The MSP’s Guide to Selling M365
How to Position Microsoft 365 and Effectively Target the Right Clients
About This Guide

This guide breaks down the features and benefits of Microsoft 365 and provides advice for selling it to your clients.

What is M365?
Productivity + Security ................................................................. 3
Breaking Down the Features & Functions ....................................... 4
Comparing Microsoft 365 Plans ...................................................... 5

Why Move to M365?
Modernizing the Workplace .......................................................... 6
Calculating How You’ll Earn More .................................................. 7

Selling the Solution
Client Targeting ............................................................................ 8
Sample Email Template ................................................................. 9
WHAT IS M365?

Productivity + Security

Microsoft 365 Business Premium offers a single, integrated technology solution that combines the Office productivity apps users know and love with granular device management and best-in-class security features, such as ATP and Windows Defender. Designed for the needs of small to mid-sized businesses, M365 empowers your clients to communicate and collaborate while keeping their data protected.

Office 365

PRODUCTIVITY

OFFICE APPLICATIONS
Word, Excel, PowerPoint, Outlook, and more

ONLINE SERVICES
Exchange, OneDrive (1 TB), Teams, and more

ADVANCED SERVICES
Exchange Online Archiving

ADVANCED SECURITY

EXTERNAL THREAT PROTECTION
Microsoft Defender for O365
Multi-Factor Authentication
Enforce Windows Defender to be on
Enforce BitLocker to be on

INTERNAL DATA LEAK PREVENTION
Data Loss Prevention
Azure Information Protection

DEVICE MANAGEMENT

DEVICE MANAGEMENT
Microsoft Intune
Windows 10 Credential Guard
SSO > 10 Apps
Conditional Access
Shared Computer Activation

DEPLOYMENT ASSISTANCE
Windows Autopilot
Azure Information Protection
Auto-Installation of Office Apps
AAD Auto-Enroll
WHAT IS M365?

Breaking Down the Features & Functions

Advanced Security Features

Microsoft Defender (formerly Advanced Threat Protection): Cloud-based email protection against malicious links, phishing, and spoofing.
Multi-Factor Authentication (MFA): Safeguards access to apps and data by requiring a second form of authentication.
Data Loss Prevention (DLP): Identifies, monitors, and automatically protects sensitive information across many locations.
Windows Exploit Guard Enforcement: Protects devices from ransomware and malicious websites at device end points.

Data Protection & Compliance

Azure Information Protection (AIP): Controls and manages how sensitive content is accessed by providing classification labels on documents and email.
Exchange Online Archiving: 100GB archiving and preservation policies help recover data and remain compliant.
BitLocker Enforcement: Encrypts data on devices to protect it if devices are lost or stolen.

Device Management

Intune: Manages devices and apps from the cloud, protecting company information on employee devices.
Single Sign-On (SSO): Allows users to access multiple applications and resources by logging in only once, with one account.
Active Directory (AD): Manages permissions and access to shared network resources such as servers, printers, and user accounts.
Autopilot: Simplifies the new device configuration and deployment process for IT and end users.
WHAT IS M365?

Comparing Microsoft 365 Plans

<table>
<thead>
<tr>
<th>FEATURES</th>
<th>Microsoft 365 Business Standard</th>
<th>Microsoft 365 Business Premium</th>
<th>Microsoft 365 E3</th>
<th>Microsoft 365 E5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated retail price per user per month (USD with annual commitment)</td>
<td>$12.50</td>
<td>$20</td>
<td>$32</td>
<td>$57</td>
</tr>
<tr>
<td>Maximum number of users</td>
<td>300</td>
<td>300</td>
<td>unlimited</td>
<td>unlimited</td>
</tr>
<tr>
<td>Office Apps</td>
<td>Install Office on up to 5 PCs/Macs + 5 tablets + 5 smartphones per user Word, Excel, PowerPoint, OneNote, Access, Office Online</td>
<td>Business</td>
<td>Business</td>
<td>ProPlus</td>
</tr>
<tr>
<td>Email Archiving</td>
<td>Exchange Online Archiving</td>
<td>100GB</td>
<td>unlimited</td>
<td>unlimited</td>
</tr>
<tr>
<td>Email &amp; Calendar</td>
<td>Outlook, Exchange Online</td>
<td>50GB</td>
<td>50GB</td>
<td>100GB</td>
</tr>
<tr>
<td>Hub for Teamwork</td>
<td>Chat-based workspace, online meetings, and more in Microsoft Teams</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>File Storage</td>
<td>OneDrive for Business</td>
<td>1TB/user</td>
<td>1TB/user</td>
<td>unlimited</td>
</tr>
<tr>
<td>Social, Video, Sites</td>
<td>Yammer, SharePoint Online, Planner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Apps</td>
<td>Scheduling Apps – Bookings; StaffHub</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Threat Protection</td>
<td>Microsoft Advanced Threat Analytics, Device Guard, Credential Guard, App Locker, Enterprise Data Protection</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identity Management</td>
<td>Self-service password reset for hybrid Azure Active Directory accounts, Azure MFA, Conditional Access</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Device &amp; App Management</td>
<td>Microsoft Intune, Windows Autopilot</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Protection</td>
<td>Office 365 Data Loss Prevention, Azure Information Protection Plan 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compliance</td>
<td>Unlimited email archiving</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analytics</td>
<td>Power BI Pro, MyAnalytics</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Most of your clients are probably using the Office suite for their productivity needs and may not be familiar with the additional benefits that M365 Business Premium offers. M365 Business Premium includes all the Office apps, such as Outlook, Word, Excel, and Powerpoint, that users are familiar with using in their day-to-day work, but offers additional capabilities in several key areas:

**Advanced Security**
Office 365 is the #1 target for phishing attacks, and it doesn’t provide the more advanced security solutions needed to fully detect and prevent phishing attacks.

- **48% of malicious email attachments are Microsoft Office files**

**Data Protection and Compliance**
Microsoft 365 Business Premium checks all the boxes for data protection and compliance with HIPAA and PCI. It also aligns well with the functions of the NIST Cybersecurity Framework.

- **90% of SMBs do not use data protection for company and customer information**
- **31% of SMBs say they do not comply with any security guidelines or standards**

**Windows 10 OS Upgrade**
Microsoft’s Windows 7 End-of-Support took effect on January 14, 2020. To avoid the security risks of an unsupported OS, your clients on Windows 7 need to upgrade to Windows 10, which they can do automatically by moving to Microsoft 365 Business Premium.

**Device Management**
Microsoft 365 Business Premium’s granular device management enables businesses to securely communicate and collaborate with team members anytime and anywhere.

- **39% of the global workforce is mobile**
- **45% of business-critical applications are accessed by mobile devices**

**Windows 7 Support Ended - Now What?**
Microsoft stopped supporting Windows 7 on January 14, 2020, leaving clients open to security risks. However, you can easily upgrade to Windows 10 by moving clients to Microsoft 365 Business Premium.

Check out the Windows 7 End-of-Support Guide to learn more.
WHY MOVE TO M365?

Calculating How You’ll Earn More

Earning more margin has never been easier! The Pax8 + Microsoft CSP incentives reward Pax8 partners for driving the activation and enablement of clients using Microsoft. All you need is a Silver or Gold Microsoft competency to get started.

Moving Clients From O365 E3 to M365 Business Premium

US-based Pax8 partners who upgrade clients from Office 365 E3 to Microsoft 365 Business Premium can receive global and local accelerators on top of your core incentive rebates. If you have valid subscriptions, you will get an additional $.80 in your pocket for every client you upgrade.

1. Standard Core Incentive – O365, M365 4%
2. Global Strategic Product Accelerator – M365 Business Premium 5%

5% Additional Margin

Core Incentives + Accelerators

- O365 E3 Incentives = $0.64/user
- M365 Business Premium Incentives = $1.44/user

3. Total Increase = $.80 on every seat
SELLING THE SOLUTION

Client Targeting

M365 has a LOT of functionality, so instead of overwhelming clients with a long list of features that they may not even understand or care about, you should position the value and benefits of M365 to clients based on their unique needs, requirements, and experiences.

POTENTIAL VALUE-SELLING SCENARIOS:
- Clients with remote workers, BYOD policies, or multiple locations will benefit from the device management features of Intune
- Clients with high employee turnover will care about the ability to remote wipe devices
- Clients who have experienced a data breach will be concerned about improving security
- Clients in regulated industries be able to utilize features that enable compliance

“Each time we’ve described what’s included with Microsoft 365, clients want to move forward, recognizing immediately the value to their business, security, and success.”

Daniel Johnson, President of machineLOGIC

TARGET MEDIUM CLIENTS
- Focus on SMBs with 25-300 seats
- Look for clients with compliance requirements (e.g. healthcare, financial services, legal, consulting, and manufacturing)

CHOOSE A PROFILE
- M365 Business Standard (formerly known as O365 Business Premium) clients
- O365 E3 clients
- Clients with EMS + competitive security solutions (could benefit from consolidation)
- Clients on legacy Office and Windows

USE MARKET MOMENTS
- Security is top-of-mind for businesses of all sizes
- Windows 7 reached End-of-Support in January 2020
- GDPR and other regulations are forcing SMBs to consider compliance

wingman@pax8.com | +1(855) 884-8298 | pax8.com
SELLING THE SOLUTION

Sample Email Template

While we don’t recommend blasting your entire client base, sending an email to a targeted list of your Microsoft clients who are a good fit for M365 Business Premium can be a great way to start a conversation about why moving to M365 makes sense. Below is a sample email template you can customize for use with your clients – and feel free to reach out to your Pax8 Wingman for assistance on talking about M365!

Dear [CLIENT CONTACT FIRST NAME],

Cyber attacks targeting small and medium businesses are on the rise, and we want to make sure your business stays safe while remaining as efficient and productive as ever.

That’s why we strongly recommend that [CLIENT COMPANY NAME] upgrades to Microsoft 365 Business Premium. It combines the Office productivity apps you already use and love, with the following security and device management features:

- **Advanced Security**: keeps your data and users safe with Multi-Factor Authentication, email protection, and more.
- **Device Management**: ensures your users have access to the devices and applications they need, when and where they need it, with Microsoft Intune and shared computer activation.
- **Windows 10**: provides an always-up-to-date and secure operating system.

To keep our clients secure, [MSP NAME] plans to move all of our Microsoft clients to M365 Business Premium within the next two months, unless they choose to opt out of the upgrade.

Let’s set up a call to discuss next steps. What’s your availability this week?

We appreciate your business and highly encourage you to make this move to protect your systems, data, employees, and customers.

Thanks,

[MSP NAME]
Pax8 is here to help.

Pax8 is here to help.

**SELLING THE SOLUTION**

**Other Resources**

**ATTEND:**
- Pax8 + Microsoft Bootcamp – 2-Day M365 Bootcamp

**OPTIMIZE:**
- Microsoft – The Pax8 CSP Program

Want to discuss moving your clients to M365?

**Pax8 is here to help.**

**Schedule a Call**

**SOURCES**

1. Pax8, 8 Steps to Secure Microsoft 365
2. UPS Capital, Hacked: Just Because It’s In the Cloud, Doesn’t Mean the Bad Guys Can’t Reach It