



Customer Journey-in-a-Box | Playbook

# Modern Work & Security for SMB M365 Business Premium

January 2023



For every \$1 of Microsoft revenue partners in Western Europe sell, customers purchase an additional average of \$6.70 of the partner's services and products.

**\$1 =**  
USD



**\$6.70**  
Western Europe



**\$6.10**  
Total (Worldwide)



For every \$1 of  
Microsoft revenue

Resale-led  
partners make  
**\$2.21**  
in economic value

Services-led  
partners make  
**\$5.75**  
in economic value

Software-led  
partners make  
**\$7.86**  
in economic value

# Customer Journey Insights

For partners serving small and medium businesses (SMBs), the work-from-anywhere world creates new opportunities to provide value-added managed services to customers to enable their digital transformations. With [Microsoft 365 Business Premium](#), partners like you can create standardized managed services offerings around remote access, productivity, and security that can deliver an ongoing revenue stream and profitability

## ⚡ Priority

- Modern Work & Security for SMB – Microsoft 365



## Segment

- SMB
- Scale



## Solution Area

- Modern Work
- Seamless Security for SMB

## ★ Hero SKU

- M365 Business Premium

## 📈 Up/cross sell path

- M365 E3 or E5 suites

## 📊 KPIs

- Premium Mix
- #Premium EOP seats
- ARPU
- Customer Adds

## Audience

### Customer targeting

#### Premium Upsell

- Microsoft 365 Business Basic, Business Standard users (up to 300 seats) who want to upgrade to better Security & Productivity features
- Single point-solution users (for example, Exchange Online, Defender for Business)
- Customers using On-Premise assets that see an opportunity to move to Cloud

#### Premium Acquisition

- Productivity & Security Compete users, that could benefit from a unique solution that provides best in class integrated Productivity and Security tools

**Fall-back option:** customers that are not ready or interested to move to the full M365 suite, can consider Business stand-alone SKU, like **Defender for Business** as an option to improve their endpoint security posture and management, or **Teams Essentials**, to upgrade their productivity and collaboration tools.

### Buyer Persona

- BDM audience to land “Do More with Less” message. **Pitch: Business decision maker**
- Technical audience to showcase value of M365 Business Premium, feature by feature. **Pitch: IT decision maker**

## Campaign material

### Workshops for SMB customers

Partners can drive 1 to many workshops with SMB audience and earn through the [Cooperative Marketing Funds](#) program. Learn more [here](#).

Download the assets

- [Do More With Less in SMB Workshop](#)
- [Microsoft Defender for Business](#)
- [Teams Essentials](#)

### Seamless Security for SMB

- Visit the [M365 Business Premium](#) partner portal and learn how to build a profitable managed services practice.
- Get familiar with [M365 Lighthouse](#) to proactively manage your CSP customers security posture.

### Marketing Campaigns

- Digital Marketing Content (DMC): [M365 & Security & Do More With Less](#)
- [Download these social assets to drive demand generation for your workshops](#)

# Partner

## Criteria

- ✓ **Cloud Solution Providers** leveraging Microsoft New Commerce Experience
- ✓ Partners with **large Installed Base of Microsoft 365 Business Basic, Business Standard, and single point-solution or Security Compete users.**
- ✓ Partner that want to build and add a **Managed Service practice in the Security** field for their customers.
- ✓ **MCI Build Intent Workshops Partner Eligibility Criteria**
  - Partner Agreement: Microsoft Partner Network Agreement
  - Program Enrollment: Microsoft Commerce Incentives
  - Partner Qualification: Specific by Workshop. [Check Microsoft Commercial Incentives Guide](#)

## Skilling and enablement

### Modern Work SMB Practice Development

- [SMB Go To Market Partner Portal](#)
- [Modern Work Practice Development Guide](#)
- [Security & Identity Practice Development Guide](#)
- [Virtual workshops and training](#)
- [Small Business Resources Center](#)
- [Microsoft 365 SMB new customer, upsell, and CSP legacy to CSP new commerce renewal promo FAQ](#)
- [Microsoft Modern Workplace Plays for SMB](#)
- [SMB Workshops](#)
- [SMB Masters Program](#)

### Partner Enablement Guides

- [Modern Work](#)
- [Security, Compliance and Identity](#)

### Partner Playbooks

- [M365 Business Premium](#)
- [Microsoft Defender for Business](#)
- [M365 Lighthouse](#)
- [Project Orland](#)

### Additional resources

- [Go-To-market Toolbox](#)
- [Partner led marketing guidelines](#)

## 3 questions you should ask the customer:

- Do you want to safeguard your business with built-in security you can trust?
- Do you want your employees to be productive anywhere?
- Do you want one solution that integrates chat, call, online meetings and collaboration in real time?

# Customer Journey

## Tactics

## Funding & Incentives



Listen  
& Consult

Demand Gen Campaigns

- Digital Campaigns / Webinars / Events
- Leverage the Marketing BOM to create demand gen campaigns to drive customers to the 1:few workshops.

DMC Campaigns:

- M365 & Security
- Do More with Less

Project Orland customer lifecycle management

- Demand gen activities are eligible for Cooperative Marketing Funds
- Check availability of trough Partner Marketing funds in your corresponding Microsoft subsidiary



Inspire  
& Design

SMB 1:few Workshops

- Drive upsell of SMB customers to Microsoft 365 Business Premium
- and cross-sell or acquisitions of new SMB customers to Defender for Business

Modern Work & Security Assessments

MCI Build Intent Workshops for 1:1 engagement with eligible Scale customers

- Up to 1K\$ available for partners executing workshops through Coop funds program
- Up to 2K\$ for eligible partners executing Do More with Less Workshops Program (by invitation only)
- Solutions Assessment funding not available until end of June 2023
- MCI Build Intent Workshops: \$3,5K up to \$5K depending workshop



Empower  
& Achieve

Microsoft 365 Trial

- Offer 30-day free trials. You can sign up for the trials in the catalog just like many other online services. All partners can participate.



Realize  
Value

Check available Global CSP Incentives here

- Do More with Less Promo on available for all Business SKU
- CSP Security QoQ Growth Incentive available for Premium acquisitions and Upsell (WE Only) – Ask your Microsoft representative to share more details on local campaigns



Manage  
& Optimize

Offer a Security Managed Service practice with M365 Lighthouse.

Online Services Usage M365: Starting at \$2K for Teams Meetings and Intune small deals. Rate card for details.