A business transformation playbook for the commercial marketplace

Preparing your organization for successful onboarding and selling
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Overview

Partners are fundamental to the Microsoft ecosystem. Historically, Microsoft has stood at the forefront of industry technology trends – from the move to GUI, client/server computing, the evolution of the internet, to the rapid shift to cloud computing and remote work. Microsoft has helped its ecosystem capitalize on these transformative changes by providing partners with effective mechanisms to generate positive business outcomes.

Paradigm shift to self-service technology, streamlined procurement, and marketplace as a distribution engine

The Microsoft commercial marketplace (commercial marketplace) is currently addressing another important and opportunity-rich change – the shift in customer buying behavior to a self-service paradigm that impacts the way both Microsoft and its partners deliver solutions to the market. This paradigm shift presents a powerful opportunity to enhance Independent Software Vendors’ (ISVs) success and address this fundamental change in how customers discover and buy software and services, via a marketplace environment.

As the way technology is developed, discovered, distributed, purchased, and deployed continues to evolve, Microsoft is working to help our partners take advantage of this transformation. This evolution of the technology procurement process is rooted in a self-service mindset where business buyers increasingly conduct more of their own discovery, research, and trials; and then purchase and deploy technology on their own or via a streamlined purchasing and deployment experience.

The commercial marketplace addresses these trends, making it possible for customers to easily discover, try, and buy in a way that makes sense for their business. In some cases, this means discovering, trying and buying through an online storefront, but it also may mean engaging their trusted Cloud Solution Provider (CSP) partner or working with their Microsoft account representative. Microsoft commercial marketplace enables partners to leverage all these scenarios.

Nearly every company in the world has a commercial relationship with Microsoft. This customer base is an asset Microsoft partners can most effectively leverage through commercial marketplace. This modular guide provides the tools to convert the potential offered by the commercial marketplace distribution engine into real value and business success.

However, for this channel to drive return on investment, investments are required to adapt and grow, as they are with any distribution channel. Whether such investments focus on pricing, packaging, sales, marketing, offer structure, operational adjustments, or technology integrations, the outcomes will enable and optimize your transactions on commercial marketplace, leading to incremental revenue.
Addressing the commercial marketplace opportunity

Consider the implications of incorporating this distribution channel into your business. With the commercial marketplace, a new go-to-market channel now exists, enabling a self-service approach for discovery, evaluation, purchase, and deployment. This channel can be used as part of a multi-channel approach, or as your primary way to go to market. The availability of this channel can increase margins by offloading significant business costs, streamlining procurement and accelerating deal velocity, and expanding customer reach to access incremental revenue opportunities.

The potential value of such a channel is tremendous. The Forrester Total Economic Impact Study: The Value of Commercial Marketplace for Microsoft Partners provides an insightful view of the benefits and value of leveraging this channel.

In order to fully take advantage of this opportunity, it is important to evaluate various implications for your organization – the way business is currently done, and what changes might be needed to current go-to-market efforts to effectively close deals.

Here are a few key examples to consider:

- **Channel strategy:** How can a new channel like the commercial marketplace seamlessly be incorporated into the business? How can it supplement (not replace) your existing channels?
- **Product strategy:** What are the implications regarding your stock keeping units (SKUs), pricing, and packaging? Can your current product(s) be sold and deployed using this model?
- **Business processes:** Do your current billing systems, invoicing, support, or other core infrastructure support such a channel?
- **Sales and marketing approach:** How can you effectively incorporate and leverage this channel into your existing customer outreach efforts to help drive incremental sales and reduce friction for your existing pipeline?

When considering the business implications of the answers to these questions, you may determine that some action is required to most effectively leverage the commercial marketplace channel. For example, some basic implications that may be considered include whether to:

- Address the strategic need and opportunities created by an emerging channel like commercial marketplace.
- Create channel neutrality by managing potential channel conflict, exclusivity, and segment delineation among direct and indirect channels.
- Change sales compensation models to account for changing buyer behavior and a multi-channel sales approach.
- Create and optimize product channel-specific offerings for evaluation, trial, and deployment.
- Modify or augment marketing lead generation and management programs and processes.
- Identify co-selling opportunities and actions with other partners, and with the Microsoft enterprise sales force.
- Effectively accommodate your offering’s sales cycle, complexity, customization requirements, or other unique attributes.
- Shift metrics and key performance indicators (KPIs) required to effectively manage the business.

As you continue to move forward and take advantage of opportunities generated by the shift to self-service and streamlined procurement, we recommend considering how your firm will address the above implications and strategic questions. This guide provides a framework to support your planning to address such issues.
Preparation to onboard to the commercial marketplace: an overview

Key objectives:
In this module, the following key concepts will be discussed:

- Key onboarding considerations
- Peer-based onboarding guidance
- What is the commercial marketplace?
- Significant platform functionality
- Driving revenue: access to new channels and streamlined fulfillment
- Reducing cost: leverage Microsoft’s infrastructure and procurement relationships
- Integration capabilities
- Building the onboarding business case
- Decision making and planning process
- Gaining buy-in
- Critical onboarding focus areas
Peer-based onboarding guidance

This playbook is intended to help prepare Independent Software Vendors (ISVs) to publish software and services through the commercial marketplace. Much of the information in this document is provided directly by ISV industry peers—those that have ‘been there, done that’ and have already effectively onboarded to commercial marketplace.

Through this document, they have shared their insights, tips, and tricks to help you more quickly overcome onboarding barriers. They have also provided potential planning considerations for your firm as you move forward in the process.

Specifically, this guide can help inform your firm’s planning to effectively prepare to onboard applications and services to the commercial marketplace, and more quickly get to transactability and incremental revenue. This document guides you through some key areas that your peers have noted they stumbled on and provides ways to mitigate the issues they faced.

Thus, these recommendations are based on best practices from industry experts—the ISVs currently building thriving businesses on the commercial marketplace.

Look for Peer-based insights (👍), suggestions (💡) and expert tips (⭐) throughout this guide.

What is the commercial marketplace?

Customer buying behavior is shifting toward a more cloud-based, self-service paradigm. This shift impacts the way both Microsoft and its partners deliver solutions to the market, while at the same time presenting a powerful opportunity to enhance Independent Software Vendors’ (ISVs) business success. As Figure 1.1 indicates, there are significant benefits to taking a cloud-based approach for enabling procurement self-service.

A self-service, cloud-based platform such as commercial marketplace can unlock new customer segments, reduce purchase complexity, lower customer total cost of ownership (TCO), integrate new cloud services, and leverage aggregate data to develop innovative new products and services.

Cloud technologies have:

- Changed the way IT is purchased, implemented, and deployed
- Accelerated application development and deployment, and thus reduced time-to-market availability
- Expanded business opportunities to a global scale
- Provided huge revenue opportunities. Software-as-a-Service (SaaS) applications are expected to generate nearly $100 billion in annual market revenue, at a growth rate of 21%
- Allowed buyers to easily trial new software
- Enabled new recurring revenue business models such as subscriptions
- Provided near-instant provisioning of resources, on-demand capacity, increased agility, and service quality, and shifts the IT cost from CapEx to OpEx.

Source: Consolidated ISV Feedback, June 2020
The commercial marketplace is built on cloud technologies and is constructed to address this fundamental change in how customers buy software and services via a ‘marketplace’ environment. The commercial marketplace is both a sales channel, and an e-commerce hub that brings together technology buyers and ISV sellers to enable seamless transactions via this cloud platform. As a channel, ISVs can sell products and services, and reach and interact with millions of potential buyers to achieve positive business results. Buyers can evaluate, purchase, and deploy the solutions they need in a self-service fashion, or working with their sales teams using streamlined procurement options facilitated by the commercial marketplace. Because of Microsoft’s reach and existing business relationships, the commercial marketplace has millions of monthly active users that generate a large number of qualified sales leads to participating ISVs.

**Significant platform functionality**

Figure 1.2 overviews the commercial marketplace offerings at a high-level and illustrates the significant level of functionality provided by the platform capabilities. These capabilities not only provide significant benefits to growing your top-line revenue, but also help off-load costs, enhancing your profitability.

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**Figure 1.2: Microsoft commercial marketplace overview**

**Module 1: effective onboarding**
Driving revenue: Access to new channels and streamlined fulfillment

As you can see, Microsoft has one commercial marketplace built upon its commerce platform. The commercial marketplace comprises two revenue-generating ecommerce sales channels (not shown in diagram) – Azure Marketplace, that surfaces IT solutions, and Microsoft AppSource, that surfaces business solutions. As an ISV, you can create your listings to be merchandised on either or both. The commercial marketplace also provides access to additional sales channels, including the Cloud Solution Provider (CSP) program, where resellers and managed service providers can package and sell your solution with their services, and Microsoft’s own sales team leveraging the co-sell motion.

On their own, customers can move from discovering needed solutions via search and the offer listings, to trying out solutions and assessing their fit. Finally, solutions can be purchased and fulfilled, right from commercial marketplace. In addition, the commercial marketplace also supports fulfillment for many solutions they may have already procured elsewhere. A customer that has a license for a product or service already through some sort of contractual agreement, can use Bring Your Own License (BYOL), apply the credits for the technology solution that they have already paid for separately, then fulfill their solution acquisition via the commercial marketplace.

Your organization can use the commercial marketplace to not only generate new revenue, but as a channel to fulfill existing demand as well.

Reducing cost: Leverage Microsoft’s infrastructure and procurement relationships

The functionality of the platform provides significant opportunities for cost-reduction as well. Again, referring to Figure 1.2, you can see the commercial marketplace platform infrastructure and services provide a wealth of built-in functionality for your business that you do not need to duplicate (cost savings) and can immediately leverage.

For example, consider the following cost-saving enablers that you inherit by leveraging the commercial marketplace:

- **Cost savings areas:**
  - Reduction in the cost of having to bill customers.
  - Reducing the costs of customer collections by leveraging Microsoft’s high collection success rate relative to other businesses success rates.

- **Infrastructure and operations:**
  - Built-in credit card validation and verification.
  - Accommodation of local laws regarding tax rates and managing the evolution of those laws as they change, in addition to handling currency translations.
  - Huge investments into the commerce platform and into the customer provisioning systems that automate the process, saving your business from needing to handle that potential cost.

- **Sales:**
  - Mitigating sales costs via available co-sell opportunities with the Microsoft sales force—the largest enterprise sales force in the industry.
  - Leverage customers’ existing procurement relationships with Microsoft to accelerate the sales cycle.

- **Marketing:**
  - Marketing spend minimization by taking advantage of the Marketplace Rewards program, where Microsoft is funding marketing efforts for your product on your behalf.
Integration capabilities

The commercial marketplace is integrated into Microsoft products, enabling our ISV partners’ products to be surfaced directly within the in-product experiences for Azure, Dynamics, Microsoft 365, etc. Based upon configuration, these offerings are exposed to customers at the right time and in the right places so that they can seamlessly find, try, and buy solutions to their business problems.

Integration with the Azure Active Directory (AAD), while not required as a user management system, is required to reduce the complexity of the onboarding process for customers, by using a Single Sign On (SSO). This way, IT teams can easily manage multiple logins and the integration of your customers’ identity platforms.

In addition, the commercial marketplace offers and supports webhooks and API integration that enable your firm to connect commercial marketplace to your internal systems via a modest engineering effort. For example, allowing data flow into your CRM system from the commercial marketplace, or into your billing systems, are enabled via webhooks/APIs to help streamline your usage of the commercial marketplace as a measurable and operationally effective sales channel.

Building the onboarding business case

As with most business efforts, having a plan in place for investment justification and roll-out is preferable. And, it will be beneficial to engage all the key stakeholders that are likely to be involved in the business decision to pursue the commercial marketplace as a sales and distribution channel.

Decision making and planning process

ISV industry participants indicate that core stakeholders in their companies that were involved in building and approving the business case, as well as the execution plans generally included:

- **Chief revenue officer, Senior management** – in fact, it was deemed critical to get senior management buy-off and support to pursue onboarding to the commercial marketplace. Depending on your company situation, some business transformation of core business processes, offerings, and pricing may be necessary to accrue the full benefit of commercial marketplace. This requires initial commitment and on-going support by the CRO and senior management.

- **Chief marketing officer, VP marketing** – those in this marketing role were generally concerned about assuring that existing brand equity and positioning translated to and was consistent across all channels, including the new commercial marketplace channel.

- **Chief technology officer** – involved in onboarding to evaluate and direct appropriate technical resources regarding any engineering work or API integrations that is considered necessary.

- **Channel marketing, product marketing, and alliance managers** – onboarding participants in these roles were key drivers and implementers to achieve tactical success, both from an onboarding roll-out perspective, and for post-launch on-going sustaining efforts.

This stakeholder list does not account for other v-team members that should be consulted, such as support professionals, your operations team, engineering development staff, and the finance and accounting team, to name a few. These folks should be included to form your commercial marketplace roll-out dream team.

**Sales:** Work with your sales team to fold Microsoft sellers and CSPs into your strategic sales plan. Depending on the average value of your listed product and its deployment, consider involving your sales team in private offer deals, large account negotiations, and post-sales account management.

**Finance:** Coordinate with your finance team to take full advantage of Microsoft’s one-bill and other payment options. The Analyze tools offer valuable insights and analytics, giving your finance team a complete picture of the commercial marketplace channel’s financial performance.
Support: And finally, please involve the support team to ensure they’re prepared to identify and resolve any post-purchase issues for your commercial marketplace customers! This is a key customer relationship effort to building a sustaining business for cross-sell and up-sell through the commercial marketplace that will help drive on-going revenue for your firm.

The bottom line is that key activities before onboarding or as a prerequisite to onboarding should likely include:

- **Building a solid business plan** to grow the commercial marketplace as a channel. Craft a strategic approach and execution plan. Make the plan specific to the commercial marketplace. Communicate the plan to relevant stakeholders.

**Gaining buy-in**

These stakeholders and their roles and responsibilities will need to be accommodated in your planning and execution process. But how do you get them bought in? Why would they care about the commercial marketplace as a channel? What value does the commercial marketplace bring? Answers to these questions (and others of course) should be included in your planning efforts.

You may consider including some of the following points to underscore the opportunity as part of your onboarding planning process:

- **Gaining global distribution, and transferring the costs** of invoicing, collection, tax remittance, currency translations, and billing. All Microsoft customers have a Microsoft contract. Purchases made through the commercial marketplace are automatically billed under the customer’s existing contract, eliminating the need for separate billing. Learn more about the types of transactions and billing options [here](#).

- **Selling through Microsoft** and the exposure gained via the commercial marketplace listing and leads that are generated. Nearly all companies around the world are Microsoft customers and have a commercial billing relationship with Microsoft. Partnering with Microsoft and publishing on the commercial marketplace allows you to tap into Microsoft’s sales organization, global channel partners, and world-wide customer base.

- **Educating your executive leadership team** on the importance of making the commercial marketplace channel successful, what it takes to get there, and getting explicit approval and ongoing support for the effort.

- **Informing and including all stakeholders** on the importance of a successful launch. Get their buy-in.

- **Creating a cross-functional team** that includes all stakeholders as a cohesive roll-out team to manage a smooth onboarding process. Work with the marketing team to create a functional marketing plan that holistically considers marketing across the commercial marketplace, other channels, and demand generation activities.

- **Accessing customers’ Azure commitment** to Microsoft count toward the sale of your commercial marketplace solution, meaning you can access budget they’ve already set aside.

- **Earning Marketplace Rewards**, key marketing incentives funded by Microsoft. Once you publish your offering, you are automatically eligible for a set of benefits to help drive awareness to your offers. As soon as you transact through commercial marketplace, you qualify for marketing activities to increase demand generation, lead development, and sales. Learn more about the Marketplace Rewards program [here](#).

In addition, currently onboarded ISVs have indicated that they place significant value on the Microsoft brand, as it gives them instant credibility with customers, partly because of Microsoft’s rigorous and well-known certification process required as part of the onboarding effort.
Critical onboarding focus areas

As mentioned, industry experts from ISVs across the industry have provided their input into this document’s guidance. Beyond the information provided so far in this module, these experts have indicated there are three very critical areas that must be well thought through to help assure your commercial marketplace onboarding success, but also for successfully transacting and driving revenue via the platform. These three areas of focus are significantly addressed as Modules 2, 3, and 4 of this guidebook, and are as follows:

**MODULE 2:**

Pricing, listing and offers guidance-
This module will dive deep into advice on assuring that the product you intend to place on commercial marketplace is the right product for the audience, that the specific offer and listing types are thought-through, and important pricing considerations are presented and explained.

**MODULE 3:**

Business infrastructure evolution for commercial marketplace optimization-
Depending on your company’s existing infrastructure and legacy go-to-market approach, there may be various internal processes that require some change in order to effectively onboard and sell on commercial marketplace. This module will address those potential changes and provide advice on handling them.

**MODULE 4:**

Sales and marketing ramp up-
Adding a new sales channel provides incremental opportunity, but only if you know how to take advantage of it. Module 4 will provide suggestions on how to onboard the sales and marketing functions and take advantage of programs and opportunities the Microsoft commercial marketplace provides.

It is strongly recommended that you review all modules to maximize your firm’s opportunities with the Microsoft commercial marketplace.
MODULE 2

Product/market fit, listing, and pricing guidance

Key objectives:

In this module, the following key concepts will be discussed:

- Introduction and overview
- Assessing product/market fit
  - Customer targets
  - Product features and packaging
- Important publishing options
- Product listing considerations
- Basic pricing considerations
- KPIs and suggestions
Introduction and overview

As you engage in your onboarding activities, it is recommended to evaluate your target market, pricing, value proposition, SKUs, and offer types to assure they are aligned to effectively drive transactions via the commercial marketplace. Why is this? Because the commercial marketplace is likely a new channel for your firm, and it is important to make sure that legacy assumptions are still valid (or not) in order to affect sales in this channel relative to other sales channels.

Refer to Figure 2.1 to further illustrate this point. Your company’s situation will probably fall into one of the four quadrants indicated in the chart. For example, although this is a new channel, you may be bringing your current in-market product to marketplace, and this product likely targets the same customer segment or buyer persona as in other channels. At the other end of the spectrum, quadrant four indicates that you are bringing a brand new product into the commercial marketplace, which targets a completely new buyer persona or market segment.

Figure 2.1. Key considerations

Considering the various go-to-market attributes that need to be thought through (pricing, value proposition, offer types, placement, promotion, etc.), there is clearly a difference between these quadrants in the level of work effort and forethought that needs to occur as you bring your offering onboard.
For example, for quadrant 1, go-to-market attributes such as the product value proposition, target customer, and price will likely stay much the same as for other channels. However, quadrant 4 requires new messaging to convey the new value proposition, pricing analysis, assuring fit to the commercial marketplace customer segments, and so on.

And the level of effort required to address these attributes may also vary depending on if your firm is a ‘born in the cloud’ company, or a company that is new to the cloud, or moving applications there for the first time.

This module is designed to overview some of these topics relative to preparing your offering for the commercial marketplace and will focus on:

- Assessing product/market fit: target customers, features, and packaging
- Product listing and pricing options/considerations

First, let’s consider product/market fit.

**Assessing product/market fit**

Aligning your product offering with the needs of the marketplace customers is important. Good alignment will help create and communicate the product value proposition to the target market buyers you are pursuing, and drive sales. Poor alignment may inhibit sales of your offering. There are two key focus areas you may consider when assessing product/market fit:

- Your customer target and key messages
- The product feature set and packaging

**Customer targets**

As a first step, consider the target audience you are trying to reach. The commercial marketplace is focused on both technical and business customer segments, and comprises two customer experiences that address these audiences separately as follows:

- Azure Marketplace is designed for IT solutions, and offers a variety of technical solutions, from infrastructure to applications.
- Microsoft AppSource is designed for business solutions and generally focuses on line-of-business and industry-focused applications.

Assuming there is clarity on which of these broad targets you are pursuing, you may want to refine the customer targets further with more specificity, evaluating attributes such as:

- **Customer size:** Are you targeting enterprise, mid-market, or start-ups (or all)?
- **Industry:** Which, if any, verticals markets is your offer targeting, e.g. financial services, healthcare, telco, etc.?
- **Geographic region:** Is there a specific geography being targeted? Geographic regions can have a significant effect on messaging, pricing and other attributes, i.e. it matters whether you are catering to a local or global audience.
- **Cloud adoption business drivers and needs:** What are the customer’s cloud adoption drivers or specific needs that are being addressed by your offering? Examples are application modernization, datacenter migration, operational costs, workforce productivity, scalability, on-demand technology consumption, or business agility, etc.
Achieving a level of clarity about your target customers can significantly help refine your offering’s differentiable value proposition and drive the specific messages you want to convey to marketplace customers.

Making the above a working exercise for company stakeholders to refine the customer target information can help assure a smooth onboarding process (e.g., it will simplify the effort and process to write your listing entry). Figure 2.2 indicates a framework that you may consider using for such an internal exercise as you plan your onboarding process.

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<tr>
<th>Targeting and messaging tool</th>
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<tbody>
<tr>
<td><strong>Product description</strong></td>
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<td><strong>Target audience</strong></td>
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<td><strong>Key customer needs</strong></td>
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<td><strong>Positioning statement</strong></td>
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<td><strong>Key benefits or value propositions</strong></td>
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<td><strong>High-level value messages</strong></td>
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<td><strong>Supporting features</strong></td>
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<td><strong>Third-party evidence</strong></td>
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In summary, consider the following recommendations regarding customer targeting as you prepare to onboard:

- Define your customer segments, possibly including clear buyer descriptions.
- Generate a solid and communicable product value proposition.
- Create buyer-specific targeted messaging.
Packaging your offer is another critical step you need to consider for onboarding. A successful offering takes into consideration the target audience, the problem customers are trying to solve, and the price they are willing to pay for the solution. These attributes can impact what features to bring into your offering on the commercial marketplace. It is beyond the scope of this document to get into defining product strategy, however some advice from ISV industry peers regarding this is as follows:

Deciding which features to include in each product offering should be done with your target audience in mind. Here are a couple of examples to get you thinking:

- **Example 1:**
  If a product offering has a high entry cost, your targeted buyer might not have enough credit to pay with a credit card. In this case, reduce the number of features to create a lower-priced offering, which will be better suited for your prospects. Alternatively, you can create a new offering with fewer features and make the rest of the features optional at extra cost.

- **Example 2:**
  Microsoft has commercial relationships with many organizations that purchase business-to-business (B2B) subscription solutions for a large number of users. You can save time and effort by selling through Azure Marketplace where the customer can use their existing procurement relationship with Microsoft to purchase your solution, meaning they can make larger purchases and receive a consolidated bill from Microsoft. Microsoft also allows highly customized transactions, called Private Offers.

- **Example 3:**
  You may also engage in highly customized deals, in which case you will publish a public-facing price, terms, and conditions, but you can also provide Private Offers to specific customers where you want to offer a negotiated price, custom terms and conditions, etc.

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**EXPERT INSIGHT**

**How KenSci found the right market fit**

KenSci’s Artificial Intelligence (AI) and Machine Learning (ML)-based platform provides advanced healthcare analytics. After publishing on the commercial marketplace, KenSci was able to access large customers in the public and private healthcare industry. KenSci attributes its success to the Microsoft co-sell opportunities. Through the Microsoft sellers, KenSci added 2 new large customers and 12 new qualified opportunities, which otherwise would have been out of the company’s reach.

A born-in-the-cloud company, KenSci, used its SaaS model for the commercial marketplace. They also leverage the Enterprise Agreement (EA) the new customers had with Microsoft and reduced the time and effort to establish themselves as new vendors with large organizations.

**How KenSci packaged its product offering**

KenSci’s original platform included ingestion of large healthcare data sets and the AI/ML-based analysis performed on them. After publishing its offering, the company realized that it would serve its new marketplace customers better by splitting the offering. Using this approach, KenSci was able to attract more customers, who were looking to get started with only one component of the original product.

- Kanhav Anand, Sr. Marketing Manager, KenSci

Figure 2.3 provides a short example of how KenSci, a leading AI/ML firm and contributor to this document, approached market fit and product offering packaging.
Publishing options

As you are clarifying target customers, value propositions, and packaging, be sure to consider how you plan to publish your offering on the commercial marketplace. The four main publishing options are list, trial, Bring Your Own License (BYOL), and transact—the focus of this document, the benefits and considerations, center on the transact option:

- **List**: You can publish your application or service without having to transact through commercial marketplace. List an offering in the commercial marketplace to raise awareness of your products and solutions, and to generate leads.

- **Trial**: You can offer Free Trials or test drives to attract new customer segments, without charging your customers for their software licenses for 30 or 90 days. Offer trials are beneficial as they can lead to a revenue transaction after the end of the free trial period.

- **Bring Your Own License (BYOL)**: The financial transaction is done by the publisher separately, not through the commercial marketplace. Utilize the BYOL option to bring existing customers into commercial marketplace for the first time.

- **Transact**: When using the transact publishing option, Microsoft is responsible for billing and invoicing. You could create an entirely new business line by leveraging the commercial marketplace through Transact options. Creating a transact offer will provide partners with ROI and the customers with the best experience. There are three offer types that can be transacted through the commercial marketplace (outlined in figure 2.4): virtual machines, Azure applications (Solution template or Managed application offers), and SaaS applications. Organizations should consider the product they want to bring to the marketplace and determine if and how it aligns with one of these three offer types. SaaS offers provide the most flexibility for organizations to determine the pricing structure that works best for them. That said, the technical architecture will of course be a key driving factor of which offer type to leverage.

### Determine the offer type

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<tr>
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<th>Container offer</th>
<th>Solution template offer</th>
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<td>• Allows to combine Azure services</td>
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<td>• 1x VM with up to 15 attached disks</td>
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<td>• BYOL by default</td>
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<th>Managed application offer</th>
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<td>• Deployed in the publisher subscription</td>
<td>• Solution deployed in a customer subscription and managed by a 3rd party (SI or MSP)</td>
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<tr>
<td>• Requires integration with billing API</td>
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Figure 2.4
Consider the following KPIs to help you assess your product/market fit:

- **Churn & retention rate**: solid metrics to track. Customers that are not satisfied may leave after minimal product usage, leading to a high churn and low retention rate. This implies a poor product/market fit. Obviously you want to minimize your churn and maximize your retention rate.

- **Customer satisfaction**: as with most products, a high customer satisfaction rate will indicate a positive product/market fit. There are many ways to assess customer satisfaction. One widely adopted method is Net Promoter Score (NPS), which can provide the level of your customers’ willingness to promote/refer your product. A simple web search can provide the details on how you can implement the NPS methodology.

- **Customer lifetime value**: a post-onboarding metric but one to consider building into your planning at the start. Here you measure the profits from each customer’s total product lifetime usage. This can help you discriminate between high-value and low-value customers.

- **Lead-to-sale conversion rate**: if your product is viable for the targeted market and customers, you should see a solid conversion rate from leads you gather, to paying customers. If this is increasing over time, that’s great. If it is low to start with and not going anywhere, or even getting lower, then this situation requires corrective action.

Product listing considerations

Creating a robust offer listing in the commercial marketplace is another aspect requiring planning during the onboarding process. The listing you choose to create will be a key marketing communication tool to attract your target audience to learn about your offering and move them to evaluation, and eventually purchase.

Creating the listing correctly from the beginning will save you time and effort down the road. Consider engaging your product marketing and marketing teams to help write a listing that is both on brand and tailored for the commercial marketplace customers. You will need to include your company’s name, logo, company description, contact information, and description of your product. You will be prompted to select the categories and industries for your product. The advice provided previously regarding product/market fit, target customers, and value propositions will all come into play here.

As part of creating the listing, it is generally suggested that you:

- **Ask your marketing team** for help with keywords selection, so that it is both a part of the listing description and appeals to your target audience, and is SEO-friendly.

- Consider including images, screenshots, videos, and other content that will entice a prospective customer to check out your products. After all, this is your storefront; you want to make it appealing to buyers.

- **Use the content guidelines document** to make sure you comply with the commercial marketplace’s requirements.

- **Provide a clear offer description.**
  - Clearly describe your offer’s value proposition in the first few sentences of your description.
  - Keep in mind that the first few sentences might be displayed in search engine results.
  - Do not rely on features and functionality to sell your product. Instead, focus on the value you deliver.
  - Use industry-specific vocabulary or benefit-based wording as much as possible.
  - Additionally, Consulting Service listings must clearly state the professional service you provide.
• **Core components of your value proposition should include the** following information:
  - Description of the product.
  - Type of user that benefits from the product.
  - Customer need or pain that the product addresses.

• **Provide a strong title.**
  - Your product name should communicate the core value for your customers.
  - Include search keywords in your product title to receive higher ranking in search engine results.

• **Integrate your CRM to your listing**
  - To make the most of your listing, connect your Marketing Customer Relationship Management (CRM) tools. This way, you will capture the traffic to your listing, including the number of views, customer/viewer contact information, etc. This information will be beneficial for the sales teams to follow up and for nurturing marketing campaigns. If you don’t have a CRM, you can create an Azure Table in the Partner Center.
  - Suggestion: Microsoft requires that you connect your Test Drive listing to your CRM. For all other options, the integration is optional. If you already have a Test Drive option listed and want to start transacting, you will need to create a new listing and retire the old one. Change the Trial option to “Contact Me,” as the Trial and Test Drive options cannot be converted to transactable offers.

• **Understand the technical integrations needed** for your selected offer type.
  - Virtual machines will require a Virtual Machine VHD.
  - Azure Apps will require an ARM template and a UI definition file; for Managed Azure Apps a Security Principal to manage the offer will also be required.
  - SaaS Apps require integration with Azure Active Directory.

**Transactable offers and assets**

<table>
<thead>
<tr>
<th>Offer elements</th>
<th>Offer types</th>
<th>Virtual machines</th>
<th>Azure apps (solution template)</th>
<th>Azure apps (managed apps)</th>
<th>SaaS apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create offer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketing assets</td>
<td></td>
<td>• Offer images/icons • Offer description • Offer category/SEO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lead management</td>
<td></td>
<td>Define how do you want to manage the offer leads: • Taxable storage • Dynamics CRM • Online • HTTPS endpoint • Marketo • Salesforce</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal documents</td>
<td></td>
<td>• Privacy Policy • Terms of Use</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publishing SLA</td>
<td></td>
<td>11 days</td>
<td>3 days + 7 -14 days (MS review (manual process))</td>
<td>7 days</td>
<td></td>
</tr>
<tr>
<td>Support information</td>
<td></td>
<td>• Engineering contacts • Customer support • Support URLs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical assets</td>
<td></td>
<td>Virtual Hard Disk (VHD) • ARM template • UI definition file • Resources (libraries, scripts, runtimes, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical requirements</td>
<td></td>
<td>Virtual Machine VHD • ARM template • UI definition File • ARM Template • UI Definition File • Security Principle to Manage the Offer Integration with Azure Active Directory</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Billing</td>
<td></td>
<td>• BYOL • Core/hour/month • BYOL • Using VM offer • BYOL • Monthly fee • Metered (monthly) • Free/trial • Month/year • Seat • Metered</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Figure 2.5*
Produc${\text{ing a transactable offering often requires the collaboration of multiple teams (sales, marketing, product management, product marketing, engineering), which can be time-consuming and effort intensive. Once you have the offering ready for submission, the API integrations done, and the bank account and tax information filled out, you can submit all the information to Microsoft. Be mindful that the validation and certification process takes approximately 7 to 14 days.}}$

**Suggestion:** Make sure you obtain the approval of all relevant stakeholders for all the information you are about to submit. Ensure that your commercial marketplace channel is aligned with your business strategy, the messaging and content are on brand and consistent, and the packaging and pricing are in line with your offering outside commercial marketplace.

⭐ **Expert Tip:** If you have limited engineering resources to help you build the listing, you might consider using companies like Corent Technology, Spektra Systems, Tackle.io, or The York Group.

Finally, changing your listing once published requires validation from the Microsoft team. Check your listing before publishing it to limit future changes. Consult the listing best practices document for additional information.

## Basic pricing concepts

Entire books have been written about pricing. This is not one of them! The following provides a quick overview of some considerations you may evaluate as you determine your commercial marketplace pricing.

In general, a consistent pricing strategy across all of your sales channels (including the commercial marketplace) will make it easier to create new offers, special promotions, and avoid having significant price gaps across your channels that could lead to channel conflict issues, or customer confusion.

More specifically, you may want to consider offering free trials (aka price is zero) to attract new customers and leverage co-selling. Marketplace data supports this approach, and indicates that 27% of in-marketplace searches are filtered for offers with a trial.

Cost is another driver of pricing that might be considered as you onboard. The commercial marketplace follows an Agency model, which means the publisher sets the price and defines the terms of use. Microsoft provides the platform, bills, and collects payment, and charges a flat fee for transactions made through the channel:

- **Standard fee:** 80% publisher, 20% Microsoft
- **Reduced fee for eligible* offers:** 90% publisher, 10% Microsoft (*Eligibility for reduced transaction fees and channel incentives: These benefits apply to solutions/offers that are Azure IP Co-sell eligible, and those integrating with Microsoft Teams, or those that integrating with at least two Microsoft 365 products (Excel, PowerPoint, Word, Outlook, SharePoint)

The fee is a percentage of the publisher's license cost:

- **Per month, per year, per seat, or metered/consumption-based for SaaS**
- **Consumption per-core, per hour for virtual machines**
- **Sum of virtual machine pricing for Azure Applications**
- **Flat rate or custom meter price for Managed Apps**

Underlying Azure usage is not considered or included in the fee. Bring Your Own License (BYOL) offers do not have a fee as the license transaction happens elsewhere, and free trials also do not incur a fee.
Depending on how you want to deploy and deliver your solution, your pricing options will also vary:

### Transactable offers and assets

<table>
<thead>
<tr>
<th></th>
<th>Virtual machines</th>
<th>Azure apps</th>
<th>SaaS apps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Duration</strong></td>
<td>Monthly</td>
<td>Monthly</td>
<td>Monthly or Annual</td>
</tr>
<tr>
<td><strong>Pricing</strong></td>
<td>Consumption per core/per hour</td>
<td>Leverage VM pricing Managed Apps only: Flat rate or customer meters</td>
<td>Flat-rate Per-user Consumption-based</td>
</tr>
<tr>
<td><strong>Trials (Optional)</strong></td>
<td>1-month or 3-months</td>
<td>Leverages VM pricing</td>
<td>ISV led: Variable Sell through Microsoft: 1-month</td>
</tr>
</tbody>
</table>

Finally, if publishers want to offer a unique price or terms to a specific customer, they can leverage Private Offers to create new, private variations. Private offers are only discoverable via the Azure portal to the selected customer(s). Find more information about private offers [here](#).

### Other pricing considerations

- **What is your pricing model today?**
- **What are you going to monetize with your offer?** A feature set, or services, or both? This might depend on what a customer will be deploying from the storefront: is it a fully functional app, or is it a subset of your product’s full capabilities?
- **Would one of the following standard pricing models apply to your feature set?**
  - Flat rate, with monthly or annual billing
  - Billing per use, per consumption, or other usage-based (custom meter)
  - Billing per hour of consumption or usage
  - Hybrid (For example, flat rate plus a per usage fee)
- **Would your sales organization need to shift their approach, based on pricing?**

*Figure 2.6*

When a customer comes to your product description page in the commercial marketplace, they should be able to easily calculate their total cost of ownership (TCO). This means answering the questions in Figure 2.6 for your commercial marketplace product and having specific dollar or other currency amounts on your plans + pricing tab to help them move forward with confidence toward a deployment.
Your price will also likely need to consider the following points:

- **How do you want to charge?** There is support for monthly or annual plans, and flat fee, per user, or metered billing.

  Suggestion: Accelerate the buying decision by providing 3 or 4 different tiered packages. Your middle offering(s) should ideally be your highest-margin, most popular option(s). A low-priced entry package will encourage a quick buying decision and remove some barriers to purchasing. A high-priced package will make the middle option(s) more attractive and allow you to provide a premium option for higher value offerings.

  Suggestion: Consider offering a fixed price, “quick start” 30-day-or-less deployments, or a pilot project to speed up purchasing decisions.

  Suggestion: Consider what your customer will be deploying from the storefront. Is it a fully functional app or a subset of your product’s full capabilities? This can help inform and monetize your offer.

  Expert Tip: Consider what your sales organization needs to shift in their approach, based on pricing.

- **Don’t forget taxes.** Different countries have different tax regimes that can affect your ability to price and transact through the commercial marketplace. There are two ways of handling international taxes: for some countries, Microsoft will collect and remit all applicable taxes on your behalf. For others, you will be responsible for managing the appropriate taxes. You can find the list of countries and the tax responsibility [here](#). Consider the impact taxes have on your offering for each country. High taxes might require you to adjust the price for that country, and, doing so, it might make the price too high to be attractive. You can consider a different, basic offer with fewer features, which reduces the overall cost.
Module summary

This module provided some considerations for assessing product/market fit, target customers, features and packaging relative to onboarding your offering onto the Microsoft commercial marketplace. An overview with considerations involving product listing and pricing were provided.

In summary, some key takeaways from this module are as follows:

- As you engage in your onboarding activities, it is recommended to evaluate your target market, pricing, value proposition, SKUs, and offer types to assure they are aligned to effectively drive transactions via the Microsoft commercial marketplace channel.

- Aligning your product offering with the needs of the commercial marketplace customers is important. Good alignment will help create and communicate the product value proposition to the target market buyers you are pursuing, and drive sales. Poor alignment may inhibit sales of your offering.

- Packaging your offer is another critical step you need to consider for onboarding. A successful offering takes into consideration the target audience, the problem customers are trying to solve, and the price they are willing to pay for the solution.

- Creating a robust offer listing in the commercial marketplace is another aspect requiring planning during the onboarding process. The listing you choose to create will be a key marketing communication tool to attract your target audience to learn about your offering and move them to evaluation, and eventually purchase.

- In general, a consistent pricing strategy across all of your sales channels (including Microsoft commercial marketplace) will make it easier to create new offers, special promotions, and avoid having significant price gaps across your channels that could lead to channel conflict issues, or customer confusion.
MODULE 3

Evolving internal business processes and infrastructure to optimize for commercial marketplace

Key objectives:

In this module, the following key concepts will be discussed:

- Introduction and overview
- Evolving operational infrastructure
  - Evolving operations for commercial marketplace: considerations
  - Operations transformation KPIs and checklist
- Evolving support infrastructure
  - Evolving support for commercial marketplace: considerations
  - Support integration KPIs and checklist
Moving to adopt the commercial marketplace as an additional channel may require various levels of commitment and potential change from diverse internal company stakeholders. These stakeholders include senior management, technical leaders, business-line owners, and those whose job is to conceptualize, roll-out, and maintain the infrastructure and go-to-market activities for such a marketing and sales channel.

These stakeholders will need to engage in adequate planning for success with the commercial marketplace. Such planning is typical in many business areas, and it is no different for this venture. Basic high-level questions to consider early in the process include:

- Is our business strategy clear?
- Do we have the right tools, processes, and skillsets to move forward? If not, where are the gaps?
- Are our internal policies and operations aligned to drive the commercial marketplace as a channel?

The commitment level required to pursue success with the commercial marketplace can vary and may depend on the existing company structure or go-to-market design. For example, your company may be ‘born-in-the-cloud,’ where products and processes have been designed from the beginning to deliver solutions and services that work smoothly in a cloud-first environment. Alternatively, your firm may be evolving from a central focus of providing on-premise technology offerings, to delivering those solutions via a cloud-based model.

In either case, relative to commercial marketplace as a channel, there are likely internal business infrastructure and processes that will need to evolve to effectively leverage the commercial marketplace infrastructure and accrue its benefits.

Take invoicing and payment systems as an example. Your existing business invoicing system may be designed to allow your company to invoice customers directly via email, or through a customer e-commerce system or portal, or shared website, or another mechanism. Payments are received from customers via check, funds transfer, or some such mechanism.

So, how do those system processes work with the commercial marketplace? Do you need to change or adapt company invoicing and payment systems to leverage commercial marketplace as a channel? Those are questions that only you and your colleagues can answer, but they are examples of questions that should be asked as you move to adopt commercial marketplace as a marketing and sales channel.

That is simply one example of how evolving and extending financial infrastructure may need to occur. There are likely other areas. Such transformations may need to happen not just within financial systems, but across various processes that include finance, operational and support processes.

This module will address some of the key transformational considerations required and provide some insights based on other companies like yours that have incorporated commercial marketplace as a channel and have shared their ‘feet-on-the-street’ experience in this document.

Many of your software industry counterparts have indicated that to maximize success, making any essential process or infrastructure accommodations before joining commercial marketplace is the way to go. Doing so may help accelerate your time to market and increase your chances of a successful marketplace roll-out.

The goal of this module is to provide some guidance in this area, both from a planning and implementation perspective. The module will focus specifically on finance, operations, and customer support functions. Module 4 of this guide will focus on the sales and marketing evolution needs, and therefore will not be discussed in this module.

First, let’s focus on financial operations.
Evolving financial infrastructure

Transforming some finance operations and processes may improve the predictability of your commercial marketplace revenues, reduce revenue risks, and align pricing with customer success.

A key goal for financial transformations is supporting transactable commercial marketplace offerings in order to deliver incremental sales revenue. Driving revenue is generally one key target metric for a sales channel. Assuring your financial systems effectively support transactable sales through such a channel can provide benefits such as:

- Enablement of frictionless transactions
- Increased visibility into commercial marketplace transaction activities
- Automation of payments for unique transactions—private offers and recurring revenue—subscriptions (see Module 2 for guidance on offer types and SKUs)

However, some thought and effort are required to achieve these benefits. For example, some engineering work may be needed to integrate transactions into your company financial systems, potentially using an API integration.

To address these and other issues, the next section provides some detail on various considerations you may wish to incorporate into your planning, as well as some suggestions and guidance to make your financial systems transition easier.

Evolving financial systems for commercial marketplace: Considerations

In general, to achieve the mentioned benefits, you will need to set up your finance systems to receive data from the commercial marketplace transactions and reconcile your data with the Microsoft systems.

To do so, you may want to review and assess various elements of financial operations in the context of leveraging and integrating with commercial marketplace.

Some of these elements are as follows:

- **Billing**: Multiple types of transactions can be implemented in commercial marketplace.

  - Suggestion: Based on the transaction type(s) you’ve selected to support your business model (refer to module 2) review the associated payout policies. Use the examples provided and the step-by-step instructions on how to set up billing for SaaS offering to help you evaluate your options. (See Module 2 for illustrative transaction types).

  - Expert Tip: If there appears to be limited or zero visibility into listing traffic or customer information (transactions, churn, upsell/cross-sell values) after your listing goes live, it is recommended to use commercial marketplace built-in APIs for a smooth flow of information from Microsoft’s systems to yours.

  - Expert Tip: If your financial system is not reflecting the expected revenues, consider reviewing Module 2 of this guide that covers SKUs and pricing. Consider tweaking the offer or publishing a completely different one. It could be the way it is packaged, or it isn’t resonating with the audience, or the pricing structure is not aligned to buyer expectations.

**EXPERT INSIGHT**

“Once we started working on commercial marketplace, we found that there were a lot more advantages in being able to provide our product through Azure Marketplace. For example, things like being able to transact directly through Microsoft was much easier for our users (who already had existing, established processes with Microsoft) to be able to use our product directly within their Azure subscription.”

- Dev Subramanian, Drizti
• **Currency management:** Microsoft transacts in over 141 countries and 17 different currencies

**Suggestion:** Microsoft will handle all the currencies on your behalf. Consider how global customers and differing currencies will affect your financial systems and statements.

**Expert Tip:** Some commercial marketplace vendors have had roll-out questions around international taxes. Know that there are two ways of handling international taxes: Microsoft will collect and remit all applicable taxes on your behalf for some countries. For others, you will be the one responsible for managing the appropriate taxes. You can find the list of countries and the tax responsibility [here](#).

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**EXPERT INSIGHT**

"I would say the main driver for us and why we were initially interested in marketplace [is] namely about having the ability to transact in more countries, especially once SaaS transact came about."

- Andrew Leciejewski, Tofugear Limited

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• **Payment:** Multiple payment methods can be set up to accommodate customer preferences.

**Suggestion:** Consider downloading the payment summary to reconcile it with your financial system.

**Expert Tip:** If you need to reconcile the Microsoft fee with what the customer is actually paying, create two financial entries: one for what the customer pays, and one for what your company is getting paid after deducting Microsoft's fee.

• **Payment API:** This API allows you to create new revenue streams to sell your products and services without asking the user to enter payment information each time they purchase one of your products.

**Suggestion:** Use the payment request API to simplify purchasing options.

---

**EXPERT INSIGHT**

"We view that listing on Marketplace is a great opportunity for our customers and for Teradata, for multiple reasons. One is single billing for the customer, one transaction versus multiple billings, so that was key for us. Two, customers have large commits with Microsoft, so the marketplace and how they have it set up gives the customer the ability to draw down against their commit based on their contract with us."

- Wendy-An Engelmann, Director, Microsoft Global Alliance, Teradata

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**Analytics and decision support:** Analytics help you understand your business and your customer. There are many analytics you can access: customer information, usage and billing metrics, marketplace insights, downloads, orders, and ratings and reviews.

**Suggestion:** Use the available customer churn prediction tool to predict churn probability and find patterns in existing data. You can also get actionable insights using the marketplace insights dashboard, the Analyze tool, and data visualization tools like Microsoft's Power BI.

• **Reporting:** Financial reports will likely need to be extended to accommodate the marketplace channel.

**Suggestion:** Consider standardizing processes, terminology, and reporting across the organization and combine your reports with the insights you get from commercial marketplace analytics. This will reduce workflow errors, manual work, and cycle time.

---

**EXPERT INSIGHT**

"We view that listing on Marketplace is a great opportunity for our customers and for Teradata, for multiple reasons. One is single billing for the customer, one transaction versus multiple billings, so that was key for us. Two, customers have large commits with Microsoft, so the marketplace and how they have it set up gives the customer the ability to draw down against their commit based on their contract with us."

- Wendy-An Engelmann, Director, Microsoft Global Alliance, Teradata

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If you want to dive deeper into these topics, more detailed resources are available in Module 5: Additional resources.
Financial KPIs to track success

As work progresses on evolving financial systems as necessary, it’s essential to keep in mind that as an innovative channel, new or modified metrics that flow through the financial systems may be required to track and assess key performance indicators adequately.

Some of these metrics you may already be familiar with. In fact, if you offer a SaaS solution, you might be using metrics such as:

- Annual Recurring Revenue (ARR) and MRR (Monthly Recurring Revenue)
- Churn rate (% of people dropping their subscriptions) and churn MRR (impact of the canceled subscriptions on MRR)
- Renewal rates

If you are offering a SaaS solution via commercial marketplace, you will want to augment your financial reporting systems to accommodate this solution and to use as input to a holistic view of these metrics.

Other common metrics used by industry participants, independent of SKU or offering types, include:

- Average revenue per account
- Lifetime customer/account value
- Average sales price
- Annual growth rate
- Customer acquisition cost
- Average revenue per customer and/or user
- Direct sales costs

If you are using such metrics, you’ll want to assess how the commercial marketplace impacts these success indicators, and again, assure that your financial tracking and reporting system accommodates these as necessary.

Financial checklist

Figure 3.1 provides a checklist for assessing potential financial system changes or modifications and summarizes a number of the items previously discussed in this section. Please use this as a starting point and extend the list as necessary to accommodate the specifics of your company’s situations and needs.

Partner center checklist

- Select transaction type: Free BYOL
  Pay-as-you-go Subscription
- Choose your preferred payment method
- Fill out tax forms
- Create unique SKUs for commercial marketplace offering
- Activate marketplace benefits

Internal checklist

- Align business goals with the strategy for the commercial marketplace channel
- API to billing system
- API to in-app sales
- Automate data reconciliation
- Create/update standard reporting across the company
- Identify metrics and KPIs to measure in real-time (see suggestions below)
- Build a real-time dashboard that combines your financial data with the analytics from Microsoft Partner Center

Figure 3.1: Financial checklist

Module 3: core business processes
Company examples

SoftNAS is an enterprise data protection company. The company’s success in Microsoft commercial marketplace (more than 24 countries, over 12 Forbes Global 2000 customers) is in part due to productizing their product specifically for commercial marketplace. The company took into consideration commercial marketplace customers’ expectations and designed the self-serve experience to make purchasing and onboarding easy.

EXPERT INSIGHT

“Partnering with Microsoft provided the cloak of credibility that we’ve been certified and vetted by Microsoft and perceived as somebody worth the investment that large enterprises make.”

- Michael Goodwin, COO, and CFO, SoftNAS

Pickit built a company around Azure Products and a full Microsoft stack (and moved one of the founders to Redmond from Sweden to be closer to Microsoft). The company’s strategy to focus only on Microsoft solutions (presentation add-ons for PowerPoint and Teams) paid off. Through commercial marketplace, the company acquired over 39,000 customers in less than two years and is getting an average of 1,000 downloads per day.

EXPERT INSIGHT

“We had a tremendous journey. We had, through AppSource, reached over 39,000 customers in 209 countries, and I think that is pretty amazing.”

- Mathias Bjorkholm, CEO, Pickit

Evolving your customer support for the commercial marketplace

Customer’s expectations for reliability have never been higher, and company reputations have been won and lost over support issues.

The key goals for the support transformation are to provide excellent customer experience, turn customers into advocates, lower costs, and collect valuable insights for improving the existing product and stimulate ideas for new ones.

Well trained agents, a limited number of steps to get to a satisfactory answer, and access to an extensive knowledgebase can increase your Net Promoter Score (NPS), which measures customer experience and predicts business growth.

The next section provides some detail on various considerations you may wish to incorporate into your planning, as well as some suggestions and guidance to make your transition smoother.
**Customer support infrastructure considerations**

There are a few elements you may consider implementing to make the commercial marketplace customer experience a delightful one:

- **Support model, infrastructure, and plans:** There are many support models, tools, and places to adopt.
  - Suggestion: Determine the levels of support you will be offering based on the plan options. For examples of how to structure your support plans, what to include, and how to price them, check out the Azure support plans. Consider tiering your support: self-serve (searchable knowledge base), chatbot-assisted support, call with an agent, escalation to subject matter expert (SME). Optionally, you can add a monitored/unmonitored support forum. Performing that analysis first will give you a better understanding of the types of tools needed to implement.

- **Customer feedback and analytics:** Customer feedback is invaluable. It sheds light on potential inconsistencies and inefficiency in your process, and it is a great source to gather ideas for product improvement or new product development.
  - Suggestion: Use the knowledge mining solution accelerator to build an initial knowledge mining prototype with Azure Cognitive Search.

- **Customer expectations:** Anticipate your customers’ expectations to their delight.
  - Suggestion: Chatbot-assisted or interactive multimedia content can make knowledge bases more interesting. Eliminate potential tension points by streamlining the support call process and reducing the number of steps to get to an agent. Combine your customer data with the usage data you get from the Analyze dashboard.

- **Customer onboarding:** Make customer onboarding simple, logical, and intuitive. You’ll save time and resources, and customers get to use your product right away. They might even write you a glowing review!
  - Suggestion: Consider using chatbots to help them when they get stuck during the process. Use the Azure Onboarding Guide for IT Organizations as an example to develop your own process.

- **Omnichannel support:** Meet customers where they are by providing support on multiple platforms and devices.
  - Suggestion: Consider using the Omnichannel for Customer Service suite of capabilities to connect with your customers across digital messaging channels.
Support integration checklist

Figure 3.3 provides a checklist for assessing potential support changes or modifications and summarize a number of the items previously discussed in this section. Please use this as a starting point and extend the list as necessary to accommodate the specifics or your company’s situations and needs.

<table>
<thead>
<tr>
<th>Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Develop a support strategy</td>
</tr>
<tr>
<td>☐ Develop a support model</td>
</tr>
<tr>
<td>☐ Identify support channels: calls, chatbot, mobile, video, social</td>
</tr>
<tr>
<td>☐ Support infrastructure</td>
</tr>
<tr>
<td>☐ Tools</td>
</tr>
<tr>
<td>☐ Policies</td>
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<tr>
<td>☐ Taxonomy</td>
</tr>
<tr>
<td>☐ Integration with CRM Tools</td>
</tr>
<tr>
<td>☐ Agent training and Agent utilization plan</td>
</tr>
<tr>
<td>☐ Knowledgebase Tools Policies</td>
</tr>
<tr>
<td>☐ Build a real-time dashboard for incidents (see suggested KPIs below)</td>
</tr>
<tr>
<td>☐ Develop the onboarding process and related training materials (videos, webinars, how-to guides, etc.)</td>
</tr>
</tbody>
</table>

Operations KPIs to track success

As you move through your support transformation journey, remember to track important metrics to assess your progress. You should also consider correlating these changes with the success metrics on the commercial marketplace. Here are examples of typical metrics/KPIs:

- Time per incident
- The number of:
  - incidents and per platform/device
  - steps to get to an agent
  - calls per type of support issue
- Time to onboard
- Steps required for the full onboarding process
- Number of customer service calls/chats related to onboarding issues
- Agent utilization rate

Figure 3.3 support checklist
Module summary

You can increase your success rate on the commercial marketplace by adopting and executing a few of the transformational changes we discussed in this module. Some of them are more complex. Others offer quick fixes to complicated problems. For example, by aligning your taxonomy and developing an API to the commercial marketplace system, you will expedite billing reconciliation and reduce errors.

Leveraging the many analytics and insights available on the commercial marketplace dashboard will give an inside view on your customers’ activity, usage, and will help you develop more accurate forecasts.

You can make your customers’ journey seamless by providing the right tools for your customers to solve product issues quickly and by having a simple, intuitive process with a minimum number of steps to answer. Happy customers quickly turn into advocates and promoters of your product and your company.
Key objectives:
In this module, the following key concepts will be discussed:

- Introduction and overview
- Sales guidance
  - Channel sales considerations
  - Sales KPIs
- Marketing guidance
  - Microsoft invests in your success
  - An integrated marketing approach
  - Use reports to gain insights and optimize marketing activities
  - Marketing KPIs and checklist
**Introduction and overview**

As a new channel, the commercial marketplace can provide incremental business opportunities for your sales and marketing efforts. Because the commercial marketplace reaches millions of customers, new or expanded reach and revenue opportunities are possible. To grasp these opportunities, the channel needs to be integrated into your sales and marketing efforts, like any other channel. The benefits of this integration may be significant, and at a high level can include:

- Expanded customer reach, with access to new and existing customers, and geographies
- Opportunities for joint sales and marketing with other partners, and with the Microsoft sales force
- Enhanced lead generation, lead capture, and nurture programs, and access to and inclusion into Microsoft-funded marketing efforts through Marketplace Rewards

Not only can these benefits lead to incremental revenue growth opportunities, but in some cases lower the cost of marketing and sales efforts. To make the most of these benefits, you’ll likely need to consider and plan for how to integrate this channel into your sales and marketing efforts. For example:

- Assume that you have a trial offer on commercial marketplace that is generating leads, how will you capture and integrate those marketing leads into your internal systems?
- How about your sales processes? Where and how will they need to change to accommodate this new channel (if at all)? How will the sales force be compensated for sales through commercial marketplace, or be trained to go after the opportunity?

Extensive feedback on such topics from market-leading ISVs that have gone through the onboarding process may assist your planning. We’ve distilled this feedback for your consideration, focusing first on sales.

**Sales guidance**

For a sales team, there can be significant benefits to selling via the commercial marketplace. For example, the ability to sell at scale was expressed as a key compelling benefit by ISVs on the platform. There are other benefits as well, and your team may consider including some of these benefits in their sales communications and trainings. These benefits include:

- Microsoft-the-company ‘air-cover’ benefits for your sales force such as:
  - A large opportunity space- Microsoft is a large company, with millions of customer organizations.
  - Ability to sell with and through the 90K-strong Microsoft partner community, including access to Cloud Service Providers (CSPs).
  - Microsoft brand, and the credibility and peace of mind this brings to customers.
- Accelerated sales cycles through:
  - low touch to conversions to move customers from trial to paid.
  - faster deployments.
  - leveraging Microsoft procurement relationships so sales will not need to setup new procurement relationships on every deal.
‘Why should the customer care?’ - customer friendly benefits like:

- Streamlining the procurement process by leveraging existing procurement relationships with Microsoft
- Simpler payments and billing with a single invoice from Microsoft.
- Streamlining the customer experience for purchase discovery, implementing proof of concept trials, and accelerating deployment.
- Simplifying and speeding up the purchase negotiation process (and thus speeding up your time to revenue!)
- Eligible customers can leverage their existing Microsoft consumption commitment for marketplace purchases, meaning they don’t need to find new budget for your solution

In order to fully leverage these benefits, there are a number of considerations that you will need to think through as it relates to the sales motion, sales teams, and sales processes for the commercial marketplace. The following sections overview some of the more commonly expressed sales considerations.

**Channel sales considerations**

It bears repeating that the commercial marketplace is a new sales channel that can help foster a self-service sales process for customers, and help a sales team scale up without adding headcount. The commercial marketplace provides the ability to engage and interact with customers throughout the sales process and purchase lifecycle via one experience. This can significantly shorten sales cycles as all the necessary purchase decision information can be made available, the customer can easily trial, purchase, and even deploy your product through the marketplace. In many cases, this limits the amount of custom engagement and hand-holding, and in some cases the need for sales to engage directly with customers at all to affect a sale, accelerating the sales cycle, and lowering the cost of sales. However, the commercial marketplace can also enable and accelerate high-touch, complex deals as well.

**Handling sales for highly custom, highly priced software**

The commercial marketplace is designed to address enterprise procurement scenarios and needs, with several levers partners and sales teams can pull to best meet their enterprise customer needs. Such as:

- Create private offers to provide customized pricing to specific customers with unique needs and requirements.
- Leverage custom amendments to support unique customer needs or scenarios.
- Develop custom terms and conditions for customers who require them.
- Enable trials for customers to ‘try before they buy’ to drive engagement and accelerate the sales cycle. With the commercial marketplace, partners can define their offer to include a 1-month trial that converts automatically to a paid offer, reducing overhead for sellers to drive conversions.
- Publish offers with limited scope and smaller price tags to facilitate proof of concept engagements. This is a powerful way for sales teams with higher priced or highly custom products to leverage the marketplace channel.

Customers use Microsoft AppSource and Azure Marketplace for solution discovery and education and can start their engagement/journey with a POC or trial through the commercial marketplace. Sales can then directly engage with the customer during that POC process and facilitate the remainder of the sales cycle.
To complement that approach, an ISV can then also provide the customer with a private offer if needed to support the negotiation and sales concessions around pricing and terms of use. Private offers unlock the ability for ISVs to create exclusive offers for specific customers and offer customized pricing.

Your sales team should work with marketing and engineering to encourage availability of a trial product version and/or limited scope POCs as this can not only help address the custom/price issues, but a trial version on marketplace has been shown to significantly increase traffic to a listing, and can help accelerate conversion to sale.

**Leveraging Microsoft procurement relationships**

Another key benefit for both your sales team and the customer is that customers can use their existing agreements and commitments with Microsoft to purchase your Azure-ready products using the same procurement relationship and billing mechanism. This makes the sales process much easier.

**Customers can:**
- Use the existing contract and processes they use for transacting with Microsoft to purchase your solution
- Benefit from consolidated billing from Microsoft – one bill including their Microsoft purchases and 3rd party purchases made through the commercial marketplace
- Purchase and deploy the solution directly within their Azure subscription
- Eligible customers can decrement consumption commitments they’ve made to Microsoft by purchasing eligible partner solutions, making those partner solutions even more compelling

**Sellers can:**
- Enjoy a faster sales cycle, without the need to set up new contracts or new procurement relationships
- Leverage budget the customer has already allocated to technology spend using their consumption commitments with Microsoft

**Sales process, management, and compensation considerations**

As you onboard, you will likely want to consider your existing sales processes and how they are affected by the new channel. In fact, how sales teams are managed and compensated may also deserve some thought as you plan your onboarding. Here are a few key considerations:

- **Land and expand**: The commercial marketplace is an important accelerant helping purchasing to move to a more self-service process (less human intensive). So, how does sales engage with customers through this more self-service motion? One way is to start small then expand. The commercial marketplace supports next generation types of sales motions where line of business decision makers and technical teams make IT decisions together by starting with small purchases, and then expanding. To effectively support the land and expand motion, ISVs say sales team should trained about the offering, how customers can discover and trial products, and how customers can quickly transact- all on the same experience.

- **Address channel conflict**: The issue of channel conflict and neutrality was also a topic indicated by ISV industry peers. Old channel patterns are changing, and it is no longer possible to have a hard delineation between different channels, or to create exclusivity for a particular group of customers. ISVs have found that trying to maintain these harder delineations results in longer sales cycles, more friction between channels, and higher seller dissatisfaction. Therefore, they recommended working to creat neutrality between channels.
• **Evaluate sales compensation and quotas:** Compensating a sales team in a multichannel sales environment requires some thought. Seller compensation may be a big hurdle for your organization and as specific sales compensation models vary widely across different companies, prescriptive guidance is not possible in this document. However, as food for thought, Microsoft itself is evaluating new ways of compensating its sellers, tying compensation to a longer-term consumption, usage based model as a primary way of instituting a longer term, durable approach to engage with and nurture customers. This approach has the added benefit of the Microsoft account team becoming more vested in the customer success, and not just focusing on making the deal happen. This is a different way of thinking about selling, and it may be something to consider for your organization as well. Consider also how local sales teams will be compensated or recognized for sales if the commercial marketplace offer accrues at the global or regional level.

**Leveraging Microsoft sales opportunities**

As you become transact ready, your sales team has more chance to be brought into Microsoft project opportunities and work with other channel partners. The following overviews two common ways (not exhaustive) to leverage and scale your sales force via these opportunities:

• **Work with Cloud Service Providers (CSPs):** With 90K+ CSPs, leveraging the CSP Program connects your firm to trusted advisors, services providers, and resellers connected to millions of customers around the world.

  - Consider your channel strategy – how do you want to leverage the CSP ecosystem? Are there specific geographies where you want to focus on growth? If so, identify a few key CSPs in that region to initiate a relationship with. Are there specific CSP partners you already have a relationship with? Consider engaging with those partners to define a more global engagement or approach.

• **Co-sell with the Microsoft:** The co-selling journey begins with publishing your solution in the commercial marketplace, and the commercial marketplace offers streamlined co-selling. Leverage the co-sell motion to jointly sell with Microsoft sales teams. Once a solution is listed on commercial marketplace and achieves co-sell ready status, it becomes discoverable within the Microsoft sales system and bi-directional opportunity sharing is enabled within Partner Center. Consider working towards IP co-sell status to have Microsoft sellers incentivized to sell your solution to their customers.

**Sales KPIs to track your success**

Measure your business goals and sales team performance to ensure you’re on track to meet your revenue goals. Here are some of the KPIs that industry ISVs indicate they track regarding sales efforts:

• Annual Recurring Revenue (ARR) and MRR (Monthly Recurring Revenue)
• Direct sales costs
• Cost of sales
• Lifetime customer/account value
• Average sales price
• Annual growth rate
• Renewal rates
Marketing guidance

Transform your marketing efforts to leverage the new channel opportunities with the commercial marketplace. These opportunities include co-marketing activities, commercial marketplace expert marketing advice, and commercial marketplace integration into your marketing efforts, all through the Marketplace Rewards program.

EXPERT INSIGHT

"Azure Marketplace is a key component of our go-to-market strategy, bringing a complete toolkit to develop all the assets we need to distribute them and grow our reach. We also get the benefit of Microsoft Professionals experience who can help us optimize to drive more design campaign content and create join success stories."

- Jan Andersen, Director, Partner Marketing Full Case, Matillion

Microsoft invests in your success

Microsoft uses brand recognition, customer base, and in-product experiences to highlight commercial marketplace offers. This leads to millions of impressions for commercial marketplace offers every month.

The Microsoft Rewards program helps you leverage the Microsoft brand and reach the Microsoft customer base. This program provides commercial marketplace best practices and invests in co-marketing activities. These co-marketing activities include go-to-market, demand generation, and nurture programs. For example, you get insider tips on how to create a compelling offer landing page, develop a go-to-market campaign, craft your search strategy and more. It is like having a commercial marketplace expert at your fingertips to help you accelerate transacts.

Expert Tip: Once you have a commercial marketplace transaction, you qualify for co-marketing activities to increase demand generation, lead development, and sales. Learn more about the Marketplace Rewards program here.

Suggestion: Consider a trial offer for increased visibility. Microsoft promotes trial offers to commercial marketplace visitors by investing in an array of traffic driving tactics. These include a social promotion, press release, success story, and a featured category placement. Email gtm@microsoft.com to learn more about the Microsoft Rewards Program.

Expert Tip: You unlock more co-marketing benefits to accelerate your growth as your revenue grows.

EXPERT INSIGHT

“Did you know you could increase your listing visibility by offering trials? 27% of searches on commercial marketplace are filtered by users looking for solutions with trials.”

- Source: Microsoft, 2019

Expert Tip: You are automatically eligible for Microsoft benefits to help drive awareness of your offer once you publish on commercial marketplace.

Suggestion: Activate your Microsoft Rewards Program to maximize your commercial marketplace presence and grow your business.
**An integrated marketing approach**

Marketing investments are required to grow new and existing channels. Invest in the commercial marketplace channel by integrating your commercial marketplace offer into your current demand generation and nurture initiatives.

**Promote the availability of your offer or fulfillment on Microsoft commercial marketplace.**

- **Suggestion:** Amplify your offer on your site using the “Get it from” badges via the Marketing Toolkit.
- **Suggestion:** Create and advertise commercial marketplace specific content, including demos, videos, blogs, webinars, infographics, and more.
- **Suggestion:** Promote your commercial marketplace offer via paid media, including social media, programmatic, display, syndicated content, and SEM.
- **Expert Tip:** Tag your marketing efforts to understand your return on marketing investment and enable remarketing and retargeting efforts.
- **Suggestion:** Engage your target audience by remarketing and retargeting on social media, programmatic, and syndicated content.

**Incorporate leads into your Marketing Automation and CRM programs**

Customers show interest when they interact with your commercial marketplace offer. By taking specific commercial marketplace page actions, they show higher interest and are captured as a lead. These sales leads are shared and can be integrated into your Marketing Automation and CRM tools.

- **Suggestion:** Capture and integrate leads into your Marketing Automation and CRM tools.
- **Expert Tip:** Access the capture lead function by checking the box when creating your listing on commercial marketplace.
- **Suggestion:** Lead integration is compatible with Dynamics CRM, Marketo, Azure Table, and Salesforce.

**EXPERT INSIGHT**

“46% of high-performing marketers view developing technology solutions that help them capture and leverage data about customers from systems they already have in place—including CRM, media analytics, and marketing cloud solutions—as mission-critical to support marketing performance measurement.”

*Source: Forbes CMO Practices Report, June 20, 2019*

**Use reports to gain insights and optimize marketing initiatives**

Microsoft analytics provides commercial marketplace traffic, prospects, and customer insights to inform your marketing efforts.

- **Suggestion:** Connect with your Microsoft Rewards commercial marketplace expert to get your offer page visitor details and additional insider reporting tips.
- **Suggestion:** Get insights from the commercial marketplace insights dashboard customer information report.
- **Suggestion:** Analyze detailed traffic information via downloads, orders, and ratings and reviews reports.
Marketing integration checklist

Figure 4.2 provides a marketing integration checklist. Please consider this as a starting point and evolve this checklist as necessary to align to your company’s needs.

Checklist

☐ Integrate the Microsoft commercial marketplace channel into your marketing efforts
☐ Activate Microsoft Reward Program
☐ Review Marketing Toolkit
☐ Marketing campaigns: Create new campaign(s) and integrate commercial marketplace into existing campaign(s)
  ☐ Go-to-market
  ☐ Demand Generation
  ☐ Lead Nurture
☐ Capture and integrate leads into Marketing Automation and CRM tools
☐ Reporting

Marketing KPIs to track your success

Here are marketing KPIs to consider:

• Web traffic sources
• Cost per marketing qualified lead
• Cost per sales qualified opportunity
• Online conversion rate
• Lead conversion rate
• Retention rate
• Upsell rate
**Module summary**

This module highlights best practices and tips to sell and market your offers through the commercial marketplace. To recap, we’ve described how to:

- Consider commercial marketplace as a new channel.
- Consider key channel sales aspects.
- Evaluate sales team management, training, and compensation.
- Use best practices when defining your offer, creating your offer page, and developing your go-to-market plan.
- Leverage Microsoft investment opportunities in sales and marketing.
- Integrate your leads into your marketing automation and CRM tools.

Use sales and marketing KPIs to track your progress. Use these transformational approaches and best practices to leverage opportunities that drive Microsoft commercial marketplace return on investment.
MODULE 5

Overview

Module 1: effective onboarding
Module 2: product market fit
Module 3: core business processes
Module 4: sales & marketing
Module 5: additional references

Key objectives:

• Summary
• Additional references
As discussed in this document, there is a fundamental change occurring in how customers buy software, services, and other technologies; and a marketplace environment plays a large role in affecting this change. As the market shifts and customers expect more self-service discovery, easy deployment, and streamlined procurement, Microsoft will continue working to help our partners take advantage of this transformation.

Microsoft commercial marketplace will continue to support this transformation, helping your customers to easily discover, try, and buy to help you leverage this channel to meet your business objectives.

Modules 1-4 of this guide have provided peer-based guidance and input to help your firm more effectively onboard to commercial marketplace. We’ve covered topics such as:

- How to prepare to onboard to the commercial marketplace, and build the business case for doing so in Module 1
- Guidance to determine your product-market fit, optimize your listing, and pricing considerations provided in Module 2
- Transforming some business processes is required in order to take advantage of cloud-based, self-service purchasing. Recall the Module 3 discussions on financial, operations, and customer support infrastructure and key considerations for evolving those functions
- The sales and marketing focus areas addressed in Module 4, and some specifics involving these functions that you may want to address during onboarding

Hopefully, this guidance provided some valuable insights and a framework that you and your team can leverage. Using the information in this document, your firm may find it easier to capitalize on the transformative industry changes that offer so much opportunity to us all.

However, the journey does not end with this document. There are a number of interesting and valuable resources you may want to consider that will augment your understanding and business strategy as you move forward.

We have done some homework for you regarding these resources and they appear below, aligned to the various module topics in this document.

Here are some additional resources that can provide a deeper dive for some of the topics addressed in this document.
Module 1: Preparing to onboard to the Microsoft commercial marketplace: an overview

- MS Learn: Introduction to the Microsoft commercial marketplace
- Forrester Economic Impact: The Value of commercial marketplace for Microsoft partners
- Microsoft commercial marketplace hub
- Common questions about Microsoft commercial marketplace
- Marketplace Rewards
- Partner Go-to-Market Success Stories
- Microsoft’s step-by-step migration guide
- Inspire 2020 sessions
  - Best practices to make the most of the commercial marketplace
- Evidence:
  - Shook IOT: A David and Goliath story – how a small startup landed a fortune 500 client
  - Fortinet: How Fortinet drove success in the Microsoft commercial marketplace
  - Video: Microsoft’s Marketplace Partner Success Stories
- External resources:
  - The York Group: 101 Questions about your cloud strategy

Module 2: Product/market fit, listing, and pricing guidance

- On-demand workshops to get started selling through Microsoft's commercial
- Azure Marketplace and AppSource Publisher Toolkit
- Create a new SaaS offer in the commercial marketplace
- Commercial marketplace: How-to demos
- All offers page
- Private Offers
- Test Drives
- Content guidelines
- Listing best practices document
- Commercial Marketplace Transact Capabilities
- SaaS offer creation checklist
- Microsoft Support
Module 3: Evolving internal processes and infrastructure to optimize for commercial marketplace

Finance

- List of countries and the tax responsibility
- Payout policies
- Payout summaries
- Analytics for the commercial marketplace
- External resources
  - Increasing benefits from cloud technology (for finance)
  - Making better decisions in finance with analytics
  - The digital elephant and the CFO
  - Memo to the CFO: Get in front of digital finance – or get left back
  - The three steps CFOs must take to lead a digital transformation
  - Business reporting on the digital world

Support

- Radically transforming your support models
- 100 stats on Digital Transformation and customer experience
Module 4: Sales and marketing guidance

- Selling through Microsoft commercial marketplace video
- The Sales Operations Playbook
- Co-sell partner engagement
- Get customer leads
- Test Drive Marketing and Best Practices
- Lead management for commercial marketplace
- Supercharge Your Business by Co-Selling with Microsoft
- Marketplace Marketing Resources Guide
- Go-to-market with Microsoft
- Marketplace Rewards
- Commercial marketplace marketing toolkit
- Commercial marketplace videos
- External resources:
  - Cloud sales strategy video tutorials

Reports to manage your commercial marketplace business/sale

- Summary dashboard
- Insights dashboard customer information report
- Traffic Reports downloads, orders, and ratings and reviews
- Customer dashboard
- Usage dashboard