



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.

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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.



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

	FEATURES	Microsoft 365 Business Standard	Microsoft 365 Business Premium	Microsoft 365 E3	Microsoft 365 E5
	Estimated retail price per user per month \$USD with annual commitment	\$12.50	\$20	\$32	\$57
	Maximum number of users	300	300	unlimited	unlimited
Office Apps	Install Office on up to 5 PCs/Macs + 5 tablets + 5 smartphones per user Word, Excel, PowerPoint, OneNote, Access, Office Online	Business	Business	ProPlus	ProPlus
Email Archiving	Exchange Online Archiving	100GB	unlimited	unlimited	unlimited
Email & Calendar	Outlook, Exchange Online	50GB	50GB	100GB	100GB
Hub for Teamwork	Chat-based workspace, online meetings, and more in Microsoft Teams	●	●	●	●
File Storage	OneDrive for Business	1 TB/user	1 TB/user	unlimited	unlimited
Social, Video, Sites	Yammer, SharePoint Online, Planner	●	●	●	●
	Stream		●	●	●
Business Apps	Scheduling Apps – Bookings ¹ , StaffHub	●	●	●	●
	Business Apps – Outlook Customer Manager, MileIQ ¹	●	●		
Threat Protection	Microsoft Advanced Threat Analytics, Device Guard, Credential Guard, App Locker, Enterprise Data Protection			●	●
	Microsoft Defender for O365		●		●
	Windows Defender Advanced Threat Protection				●
	Office 365 Threat Intelligence				●
Identity Management	Self-service password reset for hybrid Azure Active Directory accounts, Azure MFA, Conditional Access		●	●	●
	Azure AD: Cloud App Discovery, AAD Connect Health, SSO for more than 10 Apps			●	●
	Azure Active Directory Plan 2				●
Device & App Management	Microsoft Intune, Windows Autopilot		●	●	●
	Shared Computer Activation		●	●	●
	Microsoft Desktop Optimization Package, VDA			●	●
Information Protection	Office 365 Data Loss Prevention, Azure Information Protection Plan 1		●	●	●
	Azure Information Protection Plan 2, Microsoft Cloud App Security, O365 Cloud App Security				●
On-Prem CAL Rights	ECAL Suite Exchange, SharePoint, Skype, Windows, SCCM, Win. Rights Management			●	●
Compliance	Unlimited email archiving ²		●	●	●
	Advanced eDiscovery, Customer Lockbox, Advanced Data Governance				●
Analytics	Power BI Pro, MyAnalytics				●

WHY MOVE TO M365 FROM O365?

Modernizing the Workplace

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 files¹

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 information²

31% of SMBs say they do not comply with any security guidelines or standards¹

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 mobile¹

45% of business-critical applications are accessed by mobile devices¹

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

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]

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*