Partner Persona Research

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General Findings

- Three general partner segments:

  - Large organizations with a dedicated technical support team and a dedicated hosting team. Offer their own hosting solution in addition to third-party hosting.

  - Medium organizations with a dedicated technical support team. Offer hosting through a third party.

  - Small organizations where most consultants share responsibility for all tasks. No dedicated technical support. Offer hosting through a third party.

- Smaller organizations expressed interest in SEOS.

- Participant from large organization expressed concern that smaller partners will struggle to manage Azure.

General Findings

- Small organizations expressed interest in SEOS.

- Participant from large organization expressed concern that smaller partners will struggle to manage Azure.

- Participants from large and small organizations expressed concern that third-party hosting providers would steal clients.

- Partners (large and small) don't contact customer support very often – maybe once per month.

  o Payroll issues that need to be handled quickly

  o Complex technical issues

General Findings

- When offering hosting through a third party, implementation is similar to on-prem implementation. They remote into the server(s) and do the work.

- Responsibility for certain tasks varies, for example: backups and restores:

  - May be the customer.

  - May be the partner.

  - May be the third party who provides the hosting service.

General Findings

- One participant had experience with a client hosted in an Azure environment.

  - Problem occurred when the domain was duplicated in Azure. Not really the same, so it was a lot of work to set it up as it should be.

  - Problem because Azure (at least in this instance) did not allow port 25 to be used for SMTP. Other Sage products require the use of port 25. Time-consuming workaround was required.

- Multiple participants expressed the need for a multi-server environment.

Sue – President of small accounting firm

Background

- Bachelor's in accounting, CPA.

- Runs a practice in Ohio that includes 5 consultants and an office manager. They support approximately 200 clients.

- She and two of her employees have worked with Sage products for at least 20 years. Other consultants have 8 to 15 years of experience.

- Rarely needs to contact Sage – averages once per month.

"I handle everything from 'the printer ate my checks,' to helping with physical count errors, to training new users, and working with servers to do upgrades – a little bit of everything."

How they work

- Everyone has a similar skillset; when clients call, they get the first person available. There are no specializations within the firm – everyone has a broad range of knowledge and experience.

- Offer customizations related to user-defined fields, custom forms and reports, and minimal scripting. Anything beyond that they contract out.

- They don't push hosting but offer it through a third party for customers who request it.

- Small percentage of customers hosted. Happy for the most part, but hosting partner had an outage, which she worries will happen again.

- Hosting partner sets up virtual servers and hands them off to her. Main difference from on-prem is remembering additional log-in details.

Ron – Technical specialist

Background

- Bachelor's in computer science.

- Works for a mid-sized business partner with three regional offices and approximately 1,000 clients.

- He is one of 12 people on the technical support team.

- Works with both on-prem and hosted customers. Fewer customers are hosted, but the number is growing. (Hosting is provided by multiple third parties.)

"To support a hosted customer, we need full, seamless access to everything, including SQL Server. We like to install SQL ourselves because we know how we like it set up."

How they work

- Customers start out working with an account manager, someone from the technical team, someone from the consulting team, and a project manager.

- Ron sets up and configures databases, installs applications, applies customizations created by their development team, and migrates customer data from one server to another.

- Approach to hosting is similar to on-premises. Third-party company sets up servers, and he takes it from there, typically working with a terminal server, a SQL server, and an application server.

- Ron doesn't configure applications or train customers – the consultant handles that.

- When not working on implementations, he works on other technical support cases. As an example, he's responsible for restoring backups for hosted customers.

Who is at risk?

The Sues of the world.

- They are interested in managing the hosting themselves.

- It seems appealing because the demo makes it look easy.

- They know their job extremely well, so they aren't used to asking for (or needing) help.

- They are in a comfort zone.

- They may find that managing Azure is more difficult that they initially realized.

- Dealing with Azure takes them out of their comfort zone.

- Good relationship between Sue and her CSP is critical.

Q&A