



# PIPELINE MANAGEMENT

OPTIMIZING COLLABORATION TO DRIVE BUSINESS  
GROWTH

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# **INTRODUCTION TO PIPELINE MANAGEMENT**

# Understanding Pipeline Management

## Sales Opportunity Tracking

Tracking and qualifying sales opportunities is essential for shared visibility and accountability with Microsoft partners. It creates a single source of truth for yourself as a seller and the organisation.

## Pipeline Hygiene and CRM Alignment

Maintaining pipeline hygiene and aligning CRM systems ensures accurate data and effective sales forecasting.

## Leveraging the right tools

Utilizing tools like Dynamics 365 enhances forecasting accuracy, builds the customer contact database and supports informed decision-making. Leveraging tools such as Cloud Ascent data can help you identify leads.

## Collaboration for Deal Progression

Fostering collaboration between yourself and Microsoft, and/or between yourself and your resellers accelerates deal progression and improves outcomes.

## Alignment on programs

Microsoft Programs are aligned to MCEM sales stages and our sellers are actively managing customer pipeline through the sales stages and aligning programs

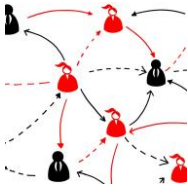


# Why Pipeline Management Matters



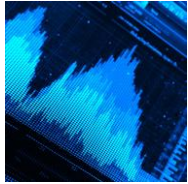
## Shared Visibility and Trust

Pipeline management enables shared visibility into sales opportunities, fostering accountability and building trust among yourself , your team, your Partners and Microsoft.



## Streamlined Collaboration

Aligned co-sell motions, get access to programs aligned to the MCEM cycle such as Azure Accelerate/Assessments, and engage resources into an opportunity.



## Time management & Hygiene

Maintaining pipeline hygiene accelerates deal progression and improves sales funnel velocity. It allows suitable time management and ensures nothing gets missed.



## Driving Adoption and Consumption

Collaborating to align resources to drive customer success in deployment and adoption



## Impact & Forecasting

Clearly demonstrate impact, volume and risks as a seller and an organization.

# **BEST PRACTICES FOR PARTNERS**

# Pipeline Hygiene

## Regularly Update Close Dates

Keep estimated close dates current to reflect the latest information for accurate sales tracking.

## Accurate Opportunity Stages

Ensure opportunity stages are correctly represented to maintain clear visibility of sales progress. Best practice to align to the Microsoft Customer Engagement Methodology (MCEM) to drive close alignment with Microsoft sellers and ability to access programs.

## Campaign Tagging for ROI

Tag campaigns accurately to track return on investment and measure marketing effectiveness.

## Parent/Child Deal Management

Using parent/child relationships in CRM helps organize and track complex deals efficiently.

## Managing pipeline with Microsoft / Resellers / Sellers

Manage the ROB with your sellers, your resellers and your Microsoft POD



# Managing Pipeline

## Joint Planning Sessions

Collaborative planning between distys, Microsoft and resellers, landing clear, measurable goals with KPIs using tools such as Cloud Ascent

## Performance Tracking ROB

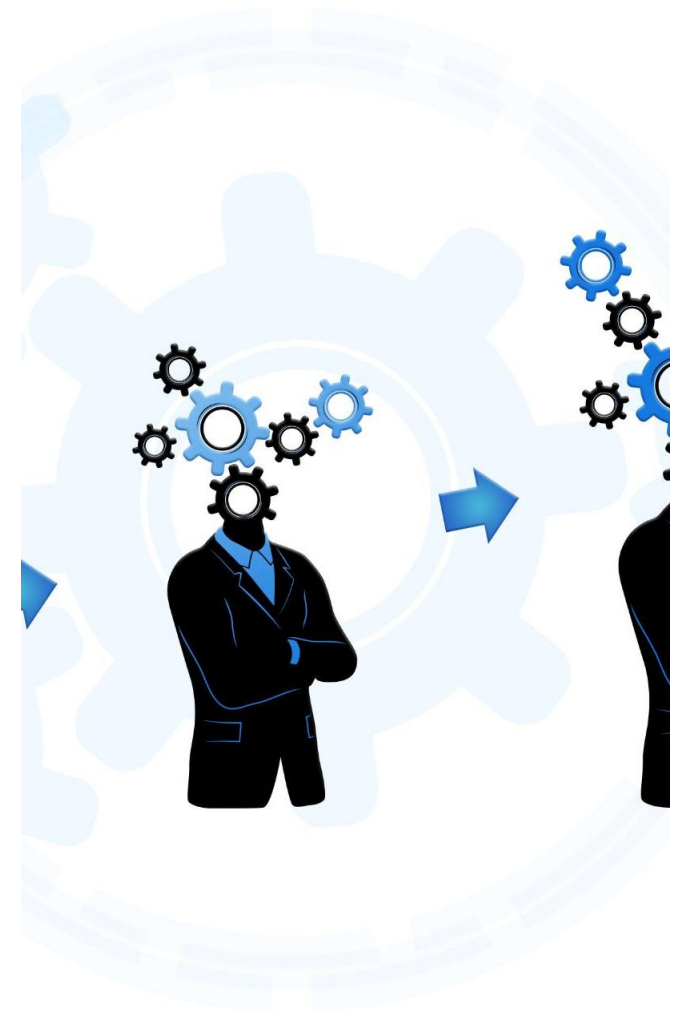
Tracking performance and following up on referrals ensures active management of sales opportunities.

## Lead Acceptance / Lead sharing

Partners demonstrating good pipeline hygiene in Partner Centre demonstrates responsiveness and commitment

## Strengthened Partnerships

Effective co-sell practices enhance relationships and pave the way for sustained growth.





# Microsoft Customer Engagement Methodology (MCEM)

## Customer Centric

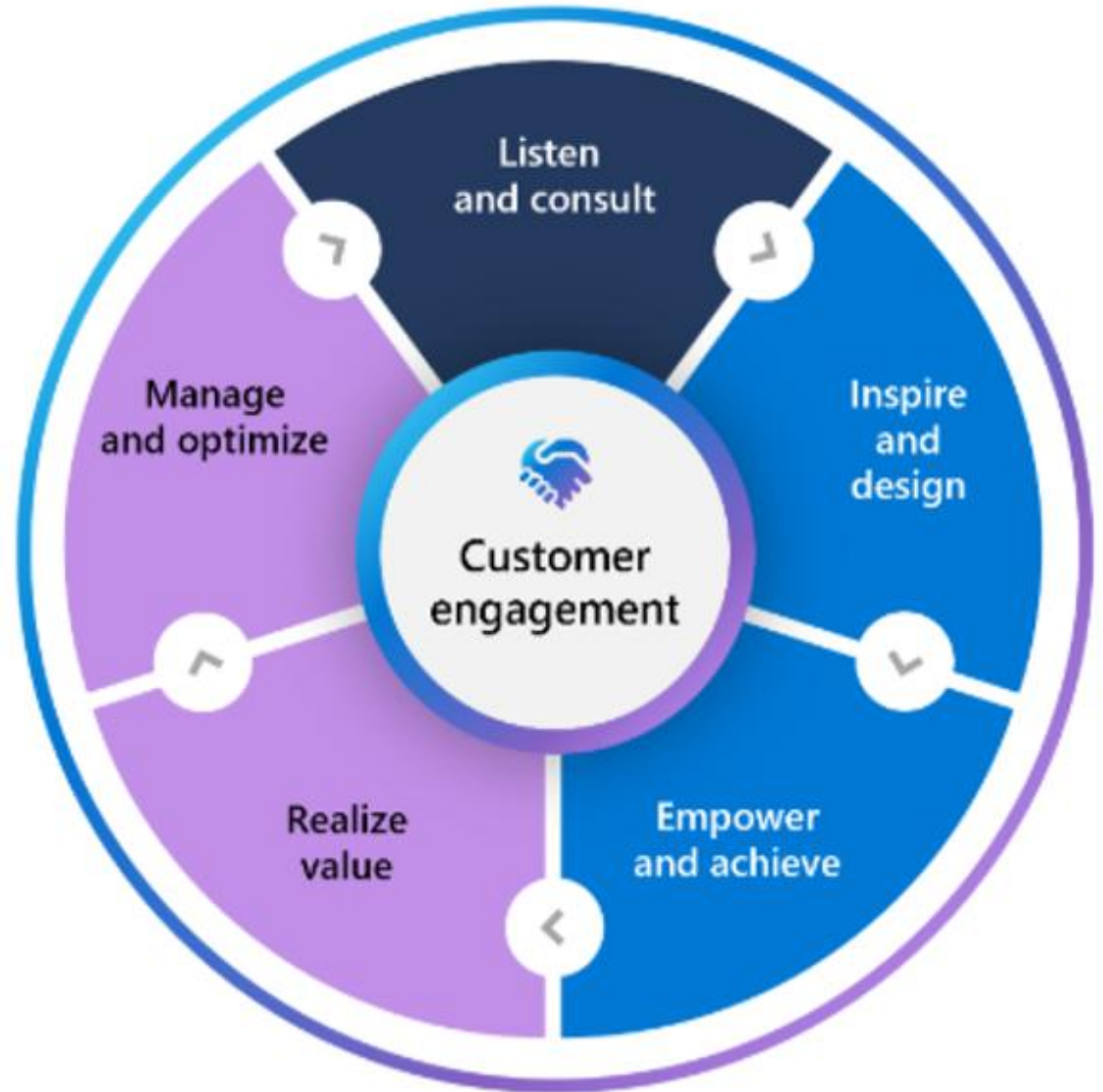
MCEM is a customer centric co-selling methodology that aligns our sales strategies and streamlines the process of selling mutual solutions and services

## Clarity and Accountability

These tools establish a strong foundation of trust by clarifying and defining accountability for each of our roles and responsibilities throughout the process.

## 5 Clear Stages

MCEM divides the sales process into five distinct stages. Listen and Consult, Inspire and Design, Empower and Achieve, Realize Value, and Manage and Optimize





# Creating the rigor around pipeline

Step 1 : Landing the ROB

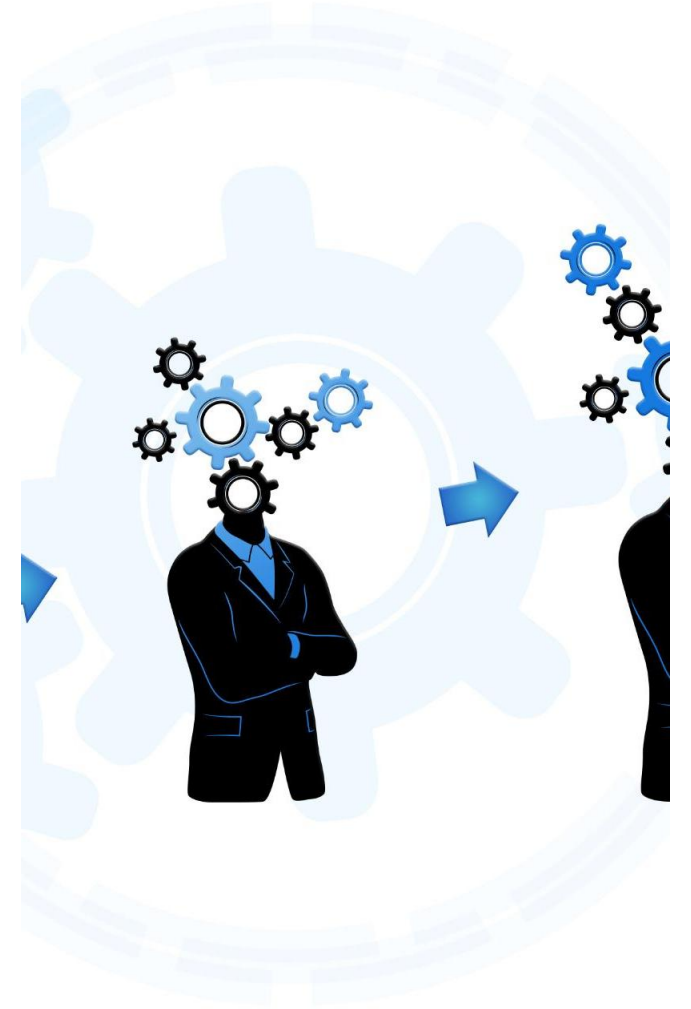
Step 2 : Opportunity Generation and adding to pipeline

Step 3 : Connect with Microsoft PSS / Distributor

Step 4 : Land programs and resources

Stage 5 : Move opportunity through the sales stages (follow MCEM as a guide)

Stage 6 : Create WinWire's and share success





# **TOOLS AND FRAMEWORKS**



# Microsoft Tools and Methodologies

## Microsoft Customer Engagement Methodology

MCEM provides structured guidance for managing billed and consumption motions effectively.

## Cloud Solution Area Playbook

The playbooks provide actionable strategies for engaging with sellers and maximizing business impact.

## Cloud Ascent Data

Customer propensity data provided by Microsoft and available through Partner Centre (for resellers) and via Microsoft (for disty) to allow you to build a lead pipeline

## Marketing tools

Utilising the marketing tools available from Microsoft to build your own campaigns, nurture customers and build demo environments and customer immersion experiences



**BEST PRACTICE**

## Partner Best Practice - Giacom



### Established ROB with Microsoft POD

Joint territory planning, mapping priority partner accounts, joint calls with sales and practice leadership to share key pipeline opportunities and engage co-selling resources



### Pipeline Sharing

Joint fortnightly call with Sales leads and Practice sharing top pipeline opportunities. Driving a closer relationship, trust and collaboration between Giacom & Microsoft and identification of next steps with customers / resellers



### Deep understanding of the Microsoft programs and incentives

The Giacom sellers and practice teams identify opportunities to land programs and engage the Microsoft PSS with the reseller early in the sales cycle to support in landing the Microsoft programs



### Giacom track & Incentivize their Program Utilization

Giacom skilled their internal sellers on Programs to ensure clarity and incentivized sellers to land and utilize programs with customers resulting in a huge increase

# **CONCLUSION AND NEXT STEPS**



# Summary and Recommendations

## Pipeline Management Importance

Effective pipeline management builds predictable, collaborative business relationships for improved outcomes.

## Best Practices Adoption

Maintaining hygiene, aligning CRM, forecasting accurately, and enabling co-sell motions enhance pipeline success.

## Utilizing Microsoft Tools

Microsoft tools and frameworks provide structure and insights for optimized pipeline management.

## Partner Recommendations

Partners should review practices, engage in joint planning, and explore resources to optimize strategies.





**THANK YOU FOR  
YOUR TIME**