Referrals and FCU Office Hours

0:00
Welcome everyone.

0:01
Thank you so much for joining us today for the referrals office hours, FCU Office hours, we're so happy to have you here.

0:09
As always, please just remember that all content provided on this call today is confidential, so just make sure not to share it externally unless you have prior permission to do so.

0:23
Also, we are recording this call and the recording will be available on the Fast Track Partner Community Portal blog, most likely in the next day or so, so stay tuned for that there.

0:36
It will look like it's available in the chat after the event, but it won't be accessible, so head over to the portal to check that out if you'd like to re watch it.

0:47
As always, feel free to post any questions that you might have in the chat along the way.

0:51
We have an awesome team on board here to answer questions throughout the event.

0:56
And then at the end of the event, we will enable the mics and you can ask your question in that way as well.

1:03
If you'd like to turn on live captions, feel free to click on the More button in your Teams app.

1:08
You can do so there.

1:10
And again, welcome everyone.

1:13
We're very happy to have you here.

1:14
And I will now turn it over to Julie.

1:17
Martin.

1:20
Thanks, Amy.

1:21
Hi, everyone.

1:22
We're really glad you joined us today, this morning, this afternoon, whatever time it is for you, our quick agenda we are going to cover how to update your referrals profile in the Community portal and a few updates and items coming soon for Referrals.

1:42
Then we'll move over to looking at Referrals in the Fast Track Community UX in Partner Center and we'll move then on to the Fast Track Partner API and then we'll open the floor for questions.

1:54
We really want to leave most of the time for questions, but we'll get through these three topics first and then we'll open the floor.

2:02
We can go to the next slide.

2:06
I'm going to start here.

2:07
My colleagues actually unfortunately is out sick, but I will be covering on her behalf and there's an opportunity to connect with her and a few more slides.

2:17
But we wanted to share our referral delivery expectations.

2:21
Many of you have probably seen this already, but just some kind of key reminders as you're getting more familiar with referrals.

2:32
For those of you who are Fast Track ready partners, we have these two blue boxes highlighted and those cover that we of course expect you to you know, understand the Fast Track scope and have a delivery approach to providing the Fast Track benefit to customers.

2:51

And then similarly down below that, this benefit is to be provided to Park to customers free of charge for for all referrals including Fast Track benefit referrals.

3:03
The rest of these items apply as well.

3:06
We expect all of you to have a minimum of 1 workload endorsement listed in the Community Portal profile and I expect most of you do.

3:15
We're going to cover how to look that up in a few minutes.

3:19
We expect that you will be accepting 80% of the referrals assigned to you.

3:23
And again, this is now a new functionality available in FCU and Partner Center to accept those referrals.

3:31
We know a lot of you have been receiving referrals and accepting them as we've gotten getting wrapped up in October.

3:37
Thanks for the heart.

3:38
I know this really this is replacing the next steps e-mail process which was a bit onerous and we hope that this new experience is much cleaner and easier to use.

3:50
We're asking for you to respond to these referrals within two business days in FCU and if we don't hear from you once we've assigned A referral, we will go ahead and reassign that to another partner.

4:03
So it's important to be responding to those within two business days.

4:08
From there we want to make sure we're getting to reach out to the customer within two business days to make sure that we're hearing from them quickly.

4:15
So we're we're hoping this whole process moves fairly quickly so that from the time the request goes into the time a partner is hearing or excuse me a a customer is hearing from a partner is is quick.

4:30

We expect you then to propose and deliver paid services to the customer beyond the scope of the benefit and then at the end of your engagement to provide notes and close out the referral in FCU.

4:43
So I'm gonna go ahead and keep moving again I'm gonna come back and look at questions in the chat.

4:47
My colleagues might be able to answer some as well.

4:51
We shared these in Yammer but I wanted to just go over them here in case there are questions.

4:58
Direct assignments are retired these this is a a legacy situation where a customer could request a partner through the RFA process and and we're no longer making matches that way.

5:16
We're really focused on matching customers with the fully endorsed partner.

5:22
So if a customer is looking to work with a particular partner, you may absolutely work with a customer, you may deliver the benefit and there's not a need or a requirement for an RFA.

5:36
It's opt in selections for seat size and industry.

5:39
Those fields are live in the portal.

5:41
You may have seen them.

5:43
They have not been integrated into our referral matching process yet.

5:46
That is coming in the next couple of weeks.

5:49
So now is a great time to get those fields filled and then look to be receiving those matched referrals later this month.

5:59
You may decline A referral after accepting it.

6:01
So there is a scenario where you, you may see a referral come in, accept it, reach out to the customer and not hear back maybe after a couple of times.

6:10
And so historically we've asked you to go ahead and have your FPM work with you to reassign that referral.

6:16
Now you have the capability to go back into FCU and decline it and that will initiate the process to reassign it.

6:26
And really sorry, in this scenario, we would probably cancel that referral.

6:33
But in other scenarios where maybe there's some sort of other mismatch, the customer really has a language capability they're looking for that wasn't evident in the RFA.

6:41
You're not able to meet it.

6:43
We would want to go reassign that to a different partner.

6:46
So declining it will help us move it to the right stage accepting referrals prior to October 11th, that's when we started processing for the new program.

6:58
We now have all of these open prior to that date for you to go in and accept decline position however you wish in a couple weeks in November 15th.

7:10
We're going to go ahead and just auto accept anything that is is left open just for our data records to be clean.

7:17
Again, you can still go back in and adjust them, but we wanted to make you aware of what we're doing so that you can again position those referrals accordingly, excuse me, manual endorsements.

7:30
This is just a reminder that some, a few of our endorsements of course are not related to the cloud partner specializations.

7:36
They have different criteria based on usage and other elements.

7:42
We are updating those on a regular cadence.

7:44
There's an update coming this month, so you will see some changes there.

7:50
So it's just a reminder to keep an eye on that criteria.

7:53
Of course we make any changes to that criteria, we will notify you, but that is the way to achieve those endorsements can go on to the next slide.

8:02
As I mentioned, my colleague Sakshi could not be here today, but she is going to be preparing to do some interviews, partner discovery interviews around standard referrals and again we've prepared for standard referrals.

8:18
A lot of you have opted into the course, receive those as being part of the program now as a fast track partner, community member.

8:29
And we are into this next quarter, we're going to be opening up those referrals.

8:33
So you'll start to see those, but in advance of that, so actually is looking forward to understanding better how you work with the field and how you'll be interacting with those referrals.

8:44
So she is inviting you to participate in those interviews.

8:48
There's a link here which we can get to you after the call, but please consider participating in that.

8:59
Go to the next slide and I think this brings us to a brief video about your referrals profile.

9:07
And again, hopefully this is a quick walkthrough that'll kind of generate some ideas and questions.

9:13
And so please feel free to put those in the chat.

9:15
Thank you.

9:28
Let's look at how to view your Referral Profile and make adjustments to the attributes used to match your company with customers.

9:36
Start at the Fast Track Partner Community Portal.

9:39
Login.

9:41
Go to My Memberships and select Program Memberships.

9:47
Select any Program Membership to view details and scroll to the bottom to find endorsements.

9:53
These are all workload endorsements this organization has earned and will be used in referral matching.

10:00
Next, go back to My Memberships and select Referral Profiles.

10:05
Click on a Referral profile to view the details.

10:10
The top 2 fields indicate which types of referrals this partner will receive.

10:15
All Fast Track Ready Partners will receive benefit referrals, also known as Requests for Assistance or RF, as the onboarding team manages this field.

10:26
All Fast Track Partner Community members will receive standard referrals.

10:30
These are requests for deployment or adoption services and are paid services.

10:36
All Partner Community members may choose to take a brief pause from receiving referrals if they are experiencing capacity issues.

10:45
Simply mark this field to know for up to 30 days to pause all types of referrals.

10:54
Select languages in which you are able to offer services.

10:59
If there are no languages marked in this field, the organization will not receive referrals.

11:05
We currently match partners with customers in the following industries, Education, Government and Nonprofit.

11:14
Select Target, Customer Size and finally select countries where you can service customers.

11:26
This is countries beyond your home country which will be used first in referral matching.

11:33
You can view who last updated this referral profile at the bottom of the screen.

11:38
Don't forget to use the Submit button to save your changes.

11:53
And with that, I'll hand it over to my other colleagues to move on to the FCU.

12:00
Thank you, Julie.

12:02
Hello everyone.

12:06
Right, we can get started.

12:09
We'll be picking up the changes, the recent changes in the FCU for QQ One release for PY 24 that will be me, Bello and Vin Call be presenting.

12:25
So what we'd like to do in this before we start is touch on the different PY 24 point releases from the earliest to the latest, right.

12:36
So in October, obviously using referrals, managing your referrals in in the FCU, we address the dark mode accessibility mode in September and the search with the referral ID August.

12:51
Obviously there's a lot of changes.

12:53
Then as we move to this new fiscal year with the new changes in strategy, with being a a fast track, you know partner community, we added also the the fast track community portal link, improved some of the dashboard and scaling added a tidbit and of course moving to the incentive.

13:12
So we'll touch each aspect of it as we move along so we can go next.

13:22
So again this is the landing page, right and the location we completely moved from the new workspaces.

13:28
We are no longer in incentives.

13:31
We move to the Insights workspace.

13:32
As you can see on the top left, if you log into your partner center you're you will be able to view your Fast track information or FCU in the insides as you can see on the top left on the little bubble right there one.

13:47
Since insides and some of the additions as well is adding the Fast track community portal, you can can go back and forth from the from the community portal to the FCU and as well as opening the FRP dashboard into a new a new full screen improving the scaling screens.

14:12
Yeah I think we can go next.

14:15
So some of the O suit updates right with this new fiscal year is the removal of incentive availability and potential earnings.

14:24
As you can see on the top right coming soon we will be having the high watermark in the compensable units right.

14:32
So we've added a a wireframe.

14:34
Again don't hold me truth to the to the columns they might change but in these changes will be coming in the next couple weeks So moving along again this is a adding the tippet right in the FCU there was a request from EU partner.

14:53
So again you asked, we listened and we delivered.

14:56
As you can see in the tennis details page you can see the tippet up there as as well as the modified on column on the top on the right side for the for the in the contacts you'll be able to sort and view the you know contacts that are modifiably know in an early stages or old ones that you want to purge out as well going to the next.

15:22
So again coming back to the biggest change in the ESU this fiscal year at least until now is the managing the, the referrals in in FCU.

15:34
So the referral experience completely changed, right.

15:36
So we added new columns, the referral sources, the referral ID, your acceptance and then the statuses.

15:44
All right.

15:46
So now basically instead of managing your referrals through e-mail back and forth interaction, you can come to the FCU and look at the statuses, notes and basically manage your whole interaction in the FCU.

16:03
And again, I know I've I've seen some questions we'll be addressing them, but I would like you to look at this new feature that we have released to manage and take action on your referrals in the FCU.

16:13
So join the next video.

16:24
Go next.

16:33
Gone are the days of back and forth emails.

16:36
Once you have opted in to receive referrals and matched with a customer, you'll receive an e-mail like this one.

16:42
The link should take you to the FCU Fasttrack Community UX.

16:45
Click on the Referrals tab to view your referrals.

16:49
You can view all of your referrals including statuses and dates.

16:57
Let's go ahead and click on the link to view the details.

17:04
In this view you will have access to the customers, workloads and the respective usage percentages, Monthly Active users and Paid Available Units.

17:16
Click on the Contact tabs to view the customers contact list.

17:22
The Notes tab will contain all of the engagement management notes to give you deeper insights.

17:32
Click on Edit to Action this Referral.

17:38
When accepting A referral, you agree to attempt contact with the customer within two business days.

17:44
Then go ahead and mark the referral status to Active to show that you are actively working on the referral.

17:57
Save your progress and reach out to the customer.

18:05
Once you have fulfilled the engagement, come back to the page and mark it closed.

18:13
Indicate if you have sold value added services in this section.

18:18
Pick and services estimated value in the drop down.

18:32
Last but not least, at any additional information pertaining to the referral and hit save.

18:49
Let's go through a scenario where the partner was not able to fulfill the referral.

19:03
The partner accepted the referral but was not able to serve the customer.

19:08
Click on Decline and select a reason from the drop down.

19:27
Please add any additional information pertaining to the interaction with the customer if applicable.

19:31
In the Notes section, click Save.

19:47
Once a referral has been declined, it will still appear in the referrals list, but the partner will no longer have access to the data as shown here.

19:59
Thank you.

20:06
Thank you.

20:11
All right.

20:12
Thank you very much.

20:13
Bellow welcome everyone.

20:16
I am Amy Fulwell.

20:17
I'm a Senior Product Manager here on the team.

20:20
As you can hear, my voice is a little bit worse for wear, so bear with me.

20:26
I'm gonna try to preserve my voice as much as possible and address questions in the chat.

20:33
So let's go ahead and get this kicked off and talk a little bit about the Fast Track Partner API.

20:39
I'm sure that you've heard us talk about the API, but what exactly is it?

20:45
It's a programmatic, programmatic application interface that allows partners to access data that's associated to those tenants that they have at least one claimed seaport workload with as well as their referrals.

21:00
It can be leveraged to send updates to our F Top data directly by integrating with your customer relationship management software.

21:14
So it's a A1 quick way for you to enter data once and be done and not have to use multiple tools.

21:21
So let's go ahead and go to the next slide and talk about a few of the benefits.

21:26
So as I first mentioned, it really does simplify your workflow.

21:30
By integrating the API with your customer relationship software, you are able to enter the data there and have it flow directly into the FCU and FPOP.

21:41
So that helps in a lot of different ways.

21:44
The first and foremost obviously is it reduces the number of tools that are required for you to use as a part of your daily workflows.

21:52

The other thing that it helps with is that it allows more users within your organization to enter this data.

21:59
There are limitations as to the number of users and the types of roles that can access the FCU and provide updates to contacts and referrals and entitlements and all of that.

22:10
But by integrating with the API in your CRM, it allows you to have more people be able to enter that data, which hopefully will allow the process to run more quickly and more smoothly.

22:24
The other thing that I think is a great benefit is that it allows you to be able to pull down all of your data, put it into whatever database or data source on your end that you like, and then you can run reports against it and create custom views of the data that you may we may not have anticipated.

22:42
So it gives you an opportunity to create reports that really match your needs and demands on the fly.

22:49
Go ahead and go to the next slide please.

22:54
Wanted to talk a little bit about where we've been, but more importantly where we're going.

22:59
So we started a a pilot early this year with just a couple of partners.

23:04
We've very quickly launched the API.

23:07
We moved that that pilot to 10 partners.

23:12
We then opened it up to a second wave and we are now at 30 partners, which is great.

23:19
The API includes being able to pull tenant data, service data, notes, contacts, referrals, and entitlements.

23:28
And then you can send us notes, contacts, and entitlements as well as deleting contacts.

23:34
So if you if once you integrate, you can pull all this data into your tools and it doesn't necessarily even have to be your CRM.

23:41
You could pull all of this data into a mobile app that your team could use, you could pull it into your website.

23:47
So there's lots of different ways that you can integrate and use this data.

23:51
And the big thing that we're super excited to announce is that in this month, within a just a couple of weeks here, we're gonna go full GA release and the the API will be available to all partners to use and we'll talk a little bit about how you can make that happen.

24:09
And we're very excited to get more and more people on board.

24:14
So go ahead and hit the next button please.

24:18
We've got a couple of little fly outs we need you.

24:21
So we want to get you on board as soon as possible because we've got some new features coming out in the January, February time frame and I know you're probably gonna be really excited to hear about this.

24:34
We are going to be sharing usage data.

24:37
So you're going to be able to get those that Mao, that POW, those AU percentages, the high watermark and all of that.

24:44
You're also going to be able to get statement data.

24:47
We're actually very close to being able to launch this already.

24:50
So you'll be able to pull what you earn within our programs on a monthly basis and that's where that reporting really, really, really is going to come in handy.

24:59
You're going to be able to manipulate all of that payment data on your own and then beyond that in

April you know we're going to start launching a few new features, but we really again we need you because we need to hear back from you.

25:12
So go ahead and hit the the next button Amy, and we've got another fly out here.

25:16
We've got some really good ideas about what to incorporate next into the API.

25:21
Wizards, workshops, notifications, data from from PRM.

25:25
So things like if you've submitted partner support cases and disputes, other new fields like RFA denial statuses and reasons, customer feedback, et cetera.

25:36
So we need to figure out what's important to you.

25:38
So having you on board, having to use it, having you familiar with the API before we start launching more and more will be really great because then we establish that relationship and we can definitely get your feedback incorporated as to what really should be our focus going forward.

25:53
All right, go ahead and hit next and how do you get on boarded?

25:57
How do, how do you get started?

25:59
Well, we're happy to share documentation on the API.

26:03
We've got a couple of different formats of it Based on how technical in nature you may be.

26:09
The full API documentation is kind of that that in the weeds kind of information.

26:14
The API Startup Guide and Use cases will give a little bit higher level summary, along with some common scenarios that you might want to consider.

26:24
We're happy to open or we're happy to meet with you, whether that's before you get on boarded or after.

26:30
We can you can request a booking with our team and we can connect and answer any questions you might have as you're on boarding or even after.

26:38
And once you've made that decision to start, all you need to do is send an e-mail to the Fast Track API support team and include your tenant ID and the e-mail addresses of those individuals that would be downloading the certificate, which is a part of the authentication scheme that we have.

26:56
And we will get that all set up and let you know when it's ready to go.

27:00
And then all you need to do is start coding.

27:01
Once you have that, there's a lot of different ways you can approach it, whether that's directly in code or Power Automate.

27:07
But as soon as you have that cert, you are ready to go.

27:10
And so it's a very quick and easy process to get on boarded.

27:13
So looking forward to to seeing some of those emails roll in and here's the success stories of our partners and how they're learning to use the API and benefiting their daily operations.

27:28
And thank you very much.

27:30
Turn it back over to either Amy or Julie, I oh, go ahead, John.

27:41
Oh, I was just going to say I'm, I'm answering questions in the chat.

27:44
I'm sure there are others coming in as well, But I think we can go ahead and open up the floor for live verbal questions.

27:53
That's right, Amy.

27:54
We can do that.

27:56
Yes, I enabled all the mics, so feel free.

27:59
Fantastic.

28:02
Yeah, I saw someone raising their hand.

28:03
I thought we'd be happy to take questions.

28:08
You'd like to raise your hand or just go ahead and come off mute.

28:22
Yeah.

28:22
Nicole, so I have a question regarding the routing of RF as, yeah, can you provide an overview of the routing?

28:34
I am the contact person for my company for all requests for assistance.

28:40
However, we did have one RFA goes to a different person in our company, which means I didn't see it.

28:49
It also did not show up in our insights where it says referrals.

28:54
It wasn't listed there either and so I'm a little concerned that referrals may not be sent to me and if they don't show up in our referral listing that they're just kind of rogue.

29:10
And so we I need a.

29:12
So when I replied back to the Microsoft representative who forwarded it to the other person on at my company, they said that they were following directions in the process.

29:22
So can you review the process for me or kind of just go over that?

29:28
Because I don't understand why, why A, why it didn't show up in under Insights for us are referrals that customer and that referral did not show up and B, why it was routed to a completely different person at our company.

29:45
Yeah, thanks for raising this.

29:46
I I I'd love to actually take it offline and look at it specifically.

29:50
I suspect what is happening here is that we do have a couple of QTM quick to market campaigns underway right now and some of those are sending out.

30:04
It's it's sort of a different flavor of a referral, but it's it's part of this campaign sending out these referrals to partners.

30:12
But you're exactly right, they are outside of our standard referral system.

30:17
It's really almost more like a lead and I suspect that's why it's been sent to a different person and outside the system.

30:23
But in general, yes, you are correct.

30:26
The there is a referral contact registered in our system on the back end and actually we're making, I know it's in the works to actually display that contact in your profile as well.

30:39
So if you would, you know let's say you're the contact you'd like to transition that to someone else, you'd be able to self manage that in your profile.

30:48
For now it's just managed on the back end and and yeah I think what you're used to seeing is is what our, our standard process is the the referral OK flows through the system.

30:59

It's displayed to you in the insights area like you said, FCU in the partner center and you're able to interact with it there.

31:08
Does that help?

31:10
Yes.

31:11
Thank you Yeah.

31:12
But please feel free.

31:13
I'm gonna, I'll put my e-mail in the chat here and I'm very happy to help kinda look at individual questions like this after the fact.

31:23
OK.

31:23
Thank you.

31:27
Sorry.

31:27
Let me just throw my address in here super fast.

31:33
OK.

31:34
And then I will go back over to, yeah, our next question.

31:38
Christy, hey there.

31:43
So quick question about the data clean up that's going to get rolled out, it looks like in the next week for past referrals.

31:53
If we want those to say decline just for our own data integrity, is there I guess is the reason for

declining past referrals that have expired impact our standing or any sort of information about like what referrals we'd be accepting in the future?

32:11
No, we won't look at anything prior to that October 11th date.

32:16
And so however you choose to disposition those is, is up to you.

32:21
OK.

32:22
So we can just go through decline all of these ones from like a year ago and yeah, choose whatever reason and that won't matter.

32:29
OK.

32:29
Perfect.

32:29
Thank you so much.

32:30
Correct.

32:31
Yeah.

32:31
Thank you.

32:31
So it's below.

32:38
Damir, my, my my name is Volodimir.

32:41
Yeah.

32:41
Thank you.

32:42
Thank you for great presentation and for such great improvements on the partner Central.

32:51
Impressive.

32:52
Thank you.

32:52
A lot of work done I see on the ground and planning.

32:56
This is appreciated dedication to the partners and customers.

33:01
I have two questions, two questions regarding the referral.

33:08
So first one, we have updated our profile for referrals and like the next day we have received referral for Microsoft 365 Customer Success offer.

33:22
This is as I understand different from the first track referral.

33:27
Maybe it's a coincidence, could you please?

33:30
So basically this is the proposal for our existing customer for the voucher, for the services and this one is not the first track benefit basically, but rather our help to deliver deployment services with the Microsoft voucher.

33:54
Could you please explain a little bit difference here and how it works?

34:00
And the second question which is very important is regarding SIP Core.

34:10
So if we receive a referral, we are obliged and this is logical to go to the customer and make a support claim for the particular workloads.

34:24
How this will be working if we get support, start working with the customer delivering foster benefit

and then some other partner will go and maybe reclaim for support for some workloads as we had the situation year after year during the previous program.

34:49
How will, how, how we should handle this and will this impact our performance?

34:58
Yeah.

34:58
So I can help you with the second one and then I may actually call on my FPM colleagues to help on the first question about the voucher.

35:05
But for Seaport, yes, we do expect you to submit a Seaport claim.

35:14
It's really important for us to see that data.

35:17
This is clear.

35:19
Yeah.

35:20
And what if the during the engagement or the other partner will claim.

35:23
So we we, we are working with big customers sure could be enterprise level customers like thousands of employees and some some other partner might be working with other contacts within the customer and working their way.

35:41
Maybe they are not fast track ready but claiming for SU for example for high watermark and they will be also claiming the same workloads that we are delivering or services for fast track benefit for free.

35:58
How should we handle this?

36:02
I I will say I I mean this is a bit out out of the scope of our program in that this may happen and and we don't really have much control over it.

36:13
I will say in our program if you know the same customer comes in with a new request, we do look for

that seaport engagement and if that partner is is endorsed for the the new workload that the customer is requesting it will go to that original partner.

36:33
But in terms of these like competing partner claims I I really can't okay advise on that.

36:40
Unfortunately you you, you you cannot know everything.

36:43
So this is fine.

36:44
We I understand that this no, no offense.

36:48
So basically if this will happen we will deal with it as it goes and if there will be problems, we know how to address because yeah, we at least we have our fast track ready dedicated manager in Microsoft.

37:05
Yeah yeah.

37:06
Now I know it's a challenging process.

37:09
This is very challenging, but also the transformation is great to compare it to previous program, even if we are doing the benefit for free because referrals is a good thing.

37:25
Yeah, OK, great.

37:26
I really appreciate that feedback.

37:29
You know, my colleague Adam just messaged me.

37:31
He may be able to sort of speak to the voucher question you had initially.

37:36
I'd I'd appreciate that.

37:41
Hope it will be useful for other partners as well.

37:46
Great.

37:47
Hello Volodimir, thank you for the question.

37:50
So to just briefly explain out, the modern work deployment offer voucher is a pre sales incentive and the fast track ready partners are expected to deliver the fast track benefit as well as deployment activities depending on the type of voucher that they're issued.

38:10
So it's either an M365 deployment voucher or a migration M365 deployment voucher and those eligible workloads are listed on the statement of work for the customer.

38:22
The M365 customer success offer, these customers have been selected by the program owner identified by them based on under utilization of licenses they already own.

38:35
So the ask in this program is for the Fast Track ready partner to help activate users on the eligible workloads that are being under utilized within that customer and those eligible workloads are M365 apps, Exchange Online, SharePoint Online and Teams platform.

38:57
So the goal there is to help increase the monthly active usage of for users for licenses that are already owned understood.

39:09
So and this one is is being initialized by by Microsoft like field LED.

39:19
Yes.

39:20
Well the the program owner has done some analysis on customers that's meet a specific profile and then they're matched with a fast track ready partner who hopefully they've had a relationship in the past.

39:36
OK, I understand.

39:37
Thank you.

39:38
You're welcome.

39:38
Thank you.

39:41
Thanks for the questions.

39:42
Hello to Mayor David.

39:44
Hi, David Noodleman.

39:51
Oh, you are very faint, David.

39:53
Let me, I'll turn up a bit, but better now can you come closer to your microphone?

39:59
Yeah.

39:59
Is it better now still faint?

40:04
Oh, thank you.

40:04
How about now a little bit better.

40:09
Yeah.

40:10
So I I think you know we're already been testing the referral but with referral received included from an existing customer.

40:22

Have a valid support claim and then we were told that we're not endorsed or a workload that we've been delivering to this customer and have a track record on the performance dashboard.

40:33
Just because we were not a massive organization, we're not going to get an advanced specialization on every security load.

40:40
It doesn't mean that the consultant assigned to deliver fast track is good enough or better than normally get on a fast track engagement.

40:51
They also specifically asked on that thing to be referred to us because we are their partner that was also kind of ignored.

40:58
So I think those things are a terrible decisions, right, because partnership means I have an existing relationship and we work together and by ignoring first seaport should be sacred because the customer signed the document specifying that they want to work with a customer and Microsoft approved that.

41:19
So I don't think the referral should go customer.

41:22
So you're breaking something that was sacred historically on the fast track program.

41:27
And then second, I understand that the referral people will not, you know time to look at the partner that they suggested is fast track ready or not.

41:36
So I kind of understand why you want to ignore the request for a specific partner, but people sacred, right even more than advanced specializations for the fast track or for the partner program.

41:49
So I think you revealed that or no happy to chat with someone saying in detail how the partner program works and how this fast track decision is a terrible one.

42:03
Well, thank you David for the feedback.

42:05
I I guess I'll say one thing and then ask you a question back.

42:13
You're right.

42:14
Oh, sorry.

42:14
Go ahead.

42:16
Oh, no.

42:17
OK.

42:20
You know, the decision is taken.

42:22
Hear you that Seaport is sacred.

42:24
We also really have a, you know, strong need to make sure that we're matching with, you know, the whole focus here, right, has been to improve the matching and improve the referral process.

42:34
So endorsement is a key part of that, making sure that a partner can adequately serve the customer.

42:42
That said, if we get a request coming through and our hope is that this program is going to grow and really go to a much larger scale.

42:49
If a request comes through from a customer, we assume that maybe there's not, there's something like, I guess here's my question back to you is if you have that existing relationship, can that customer just come back to you and request the additional service without going through the RFA process, What's wrong with that, that scenario?

43:14
The answer is normally they do.

43:17
And in this specific case, the customer came to us and say what can you do for fast track?

43:22
I said we can go through the advanced deployment guides, They went to the deployment, advanced deployment guides and raise an RFA on the three workloads that they need the help and they need to be assigned to us because they are, they expected be doing us a favor and showing Microsoft that we're going to engage with them on those 3 workloads.

43:43
And then they were told that we're not, wasn't a very positive word, endorsed right to deliver those things that we've been working with them in the last 18 months.

43:58
Yeah, it's, it's is more important than your referral.

44:05
Yeah hear the feedback and I I think it's going to just be an adjustment for our whole community to you know leverage this program for making those new matches where there really is a brand new scenario where a customer needs help and we want to provide them the best match possible.

44:22
And then also coach our current relationships to engage their first and foremost and and really not look to the RFA process any longer to re engage with the current partner.

44:35
I hear that that's not working well for you, but that's that's where we are for now.

44:39
So it's really going to be about kind of education and changing a bit of behavior.

44:44
Yeah just a final remark and then I think that that's a valid point.

44:51
I still don't agree with it.

44:54
You have to remember that the incentives that funded program people in our company are drastically reduced.

45:02
C4 is the only I would say source of income to fund those people.

45:07
If the referral from existing customers go to another partner, I think that does more damage to a lot of companies than the benefit of receiving you know a lot of referrals to get a few good ones.

45:18
We got excellent referral so far, never want that to go away.

45:22
We absolutely see the value of the referrals.

45:26

But for the partner program, C4 has to do with every number everywhere including the advanced specialization numbers.

45:34
Yeah, I'll, I'll book a time on the.

45:39
OK.

45:39
Well, thank thank you for the feedback.

45:41
Appreciate that.

45:41
And again, we absolutely want those existing relationships to continue and we really want to get I guess the paperwork bit out of the way.

45:49
So you know we we have some work to do in messaging to customers and feel to promote those existing relationships outside of any RFA.

46:00
And yeah, we'll keep moving ahead.

46:05
All right, I'll we go to the next hand up.

46:08
Is it Renin?

46:12
Hi Julie.

46:13
Good afternoon.

46:15
I have a a little question here.

46:17
When a customer opens NRFA, we as a partner support them with the deliveries of Wizards or technical materials and the customer does not have the returns with feedback for three attempts.

46:33
Can we close or decline the RFA?

46:40
And when you say sorry after three attempts at contacting them, yeah, Oh yes, I mean, yeah, absolutely.

46:49
And there is a reason code for the customer is not responsive and we definitely want to know that.

46:57
OK, sure.

46:58
Thank you.

46:59
Yeah, thank you.

47:03
So and sorry, just to clarify, there are two, as you saw fields in the FCU, one is about accept decline and the other one is open or close.

47:15
You can use the wrong terminology here.

47:17
I think we have it active and completed.

47:21
So in that case, we'd actually want you to go back and decline it and select the reason code customer is not responsive and that'll automatically, you know, close it from from your perspective.

47:35
Does that make sense?

47:38
Yeah, for sure.

47:39
Cool.

47:43
OK.

47:43
I think Christy is next.

47:46
Great.

47:46
Thank you.

47:47
I'm seeing this also come up in the meeting chat right now, but when I open up the referrals and partner center, I don't see the active usage data for customers that I don't have an existing relationship with.

48:01
It reroutes us to the FRP dashboard where again you have to have an existing relationship with the customer in order to see that active usage data.

48:11
Is that going to be corrected at some point in the future?

48:19
That's a great question.

48:20
I'm going to ask my colleagues, Vishal or Jags to respond to that.

48:26
Yeah, so if there's no existing relationship with the customer, we As for the design, we do not show the data for the tenant because of the privacy and privacy concerns and security concerns.

48:39
So but if we have an existing referral, we may look into that option to show the data for that tenant.

48:49
But yeah, if you don't have any existing relationship it would be it's it may be a tough decision to show the data because of privacy and privacy and security concerns.

49:00
I hear you two things to that first past referrals, do you have that data made available?

49:06
Was there an announcement of that change?

49:08

And then the second piece there, without that information made available, we are flying blind on selecting referrals.

49:17
I know the terms and conditions of the program do ask us to accept referrals that don't qualify for incentives, but we have no way of gauging that when making decisions.

49:27
If no referral we will show the data for that tenant.

49:31
So that if it's not available in FCU, I I believe in FRB dashboard we have that date in FCU we can we can update that rule.

49:42
If you have a referral you should be able to see the data for the tenant.

49:49
If we are not showing it, we'll we'll make it as our backlog and put it in the future release.

49:59
OK.

49:59
So what it sounds like is that it should be showing up for select or at least for most referrals and that that might be a feature problem.

50:09
OK.

50:11
Will there be a follow up with us about when that is addressed and corrected for us?

50:18
I will add to AI mean I'll I'll check with the team when they can release it, but we'll add to a backlog if we have a referral you should be able to see data for that tenant.

50:28
OK.

50:29
Currently, I'm unable to see it for all of my recent referrals and it sounds like this is an issue that's widespread because I'm seeing other people in the chat experiencing that as well.

50:39
Sure, I'll add to my my backlog and we'll work on this and let you know the plan for it.

50:44
Great.

50:44
Thank you.

50:45
Appreciate it.

50:47
Thanks, Christy.

50:48
Thanks, Vishal.

50:51
That Jesus.

51:02
Hello, Can you hear me?

51:04
Yeah, hi.

51:05
Sorry.

51:05
Hi.

51:07
My question is about the referrals in the language preferences and countries that we might receive.

51:14
The referrals we have select for a long time ago the countries that we want to receive referrals from.

51:24
Unfortunately, well we set up of some referrals for Spanish countries, but it has been for a long time and we have not received any referral in in in that language.

51:38
I mean we support English and Portuguese for now, but we have not received any referral in Spanish for Latin.

51:47

I was wondering if we need to do any additional configuration or to raise any special requests or something like that.

52:00
I'm not sure where you were registering that previously, but now, and this is really only in the last couple weeks, we're asking partners to select languages in the referral profile.

52:14
Yes, in the same profile in the same screen that you you shown.

52:20
Yes, I I did it when I said a long time ago, I mean it has been like a month ago or something like that or two maybe because I know that it has been changed.

52:30
But that screen I have OK seen for a long time and I set it up but I have not received referrals in that language.

52:38
I don't know if I need to do any additional configuration or something like that, and it you should not have to do any additional configuration, but I guess the referrals you're receiving, do they match another language that you've listed as well?

52:56
Like I don't know if you have English listed or is it that they are completely mismatched with what you've listed?

53:04
No no, no.

53:06
I use have set up English, Spanish and Portuguese OK, English and Portuguese I used to receive OK OK receive any Spanish.

53:17
I was wondering why.

53:19
Yeah, I think it's probably just a matter of volume that we haven't had.

53:25
We just haven't had the referrals in Spanish to send your organization yet.

53:31
We're working on increasing these volumes.

53:33
So I I think that should go away, but I certainly keep an eye on it.

53:37
If it if persists over a matter of months, please get in touch with us.

53:41
But hang in there and I assume you will see some Spanish referrals.

53:51
All right, perfect.

53:53
Thank you.

53:56
Something I want to mention, Julie, you know, there's, I think there's a little bit of confusion.

54:01
Is there I think Mary.

54:06
Yeah, I think Mary Ann.

54:07
Marco, yes, you would want to go back and if you are not, if the customer's not responsive go back to decline and then there's a drop down in there where it's where you can pick customers non responsive.

54:18
So you know the expectation is you go back into referral and then just decline it and you'll be able to pick customer non responsive.

54:29
Thanks for clarifying that and I'm a bit behind in the chat, but I will look in here.

54:37
It looks like colleagues have been answering.

54:48
Anyone else who would like to ask a question if I could jump in for a second?

54:55
Hi, Julie, this is Beau Gilliam from Dell.

54:58
Hi.

54:59
Had a little bit of a conversation here.

55:01
So I guess the, the kind of the overall point that I think Christy made a minute ago about when we receive these referrals, if we don't have a pre-existing relationship with them, right, we don't see any of their usage information other than what's in a note, the RFA notes.

55:17
So we don't have any, any access or knowledge of their license of their active usage of the model that they have of kind of what they're looking to do, right.

55:26
And it's it's lying blind is the right way to say it.

55:30
Like we're just kind of going out there trying to with with no very little real tangible information including what's within the fast track benefit, right.

55:39
So like we, we really need that information for this model to to work, I think.

55:47
Oh, thanks for that additional.

55:48
Yeah.

55:49
Context.

55:50
Yeah.

55:50
Because it's kind of it's very difficult for us to kind of accept and or decline these and pitch services and and and kind of angle it the right way if we don't have kind of at least a snapshot of what's in there, understand the privacy stuff.

56:04
Right.

56:04
But even if we can just get a snapshot of what things look like, that would be very helpful.

56:09
Yeah.

56:14
OK.

56:15
Well, thank you.

56:18
We'll keep you posted on this.

56:20
Yeah, sure, Definitely.

56:33
I see.

56:33
Amy, just put the survey link in the chat.

56:36
This is super helpful for us to know how this is landing for you if you want more what we can do better.

56:44
So if you would take a moment to respond to that, we really appreciate it.

57:05
Yes, Marco, hi everyone and thanks for this call.

57:13
First of all, it's been really helpful.

57:16
I just wanted to ask a little bit of a clear, maybe a clarification question rather as to what kind of training the customer success team at Microsoft is receiving when preparing customer to work with partners through our phase sometime.

57:36
What I found in my experience is that some customers don't have a clearer expectation of what faster key than what isn't and what is scope for faster.

57:46
So often we find that our very first call is to clarify that you know whether I feel like you know because they are already coming to us as a referral, they should already have some expectation on to what is faster, can have a ground of knowledge already passed through from Microsoft.

58:09
And yeah, I just wanted to understand that what kind of communication is taking place if the the the account management and customer success team has been you know, increasing that sort of knowledge.

58:27
That's a great question.

58:28
I don't have a lot of visibility into that.

58:31
I don't know if anyone else on the call could speak to it, but you know kind of communicating the Fast Track benefit scope is been a historic challenge.

58:45
I know it's one that's you know top of mind in terms of how we communicate.

58:51
I will say we are just putting the final touches on a customer facing video that's going to go out in the referral notification e-mail.

59:04
And I appreciate this is not exactly what's answering your question, but it's just one more step to help customers have come in with the right set of expectations.

59:13
We it's a brief video overviewing the Fast track benefit and what they can expect to receive from a partner and then what's outside the scope and what you know there there may be a need to purchase additional services for.

59:27
So we'll get that out to this community shortly, but I appreciate you asking the question and certainly it's something that we're aware of and generally working towards as a company.

59:40
I can also say Julie that the RFA, the RFA team, the team who processes these incoming RF as they do have their process does try to catch these non actionable or out of scope requests as best they can.

59:58

But because they're not having really deep conversations with the customers, some of those do slip through the cracks and and are missed.

1:00:05
But they do try to catch them and they do catch quite a few that are non actionable as best they can.

1:00:14
But you know like Julie said, there's always ways of you know, improving that in the future.

1:00:23
That's great context.

1:00:24
Thanks, Aaron.

1:00:29
Right.

1:00:29
I know we are one minute over.

1:00:31
Really appreciate everyone all of the time on the call and asking great questions.

1:00:37
I hope we got to most of them, but happy to circle back with some more Q&A and please keep the questions coming and thank you for your great work on referrals.