**Sales guide**

# Microsoft 365

A step-by-step guide to reselling for VARs and MSPs

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Microsoft 365

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# Introduction

Microsoft 365® is one of the most well-known cloud solutions on the market. Microsoft® reported in March 2016 that there were 1.2 billion users worldwide using an Office product or service. Of those, it says 60 million are active Microsoft 365 commercial customers, with 50,000 small business customers being added monthly.

For many organizations considering a move to the cloud, Microsoft 365 is an obvious place to start; they already know the value of many of the apps because they use them every day. Accordingly, reselling Microsoft 365 can be a good way for value added resellers (VARs) and managed services providers (MSPs) to start to build a cloud practice.

# Why resell Microsoft 365?

Nearly four in five (78%) of enterprises are using or planning to use Microsoft 365, according to a survey from Gartner. The momentum for Microsoft 365 is also growing among users of on-premises Office software. That's because Microsoft 365 is the platform through which Microsoft plans to deliver its next-generation unified communications and collaboration tools. According to Gartner analysts — "For most enterprises, it's no longer a question of whether they should implement Microsoft 365 services — it's a question of which ones, in what order and how."

That's where you come in. Most companies are going to need guidance on how to migrate to Microsoft 365, and manage it afterwards. You're already a trusted IT adviser to your existing clients, so it only makes sense for you to educate and help them move to Microsoft 365. Your advice could be the difference between a good and bad customer experience, not to mention ROI, if you bring the right expertise and technology partner to the table.

**Percentage of enterprises using or planning to use Microsoft 365**

**78%**
2016

**64%**
2014
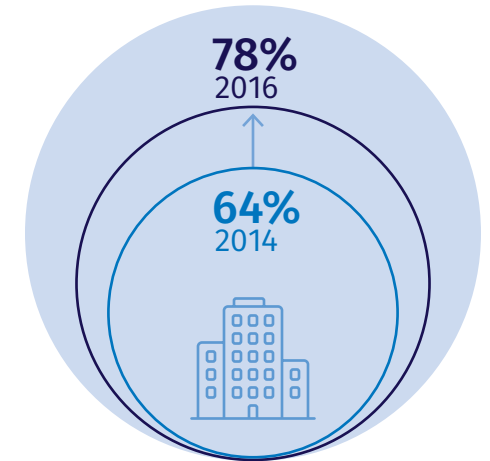
# Partner benefits of selling Microsoft 365

The revenue business relationship opportunities associated with reselling Microsoft 365 are numerous:

### Account protection
Prevent clients from moving to the cloud without you by going direct or with another reseller.

### New recurring revenue
Earn monthly recurring revenue from markups on Microsoft 365 subscriptions from your preferred Microsoft Cloud Service Provider like Rackspace Technology.

### More recurring revenue
Add-on cloud services from your preferred Microsoft Cloud Service Provider like Rackspace Technology.

### Professional services fees
Charge consulting fees for assessing customer needs, planning the migration, implementing the solution, etc.

### Ongoing support contracts
Maintain the customer connection and recurring revenue by fielding requests for adds/moves/changes and help-desk support.

### Customer retention
Avoid costly churn with layered solutions that solve business problems.
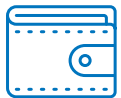
### Increased walletshare
Get more of your customers' overall IT spend by offering a suite of solutions.

## What can you learn from this Microsoft 365 sales guide?

Like any new product or service you've added to your portfolio, you have to learn how Microsoft 365 works, and how to sell and implement it successfully. That means doing some homework. If you're thinking a few shortcuts might be helpful, you've come to the right place.

We've cut through the clutter to give you the essential information you need about selling Microsoft 365 in a format that aligns with your sales process. Each section focuses on a step in the sales lifecycle that you follow every day — with plenty of handy checklists and diagrams to help you through your initial sales of Microsoft 365.



**The Sales Cycle**

Step 1: Understand the solution
Step 2: Identify prospects
Step 3: Connect with client
Step 4: Assess client needs
Step 5: Sign up to resell Microsoft 365 through Rackspace Technology
Step 6: Present the solution
Step 7: Handle objections
Step 8: Close the sale
Step 9: Implement the solution
Step 10: Follow up

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# Step 1: Understand the solution

The first step in the sales lifecycle is to understand the features and benefits of the solution. As you're engaging with customers, try to avoid getting so caught up in the mechanics of the solution that you forget to explain how it helps the customer. Use your product knowledge as the foundation for the needs assessment and presentation elements of the sales process. With that in mind, let's look at Microsoft 365, starting with the features and following with the benefits.

## What isMicrosoft 365?

Microsoft 365 is the Microsoft Office Suite and/or email in the cloud. We're referring to the cloud-enabled versions of Microsoft Office productivity applications, plus email and additional online services for both home and business. All Microsoft 365 plans are paid for on a subscription basis. Microsoft 365 for Business plans include various combinations of popular Microsoft Office applications, as well as other online services.

## Microsoft 365 applications and services

*Standard features*

**Outlook®**
Email client and calendar

**Word®**
Word processing

**SharePoint®**
Collaboration

**OneDrive**
File sharing

**Access**
Database

**Skype®**
IM, conferencing, collaboration

**Excel®**
Spreadsheet

**Powerpoint®**
Slide presentations

**OneNote®**
Shared notebooks

**Exchange**
Email server

**Publisher**
Graphic design

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## Microsoft 365 applications and services

*Advanced features*

- **Delve:** Data & content discovery
- **Yammer:** Enterprise social networking
- **Teams:** Group chat-based workspace
- **Power BI:** Data analytics
- **Visio:** Diagrams & charts
- **Project:** Project management
- **Sway:** Interactive content
- **Bookings:** Appointment scheduler
- **Dynamics:** Customer relationship management

## What are popular add-on solutions for Microsoft 365?

Increase the value of Microsoft 365 for your customers with affordable add-on solutions — available exclusively from Rackspace Technology — that help your customers address their compliance, regulatory and security concerns.
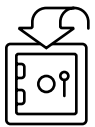
### Unlimited email storage and retention
Add Rackspace Email Archiving for Office 365 to any plan to help your customers address regulatory compliance requirements.

### Data encryption and protection
Add Microsoft Azure Rights Management to any plan to get advanced message encryption, content filtering and data loss prevention (DLP).

## What are the most popular Microsoft 365 business plans?

Microsoft 365 for Business applications can be purchased individually or as packages based on needs and business size.

For small and medium businesses (SMBs) with less than 300 users, there are two plans:

### Business Essentials
Exchange email, online versions of Office, 1TB OneDrive storage and file sharing, Yammer corporate social networking and Active Directory integration

### Business Premium
All the features of Business Essentials plus a full-featured productivity suite including a 50GB Exchange mailbox, collaboration tools, and the full Microsoft Office suite.

For organizations with more advanced needs or a large number of users, Rackspace Technology offers three Microsoft 365 plans:

### Enterprise E1
Exchange email, online versions of Office, 1TB OneDrive storage and file sharing, Yammer corporate social networking, Active Directory integration, Delve search and discovery, enterprise management of applications, Advance Skype for Business (Internet broadcast for up to 10,000 people) and Intranet site for teams

### Enterprise E3
All the features of E1, plus the full Office suite, data loss prevention and the complete suite of eDiscovery tools.

### Enterprise E5
The most comprehensive Microsoft 365 offering, including Exchange, Office, and SharePoint, plus audio conferencing, threat intelligence, advanced analytics, and more.

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# Rackspace Microsoft 365 business plans

| | Business | | Enterprise | | |
|---|---|---|---|---|---|
| | **Essentials** | **Premium** | **E1** | **E3** | **E5** |
| Price (per user, per month)* | $8.00 | $15.00 | $11.00 | $23.00 | $38.00 |
| Max users | 300 | | Unlimited | | |
| Free email migration (up to 250 users) | ✔ | ✔ | ✔ | ✔ | ✔ |
| Always-on support | ✔ | ✔ | ✔ | ✔ | ✔ |
| No long-term contracts | ✔ | ✔ | ✔ | ✔ | ✔ |
| Fully Installed versions of Outlook, OneNote, Word, PowerPoint, Publisher, Excel | | ✔ | | ✔ | ✔ |
| Online versions of Outlook, OneNote, Word, PowerPoint, Publisher, Excel | ✔ | ✔ | ✔ | ✔ | ✔ |
| Mobile versions of Outlook, OneNote, Word, PowerPoint, Publisher, Excel | | ✔ | ✔ | ✔ | ✔ |
| OneDrive for Business (cloud storage) | 1TB per user | 1TB per user | 1TB per user | Unlimited per user *(Minimum 5 Licenses)* | Unlimited per user *(Minimum 5 Licenses)* |
| Exchange (email, calendar, storage) | ✔ *50GB per user* | ✔ *50GB per user* | ✔ *50GB per user* | ✔ *100GB per user* | ✔ *100GB per user* |
| SharePoint (team site, internal portals) | ✔ | ✔ | ✔ | ✔ | ✔ |
| Access (database) | | ✔ | | ✔ | ✔ |
| Yammer (corporate social network) | ✔ | ✔ | ✔ | ✔ | ✔ |
| Delve (personalized search and discovery across Office) | ✔ | ✔ | ✔ | ✔ | ✔ |
| Active Directory integration | ✔ | ✔ | ✔ | ✔ | ✔ |
| Compliance (native archiving, eDiscovery and mailbox holds) | | ✔ | ✔ | ✔ | ✔ |
| Azure Rights Management (message encryption, info rights management, data loss prevention) | Optional | Optional | Optional | ✔ | ✔ |
| Enterprise Management of apps (group policy, telemetry, shared computer activation) | | | ✔ | ✔ | ✔ |
| Intranet site for teams with customizable security settings | | | ✔ | ✔ | ✔ |

* All prices are Rackspace Technology retail pricing; reseller discounts apply.

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# Does Microsoft 365 work for mobile businesses?

Many Microsoft 365 plans include the desktop version of the latest Office applications, including Word, Excel, PowerPoint, OneNote, Outlook, Publisher and Access. (Publisher and Access are available on PC only.) And you can install them across multiple devices, including PCs, Macs, Android tablets, Android phones, iPads and iPhones.
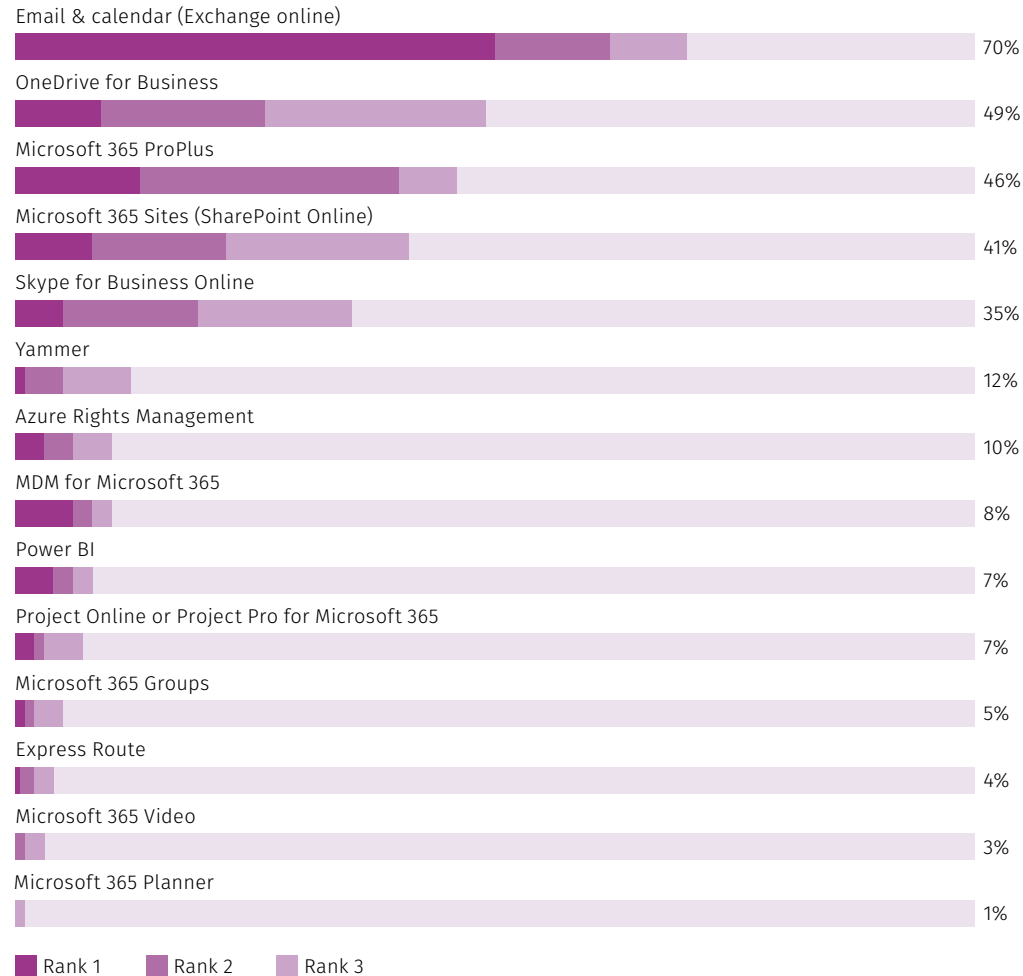
## Microsoft 365 Works Across Devices

# What are the most important Microsoft 365 capabilities?

A Gartner survey shows that the top-five Office capabilities, in order of importance to users, are Exchange Online, OneDrive, the ProPlus plan, SharePoint Online and Skype for Business.

**What are the top five most important Microsoft 365 capabilities that your organization is currently using or plans to use within the next six months?**

| Capability | % |
|---|---|
| Email & calendar (Exchange online) | 70% |
| OneDrive for Business | 49% |
| Microsoft 365 ProPlus | 46% |
| Microsoft 365 Sites (SharePoint Online) | 41% |
| Skype for Business Online | 35% |
| Yammer | 12% |
| Azure Rights Management | 10% |
| MDM for Microsoft 365 | 8% |
| Power BI | 7% |
| Project Online or Project Pro for Microsoft 365 | 7% |
| Microsoft 365 Groups | 5% |
| Express Route | 4% |
| Microsoft 365 Video | 3% |
| Microsoft 365 Planner | 1% |

■ Rank 1    ■ Rank 2    ■ Rank 3

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## What are the benefits of Microsoft 365?

Customers benefit from the performance, breadth of features and continuous rollout of new capabilities offered by Microsoft 365.

### Other benefits include:

**Cost savings**
Microsoft 365 is a bundled cloud service and costs less than typical on-premises solutions.

**Security**
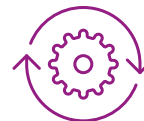Microsoft 365 applications are kept up-to-date on the latest security protocols and hosted in secure data centers.

**Minimal maintenance**
Microsoft 365 requires minimal system administration.

**Future-readiness**
Microsoft 365 includes access to the latest features, functionality and application releases.

**Automatic updates**
Microsoft 365 is updated automatically, so customers don't have to worry about fixes and patches.

**Mobile compatibility**
Microsoft 365 gives users access to their applications from any device connected to the internet.

**Solutions integration**
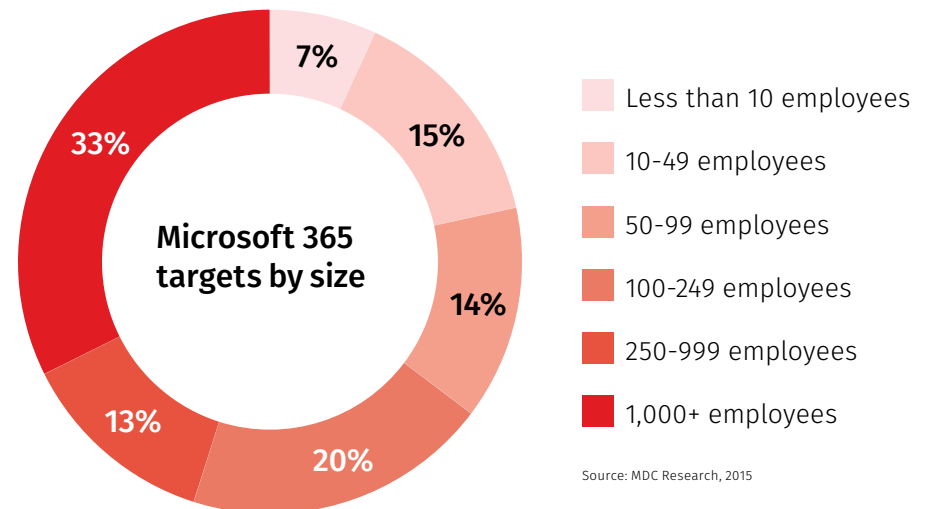Microsoft 365 seamlessly integrates users, devices and data since it's all on the same platform.

**User community**
Microsoft 365 has a large user community, so information on best practices is only a web search away.

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# Step 2: Identifying prospects

The second step in the sales process is to search for customers. Ideally, this is done by mining your prospect and client databases for profiles that align with the attributes of customers who are using the solution you are selling.

## How do I find customers who may benefit from Microsoft 365?



**Microsoft 365 targets by size**

7%
15%
14%
20%
13%
33%

Less than 10 employees
10-49 employees
50-99 employees
100-249 employees
250-999 employees
1,000+ employees

Source: MDC Research, 2015

It's been suggested that any company that uses email is a potential customer for Microsoft 365. That may be true, but to maximize your sales and marketing resources, you'll want to narrow down your target list by running it through a few filters.

One filter might be customer size. More than half of all Microsoft 365 customers have less than 100 employees. That said, there are plenty of enterprises using Microsoft 3655. A more effective "filter" consists of a few queries you can run through your CRM system or pose to an existing client during a follow-up consultation.

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# Ideal targets for Microsoft 365

| If your prospect… | Then Microsoft 365 might be a good fit because… |
|---|---|
| Operates an Exchange server in-house… | They may want to offload server management by moving Exchange to the cloud. |
| Uses Microsoft Office applications… | They already are familiar with the applications and may be interested in eliminating the hassle of upgrades and patches, which are automatic with Microsoft 365. |
| Uses dedicated SharePoint or Skype for Business… | It's included in the Microsoft 365 suite so they can reduce their costs and administrative requirements. Plus, they can add single sign-in for end users. |
| Needs advanced security… | Encrypted email, unlimited archiving and data loss prevention are all easy add-ons for Rackspace Technology resellers. |
| Outsources IT services… | They may be more likely to view cloud-delivered services favorably. |
| Is ready to move to the cloud… | Microsoft 365 offers an effective proof point for the benefits of cloud services. |
| Is growing quickly… | They can scale much more easily with Microsoft 365 than with on-premises software. |
| Employs a mobile workforce that needs to collaborate… | Microsoft 365 enables collaboration among users anywhere on any device that's connected to the internet. Plus, real-time meetings with whiteboard and desktop sharing reduce travel costs. |
| Is facing end of life on support for legacy applications… | This is a great opportunity to upgrade with cloud alternatives for apps like Exchange 2007 and the MX Logic encryption platform. |
| Operates using paper-based processes… | Collaborate across platforms anywhere, anytime. |
| Does not want to manage in-house infrastructure… | Working with a reseller plus a cloud service provider like Rackspace Technology gives a small business the convenience of a local partner along with the engineering and security expertise that may not be obtainable in-house. |
| Wants to get business done faster… | Integrated applications reduce time spent switching between apps. |
| Wants to integrate fragmented applications and processes… | Microsoft 365 applications are designed to work together. |
| Is using and paying for tools such as Dropbox or Webex… | These types of tools already are integrated into Office 365, saving money and time. |

# Step 3: Connect with the client

Armed with target data from the prospecting process, you can tailor your approach to certain segments of your database, specific decision-makers or even to individual companies or buyers.

## How do I initiate a conversation about Microsoft 365 with a potential client?

Based on your research in Step 2, you'll want to decide which prospects to target first. Keep in mind that the narrower your criteria, the more targeted your messaging and approach can be.

Ideally, you'll want to start with buyers you or your team members know personally. Even if they are not the ultimate decision makers, they can make a warm handoff to the individual who is. Unless your prospect is a very small business, it's likely that the decision will be made by more than one stakeholder as well as several influencers representing various user groups within the organization. This is important to understand because it requires you to prepare solution-benefit statements that will resonate with different people who sometimes have competing agendas (e.g., users vs. finance). Your job in this scenario is to help find an advocate (possibly your initial contact) and help them to drive consensus among all stakeholders.

**Company size**
(e.g., SMB, enterprise, etc.)

**Vertical industry**
(e.g., healthcare, education, financial services, etc.)

**Function**
(e.g., sales, marketing, HR, accounting, etc.)

**Decision-maker**
(e.g., CIO, CFO, CEO, CMO, business owner, office manager, etc.)

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Targeted messaging can also be used for cold calling, advertising and content marketing programs. Since these tactics require a considerable amount of effort and expense, consider starting with campaigns focused on targets with which you have had success in the past. For example, if most of your clients are in the healthcare market, your ability to translate their needs to Microsoft 365 solutions is much greater than a vertical you haven't served.

Also, remember that you can take advantage of the sales scripts and marketing tools offered by Rackspace Technology to create ads, presentations, case studies and more that will help you connect with potential clients.

On this page, you'll find examples of messages that might resonate with your target. Finding the right hot buttons for each prospect is critical to getting their attention and buy-in for an initial meeting. You also can leverage this information later in Step 6 when you present the solution.

| Category | Target | Sample pitches focused on business outcomes |
| --- | --- | --- |
| Company size | SMB | • Offload IT headaches<br>• Use enterprise-class applications<br>• Enable remote workers |
| | Enterprise | • Enable collaboration across geographic regions, time zones and users<br>• Offload management of Exchange servers<br>• Focus on more business-impacting IT projects |
| Vertical industry | Healthcare | • Keep up with patient care from anywhere<br>• Get an informed second opinion more quickly<br>• Support regulatory compliance requirements with message encryption, email archiving and information rights management |
| | Financial services | • Run analytics without the help of IT<br>• Store financial data centrally<br>• Support regulatory compliance requirements with message encryption, email archiving and information rights management |
| Function | Sales | • Enable access to the sales knowledgebase and experts from any device<br>• Enable real-time access to updated sales forecasts spreadsheets |
| | HR | • Support video interviews with job candidates<br>• Enable simultaneous collaboration on job descriptions or employee reviews |
| Decision-maker | CIO | • Ensure security for applications and infrastructure<br>• Ensure regulatory compliance |
| | CFO | • Move from capex to opex spending on IT<br>• Move to predictable IT spending<br>• Right size (lower) IT spending per user |
| | CMO | • Enable collaboration with internal and external teams<br>• Enable simultaneous editing of content as well as version control<br>• Enable project management for events and campaigns |

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# Step 4: Assess client needs

Congratulations! You've booked an initial meeting. Now it's time to assess your prospect's needs. The assessment process begins by finding answers to several questions. Unlike the queries in the prospecting phase, the questions in the discovery phase are meant to help you determine which solution will best meet your prospect's requirements and help uncover issues they may not have considered. It's also an opportunity to showcase your solution's features and benefits.

## How do I assess client needs for Microsoft 365?

Because Microsoft 365 is not a single product but a customized bundle of products, the discovery phase can be extensive. Start with a few probing questions to determine the hot-button issues, which will help to justify an initial deployment on which to build further.

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# Discovery questions for Microsoft 365

| Question | Sample answer | Recommendation |
|---|---|---|
| **What applications do you have today?** | We use a lot of the Office software, Dropbox for file sharing, Slack for IM and Vonage for voice calling. | *With Microsoft 365, you can have the same functionality, but eliminate costs for Dropbox, Slack and Vonage by using built-in features in Microsoft 365. Plus, they are designed to work together.* |
| **What are your current pain points?** | We struggle to enable mobile workers to have access to the data and apps they need. | *Microsoft 365 not only allows you to access shared files but it also allows you to collaborate with your teams from any device.* |
| **What are your business/revenue drivers?** | Our primary revenue driver is unrivaled technical support. | *Microsoft 365 apps like Delve can help you share knowledge across your field tech teams to more quickly and effectively serve your customers.* |
| **What are your impending events/ changes?** | We are planning to expand with branch offices in other states. | *With Microsoft 365, you can add users anytime, anywhere and give them access to your apps as well as shared files and collaboration tools.* |
| **Where do you want to be tomorrow and why?** | We want to be known for our customer commitment so that we can reduce churn and grow faster. | *Microsoft 365 offers you tools to improve efficiency of communication within your teams and also with your customers.* |
| **Who manages the applications and infrastructure you have today?** | We have one IT director. | *Sourcing Microsoft 365 through a Rackspace Technology reseller gives you access always-on migration support so that your IT team can focus on higher value tasks.* |
| **How do you prioritize the following?** Cost, business continuity, security, user accessibility and server level access/management | Security is our top concern. | *Good news! Microsoft 365, through a Rackspace Technology reseller, gives you easy add-ons for enterprise-level encrypted email and archiving.* |
| **How do you communicate internally aside from email?** | It depends on who you are talking to — some use Slack, others use Google Hangouts or Skype. | *With Microsoft 365, you can standardize on Yammer for internal messaging or use Teams to collaborate.* |
| **What do you do with unused copies of software licenses after a layoff or employee churn?** | Generally they just go unused until another employee onboards. | *With Microsoft 365, simply remove any unused service and the cost goes away.* |
| **How do your users access applications on the go?** | Presently, they use apps resident on their laptops and access files from Dropbox. | *Microsoft 365 enables users to access applications and the latest data or document versions from any device — desktop, tablet or smartphone.* |
| **How do you manage outages and downtime?** | Our employees can't access their files if our LAN is down. | *By using Microsoft 365 cloud services through Rackspace Technology you can offer your customers 99.9% uptime guaranteed.* |
| **What do you do if data is lost and/or your infrastructure is corrupted?** | We rely on backup tapes to restore lost or corrupted files. | *With Microsoft 365, your data and applications are all in the cloud, so your data is available even if your device or infrastructure is temporarily lost or down.* |

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# Step 5: Sign up to resell Microsoft 365 through Rackspace Technology

## How do I become a Rackspace Technology reseller?

Rackspace Technology makes it easy for VARs and MSPs resell or refer Microsoft 365 through access to proven marketing materials and a dedicated team to help you close deals. Best of all, your customers get award-winning technical support from a reseller-dedicated team of support professionals.

1. Sign up at www.rackspace.com/office-365/resellers
2. Log in to the Rackspace Technology Control Panel and click "Managed Microsoft 365."
3. Follow the enrollment steps to activate the Microsoft 365 reselling capabilities.

# What's the advantage of partnering with Rackspace Technology?

For many Microsoft Partners, qualifying to be a CSP like Rackspace Technology is not realistic. But becoming a Rackspace Technology reseller affords you similar benefits without the investment in systems and processes.

## Customer ownership

Most significantly, as a Rackspace Technology reseller, you get to keep and own the primary business relationship with the customer. The alternative is setting up customers directly with Microsoft. In this scenario, Microsoft gets current revenue as well as future revenue as the customer hires more people or buys more services. Your company, which often provides a majority of the support, risks being cut out of the transaction.

## Leverage

When reselling through Rackspace Technology, you are able to access more resources from Microsoft by leveraging the Rackspace Technology relationship with the software giant. A company like Rackspace Technology, which is a Microsoft Gold Certified Partner and a five-time Microsoft hosting partner of the year, can get Microsoft's attention much more easily than smaller partners.

## Expertise & resources

Rackspace Technology also offers its own resources to its partners. This includes access to Microsoft 365 experts 24x7x365 and a dedicated reseller support team. Rackspace Technology also will help partners with sales including strategy and marketing materials.

## Tools & support

Rackspace Technology offers free email migrations and account management support. Their Control Panel makes customer management easier for partners.
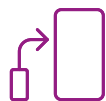
## Upsell solutions

Rackspace Technology has a range of solutions it is creating specifically for Microsoft 365, like encrypted email and archiving. It also offers Azure and Amazon Web Services as well as its own managed cloud services.

## Spiffs

Finally, Rackspace Technology may be able to sweeten the deal by offering sales incentives to its partners, which they can pocket or pass along in addition to any rebates from Microsoft.

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# Step 6: Present the Solution

As mentioned in Step 1, you'll want to focus on benefits instead of features when presenting your recommended solution to your client. Tailor your sales presentation to the perspective of the prospect as much as you can, based on your findings from the needs assessment in step 4.

## What are the key objectives for using Microsoft 365

In addition to the benefits described in Step 1, you should also incorporate the key objectives into your proposal. These objectives hit on many of the business and technical challenges of managing modern IT organizations that resonate with your prospect — from supporting mobile workforces to managing spend.

But while these objectives are universal in their appeal, they are unlikely to make the case to purchase by themselves. That's why it's critical to help your client understand the use cases for Microsoft 365.

| Objective | Reason |
|---|---|
| **Support remote workers** | Every worker who needs to access information now can do so from multiple devices, no matter where they are. |
| **Right-sized and predictable spend** | You pay according to the growth or downsizing of the company, which allows you to fully understand your IT spend. |
| **Move from capex to opex** | Reduce costs of overall infrastructure that eventually will need to be replaced. |
| **Mitigate security risks** | Software is updated to fight security threats. |
| **Consolidate vendors, integrate applications** | Instead of paying for five disparate solutions, Microsoft 365 offers similar functionality designed to work together more efficiently, saving the customer money. |

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# What are the use cases for Microsoft 365?

Use cases for Microsoft 365 are virtually limitless. While this flexibility is great news for your prospect, it doesn't help them imagine how their organization might use the many capabilities of Microsoft 365. Instead, illustrate the flexibility and power of Microsoft 365 by sharing use cases for customers in similar industries or with similar challenges. Jumpstart your case study development with resources offered by Rackspace Technology. Below are a few use cases that will help you show how Microsoft 365 apps work together to enable positive business outcomes for your clients.

## Sample use case 1: **Sales**

On-the-go productivity for sales reps

| Applications | Activity | Example |
|---|---|---|
| | Store work files in a central location. | OneDrive for Business provides a place in the cloud where you can store, share, and sync your work files. You can update and share your files from any device, and even work on Office documents with others at the same time. |
| | Edit and draft documents anywhere even a tablet or smartphone. | Work on sales reports and customer proposals on the road from both professional and personal devices with Microsoft 365 Apps (Word, Excel, PowerPoint, or OneNote). Because Microsoft 365 apps sync across devices, users can work on documents started at the office from their phones. |
| | Collaborate simultaneously with team members. | Simultaneously edit files using Microsoft 365 co-authoring capabilities. Using OneDrive, share files with colleagues and work together in real-time, seeing edits as they happen, while changes are automatically synced to the cloud. |
| | Chat with colleagues while editing documents. | While editing in the same Office document, users can initiate Document Conversations via Skype for Business by clicking the chat button. Everyone working in the document will see the message and can respond. |

Source: Microsoft Inc.

# Sample use case 2: **Retail**

Get real-time product feedback from customers

| Applications | Activity | Example |
|---|---|---|
| | Communicate directly with customers. | Gauge how customers feel about certain products by inviting them to share their feedback directly through Yammer, a private, secure social network. Yammer allows users to create groups that includes external users. |
| | Gain insights from internal experts. | Solicit deeper observations about shifting consumer opinions from internal experts instantly using Skype for Business, which enables instant messaging (IM), calling, video calling, sharing and collaboration all in one solution. |
| | Build and share customer stories. | Build a repository where floor sales reps can log customer anecdotes in a shared OneNote notebook connected to a Microsoft 365 Group. A Microsoft 365 Group is a shared workspace for email, conversations, files, and calendar events. |

Source: Microsoft Inc.

# Sample use case 3: **Healthcare**

Identify and alert colleagues about viral outbreak

| Applications | Activity | Example |
|---|---|---|
| | Analyze patient records. | Identify health trends by analyzing recent patient records with Excel Quick Analysis. Instantly create charts, including line and column charts, or add miniature graphs (called sparklines), and help pertinent data stand out. |
| | Consult with colleagues from anywhere. | Ensure your colleagues are available by viewing their Outlook calendars. Schedule a meeting using Outlook, or initiate the meeting via Skype for Business, which offers instant messaging (IM), calling, video calling, sharing and collaboration. Join or start a Skype meeting with just one click, from anywhere, and on any device. |
| | Summarize outbreak threats in a report. | Write a report simultaneously with colleagues using Microsoft 365 Apps co-authoring. First, save the document to OneDrive or SharePoint Online so all collaborators are working off the same document and can see each other's changes in real time. |
| | Alert the team and open a dialogue. | Alert the team to the report through shared inbox in Microsoft 365 Group, which includes a shared workspace for email, conversations, and patient information. Every Microsoft 365 Group also comes with a OneNote shared notebook that automatically syncs notes across devices so users can share discoveries about the spreading illness. |

Source: Microsoft Inc.

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# Sample use case 4: **Manufacturing**

Quickly resolve service and repair issues

| App | Activity | Example |
|---|---|---|
| | Share and store service guidance in a central location. | Set up a central library for visual manuals, equipment history and repair tips in a SharePoint Online Portal. Personnel can access these resources from any web browser, across any field location. |
| | Uncover repair tips from experienced colleagues. | Tap into the knowledge of your service network by searching for a specific product or subject through Delve. If needed, contact the subject matter expert directly from Delve profile page via click to call, email or Skype for Business. |
| | Find info and answers from experts across the company. | Crowd-source answers to a troublesome repair issue with the help of experts in your company using Yammer, a private, secure social network. Join a conversation, or start a new thread about a specific service issue. |
| | Inform customers of resumed service. | When the repair has been completed, inform customers quickly through Skype for Business. Start a chat, call, web meeting or video call with just one click, from anywhere and on any device. |

Source: Microsoft Inc.

# How can I add greater value?

In addition to selling the value proposition of the Microsoft 365 applications, you can sweeten the deal by adding on services and solutions of your own, or those provided by Rackspace Technology.

1. **Project Services:** services with clear start and end dates and for which you can charge one-time fees.

2. **Managed Services:** ongoing services for which you can charge monthly fees.

3. **Intellectual Property:** custom software or process that you can provide for a fee or as an add-on to your managed services.

Value-added services and solutions span the pre-sale and post-sale lifecycle and can help contribute to a more successful deployment and user experience for your client as well as increased average revenue per user (ARPU) and greater customer loyalty for you.

| Project services | Managed services | | Intellectual property |
| --- | --- | --- | --- |
| Cloud readiness assessment | Microsoft 365 tenant management | Hybrid environment support | Office connectivity |
| Exchange and mailbox migration | Accounts added and removed | Reactive help desk support and interface to Microsoft | Plug-ins and add-ons |
| Solution, analysis, scope and design | Desktop and device management and support | Performance and application troubleshooting | External portals for end customer information |
| Microsoft 365 setup and remediation | Office client connectivity setup | Microsoft billing and subscription support | Industry-specific workflows |
| File server migration | User rights and account management | Security management and identity protection | Function-specific workflows (e.g., HR, procurement) |
| Workflow creation in SharePoint | Single sign-on management | Mobile device connectivity and management | Online training and self-paced learning |
| End-user training | Software asset management | Regulatory compliance | Pre-configured dashboards |
| Change management consulting | Web defense | VoIP maintenance | Automated telemetry (for availability and performance) |
| Business process re-engineering | Reports and view adjustments | | Middleware for hybrid synchronization |

Source: Based on MDC Research, 2015

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# Step 7: Handle objections

One of the most challenging steps in the sales lifecycle is handling inevitable objections. However, you can choose to view this exercise as an additional opportunity to showcase the strengths of your solution.

## What are common objections to Microsoft 365?

Each prospect will have their own concerns, but we've highlighted a few common objections that you should be prepared to answer.

| Objection | Response |
|---|---|
| *They don't want to migrate to the cloud.* | Server-level access is expensive since you need public or private cloud infrastructure running your applications, not to mention resources to administer and manage the infrastructure. |
| *They are concerned about information security.* | Microsoft 365 Trust Center is one of the most certified secure platforms in the world. Plus, Rackspace Technology resellers can add on Azure Rights Management for message encryption, info rights management and data loss prevention. |
| *They are concerned about compliance with regulatory requirements.* | Rackspace Technology resellers can offer world-class archiving and an easy-to-use encryption tool to help meet regulatory requirements. |
| *They are concerned about the cost of the licenses.* | Licensing as a subscription ensures that your applications are up-to-date — with the most recent fixes and security patches. So, you don't have to worry about that or pay someone to make the change. |
| *They are concerned about the cost of migrating.* | With Rackspace Technology, migrations are free — assisted or do-it-yourself. |
| *They already are using Google Apps.* | Google Apps is designed for consumer use while Microsoft Office is the gold standard for business productivity applications and can include both cloud and on-premises licenses as meets the needs of your organization. |
| *They are concerned about the availability of support from Microsoft.* | By working with Rackspace Technology, you get access to knowledgeable experts who work with Microsoft 365 every day. |

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# Step 8: Close the sale

Most sales are lost because a salesperson fails to ask for the order. No sales conversation should end without an agreement to some sort of next step — another meeting, a call, a revised proposal, a decision, etc.

In some ways, closing is an extension of objection handling — only you are discovering new obstacles, often embedded in the decision-making process itself. The statements below represent hurdles standing between you and the sale:

*"I need to think about it."*

*"I'll get back to you."*

*"Let me run it by other people."*

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# How can I lock down the Microsoft 365 sale?

If you've provided your client — and all relevant stakeholders — with the information they need to make a decision, your best next step is to ask for a commitment. On this page, we present a few examples of sales techniques you can use to close the sale of Microsoft 365.

## Are there additional incentives for my clients to select Microsoft 365?

Although it's not advisable to rely on promotional incentives to close sales, you may have the opportunity to pass along savings from Rackspace Technology.

# Microsoft 365 closing techniques

| Technique | Example | Why it works |
|---|---|---|
| Ask for it | What do I need to do to get Microsoft 365 into your organization? | This forces your prospect to either decide or be specific about what additional information or incentives are needed to proceed. |
| If/then | If I could demonstrate how Microsoft 365 provides you with your productivity applications with continuous feature upgrades, easy administration, scalability up or down, secure collaboration and (other things identified in the needs assessment), then would you be willing to make the move to Microsoft 365? | This secures agreement from the client to move forward with Microsoft 365 based on meeting their requirements, which you already know you can do. |
| Process of elimination | You like Microsoft 365, you can use it throughout your organization for communications and collaboration, it reduces your IT workload and, it's not too expensive, so let's sign you up. | It reviews the client's stated requirements and countered objections to Microsoft 365, eliminating potential obstacles and leaving only agreement on the table. |
| Either/or | Would you prefer Microsoft 365 Business Essentials or Business Premium plan? | It assumes the sale is made and the only decision remaining is which plan they will choose. |
| It's my fault | I guess I didn't explain the value of Microsoft 365 very well. | Unless you actually didn't do a good job in the other steps of the sales cycle, this play can gain you some empathy that may open the door for continued conversation. Use sparingly as you risk sounding insincere or condescending to your prospect. |

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# Step 9: Implement the solution

After you have successfully positioned the benefits of your solution and your customer is on board, the implementation process begins in earnest. A sound plan is required to ensure that the deployment causes minimal disruption to the users and that the solution works as advertised.

## What is the roadmap for implementing Microsoft 365?

The technical pros at Gartner are frequently asked questions around which Microsoft 365 services should be implemented, the order of implementation, and which steps to follow around planning, design and deployment processes. This roadmap can help get you started.

## Microsoft 365 implementation roadmap

| Phase | Description | Tasks | |
|---|---|---|---|
| 1 | Confirm requirements | • Get feedback from the client on technical or business requirements and/or preferences<br>• Confirm technical assessments<br>• Adjust proposal accordingly | |
| 2 | Prioritize services rollout | • Select desired services<br>• Plan roll out either sequentially or concurrently based on business priorities. | |
| 3 | Compare cloud vs. on-premises | • Understand the differences between the capabilities of Microsoft 365 and its on-premises counterparts<br>• Determine if a hybrid deployment is needed | |
| 4 | Design and architect | • Choose an identity structure as a foundation for provisioning and security<br>• Select all-cloud or hybrid deployment model<br>• Consider and enable mobility management<br>• Evaluate and ensure network readiness | |
| 5 | Deployment | **Staged**<br>• Deploy first to a few users<br>• Test<br>• Deploy to all users in stages | **Cutover**<br>• "All at once" move for small migrations<br>• Limited to a maximum of 1,000 mailboxes total |
| 6 | Licensing | • Understand the implications of Microsoft 365 on your client's global Microsoft licensing strategy<br>• Optimize their licensing costs | |
| 7 | Training | • Train administrators<br>• Train all users in stages | |

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# Understanding identities

Beyond selecting the right applications and rollout strategy, understanding your identity options is critical to the design phase as it impacts security, administrative overhead and user experience. Here are some identity basics.

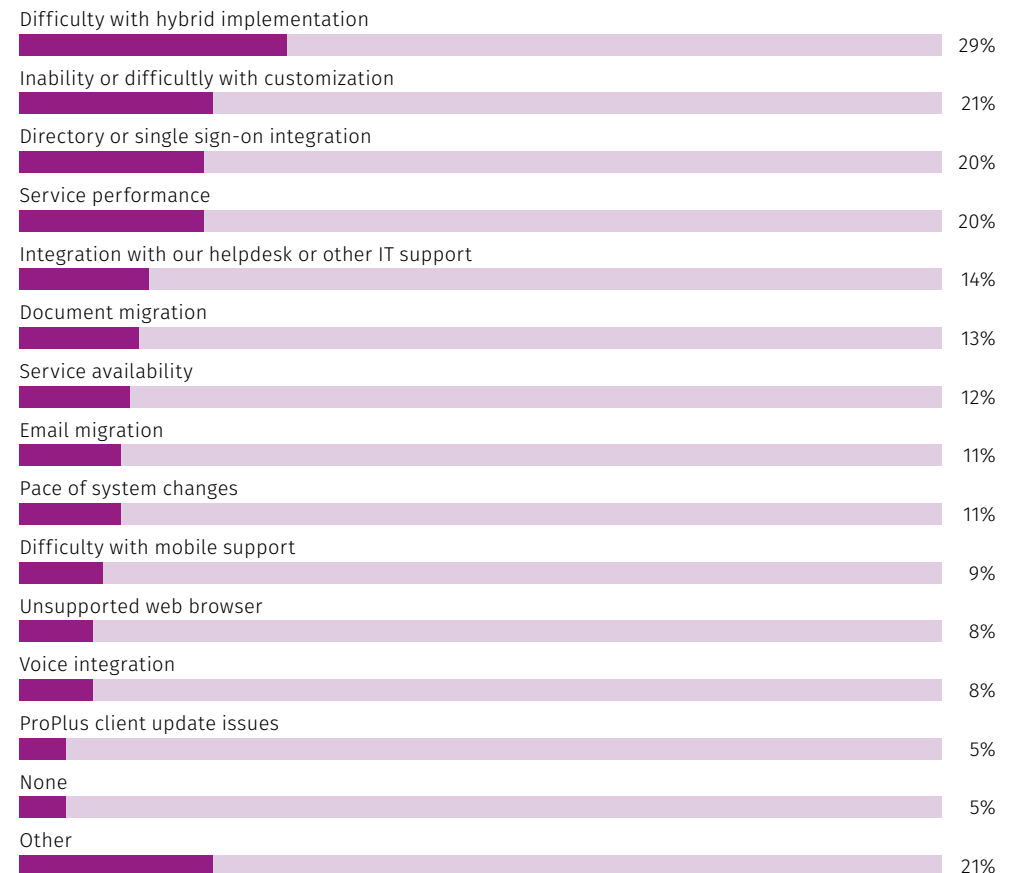| | Cloud identity | Cloud identity + DirSync | Federated identity |
|---|---|---|---|
| **Scenario** | • Smaller organizations with or without on-premises Active Directory | • Medium-to-large organizations with Active Directory on-premises | • Large enterprise organizations with Active Directory on-premises |
| **Benefits** | • Does not require on-premises server deployment | • "Source of authority" is on-premises<br>• Enables coexistence | • Single sign-on experience<br>• "Source of authority" is on-premises<br>• Two-factor authentication options |
| **Limitations** | • No single sign-on<br>• No two-factor authentication options<br>• Two sets of credentials to manage<br>• Different password policies | • No single sign-on<br>• No two-factor authentication options<br>• Requires on-premises dirsync server deployment | • Requires on-premises ADFS server deployment in high-availability scenario<br>• Requires on-premises dirsync server deployment |

# What are some technical challenges to deploying Microsoft 365 solutions?

Gartner surveys have uncovered the most common issues experienced with implementing Microsoft 365, including:

• Difficulty with hybrid implementations combining cloud and on-premises infrastructure

• Difficulty integrating single sign-on

• Poor service performance due to bandwidth limitations, user locations and the network quality

## Technical challenges with Microsoft 365

**What, if any, are the top three technical problems that your enterprise has experienced with Microsoft 365?**

| | |
|---|---|
| Difficulty with hybrid implementation | 29% |
| Inability or difficultly with customization | 21% |
| Directory or single sign-on integration | 20% |
| Service performance | 20% |
| Integration with our helpdesk or other IT support | 14% |
| Document migration | 13% |
| Service availability | 12% |
| Email migration | 11% |
| Pace of system changes | 11% |
| Difficulty with mobile support | 9% |
| Unsupported web browser | 8% |
| Voice integration | 8% |
| ProPlus client update issues | 5% |
| None | 5% |
| Other | 21% |

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# The most common Microsoft 365 project services offered by partners

A survey by MDC research shows the areas in which new customers need the most help.
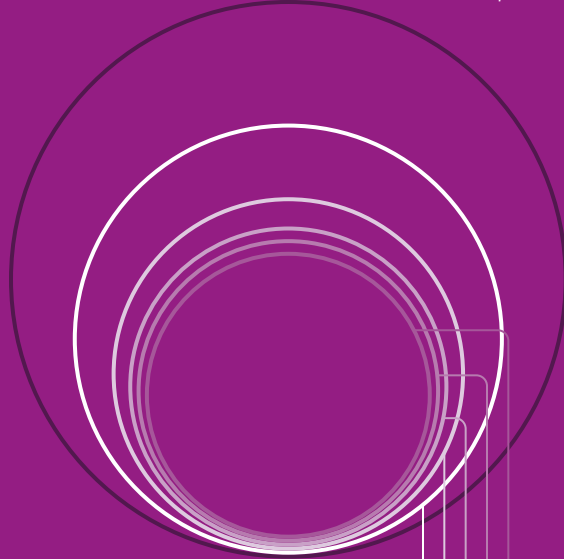
**77%** Exchange and mailbox migration

**63%** Solution analysis, scope and design

**57%** Training

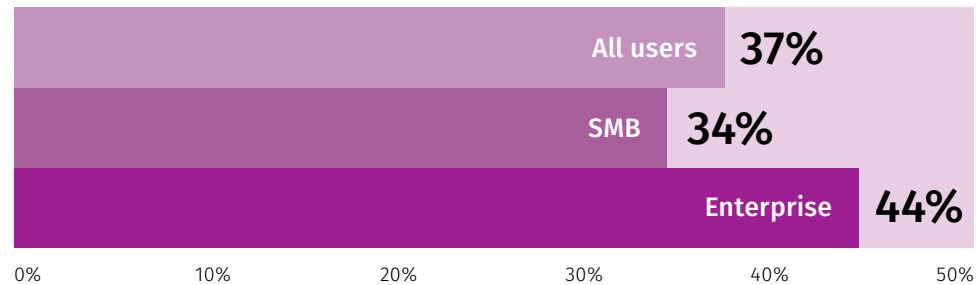**54%** Simple file server migration

**51%** SharePoint integration

**Source:** MDC Research 2015
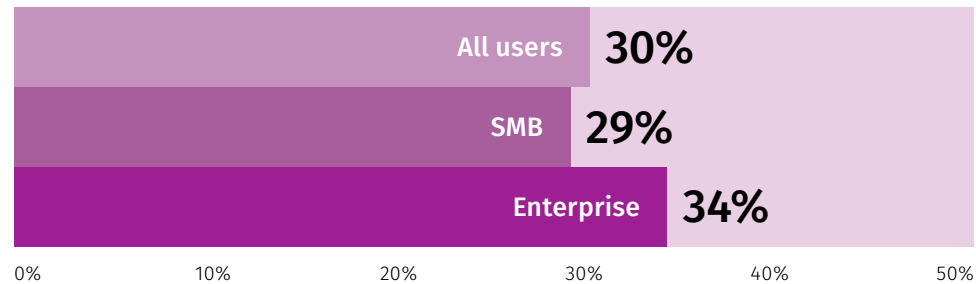
# What are the impacts of Microsoft 365 on users?

It's important to understand and address the impacts of these solutions on users, policies, training and your customer's approach to content and collaboration. This represents an opportunity to provide additional training, change-management consulting or business process re-engineering services to your new customers.

## Microsoft 365 Managed Services Delivered to New Users

**Change management consulting**

| | |
|---|---|
| All users | 37% |
| SMB | 34% |
| Enterprise | 44% |

0%   10%   20%   30%   40%   50%

**Business process reengineering**

| | |
|---|---|
| All users | 30% |
| SMB | 29% |
| Enterprise | 34% |

0%   10%   20%   30%   40%   50%

**Source:** MDC Research 2015

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# Step 10: Follow-up

Follow-up is vital throughout the sales lifecycle, but it's included here as a reminder that follow-up never ends. Even after the sale is made, a new type of follow-up begins to ensure targeted performance, adoption and ROI metrics are achieved. Fortunately, some of these follow-up activities also are opportunities for additional revenue.

## What are follow-on revenue opportunities with Microsoft 365?

As detailed in Step 6, there are services and solutions that you can sell as value-adds. Many of these services, such as needs assessments and migration services, were used earlier in the sales process. Others, such as ongoing managed services, should have made their way into your agreement with your customer. But in general, circling back to see how your customer is managing without you can be an opportunity for you to come in and save the day with a few well-timed offers to:

- **Train** end-users to use applications and/or new features and functionality
- **Consult** with clients on business process and application workflows
- **Integrate** hybrid environments or add-on applications beyond the standard Microsoft 365 apps
- **Support** end-users with questions and problems
- **Manage** assets, devices, connections, applications and performance
- **Secure** applications and data with encryption and archiving solutions that support regulatory compliance requirements
- **Enable faster** adoption and more useful reporting with custom portals and dashboards
- **Cross-sell** more of your portfolio and grow the MRC

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# Conclusion

## Why consider Rackspace Technology as your Microsoft 365 partner?

Thousands of partners have used Rackspace Technology to sell more than two million mailboxes in operation today. The Microsoft 365 Reseller Program allows an increasing number of customers to get Exchange email together with Microsoft Office and secure online file storage and sharing.

Microsoft has several different programs for managed service providers and value add resellers, but the program offered through Rackspace Technology, "2 Tier CSP," has several advantages.

Let's start with the most important one: The provider closest to the customer gets to keep and own the primary business relationship with the customer. Practically speaking, this means the provider bills and supports the customer. Why does this matter? The alternatives generally involve setting up clients as direct Microsoft customers. In this scenario, Microsoft gets the current revenue and then future revenue as the customer hires more people or buys more services. The partner, who often provides a lot of the support, can be cut out of the transaction.

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## 10 reasons to trust Rackspace Technology

1. A leader in the 2020 Gartner Magic Quadrant for Public Cloud Infrastructure Professional and Managed Services, Worldwide

2. Hosting provider to more than half of the Fortune 100

3. 2,500+ Cloud Professionals

4. 20+ years of hosting experience

5. Customers in 120+ countries

6. Five-time Microsoft Hosting Partner of the Year

7. Microsoft Gold Certified Partner in Hosting, Collaboration and Content, Cloud Productivity and Small and Midmarket Cloud Solutions

8. We support 4.5 million+ global email end users

9. Four Microsoft MVPs on staff

10. 200 Microsoft Certified Professionals

Rackspace Technology has worked with Microsoft to create a solution for its partners, who can now add new customers and services through the Rackspace Technology control panel, and configure the details of those services through standard Microsoft 365 administrative controls.

The partner sets the prices for their own offerings and bills and supports their customers. Rackspace Technology provides its partners free access to either self-migration tools or an assisted migrations team that will manage the process from end to end. After the migration, partners call Rackspace Technology to escalate Microsoft 365 support issues, and find deep expertise with email, SharePoint and related productivity tools.

Rackspace Technology is able to escalate issues directly to the highest levels of support and engineering at Microsoft, if needed. As a Microsoft CSP, Rackspace Technology has invested in tooling that makes Microsoft 365 easier to install and manage for its partners. In addition, it is developing add-on applications that its partners can sell and automatically provision. So far, these include:

- **Encrypted email**, which you can get directly from Microsoft but not without complex programming knowledge. Rackspace Technology automates this process so it is ordered and configured as easily as checking a box.
- **Email archiving**, which offers unlimited storage and retention at roughly half the cost of its competitors. Another benefit is that if the client leaves Microsoft 365, Rackspace Techonolgy's archive survives and can be transferred while Microsoft's does not.
- **User licensing & assignment**, which as-is is a complex and time-consuming process whether it's one user or 100 users.

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# Rackspace Microsoft 365 reseller program benefits

### Flexible offers
Resell or refer — choose the method that works best for your organization.

### Easy application process
Become anMicrosoft 365 reseller this week, not next month. Start reselling or referring now.

### No commitments or penalties
Resell Microsoft 365 your way. Rackspace Technology requires no long-term commitments and will never enforce performance-based penalties.

### Always-on support
Get award-winning technical support from a reseller-dedicated team of support professionals and live U.S.-based support 24x7x365.

### Sales & marketing assistance
Access proven marketing materials and a dedicated program team to help you with your sales strategy and to close deals.

### Microsoft 365 expertise
Tap into our on-staff expertise, including 200 Microsoft Certified Professionals and four MVPs who specialize in Microsoft 365 sales and implementations.

### Free migrations
Rackspace moves over 50,000 mailboxes per month! We will migrate your customers to Microsoft 365 for free.

### Unique bundles
Bundling Microsoft 365 with other Rackspace products shows your customers that you understand their needs.

### Month-to-month billing
Rackspace enables resellers to buy licenses on a month-to-month basis, instead of yearlong commitments for licenses that customers may not use.

### One control panel
Manage all your Office 2016 licenses from the same control panel you use to manage Rackspace Email or Hosted Exchange. Add users, transfer licenses, open support tickets and chat with help from Rackspace experts.

# About Rackspace Technology

Rackspace Technology is the multicloud solutions expert. We combine our expertise with the world's leading technologies — across applications, data and security — to deliver end-to-end solutions. We have a proven record of advising customers based on their business challenges, designing solutions that scale, building and managing those solutions, and optimizing returns into the future.

As a global, multicloud technology services pioneer, we deliver innovative capabilities of the cloud to help customers build new revenue streams, increase efficiency and create incredible experiences. Named a best place to work, year after year according to Fortune, Forbes, and Glassdoor, we attract and develop world-class talent to deliver the best expertise to our customers. Everything we do is wrapped in our obsession with our customers' success — our Fanatical Experience™ — so they can work faster, smarter and stay ahead of what's next.

Learn more at www.rackspace.com or call 1-800-961-2888.