



HOW TO SELL EAGLE

*Smartapps partner
sales guide*



Introduction and purpose of this guide

This guide is designed to help SmartApps for D365 partners confidently sell Eagle to their customers.

It includes:

- How to identify the right customer type
- How to position the apps effectively
- What value drivers to emphasize
- How to talk about upgrades from Eagle Free
- Selling tips and objection handling
- Key product information simplified for sales conversations

The goal is to give partners the clarity, structure, and confidence needed to turn discovery calls into successful Eagle deals.



Customer mapping: The three customer types

Before selling Eagle, it is always best to figure out what type of customer they are speaking to. The recommended segmentation is:

Customer type 1

**Multi company
customer**

Customer type 2

**Single-company
customer**

Customer type 3

**Customers currently
using Eagle Free**

	Multi-company customer	Single-company customer	Currently using Eagle Free
Examples:	Accounting firms, shared service organizations, groups/holdings with multiple legal entities.	“Regular” companies, companies with traditional finance operations.	Users who don’t yet understand the full value of automation, KPIs, or multi-company capabilities.
What matters most to them:	Centralized operations, efficiency across multiple companies, reduced time switching between companies, scalable solutions that grow.	Workflow automation, month-end close efficiency, transparency and audit trail, less dependency on specific individuals.	Understanding the difference between Free and Full, why staying on Free will limit efficiency.

Deep dive: How to sell Eagle

Partner playbook by customer type

This section is designed to help partners confidently position Eagle depending on who they are talking to.

Each customer type has specific goals, pains, and buying triggers — and Eagle should be presented differently for each.

Below you get:

- The angle you should take
- What pains to surface in discovery
- What benefits to emphasize
- Exact sales arguments
- Closing arguments

Selling Eagle to multi-company customers

The angle

Sell Eagle as a **centralized, multi-company accelerator** that dramatically reduces time, increases standardization, and simplifies operations across entities.

These customers care most about:

- Efficiency across companies
- Standardized processes
- Reduced manual effort
- Scalability
- Clear reporting and comparability



Discovery questions (pains to surface)

Ask questions that **reveal friction**

- “How do you currently switch between companies in BC?”
- “Do you manage routines separately per company?”
- “Do you want standardized processes across all entities?”
- “How do you ensure consistency in KPIs, reporting or monthly routines?”
- “Is it easy for you to compare companies or consolidate information?”
- “As you add more entities, what becomes most difficult?”

These usually reveal:

- ⚠ Lost time switching login context
- ⚠ Inconsistent processes between companies
- ⚠ No central way to manage recurring tasks
- ⚠ Difficult to scale without hiring more staff

Benefits to emphasize

Focus on cross-company power:

- Eagle lets you run finance processes across all companies at once
- Switch companies instantly — no repetitive login/logout
- Build one standard process and apply it everywhere
- Standardized KPIs & reporting → more control and comparability
- Onboard new companies in minutes instead of days
- Dramatically reduced month-end close effort

Sales arguments

- “Eagle pays for itself quickly in multi-company scenarios because the time saved multiplies across every company.”
- “Instead of doing the same task 15 times for 15 companies, you do it once.”
- “It becomes possible to scale without increasing headcount.”
- “Your controllers will love that they no longer need to jump between companies all day.”
- “Eagle unifies the way your group works — one process, one standard, one method.”

Closing Argument

“With multiple companies, you multiply the benefits of Eagle. What saves 5 minutes in one company saves hours across all of them. You gain control, standardization, and scalability that simply isn’t possible in standard BC.”



Selling Eagle to single-company customers

The angle

Sell Eagle as a [process automation and insight tool](#) that removes manual work, reduces reliance on Excel, and brings structure to month-end.

These customers care most about:

- Automation
- Efficiency
- Less manual work
- Reliable KPIs and dashboards
- Clear responsibilities during month-end



Discovery questions (pains to surface)

Ask things that expose the messy parts of their finance process:

- “How many steps of your monthly routines are still manual?”
- “Do you rely heavily on Excel for KPIs or reconciliations?”
- “How do you keep track of who is responsible for each step of the close?”
- “Do you have clear dashboards that you trust?”
- “How much time does your team spend gathering data rather than analyzing it?”

These usually reveal:

- ⚠ A lot of copy-paste work in Excel
- ⚠ No structured monthly close workflow
- ⚠ KPIs manually updated
- ⚠ Finance lacks real-time insight
- ⚠ No audit trail on tasks or reconciliations

Benefits to emphasize

Focus on the automation + control theme:

- Automated monthly routines reduce manual workload
- Intelligent dashboards = no more Excel KPI sheets
- Clear ownership: who does what and when
- Remove manual exports/imports
- Better compliance and auditability
- Faster month-end close with fewer errors

Sales arguments

- “Your finance team spends too much time collecting data and too little time analyzing it. Eagle flips that.”
- “You get real-time KPIs that update themselves — no more Excel reporting.”
- “Eagle brings structure and clarity to your month-end close.”
- “Automating your routines means fewer errors and more time saved.”



Closing Argument

“If you want a faster, more controlled, and less manual finance process — without adding staff — Eagle is the simplest and strongest way to get there.”



Selling Eagle to customers using Eagle Free

The angle

Sell the upgrade by showing the limitations of Free and demonstrating that they are already losing efficiency by staying on it.

These customers care most about:

- Cost justification / ROI
- Understanding what they're missing
- Growing beyond the Free version's limits
- Expanding to more companies or more automation



Discovery questions (pains to surface)

Ask questions that help them self-realize that Free isn't enough:

- “Are you planning to add more companies?”
- “Do you wish your month-end routines were more automated?”
- “Are you missing more advanced KPIs?”
- “Are your reconciliation processes still manual?”
- “Do you need better reporting or cross-company control?”

They often admit:

- ⚠ They are outgrowing Free
- ⚠ They want automation
- ⚠ They want more KPIs
- ⚠ They want multi-company support
- ⚠ They know manual work is costing them time

Benefits to emphasize

Focus on what they're losing by staying on Free:

- Free = single company only
- Free = limited KPIs
- Free = no automation workflows
- Free = no reconciliation expansion
- Free = no multi-company scalability

Sales arguments

- “Eagle Free is a great start, but you’re doing too much manually now.”
- “With Full Eagle, all the processes you’re manually repeating today become automated.”
- “The time you save every month exceeds the cost of upgrading.”
- “You’ve already proven the value of Eagle — now you just need the full power.”



What Eagle Free users miss out on

Multi-company support

Eagle Free is limited to one company only.

Any company growing or managing more than one entity must upgrade to unlock full efficiency.

Workflow Automation

Free has very limited automation.

Full Eagle enables process automation across all finance routines.

Advanced KPI Framework

Free version provides only basic KPIs.

Full Eagle unlocks the full analytical framework.

No Reconciliations for Eagle Access

Reconciliation automation is not available in Eagle Free.

Closing Argument

“You’ve seen what Eagle can do. Upgrading isn’t a leap — it’s simply unlocking the full version of what you’re already using and already benefiting from.”



Key objections & How to handle them

Objection

Response

“We already use Excel for reconciliations.”

Excel is flexible but not controlled. Eagle keeps everything inside BC with audit trail, ownership, and automated data gathering.

“We are only one company today.”

Eagle isn't just a multi-company solution. It automates recurring processes no matter your size.

“We already have a reconciliation tool.”

Do you need to export data to that tool? With Reconciliations for Eagle everything stays inside BC — no syncing, no double handling, lower risk.

“We don't have time for implementation.”

Setup is straightforward and can start small (one reconciliation type or one workflow). The time saved long-term outweighs the small initial setup.

