MSP Resource: Strategy for Shifting Customers from a Bundled Service to a Paid Plan

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Although we don't lead with it for our MSP Partner Program, Dynasend offers a deep array of features and flexibility, qualifying it as "enterprise-level" software and putting it on par with competitors such as CodeTwo and Exclaimer.

Our approach is to provide Dynasend in varying "levels", with the levels being determined by the program editing approach required. These levels are:

- **Basic**: Our *Guided Setup* process is a DIY widget that is easily used by anyone and provides a very solid, but somewhat generic, email signature program.
- **Intermediate**: Our *Signature Builder* opens the platform to almost unlimited modifications via a reasonably complex editor capability (some degree of understanding / learning curve is required to produce a good result).
- **Advanced**: Our *Liquid* editor is designed for unlimited formatting flexibility, requiring the creation of HTML signature code, written from scratch or manually modified from existing code. This is best used by someone with expertise in writing HTML for email.

A point will likely come when **a customer requests modifications to their signature program that requires you to elevate their program** from our basic *Guided Setup* program editor to our intermediate *Signature Builder* program editor. This is the clear delineation point where it makes sense to **shift the customer** from a service that you provide as a part of your standard bundle **to an individually paid service**.

Why is this the inflection point? Simply put, it is at this point where you will commence with doing real work on the customer's signature program.

While the customer's program remains at the basic, *Guided Setup*, level, our customer-facing roles "Designer" or "Manager + Designer" allow the customer to directly make edits to their signature program as needed.

However, the instant **they want something that exceeds the feature set** that's available under *Guided Setup*, the ball is in your court, and **you will now be actively managing change requests on their behalf** (probably at the *Signature Builder* level). This is the perfect time / opportunity to shift them to a paid plan.

In our 27 years of experience, it is exceedingly clear that **the email signature program quickly takes on significant value in the eyes of the customer**. Your request to upgrade them to a "paid" service, in exchange for adding whatever features they want, will generally be an easy one for them to approve.