professional
**advantage**

# *CHANGING* YOUR
# MICROSOFT PARTNER

## Abstract

This whitepaper discusses the process involved and answers the most common questions relating to changing your Microsoft business Partner. It also provides information useful to ensuring a successful transition to a new Partner for all organisations involved.

**Microsoft** Partner

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# 1. Introduction

Successful organisations always look at ways to boost operational efficiency, improve quality and implement cost saving measures. They strive for business processes that are efficient, accurate and repeatable. Extending this beyond the basics for success it is important to ensure you are partnering with an organisation that is able to not only support your business but in fact enable your organisation to become a high performing workplace.

Poor economic conditions see most organisations focus less on implementing new business systems and more on optimising existing systems. This can be best achieved with a strong partnership where two organisations work together in a way that ensures the best possible outcome for both parties.

This document describes the information required to help assess your current Partner as well as the details required for you to be able to change to another Partner.

# 2. Definition

As a Microsoft Dynamics customer, your organisation is associated by Microsoft with a specific Partner. This begins with the original purchase of your Microsoft Dynamics solutions and is maintained through the renewal of your annual software enhancement. However, you are able to engage with another Partner organisation at any time during the life of your solution. As Microsoft only associate one Partner to your organisation, it is important that you choose a Partner that can help you with all aspects of your business needs as this will be the Partner with which you engage.

To move to another Partner, you will go through what is referred to as a 'Change of Partner Process'. This process will simply allow Microsoft to associate your organisation to another certified Dynamics Partner. This process is repeated for any Third Party vendors (in addition to Microsoft) that form part of your Dynamics solution.

Ultimately it is a simple process that requires you to complete a 'Change of Partner' form which is sent to Microsoft for processing. You are also required (in conjunction with your new Partner) to inform any other relevant Third Party vendors that you are engaging with a new Partner. The information below describes in more detail how you can ensure all aspects of your business are covered for a complete transition.

# 3. What you will need to know

While the process of changing from one Dynamics Partner to another is quite simple, there are a number of key pieces of information that need to be considered and actioned prior to signing the final 'Change of Partner' form.

## 3.1. Protected List Price (PLP)

This is the value associated to your Dynamics solution. It is determined by Microsoft (and other Third Party vendors) at the time of your original purchase and then increased depending on the additional licenses you add during the life of your solution.

For example: you purchase your original license for $50,000. You then add additional users and modules over time with a value of $15,000. Your PLP is $65,000. The value of your PLP is used to calculate your annual maintenance.

You can obtain your PLP from your current Partner. It would normally be referenced on your most recent maintenance renewal invoice. Alternatively you can give permission to another Partner to obtain this information for you from Microsoft.

Note: Your PLP can also be reduced at any time should you deactivate users or modules from your licensed solution.

## 3.2. Anniversary Date

This is the listed date of your original Dynamics solution purchase. It is the date on which your annual renewal is generated.

You can obtain your PLP from your current Partner. It would normally be referenced on your most recent maintenance renewal invoice. Alternatively, you can give permission to another Partner to obtain this information for you from Microsoft.

## 3.3. Business Ready Enhancement Plan (BREP)

This is the term given by Microsoft to your annual software maintenance. Included in the BREP is access to the latest version of the software. It is calculated at 16% of your PLP and payable annually based on your Anniversary date. This term is also used by Third Party vendors to reference the annual maintenance fee.

Benefits of the Microsoft Business Ready Enhancement Plan include:

- Product Updates and Service Packs – Take advantage of the newest technologies by receiving and installing the most recent updates to your solution, including major version releases, point releases, service packs and fixes.

- Product Advisory Board – Participate in the yearly Product Advisory Board survey or visit CustomerSource to offer suggestions through the global suggestion database.

- Protected List Price – Control expenses with the Protected List Price and it shields you from price fluctuations and helps you more easily budget for your renewals.

- Transition Investment Credits – Apply a full license credit towards any other Microsoft Dynamics Financial Management and Supply Chain Management solution.

- Support Lifecycle Policy – Receive five (5) years of mainstream support (includes security updates, service packs) for products release after 2005. An additional five (5) years extended support (paid support with ability to request non-security hotfixes, regulatory releases and tax updates) is available on select version.

- CustomerSource and Knowledge Base – CustomerSource provides access to a searchable technical database, discussion boards, news, a subscription service and more. Knowledge Base is packed with thousands of time saving tips, usability recommendations and answers to commonly asked technical questions.

# 4. Key Considerations

## 4.1. System Development

It is important to understand if any development has been done and added to your base solution for two main reasons.

Firstly, from a support perspective, the support consultants can benefit from being made aware of any enhancement beyond the standard functionality.

Secondly, if development has been done, then access to the source code is required to enable you to continue to maintain the developed code for future enhancement or upgrade.

Complete support is able to be provided on a developed solution. If you are unable to obtain access to the original source code, then a full review of the functionality delivered can be done for future maintenance.

## 4.2. System Integrations

This relates to any piece of integration that either brings data into your solution or takes data out into another application.

## 4.3. Reporting Tools

There are several options available with reporting tools for your Dynamics solution. This includes simple reports from the system, financial reports, forms (such as invoice layout, statements, etc.) and complex business analytics. Identifying all reporting tools used will include a combination from multiple sources.

It may not be obvious as to the reporting tools that are being used. However, it is important to at least identify all the areas within your solution that reports are delivered. Once this is identified you can engage with your partner of choice to confirm the tools being used to deliver the actual reports.

## 4.4. Complete Solution

When defining the solution that you need support on, it is important to consider all licensed software. This includes the Microsoft license, any Third Party add on products and specifically any software that has been developed by your current Dynamics partner.

# 5. Be Aware of the following items

## 5.1. Development

Any development done on your site will need access to the source code. Without the source code you will be unable to maintain the development for future enhancement or upgrade.

If you are unable to obtain access to the original source code then a full review of the functionality delivered can be done for future maintenance.

## 5.2. Anniversary Date

Be aware of your maintenance renewal date as late payments to vendors will result in penalties being applied. The penalties from Microsoft include:

- **Loss of Protected List Price (PLP)** – meaning that your original protected price will be replaced by the current list price and generally result in an increase in future annual maintenance

- **Back pay the BREP plus another 12 months** – you will be required to back pay the outstanding amount to your original anniversary date as well as pay another full 12 months from the new anniversary date

- **Penalty of 3%** - for the back pay amount there will be a 3% penalty applied in addition to the normal 16% (taking the full amount of the back pay amount to 19%)

# 6. Considerations when looking for a Partner

**Does the Partner support all aspects of your business?**
This includes not only every aspect of your Dynamics solution but the complete Microsoft environment including your infrastructure that you require.

**What type of customer community is available?**
Is there a user group? Is there an industry specific group for your business?

**Is there a web based self service system available?**
Are you able to log, update and manage your own support cases online? Is there a knowledge base of common issues and resolutions available for yourself service?

**How much does the service cost?**
What are all the costs involved in the support and services available? Are there any additional costs for specific services?

**What else is provided other than helpdesk support for the service cost?**
Are there any other services provided as part of the support cost? Are there any training, account management, user groups, and web based updates available and included?

# 7. The most common questions answered

Professional Advantage has successfully transitioned many customers through the 'Change of Partner' process. Listed below are the answers to the most commonly asked questions that will help you to understand more about the process.

**Q. When can I transfer to another Partner?**
**A.** You are able to transfer your association to another Partner by completing the 'Change of Partner' form at any time. There is no restriction on the timing with which you can change to a new Partner.

If you do transfer to another Partner during your anniversary period, the Business Ready Enhancement Plan that has already been paid to the vendor will remain current until your anniversary date. You do not pay this again and your anniversary date remains the same. Your next renewal of the Business Ready Enhancement Plan will be handled by your new Partner.

**Q. How is the cost of support calculated?**
**A.** Professional Advantage provides a SupportPlus offering that is calculated at 22.5% of your Protected List Price (PLP). This includes the 16% Business Ready Enhancement Plan charge levied by the vendor.

You can obtain your PLP from your current Partner. It would normally be referenced on your most recent maintenance renewal invoice. Alternatively you can grant permission to Microsoft to provide Professional Advantage with this information on your behalf.

If you do transfer to Professional Advantage during your anniversary period, the 16% Business Ready Enhancement Plan that has already been paid to the vendor will remain current until your anniversary date. You do not pay this again and your anniversary date remains the same. In these instances we will pro-rata a 'support only' charge that will deliver the benefits of the SupportPlus program from the transfer date to your next anniversary date. This will provide you with our full support service offering until your next renewal, while keeping the renewal in line with your current anniversary date.

**Q. How can Professional Advantage support an implementation done by another organisation?**
**A.** At Professional Advantage we have certified support professionals that have been supporting Dynamics solutions for an average of over 6 years. With this extensive level of support experience the application support provided by Professional Advantage is of the highest quality. Couple this with experience in implementing several hundred Dynamics solutions, the resources at Professional Advantage have been exposed to a wide range of different organisations and implementations.

The process involved in taking on the support of an organisation implemented by another Partner first revolves around supporting the functionality of the application.

This support is provided directly via the phone, email or remotely via the internet.

Beyond the support staff, your organisation will be exposed to our fully experienced consulting and development teams.

With this full range of support and delivery services and experience, Professional Advantage has a proven track record in supporting the implementation of any other Partner.

**Q. How can a new Partner support development done by another organisation?**
**A.** The first level of support is always provided on the standard functionality available within the application. When a modification / customisation is involved, the troubleshooting effort then centres on the functionality delivered with / and without the development.

If the development is identified as being the cause of the problem, then the issue is escalated to our development team who are able to help with the resolution. Ideally if the source code is provided, then our development team can review the code and modify accordingly. If the source code is not provided, then the development will need to be completely reviewed.

**Q. How is the cost of support calculated?**
**A.** Professional Advantage provides a SupportPlus offering that is calculated at 22.5% of your Protected List Price (PLP). This includes the 16% Business Ready Enhancement Plan charge levied by the vendor.

You can obtain your PLP from your current Partner. It would normally be referenced on your most recent maintenance renewal invoice. Alternatively, you can grant permission to Microsoft to provide Professional Advantage with this information on your behalf.

**Q. What is included in the support cost?**
**A.** The following services are provided as part of the Professional Advantage support offering:

- Customer Support Team – Our team consists of dedicated specialists focussed on solving your support queries. Each issue is logged into our CRM system, updated and escalated through to resolution.

- Regular Email Newsletters - email updates inform you of developments in the Microsoft Dynamics solutions world as well as technical information and tips on how to better use your system.

- Account Management and Client Reviews - providing a program of regular meetings to proactively manage your level of satisfaction and ensuring that we are continually adding value.

- FREE Technical Site Audit - providing a review on the set-up, performance, and procedures of your Microsoft Dynamics system.

- Online Sessions of Support, Demonstration and Training - These short sessions allow you to stay informed and learn quick tips and tricks to use the system to your maximum benefit.

- InTouch: Client User Meetings - These meetings focus on specific solution related topics, provide you with the opportunity to meet with other users, as well as give you an insight into broader Microsoft products and capabilities.

- FREE Induction Training for New Users - Regular half day overview courses for new users help your new employees get up to speed faster and become more proficient with the use of the system.

- Customer Portal - This facility gives you direct access to our help desk system. It allows you to log and review cases or search for knowledge base articles via the web, as an alternative to using the telephone support. This 24x7 service greatly enhances your ability to manage an issue through to its resolution.

**Q. How is support delivered?**
**A.** Professional Advantage has certified support professionals delivering a dedicated support service. This is accessed through:

- Phone - National phone number, 1300 658 608
- Email – Support specific email address, microsoftsupport@pa.com.au
- Web – Customer Portal, http://customerportal.pa.com.au

Support cases can be initiated via any of the above methods. The method by which a case is initiated does not determine the priority. Once a case is logged it is then managed with you to determine the severity and priority going forward.

The Customer Support Team exists to provide a support service to you by logging and solving cases relating to Professional Advantage serviced solutions. Our team consists of dedicated specialists who will be your point of initial contact, and primarily the team that solves the majority of your support queries.

If there are any queries that need to be escalated, the Customer Support Team is backed by the Professional Services and Development Team. In turn, we are supported by Microsoft and relevant Third Party vendors.

**Q. How do I know that changing Partners will be better than staying with my current Partner?**
**A.** Ultimately this will be a result based on value. Professional Advantage provides a service that continually adds value to your organisation by not only providing a full service support function but additional benefits included in the annual fee.

Further to the general support of your Microsoft Dynamics solution, Professional Advantage is also able to provide service across your entire Microsoft platform including (but not limited to) Exchange, MS SQL, Active Directory, SharePoint and a full range of Business Intelligence options.

**Q. How quickly can I change Partners?**
**A.** Once you have selected the new Partner that you would like to move to, all that is required is for you to complete the 'Change of Partner' form. This will then be sent to Microsoft by yourself or your new Partner. Once the form is sent to Microsoft, it is complete and processed within 24 hours.

**Q. How will my existing Partner be notified?**
**A.** Once the 'Change of Partner' form has been completed and sent to Microsoft, Microsoft will notify your existing Partner of the change immediately.

**Q. How will Professional Advantage ensure that I am receiving the most benefit from my existing system?**
**A.** Professional Advantage will engage in a systematic approach to proactively working with you to ensure that your solution is delivering the maximum benefit possible. This approach involves all areas of our business and a variety of activities:

- Account Management. We will allocate a dedicated account manager to own the relationship between our two organisations. This person will act as your primary contact. The Account Manager is ultimately responsible for your overall satisfaction and will engage in a program of regular contact to ensure that we are continually adding value.

- The transfer process. During this time, your organisation will be profiled within our internal Customer Management system. This will include items relating to your organisation details, personal contact information and the specifics relating to your licensed Microsoft solution. It will be the first point of reference for the Account Manager to analyse your current situation.

- Support. Through our support activities, a history of interaction will be tracked and reference by all support staff. This information is available throughout our organisation within the one Customer Management system. This support information is then used to analyse any area of functional

requirement right through to possible training needs.

- Consulting / development. Through each and every delivery engagement, all interactions and relevant documentation is tracked within our Customer Management system. The consulting and development resources are also able to ensure that the available functionality is being utilised and recommend any future needs.

Through these wide range of activities, your Account Manager will work with you to not only ensure you are receiving the maximum value from your original investment, but will also provide a road map for future enhancement of your overall solution.

**Q. How will Professional Advantage start to support my business?**
**A.** As soon as we have come to a commercial arrangement, you will have full access to our support services. Our first priority will be to assess your current support needs.

This will be a check on any outstanding / unresolved support issues from your previous Partner. This process will ensure that we begin supporting you with a full understanding of your current position.

**Q. How does Professional Advantage support Third Party products?**
**A.** In our experience we understand that the best possible support is provided when one organisation can manage all your needs. Therefore we provide our support services as the first line of support for all your solution needs.

When a Third Party product is involved, we still provide the first line of support. We already have a number of recognised Third Party suppliers with which we have a formal contractual arrangement. We have a detailed process to evaluate Third Party vendors and products before including them in our range of supported products. While it is our intention to provide the first line of support for all relevant Third Party products, we can also engage directly with all Third Party providers should an issue require escalation.

**Q. How can Professional Advantage provide remote support without requiring someone physically on-site?**
**A.** In the instances where it is determined that support is required beyond the phone or email, we are able to use the internet to provide web based remote support. This will enable a support team member to access / view your system via the web to continue the resolution process.

# 8. Professional Advantage can help

Things change. Your business needs change and you find yourself needing more from your Microsoft Partner organisation. Whether you have outgrown your existing Partner or the business relationship is not meeting your expectations – Professional Advantage can help.

We specialise in helping organisations transition from their existing Microsoft Partner across to Professional Advantage for a brighter future. Having already helped hundreds of organisations through this process, we would be excited at the opportunity to engage with you directly as your Microsoft Partner of choice.

Please do not hesitate to contact us on 1800 126 499 or via email at enquiries@pa.com.au

You can also review additional information relating to transferring your support to Professional Advantage at http://www.pa.com.au