

proMX



# Transparent. Collaborative. Rewarding.

Become a part of our proMX  
Partner Program

 [proMX.net](https://proMX.net)

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## Introduction

This handbook is designed to provide our potential partners with a comprehensive guide to the proMX Partner Program. Whether you are just starting your journey with us or deepen a partnership, this document will serve as your roadmap. Here, you will find detailed information about our program structure, the benefits of partnering with us, and the steps required to become a proMX partner.

If you have any questions or need further assistance, our team is here to help you make the most of your partnership with proMX.

## About proMX

### Our story

At proMX, we are passionate about empowering businesses to make their processes more agile, efficient and competitive. Founded in 2000, proMX was focused on delivering exceptional project management solutions. Over the years, we have evolved into a leading provider of Microsoft Dynamics 365 solutions, renowned for our expertise in Project Operations and the proMX 365 Productivity Suite.

Our journey began with transforming the way organizations manage their processes. We quickly gained recognition for our ability to tailor solutions to meet the unique needs of diverse industries. As we grew, so did our service and product portfolio. Throughout our history, we have achieved numerous milestones, including our continued recognition as an Inner Circle member for Microsoft Business Applications 2024/2025.

As a leading Microsoft partner, proMX stands at the forefront of digital transformation, providing cutting-edge solutions that help businesses navigate complex challenges and seize new opportunities.

We invite you to join us on this exciting journey and be a part of our story as we continue to shape the future of project management and productivity.

## Mission and vision

### Mission

At proMX, our mission is to empower businesses to achieve their process optimization goals, enhancing their productivity and success. We strive to be the reliable partner that guides organizations through their journey, fostering relationships that are fair, professional, transparent, and always committed to delivering the highest quality.



**Peter Linke**, CEO proMX

### Vision

Our vision is to be a global leader in project management and productivity solutions, renowned for our commitment to excellence and innovation. We aim to transform how organizations manage their projects, optimize their operations, and drive growth by leveraging our cutting-edge technology and strong partnerships.

## Some Microsoft quotes



*I have been honored to lead the development of Microsoft Dynamics 365 for Project Service Automation, starting from the initial idea all the way to winning the first customers for the solution. I can say that working with dedicated partners has helped us a lot. proMX's customer scenarios, project management expertise and weekly feedback contributed a lot to developing and improving the product. Moreover, we all have enjoyed working together and with our first early adopter customer.*



**Jeff Comstock**, General Manager, Dynamics 365, Microsoft



*To build this Project Service Alliance is another great idea of the proMX team! I believe it is a logical and very important step for all partners working with Dynamics 365 to join forces. At Microsoft we believe in joint partner projects and will always support ideas that bring more value to our customers. I'm happy to be involved in this project and would be happy to meet new members at Alliance trainings and conferences.*



**Tom Patton**, General Manager, Dynamics 365 Global  
Blackbelt, Microsoft



*At Microsoft, we are dedicated to supporting innovative ISVs like proMX AG in advancing the Dynamics 365 ecosystem. Their proMX 365 Productivity Suite, powered by AI and Microsoft Copilot, showcases how partners can harness the Microsoft technology stack to enhance productivity and customer satisfaction. proMX AG exemplifies excellence in product innovation to extend the functionality of Dynamics 365 Project Operations.*







**Rupa Mantravadi**, Group Product Manager, Dynamics 365  
Project Operations, Microsoft

## Product and solution portfolio

At proMX, we offer a comprehensive suite of products and services designed to meet the diverse needs of businesses. Our offerings are all around Microsoft Dynamics 365 and include:

### Products

	<p><b>proMX 365 Productivity Suite</b></p> <p>The proMX 365 Productivity Suite enhances and extends Microsoft Dynamics 365 functionalities to drive long-term growth and efficiency. By providing additional value beyond standard offerings, it boosts decision-making and operational performance, ensuring complex projects are managed efficiently and aligned with your strategic goals.</p>
	<p><b>Microsoft Dynamics 365</b></p> <p>A robust platform combining CRM and ERP capabilities, Microsoft Dynamics 365 includes various applications tailored to different business needs.</p>
	<p><b>Microsoft Power Platform</b></p> <p>A suite of tools that empowers businesses to leverage data and automate processes.</p>
	<p><b>Microsoft Cloud and Productivity apps</b></p> <p>Our Microsoft Cloud and Productivity apps harness the power of Microsoft Azure, Microsoft 365, IoT, and Machine Learning to drive innovation and efficiency across your organization.</p>

## Services

<p><b>Consulting services</b></p>	<p>We offer functional and technical consulting to help businesses assess their needs, design effective solutions, and implement Microsoft Dynamics 365 and related technologies.</p>
<p><b>Implementation and integration</b></p>	<p>Our team provides end-to-end implementation services with a phased approach, ensuring that our solutions are seamlessly integrated into your existing systems and processes.</p>
<p><b>Training and support</b></p>	<p>We deliver comprehensive training programs to empower your team with the skills and knowledge needed to effectively use our solutions. Our ongoing support services ensure that you receive assistance whenever you need it.</p>
<p><b>Customization and development</b></p>	<p>We offer customization services to tailor our solutions to your specific requirements, as well as development services to build additional features or integrations that enhance functionality.</p>
<p><b>Managed services</b></p>	<p>Our managed services provide ongoing management and optimization of your Dynamics 365 environment, ensuring continuous performance improvements and proactive issue resolution.</p>

Our products and services are designed to work together harmoniously, providing a complete solution for project management, process optimization, and business growth.

## Unique Selling Propositions (USPs)

At proMX, our Unique Selling Propositions (USPs) reflect our commitment to delivering unparalleled value through our extensive expertise and innovative solutions. We distinguish ourselves with deep knowledge in Microsoft Dynamics 365, Project Operations and Power Platform, a proven track record of successful implementations, and a close partnership with Microsoft. Our industry-specific solutions and advanced tools are designed to address the unique needs of various sectors, ensuring that our customers and partners achieve superior outcomes.

### Expertise in Dynamics 365 and Project Operations:

proMX stands out with its deep expertise in Microsoft Dynamics 365 and Project Operations. Our advanced capabilities in Dynamics 365 allow us to tailor solutions that meet complex business requirements, while our Project Operations expertise ensures seamless project management and execution.

### Enhanced productivity solutions:

We provide solutions designed to significantly boost productivity. Our proMX 365 Productivity Suite extends the core functionalities of Microsoft Dynamics 365, integrating cutting-edge AI technology and advanced automation features. This not only streamlines operations but also enhances decision-making and operational performance, helping businesses achieve greater efficiency and long-term success.

### Proven track record:

With a strong track record of successful implementations and satisfied clients, proMX has established itself as a reliable and effective partner. Our history of delivering exceptional results across various industries underscores our ability to meet diverse client needs and drive impactful outcomes.

### Close collaboration with Microsoft:

Our close collaboration with Microsoft enhances our offerings and provides us access to firsthand information long before it gets released publicly. This partnership allows us to offer integrated solutions that leverage the latest Microsoft innovations, further strengthening our value proposition and ensuring that our clients benefit from the most advanced technologies available.



## Competitive positioning

In a crowded marketplace, proMX stands out with exceptional competitive positioning. We offer comprehensive integration with Microsoft Dynamics 365, especially in Project Operations, ensuring a seamless and unified approach to project management. Our tailored solutions are designed to meet specific business needs, while our innovative use of advanced AI drives enhanced performance and efficiency. Supported by our proven expertise and Inner Circle status for Microsoft Business Applications, we deliver unmatched value and results in project management and productivity enhancement.

### Comprehensive integration:

We provide a seamless integration with Microsoft Dynamics 365, particularly Project Operations, and other Microsoft technologies to provide a unified approach to managing projects.

01

### Tailored solutions:

Our customizable products adapt to specific business requirements and enhance productivity across various project stages.

02

### Innovative technologies:

By using advanced AI we drive superior performance and efficiency in project management and business processes.

04

03

### Proven expertise:

We are a recognized industry leader with deep expertise in productivity enhancement for many areas and hold the Inner Circle status for Microsoft Business Applications.

## Value proposition for partners

### Why partner with proMX?

Partnering with proMX provides strategic advantages that empower your business to thrive in a competitive market. Our strong brand reputation and commitment to innovation offer a solid foundation for building successful, long-term relationships.



01

#### Enhance your offerings with cutting-edge solutions:

Partnering with proMX grants you access to the proMX 365 Productivity Suite, a powerful extension of Microsoft Dynamics 365 and Project Operations. Our suite enhances and expands upon Microsoft's core functionalities and optimizes your existing investments in the Microsoft ecosystem, reducing the need for additional software. The proMX 365 Productivity Suite adapts to your unique business needs with scalable solutions and customizable features, ensuring a perfect fit for your requirements.



02

#### Reduce development efforts and project time:

Our proMX 365 Productivity Suite is engineered to minimize development efforts and streamline the implementation process. By leveraging our pre-built components and templates, you can accelerate deployment, allowing you to deliver projects more quickly and efficiently. This approach not only reduces overall project time but also lowers costs and enhances client satisfaction through faster and more effective solutions.



03

#### Gain with our Project Operations expertise:

proMX offers unmatched expertise and specialization in Project Operations, enabling you to deliver superior solutions and insights that are second to none. By leveraging our advanced Project Operations capabilities, you can differentiate yourself in the marketplace and provide top-tier project management solutions. This ensures you address complex customer needs effectively and drive exceptional outcomes.

## Benefits of being a proMX partner

Partnering with proMX offers a lot of advantages designed to elevate your business and drive mutual success. Here's how joining forces with us can **benefit you**:



### Revenue opportunities:

Enjoy significant revenue potential through various channels, including referral fees and revenue shares. Benefit from our comprehensive suite of solutions to increase your sales and profitability.



### Enhanced offerings:

Gain access to the proMX 365 Productivity Suite and provide cutting-edge solutions that enhance productivity and drive superior results for your clients.



### Comprehensive support:

Access a range of exclusive resources, including marketing materials, commercial and technical support, and detailed training programs.



### Accelerated implementation:

Reduce development efforts and project time with our pre-built components and templates, streamlining deployment and allowing you to deliver projects faster and more efficiently.



### Project Operations expertise:

Leverage our expertise in Project Operations to offer outstanding project management solutions. Differentiate yourself with advanced capabilities driving exceptional outcomes.



### Continuous learning:

Stay up to date with regular product training and updates to ensure you remain competitive in the rapidly evolving market.



### Collaborative growth:

Benefit from a collaborative partnership that supports your business goals and fosters long-term success. Our close collaboration with Microsoft enhances your ability to offer specialized solutions and access new market opportunities.

# Overview of the partner program

## What is the proMX partner program?

Our proMX partner program is founded on the principle of collaborative success. We know that partnerships are a joint effort to achieve common goals, leveraging each other's strengths to drive greater outcomes. We prioritize our customers' needs, ensuring that their satisfaction is at the heart of everything we do.

By collaborating with us, you gain access to our exceptional products and extensive expertise in Microsoft Dynamics 365 and Project Operations. We are committed to broadening market reach and driving innovation through our advanced solutions and deep knowledge in these areas. Our goal is to enhance both our offerings and our partners' capabilities, ensuring that together, we address the evolving needs of the market with cutting-edge solutions and a shared commitment to excellence.



We support our partners with comprehensive resources and guidance to effectively market and deliver both our products and services. This support system is crafted to help partners maximize their potential and achieve shared success.

## Types of partnerships

proMX offers a variety of partnership types for different business models and goals. Each partnership type comes with specific roles, responsibilities, and benefits to ensure mutual success and growth.

### Referral Partners

Referral Partners are individuals or organizations that refer potential customers to proMX. Their primary role is to identify and recommend clients who would benefit from our products and services.

Key responsibilities:	Benefits:
<ul style="list-style-type: none"> <li data-bbox="220 976 794 1167">■ <b>Lead generation:</b> Identify and refer qualified leads for both the proMX 365 Productivity Suite and related projects and services.</li> <li data-bbox="220 1211 794 1361">■ <b>Networking:</b> Utilize existing relationships and networks to introduce proMX solutions and services.</li> <li data-bbox="220 1406 794 1556">■ <b>Awareness:</b> Promote the benefits and capabilities of the proMX 365 Productivity Suite and our project and service offerings.</li> </ul>	<ul style="list-style-type: none"> <li data-bbox="868 976 1406 1126">■ <b>Referral fees:</b> Receive attractive referral fees for every successful lead that converts into a customer.</li> <li data-bbox="868 1171 1406 1285">■ <b>Minimal involvement:</b> Focus on referrals without handling sales or implementation.</li> <li data-bbox="868 1330 1406 1444">■ <b>Support and resources:</b> Access marketing materials and support to help generate leads.</li> </ul>

### Collaboration Partners

proMX work closely with Collaboration Partners to deliver end-to-end projects and tailored solutions.

Key responsibilities:	Benefits:
<ul style="list-style-type: none"> <li data-bbox="220 1953 727 2103">■ <b>Sales:</b> Promote and sell Dynamics 365-related projects to potential customers.</li> </ul>	<ul style="list-style-type: none"> <li data-bbox="868 1953 1406 2067">■ <b>Enhanced offering:</b> Benefit from the proMX experience and best practices.</li> </ul>

Key responsibilities:	Benefits:
<ul style="list-style-type: none"> <li data-bbox="231 409 810 611"> <p>■ <b>Customer contracting and project ownership:</b> Manage customer contracts and oversee project delivery, including proMX services and products.</p> </li> <li data-bbox="231 656 810 813"> <p>■ <b>Support and training:</b> Provide initial support and training to customers for smooth implementation and effective use.</p> </li> </ul>	<ul style="list-style-type: none"> <li data-bbox="880 409 1444 533"> <p>■ <b>Co-Marketing opportunities:</b> Benefit from joint marketing efforts to promote integrated solutions.</p> </li> <li data-bbox="880 555 1444 712"> <p>■ <b>Technical collaboration:</b> Have access to proMX Group’s technical resources and support to facilitate smooth integration.</p> </li> <li data-bbox="880 734 1444 902"> <p>■ <b>Market expansion:</b> Tap into new markets and customer segments through collaborative solutions.</p> </li> </ul>

## Reseller Partners

Reseller Partners have the expertise and market access to sell the proMX 365 Productivity Suite and related projects directly to end-users including support and training.

Key responsibilities:	Benefits:
<ul style="list-style-type: none"> <li data-bbox="215 1308 774 1431"> <p>■ <b>Sales:</b> Promote and sell the proMX 365 Productivity Suite to customers.</p> </li> <li data-bbox="215 1453 774 1610"> <p>■ <b>Customer contracting and project ownership:</b> Build and maintain strong customer relationships.</p> </li> <li data-bbox="215 1632 774 1789"> <p>■ <b>Support and training:</b> Provide initial support and training for smooth implementation and usage.</p> </li> </ul>	<ul style="list-style-type: none"> <li data-bbox="865 1308 1428 1431"> <p>■ <b>Partner discount:</b> Receive a discount on proMX solutions and services delivered.</p> </li> <li data-bbox="865 1453 1428 1576"> <p>■ <b>Sales support:</b> Access comprehensive sales training and tools.</p> </li> <li data-bbox="865 1599 1428 1756"> <p>■ <b>Marketing collaboration:</b> Engage in co-marketing initiatives to enhance visibility and lead generation.</p> </li> <li data-bbox="865 1778 1428 1912"> <p>■ <b>Continuous learning:</b> Stay updated with ongoing product training and updates.</p> </li> </ul>

## Comparison of partner types

Each partnership type is designed to leverage the strengths of both proMX and our partners, ensuring a collaborative approach that drives mutual success and growth in the market.

The **table** compares the benefits of each partnership model.

Your partner packages to success	Referral Partner	Collaboration Partner	Reseller Partner
Refers business to proMX and receives a referral fee	✓	✗	✗
Resells business to the customer and receives discount on product and services	✗	✓	✓
Customer contracting and project ownership	proMX	Partner	Partner
Strategic engagement	✗	Case by case	Long term
Being able to demo the proMX 365 Productivity Suite and being self-sufficient	✗	✗	✓
Leverage in-depth Dynamics 365 knowledge for customer success	Limited	✓	✓
Leverage in-depth Dynamics 365 Project Operations knowledge for customer success	Limited	Limited	✓
Training and certification of sales and technical consultants	✗	Limited	✓
Partner providing technical support to customer	✗	1st level	1st & 2nd level
Promote proMX 365 Productivity Suite on partner website and link to proMX website	✗	✗	✓
Product license for own tenant demo environment	✗	✗	✓

Your partner packages to success	Referral Partner	Collaboration Partner	Reseller Partner
Internal use rights of the proMX 365 Productivity Suite	✗	✗	✓
Consulting services from proMX specialists	✗	Predefined	Predefined
Partner account manager and resource manager	✗	✓	✓
Partner Stay Connected webinars and newsletters	✓	✓	✓
Partner listed on proMX website	✗	✗	✓
Access to marketing materials, sales and technical support	Limited	✓	✓
Co-marketing initiatives	✗	Limited	✓

## Partner journey

At proMX, we are dedicated to making the partnership journey seamless and rewarding. Our phased approach ensures that each step, from initial engagement to long-term collaboration, is structured to support and maximize the success of our partners.

### Discover: explore and understand

This phase is designed to familiarize you with our offerings, including the proMX 365 Productivity Suite, Dynamics 365 Project Operations, and our comprehensive services. You will have the opportunity to:



**Initial outreach:**  
Engage with our team to learn about our partnership opportunities and the value we offer.



**Product overview:**  
Gain insights into our solutions through detailed information and demonstrations.



**Program introduction:**  
Understand our partnership structure, benefits, and the support we provide.



**Partner assessment:**  
Discuss your needs and goals to see how well they align with our offerings.



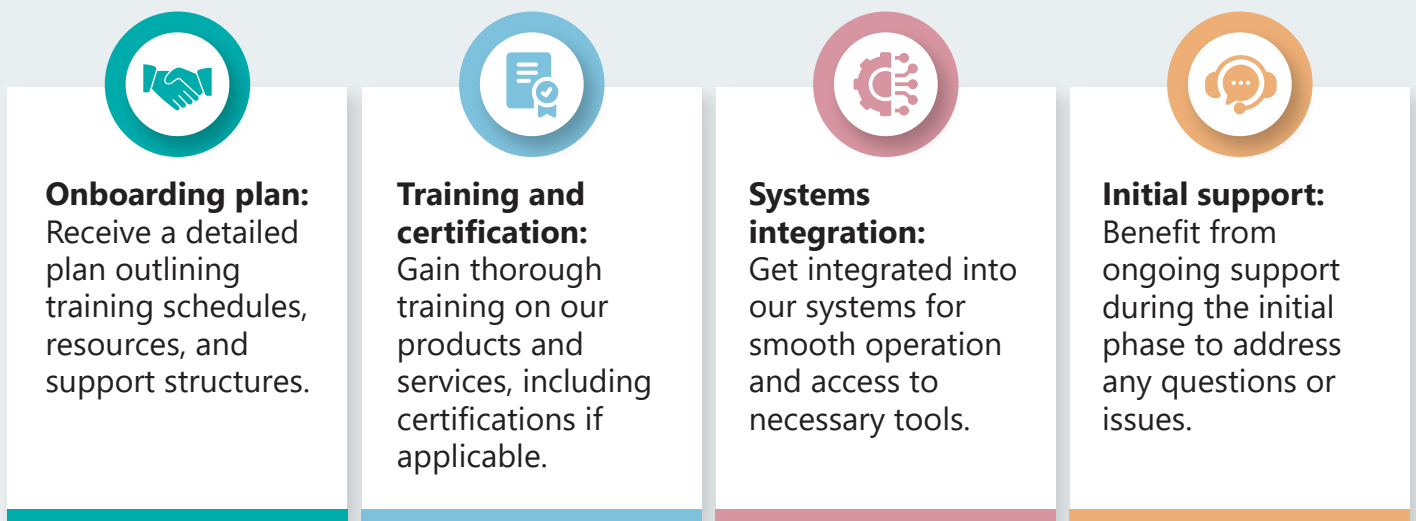
## Engage: formalize the relationship

Once you have decided to partner with us, we move into the engagement phase. This is where we formalize the relationship and set the stage for a successful collaboration:



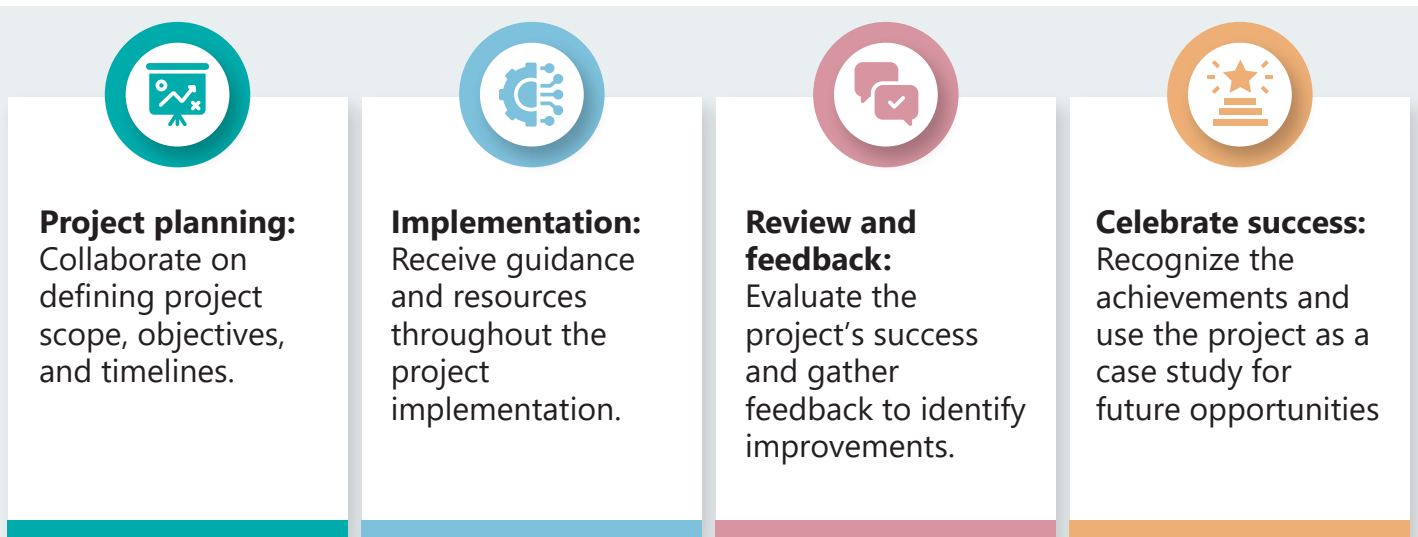
## Onboard: integrate and equip

The onboarding phase is crucial for setting you up for success. We provide the tools, training, and support needed:



## First project: demonstrate value

Starting your first project with proMX is an exciting milestone. It is an opportunity to showcase the value of our partnership and set the tone for future success:



## Grow: expand and enhance

To strengthen the partnership, we focus on growth and deepening our collaboration:



## How to become a proMX partner

At proMX, we want to partner with dynamic organizations to expand the reach and impact of our Dynamics 365 knowledge and expertise together with the proMX 365 Productivity Suite. Our goal is to make the partnership journey as smooth and rewarding as possible. Here is a simple guide on how to join our partner ecosystem:



### Get in touch:

Start by reaching out to us! We are eager to learn about your business and discuss how we can work together. Get in touch by filling out our online application or contacting our partner management team directly.



### Share your story:

Tell us more about your company. We would like to know more about your market presence, expertise, and how you see a partnership with proMX fitting into your goals. This helps us understand how we can best support you.



### Explore the opportunity:

We will get in touch with you to discuss our partnership program in detail. You will learn about our Dynamics 365 knowledge and expertise and the proMX 365 Productivity Suite, our vision, and how we can collaborate to create amazing solutions together.



### Formalize the partnership:

Once we are on the same page, we will finalize our partnership agreement. This step is all about ensuring that both sides are aligned.



### Get started:

Welcome aboard! We will provide you with all the resources, training, and support you need. From product training to marketing support, we are here to help you succeed.

## proMX partner team

We are dedicated to ensuring that our partners receive exceptional support. To enhance our collaboration, we plan to assign a dedicated team to each partner. This team will consist of two key roles:



Your go-to person for maximizing the value of our partnership. They will guide you through periodic check-ins, develop joint business plans, and oversee strategic initiatives. They also handle contract-related questions and act as the main escalation point.



Focused on optimizing service delivery and resource management. They will manage resource needs, suggest improvements, and track progress, ensuring you have everything required to succeed.

## Learning services

Our range of learning services help you get the most from our expertise and the proMX 365 Productivity Suite:



**proMX Academy:**

Access to a variety of training formats, including online courses, advanced programs, and customized workshops. Our academy ensures your team stays current and proficient.



**Webinars and live sessions:**

Join our regular webinars and live sessions for updates and interactive learning experiences.



**Certification programs:**

Validate your team’s expertise with our certification programs to build credibility and trust with your clients.



**Resource materials and documentation:**

Join our regular webinars and live sessions for updates and interactive learning experiences.

## Selling services

To help you effectively market and sell our expertise and the proMX 365 Productivity Suite, we offer comprehensive selling services:



**Marketing resources:**

Utilize our product brochures, case studies, and marketing playbooks available on the proMX Partner Portal.



**Co-Marketing opportunities:**

Participate in joint webinars, press releases, and co-marketing campaigns to enhance your visibility and reach.



**Sales assistance:**

Benefit from pre-sales support, sales training, and certification programs designed to strengthen your sales process and expertise.



**Lead generation and management:**

Get help with lead generation campaigns and management tools to build and maintain a robust sales pipeline.

## Operational services

We provide a range of operational services to ensure a seamless partnership experience:



**Efficient ordering and delivery:**

Place orders easily and receive timely updates on your delivery status.



**Comprehensive support:**

Access technical and customer support, including a dedicated Partner Success Manager for personalized assistance.



**Resource library:**

Utilize our extensive resource library for documentation, training materials, and FAQs.



**Project management and consulting:**

Get assistance with project planning, implementation, and consulting services to optimize your use of proMX 365 Productivity Suite.

## Legal and compliance

To ensure a successful and secure partnership, proMX and our partners adhere to several key agreements:



**Non-Disclosure Agreement (NDA)**

The NDA is crucial for maintaining confidentiality between proMX and our partners. It ensures that sensitive information shared during the partnership remains protected and is not disclosed to unauthorized parties.



**Partner agreement**

The Partner agreement outlines the terms of our collaboration specifically related to product licenses. It details the licensing terms, usage rights, and any associated obligations to ensure a clear understanding and smooth operation of licensed products.



**Collaboration agreement**

This agreement is specific to collaborative projects between proMX and our partners. It details the terms and conditions for working together on initiatives, including project goals, timelines, and resource allocation.