





Create your strategy

UX best practices

Launch first release

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Office GTM Guide for ISVs overview

Welcome

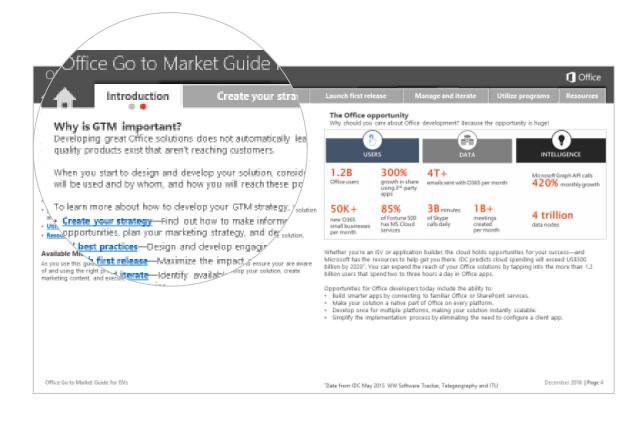
This document provides go to market (GTM) guidance for independent software vendors (ISVs) who develop solutions that integrate with Office. This guide covers available programs, tools, and resources to help you successfully bring your Office web apps, Office and SharePoint add-ins, Microsoft Graph powered apps, Connectors, Skype Solutions, etc., to market.

You develop your go to market strategy (identifying your potential customers, what unique value you provide, and how you will reach your target audience) before you start to develop your solution, and you continue to refine your strategy at every phase of the design and development process.

Audience

If you're a developer or part of a team that's driving your business and launch strategy, this guide is for you. Use this guide if you:

- Are new to developing an Office solution, to learn more about each step of the go to market process.
- Are currently developing a solution that integrates with Office, to enhance your go to market strategy or get specifics about your current phase in the process.
- **Previously developed an Office solution,** to find information to help you enhance your existing go to market strategy.



How to use this document

This guide is designed to be interactive so you can focus on the sections that will best help you build and grow your business. Use the tabs at the top of the page to:

- Go directly to the section that is relevant to where you are in your process.
- Read through the guide from start to finish.





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Why is GTM important?

Developing great Office solutions does not automatically lead to success in the marketplace. Many quality products exist that aren't reaching customers.

When you start to design and develop your solution, consider how you will bring it to market, how it will be used and by whom, and how you will reach these potential users and buyers.

To learn more about how to develop your GTM strategy, see the following sections in this guide:

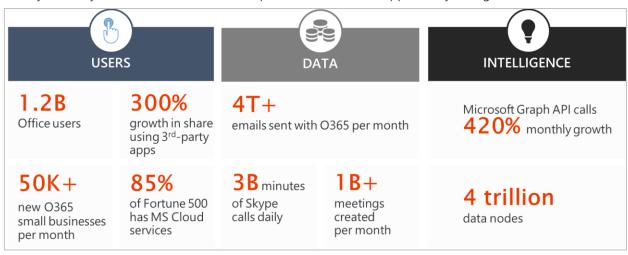
- <u>Create your strategy</u>—Find out how to make informed decisions about business-growth opportunities, plan your marketing strategy, and develop an effective GTM plan.
- **UX best practices**—Design and develop engaging solutions that integrate with Office.
- Launch first release—Maximize the impact of the first release of your solution.
- <u>Manage and iterate</u>—Identify available metrics you can collect and analyze to enhance your solution and marketing strategies.
- <u>Utilize programs</u>—Learn about the Microsoft programs available to Office ISV Partners.
- Resources—Utilize all the resources available to help you go to market with your Office solution.

Available Microsoft programs

As you use this guide, make sure you check out the <u>Utilize programs</u> section to ensure your are aware of and using the right programs to help you get started, design and develop your solution, create marketing content, and execute demand generation activities.

The Office opportunity

Why should you care about Office development? Because the opportunity is huge!



Whether you're an ISV or application builder, the cloud holds opportunities for your success—and Microsoft has the resources to help get you there. IDC predicts cloud spending will exceed US\$500 billion by 2020¹. You can expand the reach of your Office solutions by tapping into the more than 1.2 billion users that spend two to three hours a day in Office apps.

Opportunities for Office developers today include the ability to:

- Build smarter apps by connecting to familiar Office or SharePoint services.
- Make your solution a native part of Office on every platform.
- Develop once for multiple platforms, making your solution instantly scalable.
- Simplify the implementation process by eliminating the need to configure a client app.



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Create your marketing strategy

Why you need a marketing strategy

Developing your <u>marketing strategy</u> is critical to the success of your Office solution and your ability to attract customers. Customers must see the value of what your solution offers before they will decide to use it.

Your marketing strategy brings together all the pieces of your business into one cohesive plan: marketing, distribution, pricing, branding, competitive analysis, and target customer insights. It helps you successfully reach your target customers and show the value your solution brings and what differentiates it from others.

Your go to market strategy is an ongoing process that you continually improve by monitoring its effectiveness and adjusting as needed. Planning and preparing for a GTM launch of your Office solution involves:

- Conducting a situational analysis and developing your marketing approach and plan.
- Identifying your target audience and value proposition.
- Determining your sales, licensing, pricing, and distribution models.
- Applying best practices for going to market.

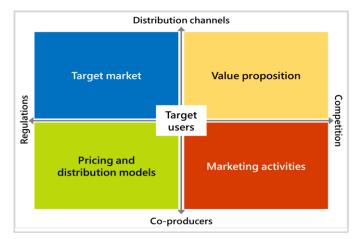


Figure: Components of a comprehensive GTM strategy

Situational analysis

A situational analysis of your business or solution provides insight into the current internal and external environmental factors that can impact your capabilities, customers, and go to market plan. Conduct an internal and external analysis to get a complete view of your situation.

Internal analysis

- Specify your core business (ex., document processing, imaging, customer relationship management).
- Identify the areas you specialize in (ex., vertical industries, line of business [LOB] focus, niche solution market).
- Define the problem your solution addresses for your customers.
- List where you sell your product today (locally, regionally, globally, specific countries).
- Describe how you sell today (ex., direct versus indirect, B2B, B2C, B2B2C).
- Identify the typical target audience for your solution.
- Identify the current marketing strategies and activities you have.
- Identify the value proposition of your solution.
- List your current partners for this solution.
- Define where your solution fits in the current market (ex., new to the market, an existing solution you are selling through new channels, an extension of an existing solution).
- Capture your current pricing strategy (if applicable).

External analysis

- Identify the current market situation and trends that could impact your solution.
- Identify your target customers' needs and business drivers.
- Conduct a competitive analysis including the key players in the market, what they offer, and how it compares to your solution.
- Identify your solution's competitive impact and how competitors might react.
- Identify any substitutes or alternative solutions that can solve the problem you fix. List the strengths of your solution compared to these.
- If selling through the channel, identify what you're looking for in potential channel partners.
- Identify potential partners who can help you co-produce the solution (if relevant).





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Build your plan

You will want to develop a detailed marketing plan that captures:

- What markets you want to enter.
- Who your target customers are and how to define your value.
- What distribution channels you will use to reach your target markets.
- What your pricing and licensing model will be.
- What **business goals** you want to meet when you go to market.
- How you will generate demand.

App overview

Solution name: Insert name of your Office integration.

Microsoft platforms targeted: Identify all Microsoft platforms targeted by your solution.

Description: Enter brief description of what your app does and the value it provides the customer.

Customer segments: Enterprise, SMB, size of customer, etc.

Geographical markets and languages: List available regions or countries and languages for your app

Target industries: Identify your target markets, including geographic markets and industry markets.

Target customer: Identify specific LOBs, who the user is, and who will make purchasing decisions.

Sales strategy: What is your sales strategy (ex., direct, B2B, telesales, P2P)?

Unique differentiators: List app's unique differentiators compared to alternative or competitive apps.

Proposed support: Identify how and who will support your app (tier 1, tier 2, tier 3).

Overview of GTM strategy

Pricing strategy: Identify your pricing strategy.

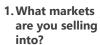
Distribution strategy: List resellers, websites, and marketplaces you will sell your solution through.

Demand generation activities: Identify the demand generation activities you are planning.

Goals <specify dates=""></specify>	Metrics <specify dates=""></specify>	Milestones <specify dates=""></specify>
Identify the top three to five business goals for your solution. Example: growth, market share, revenue, net new users, conversions	Identify the metrics you will use to measure the success of your app. Example: revenue, site visits, installs, retention, conversions, upgrades	Identify key milestones and target dates. Example: market announcements, demand generation launch and activities, commercial availability dates, store availability dates

Figure: Example marketing plan







2. Who to sell to, and 3. Creating your how to build value?



Distribution model



4. Develop your pricing strategy



5. Build your demand generation plan

What markets are you selling into?

Will your solution be available locally or globally, and what is the impact? You will need to:

- List the regions or countries where you plan to sell your solution.
- Identify the languages you will offer your solution in.
- Identify the different marketing vehicles you will use within each country or region.
- Research and identify any legal and regulatory requirements to enter each market.
- Identify any value added tax (VAT) connected with doing business with each country or region.
- Find and develop your distribution channel and build strong global partnerships within each country or region.
- Identify the competitive impact of entering each country or region.
- Define your <u>pricing strategy</u> per market.
- · Review the guidelines for globalization and localization.

Are you targeting specific vertical markets? You will need to:

- Identify which verticals you currently have the most success in and why.
- Identify verticals that your current channel partners are having success in.
- Research any new verticals that you are interested in targeting.
- Build the use case scenario and value proposition for your solution within each targeted vertical.
- Develop a channel strategy to reach these verticals:
 - Review existing channel partners.
 - Identify potential channel partners with experience in the selected markets.



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Best Practice for defining target markets

Developing a global distribution channel

As you develop your solution, you can take advantage of the market awareness and global channel that Microsoft and Office have to extend the reach of your solution. By considering globalization prior to development as part of your GTM strategy, you can extend your market reach faster and easier while minimizing your costs.

Reselling your solution globally

Officeatwork provides global software services that empower users to create winning documents and content by allowing organizations to surface their templates, content, and processes right within Microsoft Office 365.

Officeatwork successfully extends the reach of their solutions by planning for globalization when they begin designing and developing their app and considering these two aspects:

- What adjustments do they need to make to meet local needs and languages?
- How will they build their global sales infrastructure?

Localizing your solution

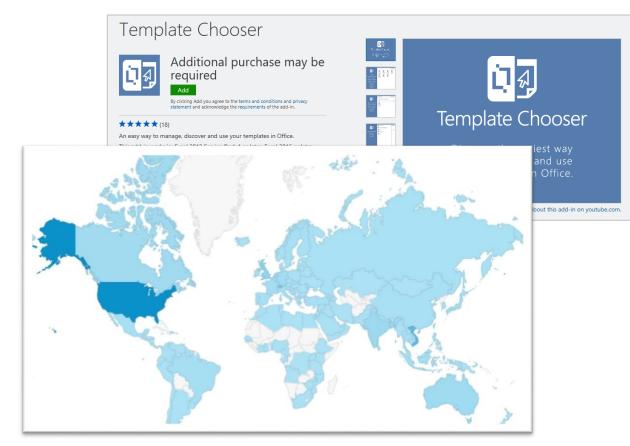
Many developers develop in English. However, most global markets will not embrace your software if you don't embrace their local language and culture. As you design and develop your app, you can reduce your costs and time to enter global markets by using these simple strategies:

- Isolate your user interface (UI) elements to few locations within your code, so you can easily identify the components that need to be localized.
- Identify which languages to translate to reach the largest potential markets for your app.
- Find and use experienced technology translators for high quality translations.

Reaching a global market

Take advantage of existing global distribution capabilities that come with designing an Office solution.

- Be well positioned in global online storefronts like the Office Store.
- Build and execute a global commerce and channel strategy by developing channel relationships through the Microsoft Partner Network.



Officeatwork more than doubles their ability to reach Office addressable users simply by translating their solutions into the following languages:

- Chinese (China)
- Chinese (Taiwan)
- Dutch (Netherlands)
- English (International)
- English (United States)
- French (France)

- Germany)
- Italian (Italy)
- Japanese (Japan)
- Portuguese (Brazil)
- Russian (Russia)
- Spanish (Spain)





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Who to sell to, and how to build value?

Who are your potential customers?

Knowing who your users are and how they are going to benefit from your offering can help you design and develop a more functional solution that lands well in the marketplace. To identify your potential customers:

- Consider all the following potential segments:
 - Existing customers who get additional value and benefits by using your solution with Office.
 - New customers you were not reaching previously.
 - A **brand new customer segment** that was previously untapped with your existing solution.
 - A **new market** with a new solution that integrates with Office.
- Identify who your users are (ex., sales person, physician, administrator, retail clerk), and how they will use and benefit from your solution in their day-to-day activities.
- Identify the LOBs that will benefit most from your solution (ex., human resources, sales, finance).
- Identify and build a profile on the purchase decision makers (for example: operations, IT, CxO).
- Create a target customer profile that includes the customer segment, the size, and the potential revenue.

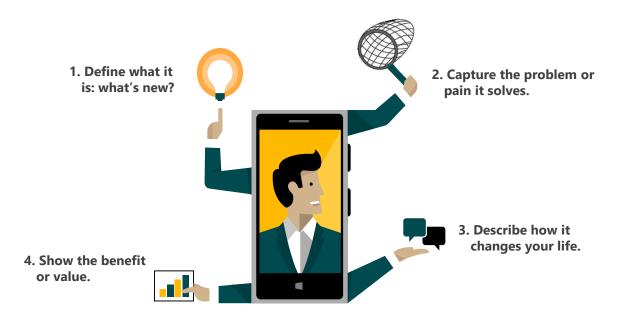
How do you define your value?

If customers perceive value from your solution, they will spend more time exploring it and understanding what it does. Create Office solutions that help users complete tasks more quickly and efficiently.

A strong value proposition

- 1. Clearly identifies what your solution does that is new or different from how the user is currently doing something.
- 2. Captures the challenge or pain a customer is currently experiencing and how your solution addresses that challenge.
 - Consider whether users are aware that there is an easier way to do what they are doing.
- 3. Describes what life looks like using your solution and how it can change users' day-to-day activities.
 - Will it save them time?
 - Will it help them accomplish tasks more easily?
- 4. Shows the benefit of solving customers' issues and what the solution looks like.
 - Customers will invest, if the time and cost of implementing the solution outweigh the current challenge or pain they are facing.

For more information, see uncovering the value of your solution.







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3 Create your distribution model

Determine which distribution model best fits your GTM strategy for your solution. Consider all the various ways you can distribute your product including:

- Selling directly to your customers.
- Selling indirectly through channel distributors, resellers, cloud solution providers (CSPs), etc.
- Selling through third party marketplaces, such as Google apps, iOS.
- Selling through <u>Microsoft marketplaces</u> (including <u>Windows Store</u>, <u>Azure Marketplace</u>, <u>Windows 10</u> Apps Store, <u>AppSource</u>, <u>Office Store</u>).

To reach the broadest possible audience:

- Identify which marketplaces you will list your product through.
- Develop your app website and use badges to link directly to your Microsoft marketplace listing.
- Determine how you will sell your solution: direct or indirect.
- Decide whether your solution can be customized (and who can customize it).
- Identify potential marketing activities to drive demand.

The Microsoft Partner ecosystem

Microsoft has a large and mature partner ecosystem including CSPs, distributors, resellers, managed service providers, hosted service providers, and system integrators. This partner ecosystem can help you:

- Broaden the awareness of your solution.
- · Expand your customer reach.
- · Increase sales success.
- Provide ongoing support and customer service.

Identify the right partners through <u>Microsoft PinPoint</u> to begin developing partnerships that help build your business.

Preparing for reseller sales

Selling through a partner marketplace requires a substantial investment to ensure that your solution is ready for a partner to sell. If done correctly, that investment will pay off in increased monetization. To successfully sell your solution through a partner:

- ✓ Develop and provide proof of concept materials, including customer examples or case studies that demonstrate your solution's value proposition and what makes it unique in the marketplace.
- ✓ Develop sales and marketing collateral to enable other resellers to sell your product.
- ✓ Create your pricing and licensing model to align with reseller models.
 - · Licensing is typically based on consumption and the number of licenses sold.
- ✓ Identify resellers that align with your geographic and vertical segmentation targets.
- ✓ Develop your strategy for technical support. Identify who will provide support, what level of support they will provide, and how you will prepare them to provide the required support.
- ✓ Determine how much you can invest in marketing activities and events.
 - Most disti events are pay to play and will require investment up front. Determine your ROI potential based on anticipated number of leads from each event.
 - Use social media, such as LinkedIn, for less expensive marketing campaigns.

Review additional content available in the <u>App Builder and ISV Center</u> to help you prepare your solution for market.

Figure: Determine which Microsoft marketplaces best fit your solution, and use badges for direct links from your web page and other marketing activities.









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Best Practices for creating your distribution model

Reselling your vertically focused solutions

Office is traditionally a horizontal opportunity for partners. Vertically focused ISVs have an opportunity to expand their business by developing partnerships with other ISVs and resellers who are looking for ways to make their offerings stand out.

One such vertically focused ISV, LawToolBox, has successfully developed strategic partner to partner (P2P) relationships with Microsoft resellers to grow their business within the legal vertical. The following are some best practices they applied to achieve their success.

Utilizing other ISVs

Consider partnering with other ISVs for deeper vertical penetration:

- Identify vertically focused ISVs who complement your solution and will bundle your solution with theirs. This allows you to utilize their experience and realize the benefits without making a full investment in solutions, experts, and events.
- Offer a "better together" story by partnering with ISVs in your industry who offer a unique niche solution.

Developing your reseller channel

Invest in creating and customizing reseller friendly GTM resources such as email templates, data sheets, pitch decks, videos, and webinars, that are customized to your vertical. These will help your partners sell your solution more quickly. Look for Office resellers who:

- Currently sell into your vertical and see your solution as a unique offering that will provide them a competitive advantage.
- Do not currently sell into your vertical but may see an opportunity to penetrate into this market and expand their business.
- Are traditional consultants in your industry who want to start selling through Microsoft distribution using off-the-shelf migration support services.
- Currently sell on-premises solutions and want to start migrating to cloud solutions. A vertical niche can provide a competitive differentiator to other resellers who are already in the cloud.

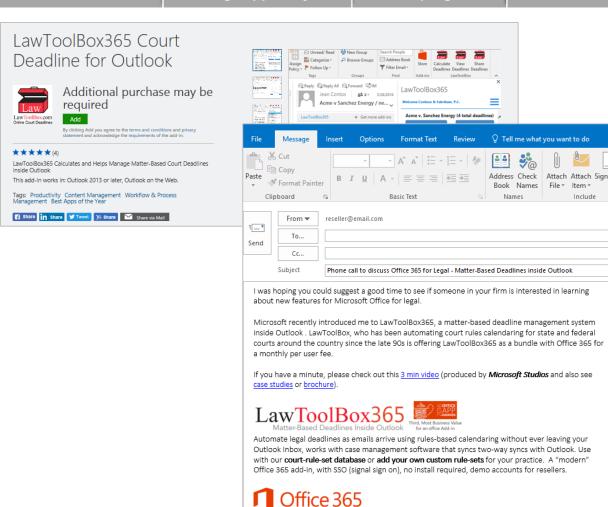


Figure: Create easy to use resources, such as this email template, to assist your partners with demand generation for your solution.



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4 Develop your pricing strategy

Pricing is a critical part of determining how your product will be perceived by customers and whether they will decide to install it. Your price should reflect the value your solution provides to the user. Consider the following as you develop your pricing strategy:

- What are your business goals and objectives? Are you:
 - Launching a net new product?
 - Trying to develop new business for an existing solution?
 - Trying to add value to your current product for existing customers?
 - What is your monetization strategy? Will you be offering your solution as a(n):
 - Free extension to your existing app?
 - Free trial with a paid subscription after a specified number of days?
 - Free limited functionality version with a paid upgrade or subscription for full functionality?
 - Enterprise version either now or in the future?



Tips for determining pricing strategy

- **Pricing today is agile.** The price you set today isn't necessarily your price tomorrow. Plan continual reviews of your pricing strategy and make adjustments as needed.
- **Consider free versus paid.** Offering your solution for free might result in higher distribution rates but limited return on your investment. Pricing your solution higher might result in lower distribution rates but increased monetization. You need to find the balance between price and value, because customers will only purchase if the value of your solution exceeds the price.
- **Utilize freemium offers** to offer a limited version for free and upsell your customers to additional value with a full-featured version.
- Use in-product notifications to offer upgrades from free to premium or upgraded versions.
- **Deliver what you promise.** Clearly communicate what the customer receives for free or the price you are promoting. Asking customers to pay for something they thought was included can lead to poor ratings and reviews.
- **Conversions and upgrades.** Customer value directly leads to trial conversions and upgrades. If your customer perceives value during a trial or when using a free version, your conversion rate will increase.

Free app

How do you make revenue on your free app?

- Is it providing additional value to existing customers?
- Does it provide a competitive advantage to your core business?
- Is it increasing your brand awareness?

Figure: Three pricing models, two models that evolve.

Free version

Identify value to the user in free version:

- What features will you include in the free version?
- What are the customer use case scenarios for the free version?

Note: If customers do not perceive value for the free version, you may receive poor ratings and reviews.

Free trial

Identify how long the free trial should last:

- How quickly can users begin using your app?
- How long does it take for users to experience value from your app?
- Will you include full or limited functionality during the trial?

Note: If customers were not able to receive value during the trial period, they will not convert and may leave poor ratings and reviews.

Premium version

Identify value to the user in premium version:

- What additional features are included in the premium version?
- What are the customer use case scenarios for the premium version?
- What is the value, and how does the customer benefit by upgrading to the premium version?

Convert to subscription

What will drive customers to convert to a paid subscription?

- Have they used the app during the trial?
- What features have they been using?
- Was the trial long enough to show value to customers?
- Have they had a positive user experience?
- Do they perceive enough value to convert to a paid subscription?



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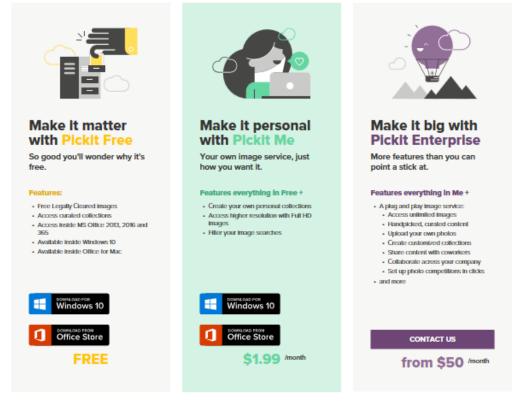
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Best Practice to develop your pricing strategy

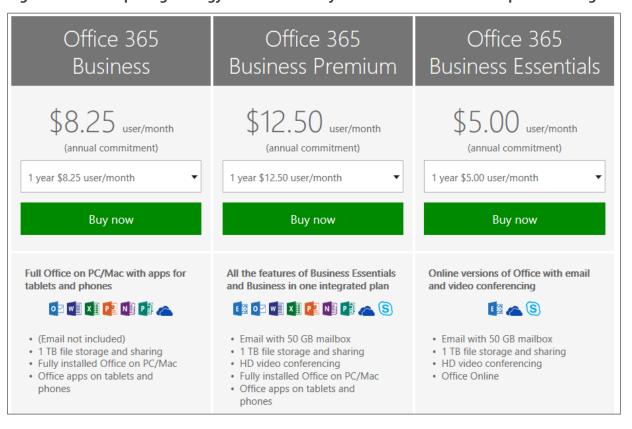
Figure: Pricing strategy example for Office add-ins and Office 365. Pickit's Office pricing strategy for their Office add-in includes a free version as well as a premium and enterprise subscription.



- Free version with limited features that still provide customer value
- Monthly subscription with increased capabilities
- Enterprise version for high-usage customers



Figure: Office 365 pricing strategy includes a 14-day free trial and tiered subscription offerings.



- 14-day trial version with full features
- Tiered subscription offerings based on customer requirements



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4 Develop your pricing strategy (continued)

Creating your pricing strategy for SharePoint add-ins

You can choose from many different pricing strategies for SharePoint add-ins. The Office Store supports the following SharePoint add-in licensing options:

- · Built-in licensing framework for regulating perpetual all-user and per-user licenses
- 15-, 30-, or 60-day trials
- Monthly recurring licenses

Using a custom licensing model

You might want to consider options other than the built-in SharePoint all-user or per-user models, such as:

- Charging based on page views in bulk.
- · Charging monthly.

For these types of custom licensing models:

- Layer in your own customer management and monetization model. Use Office as an entry point into existing customer onboarding and lead generation.
- Consider prompting for registration and email upon install, and administering a 15- or 30-day trial for users.
- With users' consent, send an email or follow up with a sales call as part of the email registration.
- Consider saving the account signup experience until the trial expires, to reduce the steps required to start using your add-in and realizing the benefits it provides.

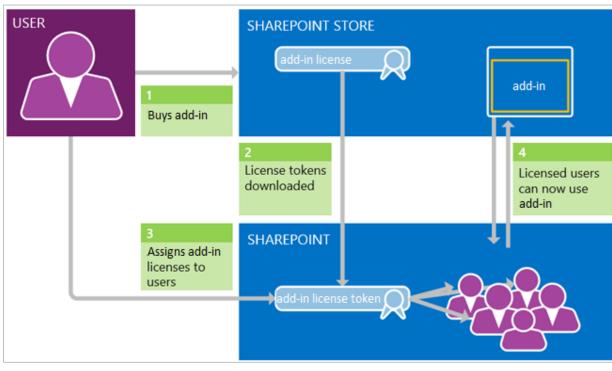


Figure: The add-in license acquisition and assignment process for SharePoint add-ins





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5 Build your demand generation plan

Customers have an overwhelming number of solutions to choose from, so how do you make them aware of yours? And once they are aware of it, how do you communicate the value your solution brings them?

- · Drive demand with external marketing activities.
- Utilize Microsoft ISV Go to Market program materials and templates.
- Participate in other Microsoft programs and campaigns.

Drive demand with external marketing activities

Engaging in external marketing activities can help increase demand for your solution. For example:

- Publish a blog post.
- Run social media campaigns on Facebook, Twitter, YouTube, or other social media platforms.
- Sponsor or conduct industry events and trade shows to announce your product offering.
- Conduct digital campaigns for targeted LOB or vertical markets.
- Release press announcements and hold media events to promote your new solution.
- Send direct emails to target customers.
- Host webinars with Microsoft or other partners.
- Conduct telesales campaigns to generate awareness and demand with your internal resources or experienced telesales vendors.
- Run advertising campaigns in trade journals or through digital marketing.
- Customize available Microsoft GTM campaign materials and templates.

Use the following resources to develop your marketing, digital readiness, and online social media campaigns:

- Marketing Planning for Success guide for creating successful marketing strategies
- Online Social Marketing campaigns guide for effective social media, public relations, and blogging
- Digital Readiness guide for building effective landing pages, websites, and search engine optimization (SEO) and search engine marketing (SEM)

These <u>guidebooks</u> provide best practices as well as worksheets to provide guidance and help you create your marketing campaigns.







Figure: Microsoft marketing guides





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5 Build your demand generation plan (continued)

Utilize Microsoft ISV Go to Market materials

Save money and reduce your time to market with the collection of ISV GTM materials Microsoft designed to help your company promote solutions built on Microsoft cloud platforms. These materials provide resources around marketing and digital marketing, as well as templates to help you drive conversations with customers and generate leads. These customizable documents help you develop your:

- Messaging framework
- ISV GTM partner solution battle card
- GTM customer sales presentation



Additional Microsoft programs and campaigns

Microsoft offers different campaigns that can help you drive awareness. Continue checking back with Microsoft to see what new campaigns are available or have changed.

<u>Project LeadGen</u> is a comprehensive sales and marketing program to help Microsoft partners develop sales opportunities built on Microsoft cloud solutions. Using key assets from Microsoft Community Connections, this five-part training series includes instructional videos, event assets, and personal coaching. This program is for partners who would like to learn about seminar selling and how they can use Microsoft branding to build business leads.

ISV Showcase Program

The ISV Showcase Program helps drive awareness and adoption of ISV CSP Marketplace applications that integrate with Office365. By supporting ISV efforts to sell through CSP Marketplaces, the program enables partners to provision, bill, and support ISV and Microsoft cloud services for their customers.

Microsoft PinPoint

Showcase your Microsoft IT expertise with a company listing in <u>Microsoft Pinpoint</u>, an open marketplace where customers who are interested in implementing Microsoft technologies and solutions for their business can connect with partners who can help them.

Targeted email campaigns

Reach existing Office customers by running a targeted marketing email campaign to Office 365 subscribers. Existing Office customers can begin using your solution immediately, without having to purchase Office in addition to your add-in. By targeting existing Office customers, you have a higher potential for increased conversion rates. Use a tool such as MX record lookup or CNAME lookup to obtain records for your customer email list. (Make sure you are following any legal and privacy policies that pertain.)

Additionally, you can overlay geographic and demographic information for further segmentation. You should measure open rate and click through rate and use <u>campaign tracking</u> (available in Office Store for free Word, Excel, and PowerPoint add-ins) to measure the success of your campaign.



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Best practices to build your demand generation plan

Best practice demand generation example

Boomerang helps their customers focus on email that matters, when it matters. Boomerang tools allow for reading and responding to messages faster and more decisively than before. Their mission is to make productivity software that encourages people to be more productive. Boomerang applies the following demand-generation best practices to ensure their target customers understand who they are and how they can help:

- Promotes and reinforces the value of their service through various marketing campaigns, including social media.
- Provides a dedicated website that tells the Boomerang story.
- Includes a video that clearly communicates the value and how the customer will use it.
- Entices users with a clear call to action.
- Promotes through articles, press coverage, and blog posts.

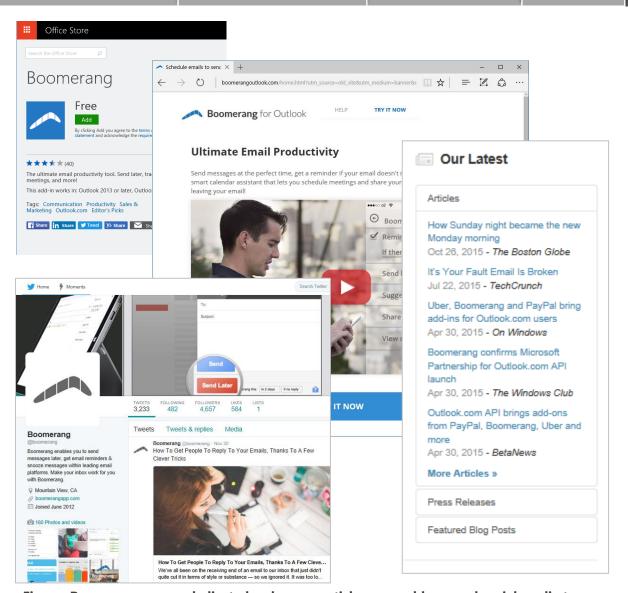


Figure: Boomerang uses a dedicated web page, articles, press, blogs, and social media to communicate the value of their solution to potential customers.

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Applying UX best practices

Overview

As you design your Office solution, consider the overall user experience (UX) and how you will deliver the value you promised to your users. You need to provide the user with everything you said your solution would do in a seamless and user friendly experience. This section focuses on best practices for Office and SharePoint add-ins. Best practices for Graph-powered apps and Connectors will be available soon.

Best practice	User experience
Office add-ins	Detailed guidance
SharePoint add-ins	Detailed guidance
Graph-powered apps	Coming soon
Connectors	Coming soon

Office add-ins

Effective Office add-ins offer unique and compelling functionality that extends Office applications in a visually appealing way. Create add-ins that help your users complete their tasks quickly and efficiently by:

- Envisioning and planning your experience.
- Developing engaging interactions.
- · Integrating seamlessly into Office.

Outstanding Office add-ins will:

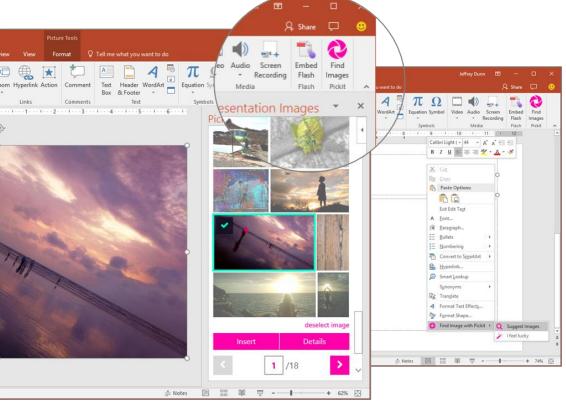
- Enhance and complement the features that Office provides.
- Provide a seamless end-to-end user experience.
- · Apply UX design principles.
- Provide a net value that exceeds that of alternative or competitive solutions.
- Deliver continuous, data-driven improvements to the Office experience.



Best practice Office UX design example

The Pickit add-in engages users throughout the entire journey and delivers clear value immediately after installation. This add-in:

- Complements Office and provides value by meeting a need for royalty-free high-quality images.
- Integrates seamlessly with the Office UI via natural entry points in the context menu and ribbon.
- Provides immediate value without an account and enhanced value for users with an account.







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SharePoint add-ins

Purchasing decisions for SharePoint add-ins are made on behalf of an entire team or organization. Therefore, your SharePoint add-in must deliver the value promised to ensure the buyer doesn't regret the acquisition of your add-in for their team.

Value is recognized when a SharePoint add-in significantly improves a team or organization's efficiency, creativity, or morale. Your SharePoint add-in must be easy to use while allowing users to quickly realize the benefits.

SharePoint add-ins come in many different shapes and sizes that:

- Provide additional web parts that can be used on home pages.
- · Extend lists and libraries and provide extension points.
- Are fully self-contained.

Outstanding SharePoint add-ins will:

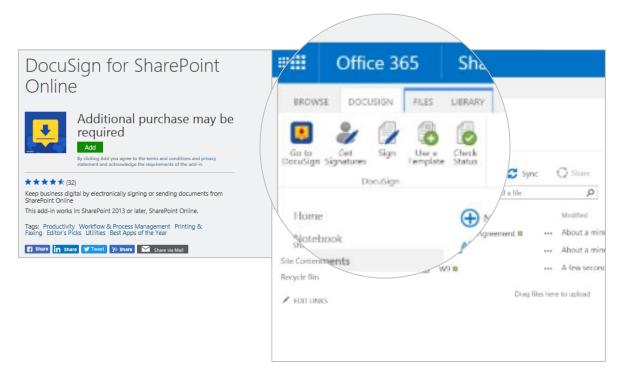
- Blend into the natural user experience of SharePoint.
- Leverage the user's experience with the SharePoint interface to minimize the learning curve of your add-in.
- Have consistent look and feel, including colors, styles, and UI of the SharePoint user experience.
- Provide clear navigation link to return the user to the SharePoint site that launched the add-in.



Best practice SharePoint UX design example

The DocuSign add-in for SharePoint engages users and delivers a clear benefit for the entire team or organization. This add-in:

- Allows uses the choice of using their existing company credentials to sign in to DocuSign without leaving SharePoint or creating a new DocuSign account using their Office 365 credentials.
- Links accounts automatically using SSO capabilities powered by Azure Active Directory.
- Complements SharePoint and increases the efficiency of getting documents signed within the customer organization.
- Integrates seamlessly with the SharePoint UI via natural entry points in the context menu and ribbon.
- Is easy to use and requires no new learning. Customers can just use DocuSign within the familiar SharePoint document library interface.





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Best practice design a friction free first-run

Even after your solution is installed, customers are evaluating the value. You have a short time period and limited space to answer the question, "Why would I use this?" Is it worth their time and effort to acquire, sign in to, or set up the service? Make the steps easy to follow and understand. Hold their hand and draw them into the experience by answering the following questions:

Does your user understand the value of the solution?

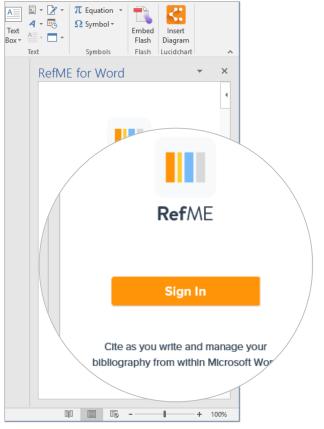
- Reinforce your brand immediately after installation, so customers know they are now engaging with your service or solution.
- Communicate your value proposition during setup to reinforce the benefits of using your add-in.

What steps do customers need to complete to begin using your solution?

- Decide whether users set up an account before they try or when they purchase your solution. The fewer steps, the more likely a new user will engage.
- Consider offering a trial, free, or paid version of your add-in. Clearly communicate on your Store listing if users must pay for some features to eliminate customer surprise when asked to pay.
- If an account is required, make signup simple. Prefill information (email, display name) and skip email verifications.
- Allow users to log in with their Microsoft identity through Azure Active Directory.
- Ensure your UX is tested on all platforms that your add-in will be available on.

How do users interact with your solution?

- Show users where they can find and start using your add-in after they download it.
- Once installed, clearly communicate, using simple instructions, how to begin using your add-in.
- Provide a distinct call to action on the first screen to engage users early.
- Provide a teaching UI for first use and make it easily accessible for return users.
- Interactions should integrate seamlessly with Office. Take advantage of add-in commands to provide access to add-in functionality using clear navigation elements.
- Make help easily available within your add-in; provide guidance on how to resolve common user errors.
- Provide in-app options to convert or upgrade to access additional features or functionality.



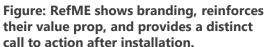




Figure: DocuSign demonstrates in simple steps how to use their add-in and provides a distinct call to action.



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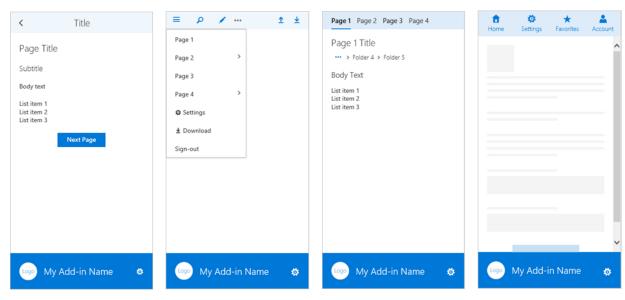
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Apply UX design principles and developer tools

When designing your Office add-in, reference Microsoft's best practices for developing Office add-ins for common design principles of successful solutions. Apply the following principles to your UX design:

- Ensure the look, feel, and functionality of your add-in complements Office while maintaining simplicity and a seamless user experience.
- Optimize your add-in for touch, so it adjusts controls and the size and spacing of elements on touch devices.
- Optimize and monitor add-in performance to create the perception of fast UI responses.
- Use add-in commands to:
 - Provide relevant UI entry points for your add-in.
 - Identify granular actions for common tasks.
 - Minimize the number of steps to complete actions.
- Leverage Microsoft's icon design guidance.
- Develop for similar look and feel across different platforms and hosted environments.



Leverage these additional resources to help you get started: • Review the Office add-ins platform overview.

- Use the Office UI Fabric to help ensure the look and feel and functionality of your add-in complements the Office experience.
- Use the UX design patterns templates for Office add-ins to understand common interaction patterns and get a jumpstart for your code.
 - View UX design patterns and templates.
 - Download samples of UX design patterns.

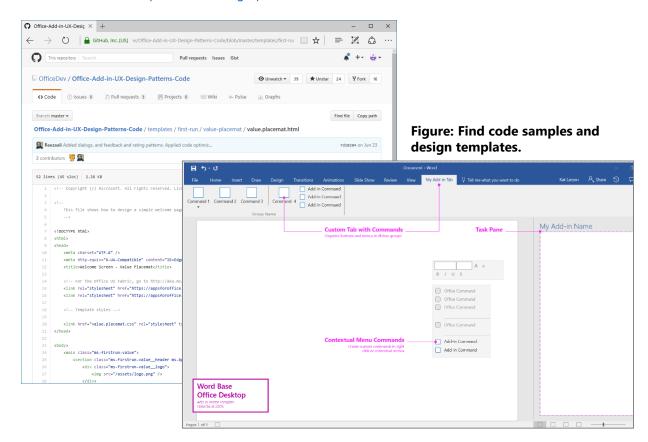


Figure: Follow best practices for navigational patterns using Office UI Fabric.





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Launch and manage first release

Overview

Microsoft marketplaces connect users to the Office solutions they need, letting you reach your target audience more quickly and cost-effectively. There are numerous marketplaces (including the Windows Store, Azure Marketplace, Windows 10 Apps Store, AppSource, and Office Store), where you can cross-list your solution depending on the audiences you want to reach. This section focuses on creating an Office Store presence. However, many of these principles are applicable to other marketplaces as well.

There are thousands of apps and add-ins listed in a variety of categories in the Office Store. Typical users may visit several categories and multiple Store listing pages before they decide to acquire. The first impression of your solution needs to capture the user's attention, ensure they understand what your solution does and how it will benefit them, and stimulate downloads. To ensure a successful first release of your solution:

- Create a strong Store presence.
- Drive traffic to your Store listing.
- · Invest in the customer funnel.
- Drive and respond to customer reviews.

Marketplace	Overview	Target audience	Business / EDU / Home	Apps	Add-ins	Other
Office Store	Office add-ins for Word, Outlook, Excel, OneNote, Project, PowerPoint, and SharePoint	Decision Makers (Business and IT), End-users	Business / Education / Home	SaaS Apps integrated with Office 365	SharePoint, Office	Outlook Connectors
<u>AppSource</u>	Apps, content packs, and add-ins that work with Microsoft Dynamics, Office, Power BI, Azure, and more	Decision Makers (Business and IT)	Business	■ SaaS Apps	Dynamics, PowerBl	
Azure Marketplace	Apps preconfigured for Microsoft Azure	IT Administrators, Developers	Business / Education	Cloud SaaS Apps Azure Virtual Machines	Developer Services	Data Services SSO configuration for SaaS apps
Windows Store for Business	Business apps for Windows 10 devices	Decision Makers (IT) , IT Administrators	Business / Education	(Windows) Universal Apps		
Windows 10 Apps Store	Apps, games, music, movies, and TV shows for every Windows 10 device	End-users	Home	(Windows) Universal Apps		Music, Movies





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Create a strong Store presence

First impressions count. Make your value proposition clear to your customers and make your offering stand out. Follow the **seven steps for creating an effective Store listing** identified in the figure to the right.

To help increase the visibility of your solution:

- Add Office <u>Store badges</u> to your website to promote your solution. This will help drive traffic to your store listing and increase the amount of installs.
- Apply all the relevant categories to your Store listings to maximize discovery.
- Use keywords in your title and descriptions that match what customers might search for.
- Respond to customer feedback and Store reviews. Feedback and reviews affect ratings, which affect your Store ranking and placement.
- Use external marketing activities to drive traffic to your Store listing.

Publishing in a Microsoft marketplace

The benefits of publishing in a Microsoft marketplace include:

- Expanding your business with a new sales channel that complements your existing B2B sales.
- · Ability to reach new customers and new markets.
- Ability to distribute a single source for your code that all customers use.
- Driving viral awareness of what your services can do for users and organizations.

Distribution and visibility on the Store page

You can set restrictions on how your solution can be discovered and acquired. This is helpful if you only want existing customers to have access to your solution, or during beta testing.

- Available to anyone: Enables anyone to see and download your solution.
- **Promotional codes:** Your app will not be visible via searches or browsing. However, customers with a promotional code can still download your solution.
- **Direct links:** Your solution will not be visible via searches or browsing. However, customers with a direct link can still download your solution.
- **Specified individuals only:** Your solution will not be visible via searches or browsing, and only those customers with specified email addresses can download it. This is often used for beta testing.
- **Make unavailable:** When you want to completely stop offering your solution to new customers, this will make it so it is no longer visible in the store.

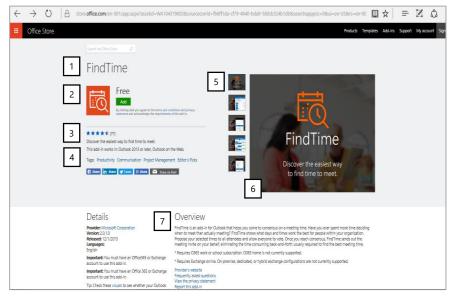


Figure: Example Store listing

Click on each step for examples and guidance on how to create an effective Office Store listing:

- 1. Use a succinct and descriptive title.
- 2. Create an impactful icon.
- 3. Manage ratings and reviews.
- 4. Write an effective short description.
- 5. Use screen shots effectively.
- 6. Provide an informative short video.
- 7. Write a compelling long description.

For more detail, see the guidance on creating effective Office Store apps and add-ins.





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Invest in the customer funnel

Your customer goes through a journey that begins with initial awareness and ends with acquisition of your solution. At each step in the journey, customers choose to engage or to look elsewhere. The number of potential customers decreases at each stage as customers determine if there is enough value to continue. Let's take a look at the Office Store customer funnel.

Analyze customer behavior at each step of the customer funnel to gauge the effectiveness of your go to market activities:

- Use a unique campaign ID (available for free Word, Excel, PowerPoint add-ins in the Office Store) for each external marketing campaign to measure the number of users who access your Office Store listing. Use the data to invest in your most effective campaigns and modify or defund others.
- Measure the effectiveness of your Office Store listing based on the number of users who view your video, install your add-in, or subscribe to your app service. When you update the assets on your Office Store listing (such as images or description), measure and compare the numbers before and after your change to assess the impact of your changes.

The phases of the customer funnel include:

1. Drive traffic

Store traffic can come from external marketing campaigns as well as through store searches and ranking.

2. Optimize your Office Store listing experience

Make a great first impression, or users won't invest the time to learn about your solution.

3. Win customers (try or buy)

A clear value proposition and simple launch experience can persuade customers to try or buy.

4. Monitor and analyze user behavior

Capture and analyze data such as number of users who land on your Store listing, number of users who click to acquire, and number of users who install and activate.

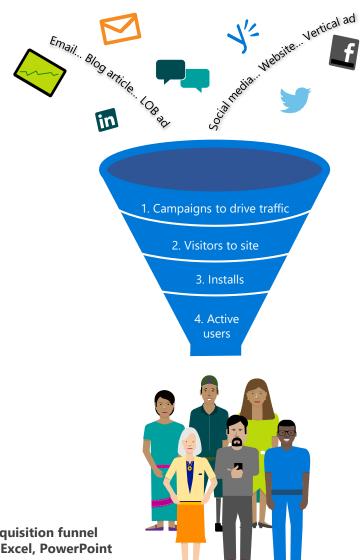


Figure: User acquisition funnel for free Word, Excel, PowerPoint apps or add-ins





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1. Use a succinct and descriptive title

Choose a title for your add-in that reflects its function, so users can easily identify what your solution does.

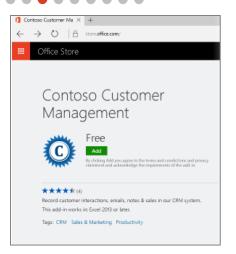
Do:

- ✓ **Keep the title short.** The title shows in the store and on the user device after install.
- ✓ Only use you brand or company name if users are likely to search for it.
- ✓ **Communicate the key function.** Choose a name describing what your solution does.
- ✓ Make it memorable. Make your title easy to remember and pronounce.
- ✓ **Keep it consistent.** Use the same name in your app manifest and in your Store listing.
- ✓ **Use the best practice naming pattern.** Function + "for" + brand or company name (optional). For example, Small Business Invoicing for Contoso.
- ✓ **Use title case.** Capitalize the first letter of each word, except articles and prepositions. For example, Apartment Search for Contoso.
- ✓ **Test your title.** Test the name with a small group of potential users.
- ✓ **Consider SEO.** Identify the keywords your target audience might use to search for a solution.

Don't:

- X Include the Microsoft product name that your Office solution works with. This will appear on your landing page in the Office Store, and in Office Store search results.
- X Use acronyms that might be unfamiliar to potential users.
- X Use all uppercase letters, unless your brand name is all uppercase.
- X Use the words "free" or "sale," or include exclamation points in the title.

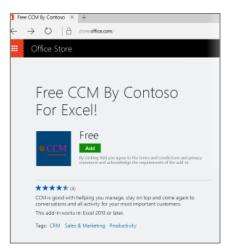
Click here to return to the list of steps.





Do

Use a clear, concise title that explains the function of your solution.





Don't

Use unfamiliar acronyms.





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2. Create an impactful icon

The logo or icon you use represents your solution and helps users recognize it in the Store and on their device.

Your icon should:

- Be recognizable and easy to understand.
- Convey how your solution helps your customer get work done.
- Use simple imagery to reduce clutter.
- Communicate the problem it solves without relying on your company logo.

When you create your icon:

- ✓ **Carefully select colors.** If your icon works with certain applications, consider matching those colors.
- ✓ **Develop a symbol or logo** that conveys what your solution does. For example, if it is related to charts, use a chart symbol.
- ✓ Keep it simple and clean. Ensure that all icon sizes are readable.
- ✓ Avoid using words. They will become unreadable in smaller sizes.
- ✓ **Consider scale** and how your icon will look in different sizes.
- ✓ **Differentiate your business** with customized logos using the <u>Microsoft Logo Builder</u>.
- ✓ See <u>create effective Office store apps and add-ins</u> for more details about creating icons.

Click here to return to the list of steps.



Communicate the problem your add-in solves



This add-in makes charts

Excel green also suggests the Office program it works with



Rely too heavily on a company brand



It's hard to tell what this add-in does





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3. Manage ratings and reviews

Good ratings and reviews lead to better Store placement and improve your customers' perception of your product. Customers also use reviews as a forum to offer feedback and suggestions, when feedback and support options are not available within your solution.

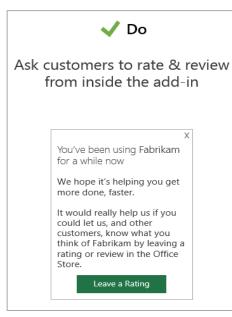
Impact of ratings on Store discovery

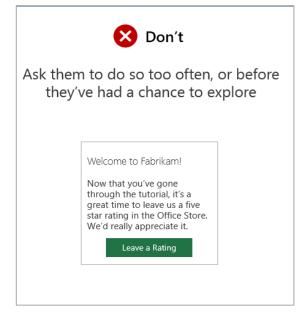
When a user searches for a solution in a specific category, the Store search ranks the results based on:

- Average rating
- Number of ratings

Collecting ratings and reviews

- Ask customers to rate and review from within your solution after they have had a chance to explore. Do not ask for feedback too soon or too often.
- Offer help and support from within your solution, so customers don't have to leave feedback in Office Store reviews.





Respond to reviews

- Use the comment feature in the Office Store to respond to customer reviews of your solution.
- Sign in to the Office Store with the account used to submit your solution via the Seller Dashboard, and your response will be tagged with an App provider label.
- Customers have the option to change their rating after you respond and resolve their issue.

Figure: Solution provider response



Why respond to customer reviews

- Help users with installation or other issues that can prompt negative reviews.
- Troubleshoot issues and provide technical support to your users.
- Encourage users to edit their rating when their issue is resolved, improving your global ratings over time.
- Indicate to users that their feedback is important and is monitored.
- Reduce future negative reviews and comments.
- Connect with your customers and discover what features to build, and why.

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4. Write an effective short description

Customers should be able to quickly identify the value of using your solution and how they would use it to solve their current problem.

Your short description can make your solution stand out or become lost in the crowd. Users see your short description in Store search results. Use your short description to entice potential users to learn more.

Make your short description original, engaging, and directed at your target audience. It should:

- ✓ **Describe the benefit of your app.** Briefly describe your solution and its value to your target customer.
- ✓ **Consider SEO.** Include keywords that customers might use to search for the functionality they need.
- ✓ Highlight key points. Display the most important information for customers. Include your key message in the first 30 characters.
- ✓ **Use available characters efficiently.** You have 70 to 100 characters to emphasize key points about your solution. Don't duplicate what's already in your title.
- ✓ **Avoid using jargon or too specialized terminology.** Use words that describe the benefit of using your solution compared to competitor products. Customers don't always know what they're looking for, but they know the problems they are looking to solve.
- ✓ Focus on the key features or capabilities available in your solution.

Click here to return to the list of steps.



Put the most important information first in your short description



Fabrikam Graphics Toolbox

Find and modify images online with our image library and filters

The important message will be read first and avoids truncation



Don't

Repeat your title



Fabrikam Graphics Toolbox Fabrikam Graphics Toolbox offers a full image library and tools





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5. Use screen shots effectively

Your screen shots are as important, if not more important, than your long description. Users might look at your screen shots before they read your description to learn what your solution does.

Choose screen shots that best explain your solution's purpose. Consider these two questions:

- What problem does my solution solve?
- What is unique and special about it?

Your screen shots should:

- ✓ Be clear and self-explanatory. Help customers understand how your solution solves problems and helps them get work done more effectively.
- ✓ **Focus on your solution.** Highlight the core purpose and what it can do for the user.
- ✓ **Show how to use your solution.** Show users how to navigate, and highlight common use case scenarios.
- ✓ **Keep it real.** Show real content rather than an empty document or obvious mockup. Remember to remove personal information that you do not want customers to see.
- ✓ **Use captions and callouts.** Be creative in your use of captions and callouts to clarify features or explain how they work.
- ✓ **Display the most important screen shot first.** Your first screen shot is what users will see when they land on your Store listing.
- ✓ **Use space effectively.** Eliminate white space and keep your screen shot uncluttered.
- ✓ **Include awards.** Display any awards or media mentions your Office solution has received.

Click here to return to the list of steps.

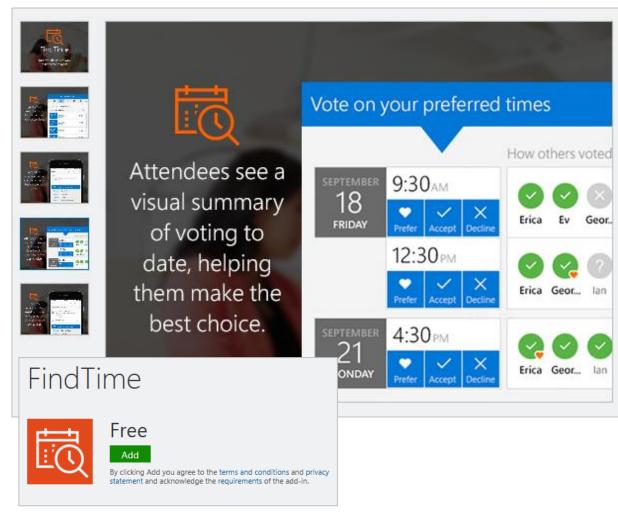


Figure: Effective use of screen shots demonstrates the value and tells the story of how your solution will be used.





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6. Provide an informative short video

You can provide a link to a video from your Store listing. Use this video to demo your solution to potential customers. You decide the host location of your video (ex., YouTube). Be mindful of where you redirect your users.

Effective videos:

- ✓ Deliver a clear, concise message about the value of your solution and how customers can use it.
- ✓ Highlight key features and the customer pain points you are resolving.
- ✓ Are no more than two to three minutes. Any longer and you might lose your customers' attention.
- ✓ Show common use case scenarios.
- ✓ Maintain consistent branding.
- ✓ Are of professional quality.
- ✓ Provide an honest representation of what your solution looks like and how it performs.

Click here to return to the list of steps.

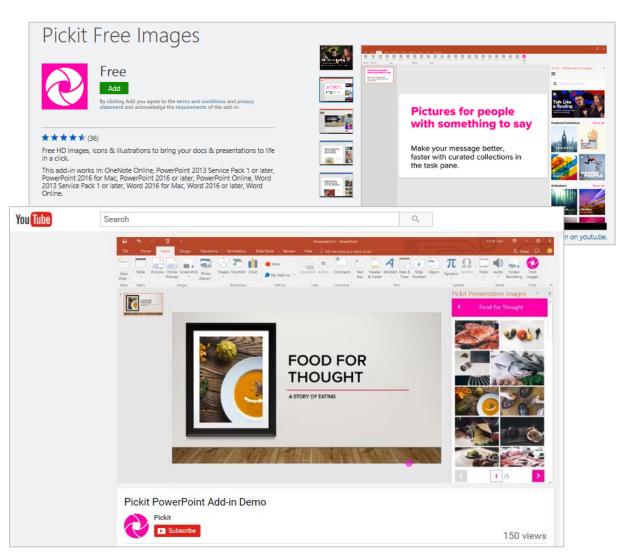


Figure: Effective use of video





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7. Write a compelling long description

Your long description helps customers decide whether to install your solution. The long description is displayed on your Store listing and provides more details about your solution and its value. Make it easy to navigate and find relevant content in your long description, because most users won't spend much time reading it.

Compelling long descriptions

Use your long description to describe your solution in detail, including the main features, the problems it solves, the most common use cases, and the target audience.

- ✓ **Include popular search keywords.** The Office Store search engine will pick these up in search query return sets.
- ✓ **Describe the benefits.** Specify how the functions and capabilities your solution provides can benefit the potential user.
- ✓ **Convey how your Office solution is different.** Identify the competitive advantage your solution has over other similar ones.
- ✓ **Show how it helps.** Provide use case scenarios that clearly demonstrate the value.
- ✓ **Identify who it is for.** Make the target audience clear. Identify specific vertical markets, lines of business, or roles within an organization that will benefit.
- ✓ **Make it easy to read.** The maximum length is 4,000 words, but most users will read 300 to 500 words. Use bulleted lists to make the information scannable.

Click here to return to the list of steps.



Office App Awards 2016 - Winner, Best User Interface for an Office add-in

Overview

Say goodbye to dull docs and predictable presentations, and get your message across with Pickit Free Images. Now you can get the best in stock photos, icons & illustrations without ever leaving PowerPoint or Word. All images are Legally Cleared and free to use for anything for as long as you like.

Pickit perks:

- · Legally Cleared and licensed to use for anything
- · Search and insert images directly from the easy-to-install task pane
- · Search by keyword or browse professionally curated collections
- Request custom photos from the global Pickit Community

Goodbye Clipart, Hello Pickit!

Provider's website Frequently asked questions View the privacy statement Report this add-in

Figure: Long description example with bulleted features for easy readability and optimized for SEO.

Pickit Free Images



Free

By clicking Add you agree to the terms and conditions and privacy statement and acknowledge the requirements of the add-in.





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Manage the app lifecycle

Overview

Make a good first impression, and customers will continue to use your Office solution. This section explores:

- · Managing the release of your solution.
- Analyzing available metrics to monitor the health of your solution.
- Collecting and managing user feedback and reviews.
- Making iterations and updates to your solution.
- Managing and improving your go to market strategy.
- Measuring success.
- Testing updates and new releases.

The diagram to the right shows a holistic view of the steps you need to consider when managing and updating your solution. Note that this does not always represent the order of the steps. For example, you may analyze metrics or collect feedback both prior to and after your release.

Managing the release of your solution

Your customers' first impression sets the tone for their perception of your brand. The following are ways you can continue improving the UX:

- Manage and monitor the health of your UX through customer support. Track your customer support interactions to identify areas you can improve to reduce the need for support. This will help decrease your costs and improve customer satisfaction.
- **Improve GTM and Store ranking.** Customer reviews affect your ranking in the Office Store. Read and respond quickly to customer reviews using the App provider username. Users can change their review and rating after you respond. Based on information gathered from reviews, make necessary modifications to improve the customer experience.
- **Increase user engagement.** Review and analyze customer engagement within your app. Identify areas you can improve, increase, or add the ability for customers to engage with your solution. Engaged users continue to derive value, which can help increase retention, conversions, and upgrades.

Adjust and improve UX experience. Continually review and modify your first-run experience to maintain a positive user experience:

- On a regular basis to improve the experience for new users
- After updates or new features are added that may change how your solution is used by both new and existing users

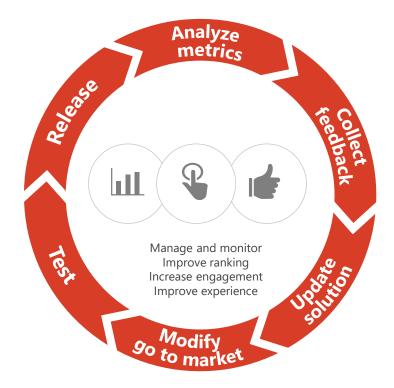


Figure: Continually test, modify, and update every aspect of your solution and GTM strategy to provide the best experience.





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Analyzing available metrics to monitor the health of your solution

Reviews provide some insight into the user experience and performance of your Office solution. You can get additional data from other tools, including the Seller Dashboard.

Seller Dashboard

You can view up to four weeks of data for your solution in the Office Store on the Metrics page in the <u>Seller Dashboard</u>, when you sign in with your Microsoft account. These metrics can help you better understand your solution's pre-download effectiveness, such as:

- How effective your marketing activities are in driving users to your Store listing.
- Whether your Store listing conveys your value proposition and drives downloads.
- Whether users are finding enough value in your app or add-in to convert from a trial to a paid version.

You can better understand how your solution is performing post-download by looking at metrics that help you determine:

- Whether users are having trouble installing your add-in.
- How many times your add-in was used and the number of unique users.
- Whether there was a high number of uninstalls or failed installs.
- Whether technical issues are causing runtime errors.
- Whether users are having trouble with upgrades.

This information can help you understand the overall health of your app or add-in and, when combined with customer feedback, ratings, and reviews, can give you insights into issues that might be limiting your business growth.

For example:

- If you're getting fewer browser hits than you expected, your marketing campaign might not be effective. Look into modifying your value proposition.
- If you're getting fewer downloads than you expect based on the browser hits, you might need to modify your Store listing to be more effective.
- If your conversion rate is low, customers might not be seeing value when they use your add-in for the first time. Look into how you can improve the <u>first run of your UX</u>.

Pre-download and purchasing metrics	What it measures
Browser hits	Number of times your listing has been viewed in the Office Store
Downloads	Number of times the app or add-in has been downloaded from the Office Store
Trial downloads	Number of times the app or add-in was acquired for free from the Office Store
Trial conversions	Number of times a customer who acquired a trial made a purchase
Purchased seats	Number of seats that have been purchased for your app or add-in
Purchased site licenses	Number of site licenses that have been purchased for your app or add-in
Post-download metrics	
Installs	Number of install attempts
Launches	Number of times the app or add-in was started
Daily unique users	The sum of daily unique users during certain time period
Uninstalls	Number of uninstall attempts
Failed installs	Number of failed installs, including retries
Runtime errors	Number of errors the app or add-in logged
Failed upgrades	Number of failed upgrades, including retries





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Collecting and managing user feedback and reviews

Customer reviews are a valuable way for you to get feedback on how your solution is working, how customers are using your solution, which features they like, and what problems it helps them solve. Reviews can also provide insight into what is not working for your customers.

You can also request feedback from users from within your solution. When requesting user feedback:

- Identify opportunities to ask for feedback. Wait until after users have experienced the benefits of your solution. For example, don't ask for feedback immediately after installation, because they have not used it (unless you only want feedback on the installation process).
- Ask for feedback that directly relates to the action they just completed with your solution.
- Don't ask for feedback too often, or customers won't respond.

Use reviews and feedback to:

- Improve installation or correct other issues users are experiencing.
- Troubleshoot issues and provide technical support.
- Indicate to users that their feedback is important and is monitored.
- Reduce future negative reviews and comments.
- Connect with customers to discover what features to build, and why.

Making iterations and updates to your solution

After you publish your solution, continue to enhance it with new features and functionality, provide updates to debug, and improve the customer experience based on feedback and metrics.

The following guidelines apply to updates:

- When you add new features, your users will see the updates immediately. Beta test or sideload your updates to ensure that they do not disrupt your customers' experience.
- Any security or privacy issues must be fixed in real time.
- Updates to paid solutions must not decrease the functionality.
- Price changes should not affect your existing customers.
- You can update your add-in no more than 10 times per month or 30 times per year.

Managing and improving your go to market strategy

Review, analyze, and modify your go to market strategy to identify areas for improvement:

- Analyze downloads to determine who uses your solution and if you are reaching your target audience. Make adjustments in demand generation activities to increase reach.
- Analyze your distribution model. Are you getting the results you expected from marketplaces, channel partners, and other distribution methods? Identify adjustments you can make to improve.
- Review feedback to ensure marketing promises are being delivered on. For example, customers
 may leave negative feedback if they do not feel they are receiving what they were promised.
 Make adjustments as needed.
- Review pricing strategy and make changes to improve monetization of your solution.

Track and analyze the effectiveness of your external marketing activities to determine their effectiveness with In-Store Tracking (available in Office Store for free Word, Excel, PowerPoint addins):

- Use a unique campaign ID to measure the success of each marketing activity.
- Optimize your marketing campaigns and focus on channels that give you the best results.
- Follow <u>Microsoft guidance</u> to set up the required tracking parameters to enable In-Store Tracking.
- Customize the first-run experience based on which marketing activity triggered the customer's interest. For example, you can thank someone for attending a webinar if they clicked a link from a direct email sent to webinar attendees.

Figure: Web page analytics



Step 1: Number of users who land in the add-in page



Step 2: Number of users who click to acquire the add-in and arrive at the install page



Step 3: Number of users who activate the add-in





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Measuring success

You can analyze the data you collect on your solution to help monitor the success of your marketing activities and campaigns. Measure and analyze data in the following categories:

Acquisition	Engagement	Outcomes	
 Number of downloads Number of new users Number of active users 	 Retention of existing users Drop off rates Session length for each user 	 Number of purchases Conversions from trials to paid versions Upgrades from free to premium to enterprise versions Goal conversions (sign ups, view a certain screen, etc.) Customer cancellation rate App monetization Net promoter score (NPS) 	

By knowing what measurements to look for and how to analyze the data, you can determine:

- The success of each external marketing unique campaign ID and how to change your marketing investments.
- The impact of your value proposition based on clicks and download rates to determine if it resonates with your target audience.
- The quality of your website or Store listing based on download rates.
- Where in the customer funnel customers are dropping off to identify what changes you can make to minimize the drop.
- What functions within your app users access most often to help you modify your value proposition and use case scenarios.
- What functions customers are not using and if it is because they are not aware of them or don't see value in them.
- At what point users are willing to make a purchase or upgrade. Are there certain features or functions that prompt more conversions than others, and how can you call these out more in your marketing activities?

Testing updates and new releases

Before making your app generally available in the marketplace, use one or more of the following methods to deploy your Office add-in for testing:

- Conduct a beta or pilot test with a select group of users to gather feedback.
- <u>Sideload your app or add-in</u> to test installation, user experience, performance, and functionality.
- Make your add-in available as unpublished in the Office Store. This way, only users with a direct link can access and test the add-in.
- Use <u>centralized deployment</u> to publish your add-in within an organization.

As you test, adjust and modify your add-in to ensure a smooth user experience when you make it available to the general market.





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Utilize Microsoft programs

Overview

Microsoft is committed to helping you go to market successfully and grow your business. As a Microsoft ISV, you gain access to a variety of tools, resources, support, and programs designed to help you develop and grow your business.

This section introduces you to some of the key Microsoft programs that can help you get started as a Microsoft Partner. These programs include tools and resources to help you develop your go to market strategy, develop a best practice user experience, generate demand, and quickly bring your solution to market.

Understanding these different programs can help you determine where to start and which programs to take advantage of. This section answers:

- What programs are available, and where can I get more information on each?
- What are the benefits of the ISV Go to Market program?
- What value does each program provide, and when would I use each?

Microsoft GTM Services

Our <u>Go to Market Services team</u> is committed to helping you successfully go to market, so your business can grow. With a focus on co-selling and co-marketing opportunities, our team can help your business reach new customers and markets worldwide by opening new doors through joint launch planning, global expansion, channel development, lead sharing, and more. Leverage Microsoft's ISV GTM Services to help:

Improve awareness and discoverability

Expand customer and channel access

Increase usage, revenue growth, and ROI

Program	Description
Microsoft GTM Services	Marketing strategy planning, co-marketing, and co-selling
Microsoft Partner Network*	Partner tools, resources, and other programs
Microsoft Action Pack**	Software licenses, tools, and support resources
Partner Center Marketing Resources	Customizable marketing resources
Smart Partner Marketing	Evaluate your marketing readiness
<u>SureStep</u>	Methodology to enhance SMB business and marketing abilities
Microsoft Developer Network (MSDN) for ISVs	Developer tools, training, and technical marketing support
ISV and Application Builder Center	Resources, tools, and marketing guidance to create solutions
Office 365 Developer Program	Training, code samples, patterns, and best practices
Demo Platform Program**	Showcase the value proposition of your solution

*May be required to access certain resources

**May cost to join

Getting started (These are the recommended programs to help you get started however, they also encompass developer tools and resources and demand generation and marketing)

Developer tools and resources

Demand generation and marketing





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Join the Microsoft Partner Network

To take advantage of all the tools, resources, programs, and marketplaces that Microsoft offers to partners, you will need to join the <u>Microsoft Partner Network</u>.

The Microsoft Partner Network provides you with partner benefits designed to help grow your business. Three types of ISV memberships provide varying levels of benefits. You receive a core set of benefits when you join to help you save time and money while you strengthen your capabilities. As your business changes you can move through the different levels to access the benefits that best fit your evolving needs and to develop your relationship with Microsoft and other partners in the network.



Network member is a no-cost, basic level that is your first step to receiving relevant information and exploring the resources Microsoft offers.



Action Pack allows you to access developer tools, support, training, and software to run your business.



Competency rewards you for your success with increased support, software, and training.

Upgrade your Microsoft Partner Network membership to Microsoft Action Pack

For access to affordable software licenses, developer tools, dedicated support, and business and marketing guidance that can help you launch a successful solution that integrates with Office, subscribe to <u>Microsoft Action Pack</u>.

Microsoft Action Pack is an affordable yearly subscription to software, support, and benefits to help you begin, build, and grow your Microsoft practice. Action Pack can help you sell approximately two times more cloud volume than network members², when you take advantage of the cloud benefits that are provided with a subscription.

Software benefits include

- Developer tools to create applications and solutions for your customers on iOS, Android, Linux, and Windows
- Ten Windows 10 Enterprise (upgrade) licenses, three Visual Studio Professional licenses, and a no-cost Visual Studio Team Services account
- Up to ten Office 365 (E3) seats, five seats of Enterprise Mobility Suite and Microsoft Dynamics CRM Online Professional
- US\$100 of Microsoft Azure credits per month

Business benefits include

- Dedicated support so you can confidently serve your customers' needs
- Ready-to-go marketing campaigns and guidance with Smart Partner Marketing resources
- Comprehensive Microsoft insights and business planning tools to help increase profitability
- Cloud-focused training with Cloud SureStep

²This data is accurate as of December 15, 2015. We compared the average Office 365 cloud sales per partner in the previous 12 months between Action Pack partners and Network members that use Office 365 internal use rights.



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(Learn more

Find a marketing service provider to

help with your marketing.

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Use Partner Center marketing resources

The <u>Microsoft Partner Network</u> provides professional, personalized resources to help you market your business. You can save time, save money, and get the tools and support you need to reach your customers.



Campaigns

Use customizable marketing and sales content.

Explore campaigns



DigitalStride

Run a digital marketing program to boost your website traffic.

(→) Learn more



Web Content

Keep your website up to date with customer facing dynamic content. Visit our new and improved content syndication experience.

→ Explore Web Content



Microsoft Community
Connections

Educate local businesses on current technology solutions.

→ Learn more



Marketing SureStep

Get step-by-step guidance to help build your marketing plan.

→ Get started



Logo Builder

Differentiate your business with customized logos.

→ Get started

Utilize SureStep resources

Use the **SureStep** methodology to improve your capabilities across these dimensions:

- Business model transformation
- · Business profitability
- Presales, sales, and technical content across Azure, Office 365, and Dynamics 365
- Customer success
- Marketing

SureStep provides varying levels of support for novice and more experienced marketers. Whether you are new to marketing or have an experienced team, Marketing SureStep provides you with tools and resources to create your SMB marketing plan including:

Telling your story



Targeting your customers



Measuring your marketing success



Evaluate your marketing readiness with Smart Partner Marketing

Marketing is as important as the functionality of your solution. With <u>Smart Partner Marketing</u> you can:

- Better understand how cloud customers buy.
- Check your marketing readiness.
- Get marketing recommendations to improve your business.
- Take demand-generation essentials training to improve your skills.





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Check out the Microsoft Developer Network (MSDN) for ISVs

For developer tools, training, and technical marketing support that can help you build great solutions, check out the <u>Microsoft Developer Network for ISVs</u>. You can take advantage of these tools and resources to increase demand for your applications.

ISV and Application Builder Center

<u>Application Builder Center</u> offers a variety of benefits including resources, tools, and marketing guidance to empower you to create solutions, certify applications, and make money.

Microsoft Go to Market Services

<u>Microsoft Go to Market Services</u> provides resources to help you attract customers, engage users, accelerate business growth, and expand partnerships. Microsoft GTM services help you:

Collaborate

- Develop a custom marketing strategy with your Microsoft marketing expert.
- Team up with worldwide GTM resources to enter new markets.
- · Unlock additional benefits as your business continues to expand.

Market

- Generate leads through joint campaigns as soon as you have an application in market.
- Showcase your solution to our sales teams and customers.
- Distribute and deploy through our marketplace to new customers.

Scale

- Reach new customers in 122 countries where Microsoft sells.
- Get exposure to tens of thousands of Microsoft direct sellers and channel partners.
- Receive and share marketing and sales leads with the Microsoft community.

Join the Office 365 Developer Program

High quality applications and short time to market are both critical to achieving GTM success earlier. The Microsoft Office 365 Developer Program is designed to help you learn new technology, solve problems, and drive success with your Office solutions more quickly.

Check out the <u>Office Dev Center</u> to explore the latest training, code samples, patterns, and best practices.



Demo Platform Program

The Demo Platform Program provides a Microsoft branded, customizable sales tool that showcases a complete end-to-end industry ISV solution through a customer journey. The Demo Platform Program:

- Is modular and customizable, allowing you to pick which sections to include in your demo.
- Uses a simplified online submission portal allowing you to submit/update demos via a portal.
- Delivers a unified presentation with one UI and visual format for all customer demos.
- Provides the ability to capture and track leads from demo downloads on MS web properties.

The cost for this program varies based on your GTM Partnership status. To learn more dxgtmcamp@Microsoft.com.





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- Microsoft guidance for developing your <u>marketing strategy</u>
- Use <u>Microsoft Pinpoint</u> to identify potential channel partners
- <u>Guidelines for globalization and</u> localization of your solution
- Guidelines for developing your pricing strategy
- Four magic questions to <u>uncover</u> your value prop
- Marketing Planning for Success guide for creating successful marketing strategies
- Online Social Marketing campaign guide for effective social media, public relations, and blogging
- <u>Digital Readiness</u> guide for building effective landing pages, websites, and SEO and SEM
- Develop sales opportunities built on Microsoft cloud solutions with Project LeadGen
- Use <u>MX record lookup</u> or <u>CNAME</u> <u>lookup</u> to obtain records for your customer email list

UX best practices

- Reference Microsoft's <u>best</u> <u>practices for developing Office</u> add-ins
- Guidance for creating UX components for your <u>SharePoint</u> add-ins
- Leverage Microsoft's <u>icon design</u> guidance
- Review the <u>Office add-ins platform</u> overview
- Use the <u>Office UI Fabric</u> to help ensure the look and feel and functionality of your add-in complements the Office experience
- Use the <u>UX design patterns</u> <u>templates for Office add-ins</u> to understand common interaction patterns and get a jumpstart for vour code
 - <u>View UX design patterns and templates</u>
 - <u>Download samples of UX</u> design patterns

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- Sell through <u>Microsoft</u> marketplaces:
 - Office Store
 - AppSource
 - Azure Marketplace
 - Windows Store for Business
 - Windows 10 Apps Store
- Add Office <u>Store badges</u> to your website
- Guidance on creating effective <u>Office Store apps and add-ins</u>
- Create customized logos using the Microsoft Logo Builder
- Create icons using <u>Effective Office</u> store apps and add-ins

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- Access your Office Store metrics page in the <u>Seller Dashboard</u>
- <u>Sideload your app or add-in</u> to test installation, user experience, performance, and functionality
- Use <u>centralized deployment</u> to publish your add-in within an organization
- Use <u>campaign tracking</u> (available in Office Store for free Word, Excel, and PowerPoint add-ins) to measure the success of your campaign

Utilize programs

- Microsoft's Go to Market Services team is committed to helping you successfully go to market heling your business reach new customers and markets worldwide
- join the Microsoft Partner Network
- subscribe to <u>Microsoft Action</u> Pack.
- <u>Microsoft Developer Network for</u> ISVs
- Application Builder Center.
- Microsoft Go to Market Services
- the <u>Office Dev Center</u> to explore the latest training, code samples, patterns, and best practices.
- App Builder and ISV Center to help you prepare your solution for market



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