

DELIVERY GUIDE

Business Central Needs Assessment

Pre-sales funded engagement for
SMB customers



Guide overview

The purpose of this guide is to support partners in understanding how to leverage and position the Business Central Needs Assessment, a partner-led, funded engagement for SMB customers who want to learn how Dynamics 365 Business Central would work in their environment.

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Activity description and overview

The **Business Central Needs Assessment** is a four-to-six-hour engagement that helps partners demonstrate to small or medium business (SMB) customers the value of modernizing with Dynamics 365 Business Central and Microsoft Copilot. It outlines the benefits of replacing manual paper-based systems or disparate line of business (LoB) applications with Business Central and built-in Copilot capabilities to manage finance, accounting, operations, and HR functions.

The engagement is structured to help partners work with customers to uncover the most pressing challenges, showcase the business benefits of Business Central and Copilot, then prove the value to the customer. The final deliverable for the customer includes a few key slides that are also required for the proof of execution (POE). These slides capture the engagement participants, recap the challenges and opportunities for the business, and identify the top 3-5 initiatives prioritized by the customer.

To prepare for the engagement, partners need to plan how best to complete and validate discovery activities based on their existing relationship with the customer, customize the materials provided by Microsoft, and invite the right stakeholders to the conversation.

Support for ERP sales in SMB accounts

The Business Central Needs Assessment is one step in a multi-step sales cycle that includes pre-sales and post-sales activities, customer offers, and partner incentives. It is specially designed for SMBs looking for a modern business management solution.

The engagement is intended for partners to use with SMB leads that have already been well qualified at the 20% sales stage. Created to be a 1:1 deep-dive discovery exercise focused on identifying priority scenarios for a near-future implementation, this engagement is not for use with every prospect or lead. With the new cap per partner/per country it's important to only offer these engagements to customers who will greatly benefit and increase their intent to buy.

This engagement can be combined with other engagements, offers, and incentives to help offset the cost of the sale to both you and your customer. It may also lead to additional partner services, support contracts, and customer sales in the form of complementary workloads.

	5 stages of the customer journey Microsoft Customer Engagement Methodology (MCEM)				
	Listen and Consult	Inspire and Design	Empower and Achieve	Realize Value	Manage and Optimize
FY25 MCI Funded Engagements for Business Central		Business Central Needs Assessment	Business Central: AIM Migration Assessment	Business Central Deployment Plan	
Microsoft offers for customer			Bridge to the Cloud 2 (BTTC2) discount over 3 years		
Partner services and incentives			Microsoft Cloud Solution Provider (CSP) incentives (up to 34%) Microsoft Business Central Concierge Desk	Partner-led migration services (based on deployment plan)	Partner-led support and services contract

Structure of the engagement

The activity includes three phases for the partner to work through: plan, conduct, and document. The following sections describe best practices for helping you complete each phase specific to this activity and includes links to tools and resources your team can use to ensure a successful engagement. Be sure to review all sections thoroughly before you start, as you may choose to perform different steps in different phases, and you will want to tailor the activity to best meet the needs of your customer and your team.

For the latest updates on Business Central and a library of resources and links, visit Microsoft Learn:

[Welcome to Business Central](#)

Complementary download kit

As you read through this delivery guide, open and review the materials in the [download kit available on the Partner Hub](#). The Business Central Needs Assessment kit includes:

- **Partner-to-customer email template:** Reach out to customers and encourage their participation through this customizable email invitation.
- **Partner-to-customer flyer template:** Keep the engagement top of mind and help champions encourage other stakeholders to participate by customizing and sharing this flyer.
- **Customer engagement deck:** Use the provided slides and guidance to help structure the engagement when you meet with customer.
- **POE template:** Capture the essential information that must be submitted to Microsoft for payment.

Phase 1: Plan and prepare for the engagement

During the first phase, you'll vet the customer to ensure they're well qualified for the engagement, assemble your delivery team, and confirm they have the right knowledge and skills. Based on what you learn, you will need to customize the engagement materials.

1.1 Confirm customer and partner eligibility

This engagement may only be used with customers that have already been qualified for a business management solution. It may not be offered as an initial offer used to build pipeline.

Customers must meet the following criteria:

- Classified as SMB (unmanaged) segment, with more than 25 and less than 500 seats
- Have Microsoft Customer ID

Partners must have a Business Applications Solution Partner designation to be eligible to receive payment for a Needs Assessment claim.

Please refer to the MCI Guide (aka.ms/incentivesguide) for the latest qualifications list and additional details about the engagement and payout.

1.2 Determine BANT, sponsor, and invite list

Before you fully engage, you will want to assess whether the customer has the budget, authority, need, and time (BANT) to make the Needs Assessment engagement viable and valuable to your team. And you will want to identify a project sponsor that has the authority to make the purchase and to pull the right people into discussions.

A best practice is to try to involve team members at both the manager and user level, so you can tie systems experiences back to business outcomes.

Customer participants:

- Project sponsor at executive/ decision-making level
- Managers for internal F&O teams (ex. Finance, Accounting, HR, Operations)
- Team members that use the systems everyday

1.3 Set the agenda for the engagement

You can use the proposed agenda listed in the customer presentation template to help you prepare for the engagement. As you review the agenda, flip through the customer presentation template at the same time and tailor both to meet the needs of your client. Below is an outline of the agenda aligned to sections in this guide where you can find additional context for the slide deck.

Topic	Time	Related sections in the guide
Kickoff	30 minutes	
Validate current state and challenges	90 minutes	1.4 Conduct a discovery exercise
Deep dive into key scenarios	30-60 minutes	1.5 Get familiar with common use cases
Identify key scenarios for exploration	30 minutes	
Envision a better way	60-90 minutes	1.6 Choose an approach for the envisioning exercise
Assess the value to the business	30 minutes	1.7 Select an approach for proving the business value
Provide a quick solution overview	30 minutes	
Conclusion	30 minutes	

1.4 Conduct a discovery exercise

Note: You may perform these activities before or during the engagement

Discovery is a key component of any engagement, however it can be part of the first (prepare) or second (conduct) phase depending on what works best for you and your customer. Some partners choose to do discovery before conducting the customer engagement and then use the engagement to validate discovery findings. Others choose to do the discovery work in the engagement itself. Microsoft materials provide guidance for either approach.

The discovery exercises help you uncover your prospect's pain points even when they don't know what they are. This may involve interviewing decision-makers to understand current state of the business, identifying challenges and opportunities, and/or observing end users to understand the user experience.

The first step is to determine if a business management solution will help the customer solve important challenge(s) or open up new opportunities like generative AI they want to explore. You can do that through a phone call, pre-engagement questionnaire, or in-person discussion in which you ask leading questions such as:

- What accounting/ finance/ operations/ HR issues does your team wrestle with today?

- How does the process work today?
- How do you see these activities impacting business outcomes?
- How do you measure success in these areas? If you currently don't use metrics to track progress, what's stopped you?
- Of these issues, which is most pressing? Why?
- How have you considered incorporating generative AI into your processes?
- What are employees using Microsoft 365 Copilot to do today? What would they like to be able to do with it?
- Where do you see the biggest business opportunities within next few years?
- What strategic goals are you heading for?
- Where do you see the improvements / development areas for IT to support strategic goals?
- What are the key challenges / limitations you are now facing?
- What do your competitors have that you are not currently able to offer?

During the conversation, share some of the most common use case scenarios with your customer and ask them which ones they would like to work through during the engagement. **Identifying a short, prioritized list of key use case scenarios is critical to the exercise.**

1.5 Get familiar with common use cases

A critical outcome of this engagement is identifying a few use case scenarios that the customer wants to prioritize and building a business case for them. In order to do that, it's important to first be familiar with common use cases enabled by Business Central so you can help customers match their business goals to the corresponding process.

The use cases listed here have supporting demos that can be downloaded and viewed using the link aka.ms/BCSalesTools.

- **Order to Cash:** Ensure efficient and accurate financial transactions through a process that encompasses the entire sales cycle, from creating sales orders and managing inventory to invoicing customers and recording payments. Use order to cash directly in Business Central, through Microsoft Outlook, or as an integrated experience between Business Central and Dynamics 365 Sales.
- **Enter Sales Order (mobile):** Enable sales teams to easily enter and post sales orders on the go by selecting the customer, adding line items, and sending invoices directly from their mobile devices with the Business central mobile app.
- **Procure to Pay:** Streamline purchasing using an integrated approach that helps ensure efficient procurement and accurate financial tracking. This process makes it easier to manage everything from creating purchase orders and receiving goods to processing vendor invoices and making payments.

- **Opportunity to Quote:** Convert a potential sales opportunity into a formal quote through a seamless process that helps track sales opportunities, activate sales stages, and assign opportunities to a sales quote for more efficient sales management.
- **Automate Accounts Payable:** Automate accounts payable using OCR (optical character recognition) and machine learning to capture invoice data, streamline workflows for vendor invoice processing, and automate payments and reconciliations.
- **Drop Ship Sales Order:** Ship items directly from a vendor to a customer by marking a sales order for drop shipment. This process lets you create a purchase order that instructs the vendor to ship directly to the customer as the recipient.
- **Make to Stock:** Match production and inventory with customer demand by using the projected sales forecast to generate a production plan and subsequent production order. This key strategy is used by manufacturers.
- **Manage your Inventory:** Gain valuable insights into inventory by creating item cards for each product or service, recording inventory transactions, and using analytical tools to monitor and manage items. This demo also includes the 'Assemble to Order' use case scenario and leveraging AI to predict inventory needs.
- **Customer Approval Process:** Enable seamless approval workflows by notifying approvers in Microsoft Teams, automating tasks with Power Automate, and posting data to Business Central. This demo features Business Central integrated with Teams, Power Automate, and Copilot Studio.
- **Reconcile Bank Accounts:** Compare and match entries in the bank accounts you've set up with bank transactions from your bank. This process ensures that your books align with the statements you receive. Once reconciled, balances are posted to your bank accounts in Business Central, making them accessible to finance managers.
- **Produce Production Order:** Convert purchased materials into manufactured items by routing work through various work or machine centers. This process ensures efficient planning, execution, and tracking of manufacturing operations.
- **Create a New Company:** Quickly and easily create new companies and import data from other systems or by leveraging Excel templates.
- **Intercompany:** Streamline intercompany transactions between multiple companies by assigning an intercompany partner code to customers or vendors. The system automatically creates corresponding documents in the partner company to ensure balanced accounts.
- **Consolidations:** Consolidate financial data from multiple companies (subsidiaries) into a single parent company and improve your ability to manage multi-company consolidations.

During the conversation, share some of the most common use case scenarios with your customer and ask them which ones they would like to work through during the engagement.

1.6 Choose an approach for the envisioning exercise

Once you've identified the customer's priority use case(s), you will want to show them how Business Central handles those situations to help them envision a better experience. This involves developing a thorough understanding of their current processes today and selecting an envisioning exercise that uses Business Central and Copilot to highlight opportunities for improvement.

Choose which approach you will use for your envision exercise:

- Share pre-recorded demo videos that show out-of-the-box functionality and Copilot capabilities aka.ms/BCSalesTools (estimated length 2-6 minutes each), options to:
 - Select demo for specific roles that combine multiple use cases
 - Pick and choose use cases individually
- Build a live demo that's run by your team using sample data pre-loaded in the trial instance, access a demo environment here [Microsoft Customer Digital Experiences](#)
- Customize a tailored demo, preconfigured by your team to show ISV components and Business Central
- Perform a [migration assessment](#) to start prioritizing use cases

Considerations for choosing your approach

If your customer	If your team	Then you might be right for
Is new to Dynamics 365 and uses mostly manual, paper-based processes today.	Is coming from Modern Work or Azure and doesn't feel comfortable doing a live demo.	High-level look at Business Central functionality using pre-recorded demo videos.
Can relate to a standard Business Central experience and does not require a highly customized implementation to see the value for their business.	Is comfortable navigating Business Central and has the knowledge base to answer questions in real time.	Interactive Q&A during a live demo by the partner walking through a Business Central trial instance using the sample data provided by Microsoft.
Currently has Microsoft NAV/ GP or SL legacy installation and is contemplating migration to the cloud (customer may or may not have taken a migration assessment ahead of the engagement).	Has experience with migrations and understands the complexities of moving customers from on-premises to Business Central.	Using the engagement to dig deeper into migration assessment and ROI of moving to Business Central online.
Is very familiar with Business Central and is either ready to buy or has specific concerns related to using it in their unique environment.	Has experience spinning up tailored demo environments.	Next-level exploration* to paint the picture of providing a complete solution using ISV components with Business Central and Copilot.

*Note: for this approach, customers need to be open to sharing sample data and providing a technical contact to answer questions before the engagement.

1.7 Select an approach for proving the business value

The second main objective of the engagement is to help prove the business value of the implementation. You can choose the approach that best suits your team and your customer or use them all:

- Use the [profitability calculator](#) to help the customer understand the value of Business Central
- Create a detailed proposal for a small-scale implementation including ISV integrations, which may take the form of one of the following:
 - Show specific requirements that can only be supported by a configuration (per tenant extension)
 - Provide generic requirements that can be supported by using an extension via AppSource
 - Offer fixed price/fixed scope/fixed time offers
- Share results from the [2023 Forrester TEI study on Business Central](#) and customer success stories: [Microsoft stories for Dynamics Business Central?](#)

1.8 Assemble your team and refresh your skills

Use your proposed engagement agenda to assemble your team. Start by thinking through who needs to be involved from your side. You'll likely want to include a sales specialist in the prepare, conduct, and document phases. However, you might choose to bring in a technical support team to help during the discovery and envisioning exercises. If someone from your side has experience with the customer's industry, they should be included in the team as well.

Looking to brush up on Business Central:

- [The Business Central in a day workshop](#) (on-demand) offers an excellent foundation for learning how to pitch the value of the solution.
- [Microsoft Copilot in Business Central 101](#) in Partner Hub offers resources and demos to help learn about the role of Copilot.

1.9 Customize the activity engagement template (.pptx)

Tailor the customer facing presentation deck to align with your proposed agenda and approach. The hidden slides that precede customer-facing slides offer guidance about how you can use them. Spend some time thinking about how you will talk to each slide. Remove any that are unnecessary for your engagement.

You can further tailor the engagement and the deck by requesting customer artifacts related to the use cases, such as invoice templates, order forms, accounting fields, industry-specific workflows, etc.

Phase 2: Conduct the engagement with the customer

The second phase involves facilitating the discussion with all customer stakeholders. The customer engagement template that you customized in phase 1 provides a framework you can elect to use to structure this phase, however all engagements must consist of five main components that help the customer move from a cool/warm lead to a warm/hot lead or sale.

1.10 Discovering (or validating) pain points

Write out the biggest problems the customer faces in business management and get them to verbally agree with your assessment. By leading with the issues/opportunities they wrestle with, you increase the likelihood that they will continue to listen and trust you.

1.11 Identifying key use case scenarios

Define the key use case scenario(s) that describe the processes or systems an organization identifies as its biggest challenge/ area for opportunity. Key use case scenarios help translate the business pain points into well-defined activities that Business Central addresses. While the scenarios are similar across organizations, the way organizations or teams approach them today widely vary. It is up to the partner to understand the current systems, processes, and challenges when proposing a use case scenario.

1.12 Helping the customer envision a better way

Help the customer envision a better way for their business to work through Business Central, Copilot, and the Microsoft Cloud.

1.13 Making the case for the business value

Showcase high-priority transformation scenarios and bring to light the product strengths and proof points around specific customer challenges you heard during discovery. The key is to lead with the Microsoft Cloud value proposition and demonstrate how Business Applications and specifically, Dynamics 365 Business Central and its Copilot capabilities, can help them solve the customer's challenges.

1.14 Recommending next steps

Immediately following the second phase, you should provide actionable next steps for your customer. As a best practice, you may want to include up to three options that provide immediate, mid-range, and long-term options for starting and growing their digital environment. Including the scope and timeline for each option will make it easier for the customer to decide and plan a course of action.

Depending on the customer's propensity to buy, you may also want to recommend other MCI Funded Engagements:

- Business Central Migration Assessment, which includes functional and technical assessments for migrating on-premises deployments of Dynamics to the cloud
- Business Central Deployment Accelerator, which helps customers plan for deployment of the licenses they've purchased and reduce implementation costs

Phase 3: Document findings and submit your POE

The last phase focuses on documenting the findings and submitting the proof of execution (POE) for your MCI claim. This work may happen during the actual engagement and be shared immediately afterwards, or you may decide to write it offsite and share it with the customer later.

Document recommendations and next steps

Share the recommendations that you developed for the customer with them in a formal document that they can share with others in their company. You may also want to include additional information about your company, the proposed solution, and customer references (if available) to help the main stakeholder have meaningful conversations with new internal teams.

Submit POE for payment from Microsoft

Three elements are required to be completed and submitted as part of the POE, including:

- **Customer survey:** The customer survey is developed by Microsoft and used to track customer experience and partner participation. The link is sent directly from the POE submission section in MCI when you trigger it.
- **Partner survey:** The partner survey is developed by Microsoft and used to track your participation. The link can be found in the POE submission section in MCI.
- **POE template:** You must download the [Business Central Needs Assessment POE template](#) and complete it in English. The template includes three slides from the Needs Assessment deck:
 - **List of participants:** Must include at least 2 customers and customer emails
 - **Key challenges identified:** Must include at least 3 challenges
 - **Top initiatives* identified for improvement:** Must include at least 2 initiatives