



To maximize and accelerate Channel Partner Sales Opportunities, we have created this step-by- step opportunity workflow. Please follow this, chronologically, to assist with supply chain strains and to avoid unnecessary bottlenecks for all engaged parties. The overall goal of this process is to identify more quality opportunities and have the time and resources to properly support them.

1. Target the *Right End User at the Right Time*

- Avoid EOM renewals - We have to be mindful of the Client onboarding process of US Cloud, and that it is typically a 3-6 week process. We can speed this up if necessary but that should be the exception and not the rule.
- Renewals in 9+ months - These are too far OUT to give accurate information and proposals on pricing and service offerings from both MSFT & USCloud.

2. Register your Opportunity – **Most Important!**

- You must go to your US Cloud Partner Portal to enter the opportunity information. Your US Cloud Channel Sales Manager shared this link with you during onboarding. **This step is crucial to getting the USC support you will need to help close the opportunity and earning sales commissions for the referral.**
- Remember that US Cloud is generating leads through its direct sales channel as well so to avoid confusion on opportunity leadership please don't skip this step.
- *Tip: Bookmark this link so you can easily refer to it when needed.*

3. Share US Cloud Webinar

- Multiple times per week US Cloud hosts a free informational webinar. This is a great way to quickly introduce US Cloud Support and Services as an alternative to MSFT.
- Please share this registration link: <https://www.gotostage.com/channel/uscloud>
- *Note: You should have already registered a lead on your Partner Portal so there should be no overlap with direct sales channel.*

4. Further Qualify with End User Q&A

It is important to get answers to the following questions to build an accurate needs assessment and proposal.

- How many employees/users?
- When is their MSFT Renewal Date?
- Are they currently under the MSFT Support Premier Model or Unified Model?
- What is their current sentiment with MSFT Support and why?
- Regarding their MSFT Solution Stack:
 - How many On Premise products?
 - How many Cloud products?
- Regarding their MSFT Support consumption, is it mostly Proactive or Reactive?
- Do they have a past or present MSFT quote that outlines cost or consumption?
- Any additional key notes on MSFT cost of service or quality of service?



5. Execute a Non-Disclosure Agreement

- Qualified leads will need to execute an NDA before sharing ANY US Cloud documents or issuing a proposal. If they prefer, we can use their NDA.
- If you are using US Cloud's, you can find it here: [US Cloud NDA](#)
- *Note: this step can also take place BEFORE step 4 if necessary to gather the information from your end-user.*

6. Leverage US Cloud Channel Partner Sales Tools

- Use the pricing guide to determine the level of support needed with US Cloud based on their previous consumption of MSFT support: [Price Datasheet](#)
- *Tip: The Goal is to have qualification questions, NDA, and preliminary demand & consumption estimates completed **before meeting with the US Cloud team**. This will help move more opportunities efficiently through the US Cloud sales process.*

7. Schedule Meeting with the US Cloud Channel Partner Team

- After you have completed all prior steps, please [schedule a meeting](#) with your end-user, yourself, and US Cloud. You will be prompted to select a meeting type followed by selecting a manager. Please be sure to select the End User Referral meeting type and choose the Channel Sales Manager that you have been working with.
- You can find the calendar link on your US Cloud Partner Portal.
- *Tip: bookmark this link so you can easily refer to it when needed.*

