



Convergence 2014

The Complete Guide to Convergence for Partners

CONVERGENCE 2014, ATLANTA, GEORGIA, UNITED STATES. MARCH 4-7, 2014

PARTNER Q&A (5:00-6:00 P.M.) AND RECEPTION (6:00-8:00 P.M.) on Monday, March 3, 2014.

Convergence is the premier event bringing the entire Microsoft business community to life. It is where opportunity and innovation meet to deliver real business value and truly amazing customer experiences. It's the chance to make key business connections and to discover the full potential of Microsoft solutions.

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Convergence 2014

Introduction

Microsoft Dynamics Convergence 2014 is designed to help you build customer relationships, make key business connections, and ultimately generate revenue. As the premier event for Microsoft Dynamics partners and customers from around the globe, Convergence is where opportunity and innovation meet to deliver real business value.

Use the information and resources in this guide to help you make the most of the Convergence opportunity with your customers.

Customer recruitment

Because you know your customers best, you play a key role in tailoring and targeting the Convergence message—and planning a successful experience for yourself, your customers, and prospective customers. To help you succeed, we have created customizable marketing materials and templates that you can integrate into your Convergence marketing plan to fuel your efforts and drive attendance.

Why invest in Convergence?

As a proven revenue generator, Convergence is a tremendous sales opportunity for partners. At Convergence, you have the power to drive and close business, build customer relationships, demonstrate customer appreciation, and build credibility.

Partners consistently cite the opportunity to develop relationships with their customers as the most important benefit of attending Convergence. Whether it's getting to know customers better, spending time with them in a less formal setting away from the pressures of day-to-day business, or the opportunity to organize business meetings with potential vendors and partners, independent software vendors (ISVs), and Microsoft team members—the networking value of Convergence is huge.

CRM Tips

Take advantage of your customer relationship management (CRM) software as a tool to help you track your Convergence 2014 plans. We offer tips throughout this guide to help make your efforts a success.

Did you know?

- Convergence attendees generate 3.3 times more license revenue than non-attendees.
- Sixty percent of Convergence attendees made purchases within six months of attending.
- Past event results indicate that overall satisfaction levels for attendees are 12 percent higher than non-attendees.

Section 1

Effectively Manage Your Convergence Investment

How much does it cost for you and your customers to attend the event?

This section can help you plan for expenses beyond the registration fee and help you project costs for you and your customers.

Estimated Costs

Outlined in the sidebar is an approximate breakdown of costs for attending the event. Advising your customers in advance about the costs they will incur will help them properly allocate their attendance budgets. Each attendee will spend about \$2,793 USD, plus airfare, to attend Convergence. These are estimates only; costs will vary according to individual location, preferences, and planning so direct them to the Bing Travel site to get actual airfare costs.

Budgeting for Your Expenses

Decide how many employees to send to Convergence to host your customers. The Microsoft Partner Advisory Council (PAC) advises sending at least one host for every five to seven customers who are attending. Think about your own business model and what you'd like to accomplish with your customers during the event to determine your ideal host-to-customer ratio.

Take Advantage of Incentives

Microsoft offers significant financial incentives for both partners and customers to attend Convergence:

- **For partners:** *Get one free registration to Convergence 2014 if you bring at least 10 customers.* Receive a registration credit toward Convergence 2014 if 10 or more existing Microsoft Dynamics customers associated with the Microsoft Dynamics partner register and attend the Convergence 2014 event in Atlanta. Terms and Conditions can be found on PartnerSource.
- **For customers:** *Get \$100 USD off the full conference pass for the third through seventh registrants.* Receive a refund from Microsoft if three or more employees associated with the same entity register for the full conference pass and attend the Convergence 2014 event in Atlanta. Terms and Conditions can be found on the Convergence website.

Tell your customers about the savings available, and be sure to contact your Microsoft representative for more details about eligibility requirements and timeline limitations.

Microsoft Dynamics CRM Tip #1:

Set up a Convergence 2014 campaign in Microsoft Dynamics CRM to forecast and track the revenue generated from customers who attend the event.

Event pass	Early registration: \$1,545 USD	Registration cost if purchased between October 30, 2013, and January 9, 2014.
	Standard registration: \$1,845 USD	Registration cost after January 9, 2014.
Airfare		Round-trip costs vary depending on flights booked. Visit the Bing Travel site to get specific airfare costs from your area.
Hotel	\$848 USD	Four nights at \$212 USD (average cost of Convergence hotel) per night.
Misc.	\$400 USD	Estimated cost of meals, entertainment, and activities not covered by your Microsoft partner or your registration fee.
Total	\$2,793 USD plus airfare cost	Total reflects early-registration discount.

Help your customers make the case for attending convergence

Customers can reap tremendous business benefits from attending Convergence, but you need to help them understand the value they'll receive for their investment by covering the top six reasons they should attend:

Learn. See how you can make your life easier when you get back to work.

Connect. Find out how other customers, partners, and Microsoft specialists use Microsoft Dynamics.

Expand. Visit the Expo Hall to see how the latest innovations bring new value to Microsoft Dynamics.

Discover. Watch Microsoft experts demo the new releases and talk about the product roadmaps.

Envision. Hear where Microsoft execs and industry analysts think the industry is going.

Enjoy. Mingle with your new best friends at evening events and the closing celebration.

You can also help customers and their employers see the benefits of attending Convergence by:

- Pointing out the types of sessions and activities available to help them increase productivity and save money by maximizing their Microsoft Dynamics investment.
- Checking the new event agenda on the Convergence 2014 website to see which sessions and activities meet your customers' needs.
- Putting a value on the hourly cost of the training available in your own market to quantify the educational value of attending Convergence:
 - » During Convergence, event areas are open to attendees for approximately 38 hours over four days.
 - » Numerous concurrent breakout sessions or interactive discussions offer many hours of valuable product sessions and learning.
 - » Roundtable discussions provide expanded offerings and a more structured environment to help maximize interaction time.
 - » Some sessions contain real-life examples and insight by other customers on using Microsoft Dynamics solutions to achieve the maximum strategic benefit.
 - » Customers can gain insight into the long-term strategic direction of Microsoft during up to five hours of keynotes and general sessions.
 - » Theater presentations offer a casual setting for brief presentations and great, inspirational stories from our Customer Excellence Award winners.
 - » The customer product showcase is the spot for Microsoft to spotlight products from some of our Microsoft Dynamics customers. The world becomes just a little bit smaller when you start to see all the companies that use Microsoft Dynamics to help produce some very familiar products.

"Microsoft Convergence 2013 was an extremely valuable event for us. We were able to connect with clients from over 20 countries, generated a tremendous amount of quality leads, and had opportunity to interface directly with Microsoft employees. We also had the chance to participate in user group activities, which are very informative and pertinent. All at one conference!"

Kathleen Cavanaugh,
Sierra Workforce Solutions

Turn networking into relationships

By attending Convergence, your customers are building a community. Even if they take full advantage of the Microsoft sessions, they will still have plenty of time to:

- Kick off the week with the Convergence Experience Reception.
- Engage in speed networking to help make the most efficient use of time and provide an opportunity to meet people and make connections.
- Network in the Expo, where they can meet top experts and leading solution developers as they explore comprehensive business solutions.
- Take advantage of networking opportunities with peers and partners in the Convergence Experience Center—including industry lounges, meeting points, community outreach efforts, and much more.
- Talk with other customers or you, their partner, during the nine included meals and possibly your own company-hosted party or dinner.

Ninety-eight percent of customers who attend Convergence return the next year.

"I have been to Convergence every year since 2009. I wouldn't miss it. I keep going back because I really think that attending Convergence regularly is the best way to keep current on what's coming."

Kerry Rosvold,
Corporate Controller, Augsburg Fortress

And these customers benefit from the networking they do at Convergence long after the conference ends. Peer-to-peer relationships during and after the conference—often maintained via the Microsoft Dynamics Community—give customers another outlet for support that saves them money in the long run.

These relationships help them recognize the great business value they receive in exchange for the investment of their time and money in attending Convergence. They can then communicate that value to the decision makers at their company, which may even increase their willingness to continue investing in their business management solution with you.

And don't neglect your prospective customers in your planning. For any business, hearing real-world experiences and testimonials from other companies can do wonders for moving them along the path toward making a deal with you. If feasible, set up these connections between customers and prospects to give yourself the boost of a good review.

Facilitating these relationships builds your credibility as your customers' trusted advisor.

Create an ROI baseline, track revenue, and follow up after the event

Forecasting how much revenue you can expect from each of your customers may help you decide how much to spend and to choose customers for your "must attend" list.

Though this forecasting is often an informal process, a structured approach may help you scale your existing customer practice. Follow these four steps when deciding how much to spend on attending and marketing Convergence 2014:

1. Generate a Forecast

How much business can you close or accelerate by attending Convergence 2014 with your customers? Forecast the license and additional user and services revenue you anticipate from each account using the phased implementation plans and your understanding of your customers' business objectives.

Use the Convergence opportunity to influence and accelerate customers' decision-making processes.

"Convergence has the best marketing ROI of any marketing activity we do."

Andy Vabulus,
IBIS

2. Develop a Target ROI

The Partner Advisory Council (PAC) experience shows that bringing customers to Convergence generates a baseline return on investment (ROI) of 10 to 1, or 1,000 percent. On average, PAC partners generate \$30,000 USD in revenue for every \$3,000 USD they spend on attending and marketing Convergence. However, every partner is unique; this is a place for you to define your own target ROI.

Apply your target ROI to the revenue forecast you developed in step 1 to generate a marketing budget. For example:

Your target revenue / your target % ROI = estimated marketing budget

or

\$300,000 USD / 1,000% ROI = \$30,000 USD estimated marketing budget

This partner may be comfortable investing around \$30,000 USD in Convergence, which is enough to allow up to 10 hosts to attend (using our cost example of approximately \$3,000 USD per person). Of course, each partner will have other cost considerations, including the cost to communicate the event or host a customer appreciation dinner.

3. Follow Up and Track Your Revenue

After the event, immediately follow up on the ideas that you and your customers discussed in the meetings you organized and the sessions you attended together. Use the Convergence 2014 product offer to create a post-event opportunity for your customers to move ahead.

4. Refine Your Forecast and Target ROI with the Results

Tracking the revenue from attending customers six months after the event can help you to evaluate your ROI and refine your forecasting. With this information, you can compare the actual revenue results to your initial forecast and calculate your own ROI using your actual expenditures.

Microsoft Dynamics CRM Tip #2:

Use your Convergence 2014 campaign to help you with the following:

- **Follow up with attendees**—Customize the email template provided by Microsoft with the attendee's name to thank them for attending and remind them of the Convergence 2014 product offers.
- **Track the revenue**—After the event, each customer's interest areas can either become an opportunity that you can track with Convergence 2014 as the source code or be retired with a valid reason code that you define.

Section 2

Plan Ahead to Ensure Success

What to do and when to do it: the planning process

When should you start promoting Convergence to customers? What sessions and activities should you participate in and who should do what? In this section, find out how much time successful partners invest in Convergence and what has worked for them.

When to Start Planning

Previous attendees on the Partner Advisory Council advise that you begin planning four to six months prior to Convergence, and many often start contacting their customers that early, as well. Begin your preparations now, if you haven't already. If you haven't built the cost of attending into your customers' training budget, it may be difficult for them to ask their company to cover Convergence expenses. This is another reason to start preparing them now.

How Much Time Should You Spend?

There is no set number of hours you should spend, but remember that inviting and then hosting your customers at an event like this takes time. You can make the most of that time by assigning people in your organization to specific roles, as suggested below:

Role	Duties
Management and practice leadership	Set strategy.
Representative	Drive attendance through direct customer contact.
Marketing	Manage lists, develop materials, and plan the event.
Misc.	Estimated cost of meals, entertainment, and activities not covered by your Microsoft partner or your registration fee.
Total	Total reflects early-registration discount.

The rough schedule below shows how much time PAC partners spend, on average, preparing for Convergence.

Month	Average Hours Spent Per Week
October	3 to 5 hours
November	3 to 5 hours
December	8 to 12 hours
January	20 hours
February	20 hours
March	Full time
April (post-event)	Varies; time spent closing deals and evaluating success

Reminder:

Have your customers list you as their partner organization during the Convergence registration process.

Due to our goal of making Convergence the best experience possible for all of our customers, we have chosen to exclude requiring an authorized phone number (APN) or account number during registration for existing customers.

We will still be including a question in the registration process for the APN or account number, but it will not be mandatory. As you may know, these numbers are what allowed us to pull a list of your registered customers. Due to this, the process in which we get you your registered customer lists will need to change and we will need to work with you more closely because you will need to supply customer data for us to be able to pull this list. We hope that you will work with us through this change and understand this will create a better experience for your customers. Please send email to mbs-evnt@microsoft.com with any questions.

Identify which customers you want to target and how to reach them cost-effectively

Customer Targeting

A-B-C targeting may help partners that are willing to increase their marketing or hosting budget for certain customers or to provide more structure to less experienced representatives. Define your own categories based on your business model and customer base.

Category	Priority	Possible Characteristics
A	High	<p>These “must attend” customers represent significant revenue potential or have a high likelihood of closing a deal within six months following Convergence. Exploring third-party solutions, connecting with Microsoft, and building credibility are critical to earning their continued investment:</p> <ul style="list-style-type: none">• Consider funding event passes or hotel accommodations as an incentive for these customers. Contact the MBS Events Inbox for more details on how to arrange this.• Other partners simply include the cost of the pass in the service agreement.• Consider sending a fun direct mail piece to your A targets that plays off the location.

What advice would you give to a first-time Convergence attendee? How should they prepare to get the most out of their experience?

“Make use of the online agenda to plan your days.”

“Check out the sessions not directly related to your product.”

“Don’t miss the social events.”

“Make sure you allocate time for the Expo.”

Jerry Kottelenberg,
Auanash Inc.

Category	Priority	Possible Characteristics
B	Medium	<p>These customers would add value if they attended. They represent longer-term revenue potential or may be customers who have attended for years and will continue to do so with minimal partner effort:</p> <ul style="list-style-type: none"> • Customize the Microsoft marketing templates on PartnerSource and send a monthly email to your A and B targets.
C	Low	<p>These customers resist continued enhancement of their business management solutions or may have already declined to attend:</p> <ul style="list-style-type: none"> • You can use the already created emails available on PartnerSource to reach them.

When used properly, tailored messages can help you catch your customers' particular interest and gain improved responses to your marketing efforts.

Tailored Messaging

As you know, different customers have different motivations. While blanket messages are good for getting general points across to your customers, they can't get the results a more customized message can. Microsoft has provided a messaging grid to aid you in tailoring your Convergence messaging to different customer audiences. When used properly, tailored messages can help you catch your customers' particular interest and gain improved responses to your marketing efforts.

Thought Starters and Ideas

These ideas cost very little to execute yet can be very effective. Even if you feel you lack the time or the marketing budget, you should consider executing one or all of the following contact ideas:

- Plan to communicate with customers about Convergence from November 2013 through March 2014.
- Call your customers and invite them personally.
- Review all of your existing communication opportunities, and add information about Convergence where it makes sense.
- Add a Convergence pitch to any recorded message you may have for your company.
- Use the copy blocks to add some mention of Convergence to your existing monthly and quarterly newsletters.
- Add Convergence-related slides to your Microsoft PowerPoint presentations. (There are several already available on PartnerSource that you can tailor to your own brand.)
- Have everyone in your organization use the Microsoft Outlook email signature promoting Convergence.

Using The Convergence Marketing Campaign Materials

Microsoft provides you with the materials you need to develop a direct marketing campaign targeting your customers. They consist of messaging guidance, already drafted emails, an email signature, copy blocks, PowerPoint presentation, newsletter copy blocks, and online banners—all with placeholder copy you can replace with your company and contact information.

Inviting Your Customers

Our research shows that early contact is the most successful invitation strategy. Customers usually respond affirmatively to your invitations within the first two contact communications.

Make sure you contact your customers as early as possible, using the following step-by-step instructions:

1. Download the marketing materials as they become available on PartnerSource.
2. Contact your customers according to the suggested distribution schedule and instructions below.

Microsoft Dynamics CRM Tip #3:

If you have your customer contacts in Microsoft Dynamics CRM, you can generate your mailing list and deliver a personalized email to each contact using the Microsoft email templates.

Evangelize the event with customers and prospects all year round in customer review meetings, customer conferences, webinars, newsletters, etc.

Customer Contact Strategy

Use the following table as a guide while you conduct your marketing campaign.

Marketing Piece	Description	Available	Suggested Execution Time Frame
Convergence messaging grid	Targeted messaging for tailoring communications to varied customer audiences.	Coming soon	As needed
"Top Reasons to Attend Convergence" presentation	For use with on-site customers or at sales calls. Includes speaker notes with detailed talking points.	Coming soon	As needed
Online banners	Banners to promote Convergence on partner sites; "register now" call to action should link to the Microsoft Convergence 2014 site.	Now	Immediately
Email signature	Promotional graphic you can copy into your email signature. It can be programmed to link to the event registration site. Includes a social media icon row.	Now	Immediately
Newsletter copy blocks	Event promotional copy for newsletters or other marketing use.	Coming soon	As needed
Touch 1 email	Save the date.	Now	Before October 30, 2013
Touch 2 email	Early registration is open.	Now	October 30, 2013 – January 9, 2014
Touch 3 email	Register today.	December	December 10, 2013 – January 1, 2014
Touch 4 email	Early registration is ending soon.	January	January 2, 2014 – January 8, 2014
Touch 5 email	Registration is happening now.	January	January 10, 2014 – February 17, 2014
Touch 6 email	Last chance to register.	February	February 18, 2014 – Event

Microsoft Dynamics CRM Tip #4:

As customers respond, update their information in the Convergence 2014 campaign you have set up in Microsoft Dynamics CRM, so that you can identify and track sales from these attendees and generate your attendee list:

- **Customer** = name of the person attending
- **Promotion code** = name of their partner host
- **Subject** = Create three to five areas of interest for each customer

Section 3

Your Role as Your Customers' Event Host

Help Your Customers Prepare For Convergence 2014

Once your customers have committed to attending Convergence, your role as their host officially begins. Prepare now for the event and maximize the opportunities Convergence provides.

Use Convergence to influence and accelerate the customer decision-making process in the following ways:

- Identify your customers' interests and concerns before the event to craft a customized agenda of the sessions you will attend together to address these topics.
- Organize meetings with business partners, Microsoft staff, and independent software vendors to address your customers' business needs and technology requirements.
- Position the Convergence attendee product offers* as a way to offset the customers' cost of attending. The product offer from Microsoft can be a useful tool to close business after the event.

Assign a Host

The Convergence PAC recommends that partners assign hosts to each customer attendee and assign specific duties to each host that may include:

- Coordinating preconference logistics, including collecting the customer's flight and hotel information so that the host can meet their flight, arrange ground transportation, or meet them upon hotel arrival.
- Holding preconference conversations to identify the customer's top three to five interest areas and arrange appropriate meetings and create a customized agenda.
- Attending sessions with the customer during the conference day.
- Eating meals with your customers. This gives you an opportunity to manage and adjust your Convergence plan on-site and builds the feeling of community with your attendees. Trading thoughts about what you heard and learned may create an opportunity to move the decision to the next step.
- Going to the Expo with the customer to meet with and evaluate appropriate third-party vendors.
- Reaching out to include the customer in evening social activities and partner outings or dinners.
- Arranging meetings with Microsoft team members and introducing customers to other customers in their industry for networking opportunities.

Partners that successfully use Convergence to drive business make it their primary objective to ensure that their customers get the information they need to secure a purchase after Convergence. At the same time, partner representatives and consultants want to take advantage of the training and knowledge-gathering sessions that Convergence offers. If possible, have a colleague attend who focuses only on the sessions that are important for your organization and who will share that information within your organization. Assigning specific job responsibilities will make sure everything and everyone get covered. And don't forget to pitch the Microsoft incentives for customers who bring three or more employees.

More details are available on [PartnerSource](#).

"Hosting consists of working with the customer prior to the event in understanding their objectives and helping them strategize their time in meeting with people and attending the right sessions and events."

Deb Victor,
PowerObjects

Make Registering Easy

Some partners create a registration form of their own and handle registration and hotel reservations for customers. This is not only convenient, it lets you know who is registered and where they are staying. Once you know who is attending, you can register the appropriate hosts early and plan your customer appreciation dinner or event more accurately.

Host a Customer Appreciation Dinner

Most partners organize a customer appreciation dinner. Make a reservation early, so that you can find the most appropriate venue in Atlanta for the type of event you want to create. To help you with planning we have a special contact at the local Convention and Visitors Bureau that you can contact directly: Monica Coleman, mcoleman@atlanta.net.

Prepare Your Customers for the Event

The main hosting work prior to the event will be helping your customers decide what to focus on at Convergence. You should work with each customer to jointly identify three to five interest areas to explore at the event—either during a routine phone call or through an email survey. This information helps you:

- Organize a conference call with all of your customer attendees before the event, to welcome them and outline your logistical plans.
- Design a customized schedule for each customer so that you both attend the sessions they need most.
- Prearrange additional meetings with third-party vendors on their behalf so that you both fully realize the networking value of Convergence.
- Prescreen the Expo hall before you meet up with your customers. Introduce yourself to exhibitors and tell them that you will be bringing a customer by to meet them. This builds customer confidence in your capabilities as their trusted business advisor.

Many partners supplement their customers' customized schedule with additional content, including:

- Details for your own customer appreciation dinner and partner outings.
- "Must see" speakers and product breakout sessions based on your own experience.
- Their host's name and contact information.
- Daily conference meeting places and times, including meals and receptions.
- Conference attire and local weather.
- Phone numbers, addresses, maps, and pricing for nearby restaurants, clubs, shopping, and possible sightseeing destinations.

Microsoft Dynamics CRM Tip #5:

Use the subject field to track each attendee's company name and interest area. This approach also allows you to consolidate the common interest areas across multiple accounts to better plan customer agendas and manage hosting responsibilities.

"Convergence has impacted our business because it's all about developing relationships. We're in the CRM world, right, which is all about developing relationships. So, to actually get to see those people that we have those relationships with, to see them every day, that impacts our business in a big way. Because we're all about relationships."

Grant McLarnon,
VP Alberta, Adxstudio

Driving Customer Engagement

Add your own activities to guide your customers to the type of experience you want to create. Here are some ideas you can include:

- Set up an RSS desktop feed that customers can subscribe to for agenda and event updates. Create your own Convergence blog. Ask other partner attendees to “guest blog” each day.
- Bring discussion boards to life (if you choose to have them). Assign a partner employee to host each discussion board.

On-Site Management Tips For Successful Event Coordination And Hosting

Coordinate with Your Customers

It can be a challenge to keep track of your customers at an event the size of Convergence. Making sure that your customers get the most out of the available opportunities does take time and effort on your part. Coordinating logistics is a key factor:

- Communicate prior to departure regarding your event location and time, attendee list, contacts, and meeting places.
- Exchange information such as flight times and hotel locations as well as cell phone numbers prior to departure.
- If you have a large number of customers and employees attending, they may not all know each other. Consider adding a ribbon to everyone's badges to help them identify each other. This allows your hosts to reach out to your customers informally throughout the event.
- Establish and communicate general meeting places for connecting during the day, as well as daily agreements to meet for meals, coffee breaks, and at the end of each day.
- Evaluate whether you need an employee on site to handle logistics for your group or whether your hosts will handle this.

“Our customers tell us that Convergence is the venue where they learn from their peers and get inspired to achieve business success. Convergence is a unique event that offers customers the ability to network with like companies, converse with product team members, and spend ample amounts of time with their partner defining what's next for their business.”

Ryan Toenies,
Sonoma Partners

Section 4

Partner Checklist

Planning Activities

Begin planning	Estimate costs.
	Create a target ROI and generate a forecast.
	Identify target customer attendees. Categorize as A, B, or C.
	Develop a marketing plan, including whether you'll create a printed attendee guide.
Register your team	Choose your host team.
	Register for Convergence and select one of the event hotels for your stay.
	Research hotels to suggest to customers.
Plan customer appreciation event	Reserve space and plan food, drink, and entertainment.
	Identify any themed or printed items needed.
	Invite a Microsoft account manager, Microsoft executives, or other Microsoft employees to attend.
Nominate your customers for the "Customer Excellence Award" (nominations open early December 2013)	Review customer awards and criteria.
	Match customers to awards.
	Assign customer write-ups.

Partner Checklist

Marketing Activities

Begin marketing campaign	Register for event alerts.
	Schedule a Microsoft Dynamics CRM email campaign using this guide.
	Identify target customer attendees. Categorize as A, B, or C.
	Add the Convergence email signature to all employees' email. Download the email signature from PartnerSource.
	Update your website with Convergence info and link to the Convergence 2014 website.
	Send "save the date" emails—located on PartnerSource.
	Create your own Convergence postcard or flyer that consultants can leave with customers after appointments.
	Schedule one-on-one meetings with A-list customers.
	The assigned team member begins calling B-list customers.

Partner Checklist

Hosting Activities

Create a Convergence attendee guide that includes:	Your specific conference meeting place and times.
	Keynote speaker schedule. Visit the event website to view the agenda.
	Customer-appreciation event invitation.
	Team members attending Convergence (include email and cell phone numbers).
	Action items to complete for customers before the conference.
	List of Convergence product offers from Microsoft.
	Tips for making the most of Convergence.
	Convergence agenda.
Register customers	Track customer registration to stay informed.
	Create a profile for each attendee, including current products and travel info.
	Set three to five Convergence goals with each attendee.
	Plan desired meetings with Microsoft team members.
	Create a target list of solutions that fit with attendees' needs. Assign a host to each and plan time to review.
Two weeks prior to Convergence	Distribute your Convergence attendee guide to customers.
	Schedule a final internal team meeting to review: <ul style="list-style-type: none"> • Convergence attendees and their goals. • Priority events to attend with customers (Expo receptions, Microsoft receptions, and regional receptions). • Your Convergence attendee guide. • Who will be at meeting locations for attendees.
	Conduct the attendee kick-off meeting in person, by webcast, or by conference call to: <ul style="list-style-type: none"> • Answer last-minute questions. • Allow customers to begin to get acquainted with each other.
	Execute your Convergence plan.
	Make sure you are meeting the goals you set with attendees.
	See section 3 of this guide for further hosting ideas.

Make sure you are meeting the goals you set with attendees.

"Convergence is an ideal time to further develop relationships with your customers. You can help guide them and be the expert in their eyes. This is also an ideal time to further build relationships with Microsoft and marketplace vendors and learn."

Deb Victor,
PowerObjects

Partner Checklist

Post-Event Follow-Up Activities

Week one	Send a personal thank-you note to all attendees within a week of returning from the event. Book follow-up meetings with each attendee.
Month one	Send out the Convergence 2014 product offer reminder.
Months one to six	Track and measure ongoing results of Convergence opportunities in Microsoft Dynamics CRM to help next year's targeting and budgeting process.

“Convergence drives sales. When you have an informed client, they know what they need to succeed.”

Deb Victor,
PowerObjects