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Balancing the Opposing Forces of Nature

Here's how it works: your sales team closes opportunities, and then the service delivery team implements them. Everything always goes like clockwork, right? Well, not quite.

Sales and service delivery represent two fundamentally opposing forces of nature and partners must keep these forces in balance. This is critical now, as we seek to capitalize on the peak selling time of the year.

The importance of balancing sales and service delivery

How do you balance these two opposing forces? Your sales team exists to pursue customers, close opportunities and commit to an implementation schedule that suits the needs and wishes of customers. Each potential deal has its own dynamics and develops its own momentum. The key to successfully closing deals is to keep this momentum going. There is an overwhelming pressure to say "yes" to customer demands and to make the commitments that seem necessary to win the business.

At best, your sales team operates in a relatively unpredictable environment which requires discipline, but also a high degree of adaptability and creativity. To close deals, salespeople must solve business problems first and technology problems second.

Your service delivery team, on the other hand, lives in a very different world. While adaptability and creativity are important, structure and process are more significant for delivering quality outcomes and predictability is critical for installing reliable solutions. Technology issues are the focus for service delivery teams—they worry about "how" to get things done, not "what" to do.

If either the sales team or the service delivery team "wins" this struggle, your business loses. The risk is a disappointed customer with a solution that compromises requirements or doesn't effectively solve business problems.

Achieving balance through communication

The best way to keep your sales and service delivery teams working together effectively is through close communication, especially during these key stages of the selling process:

1. *Estimating.* At bare minimum estimating includes a presentation to the customer with an explanation of costs based on the requirements as understood. The presentation should also include a description of the final deliverables and a quantifiable business impact. Your service

delivery teams needs to be deeply involved with preparing the estimate to make sure no later misunderstandings arise about project scope and/or cost.

2. *Proposing.* Most deals require some form of proposal that clearly defines the deliverables and includes the project estimate or cost. Once again, your service delivery team should be involved in developing the proposal to help ensure that the solution can, in fact, be delivered for the specified cost.
3. *Closing.* No deal is final until the customer commits, and the reality is that not all deals in the sales pipeline will close. But the more aware your service delivery team is about the ones that are likely to close—and when—the better they can begin to align themselves to the implementation schedule.
4. *Scheduling.* From a service delivery perspective, implementing the solution for the cost indicated and in the time promised requires detailed planning. To make the greatest possible use of both delivery resources and time, new deals must be scheduled alongside implementations already underway, while also taking care of existing customers.

Applying balance to June closings

This month, an article for salespeople poses this question: “40 days, 40 closes?” In other words, “how many deals will you close in the time remaining until the end of June—our peak selling season?”

But from the CEO perspective, the question is broader: in addition to closing the greatest number of deals possible, how many can be implemented? Effective synchronization and streamlined processes will help deliver the best combined results:

1. *Synchronization.* Your sales and service delivery teams must be brought together and their efforts fully synchronized for greatest success. Without synchronization your business will operate on more of a “boom and bust” cycle. Your sales team will sell until the service delivery team starts saying “slow down” or can no longer schedule new implementations. If the sales team takes its foot off the gas until the implementation backlog is gone, then service delivery resources sit idly waiting for new deals to ramp up and close. Apart from being stressful to all concerned, this kind of cycle can have a significant effect on your bottom line. Load balancing is an important factor which must be managed carefully.
2. *Streamlining.* The process of selling and installing solutions must be streamlined at every point, including every point of interaction between your sales and service delivery teams. As a business manager and Microsoft Dynamics partner, you need to keep your foot firmly on the sales accelerator, while also balancing service delivery commitments. The use of the Solution Selling process, combined with the Microsoft Dynamics Sure Step delivery methodology, is a great way to keep both teams focused and working well together.

40 days, 40 closes, and 40 implementations

So let’s ask the broader question: “40 days, 40 closes, and 40 implementations?”

Now is the time to make the most of the upcoming peak selling season, both in terms of adding new customer *and* bottom line profitability, to say nothing of customer satisfaction. Start now to balance, synchronize, and streamline the efforts of your sales and service delivery teams.