are trying to accomplish (identify the root cause of the user adoption challenges). In most situations the "common ground" is anchored in mitigating risk or creating value.
5. **Build a bridge** by suggesting an interim step through which both parties can both explore each other's concerns and ideate on a potential compromise. Below is an example of how to navigate a common "change resistance" objections: "Microsoft's solution capabilities are incomplete/deficient)".

Objection

Microsoft: I understand your organization is now evaluating Salesforce.

Microsoft Customer: That's correct. We've been talking with them for a few months.

Microsoft: What are your concerns with your Dynamics 365 deployment?

Microsoft Customer: Candidly, the Microsoft user interface is not as intuitive and easy-to-use as Salesforce's.

Identify the Core Objection

That's interesting. We don't hear that very often. What about the UI do you feel is less intuitive that what you've seen from Salesforce?

I'm curious, what kind of feedback have you received from the user community around the UI?

How are you measuring the impact of your UI concerns on the sales and service team's productivity and performance.

Aside from the UI, what other aspects of your Dynamics 365 solution do you feel aren't meeting your expectations?

What actions have you taken already to address the end-user engagement challenges.

Do you feel the same way about your employee's UI experience with Office and Teams?

Given the significant investment you've made in Microsoft, I'm a little surprised to hear your organization feels a new UI will deliver enough business value to balance out the risks associated with a significant application change. Why is the UI issue so important?

Acknowledge & Empathize

Look, I completely understand how you feel, in fact, many of the Microsoft customers that I work with have shared similar concerns with me in the past. The reality is, almost all end-user communities resist new CRM systems, first because its different from what they're used to, and second, because they're uncomfortable with the additional tasks they're asked to complete so that business leaders can make better decisions.

Given what you just shared, I completely understand where you're coming from, and if I were in your shoes, I'd feel the same way.

Establish Common Ground

What I am hearing though, is that both of us are trying to drive similar outcomes, but we're coming at it from two very different directions.

Based on your organization's frustration with the sales and service teams not entering important customer data into the CRM system, you're looking at alternatives that will improve the quality of the reporting your leaders use to make critical decisions.

Microsoft has an army of UI experts and engagement specialists responsible for designing the common look-and-feel you see across all our solutions including Windows, Office 365. These same principles are applied to Dynamics 365 but in your situation it's clear there's an opportunity to make some adjustments to improve the quality of the data that your leaders are receiving from your end users.

Would you be open to working together to explore some creative ways of collecting the data you need to better run the business, that might also free up more time for your sales and service teams to engage with customers?

Build a Bridge

I'd like to suggest, you and I spend some time together discussing what information you feel is not being collected due to the UI configuration.

Based on what you share, I'd like to provide some clarity and insights into how we could potentially leverage Microsoft Power Platform capability and Copilot to automate or eliminate the need for your sales and service teams to enter much of their data.

After that discussion, if you feel there's merit in taking a deeper look at these solutions with a broader stakeholder group, I'd like to work with your Dynamics implementation partner to scope out a proof-of-concept to determine how much of an impact it could make. If we committed to that approach, would you be open putting the Salesforce initiative on hold for awhile?