



Customer Journey-in-a-Box | Playbook

# Modern Work SMB Acquisition

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

As the world embraces a new hybrid workforce, we've seen a shift in customer needs. Small businesses especially are transforming quickly, giving you the chance to tap into these new opportunities by offering the best Microsoft solutions.

<b>⚡ Priority</b>	<b>★ Hero SKU</b>
<ul style="list-style-type: none"><li>• Improve SMB Productivity</li><li>• Enable transition to the world of Hybrid Work</li></ul>	<ul style="list-style-type: none"><li>• Teams Essentials</li><li>• M365 Business Basic</li></ul>
<b>🗄️ Segment</b>	<b>📈 Up/cross sell path</b>
<ul style="list-style-type: none"><li>• SMB (up to 300)</li></ul>	<ul style="list-style-type: none"><li>• M365 Business Standard</li><li>• M365 Business Premium</li></ul>
<b>📍 Solution Area</b>	<b>📊 KPIs</b>
<ul style="list-style-type: none"><li>• Modern Work</li></ul>	<ul style="list-style-type: none"><li>• Teams Phone</li><li>• NPSA</li><li>• Customer Adds</li><li>• CSP\$</li></ul>

## Audience

### Customer targeting

Small and Medium sized business organizations (up to 300 users) that are facing a shift to hybrid work.

- **First-to-Cloud** customers using On-Premise assets that see an opportunity to move to Cloud with a full suite solution like M365 for Business, or Teams Essentials
- **Upsell** single point-solution users (for example, Exchange Online, Apps for Business) to full M365 suite for Business or **Cross-sell** to Teams Essentials to expand their collaboration potential.
- **Compete** users of multiple compete solutions (i.e. Google Workspace, Zoom, etc.), that would benefit from a unique suite that provides best in class productivity and collaboration tools like M365 all in one place.
- **Free & Trial** version users (i.e. Teams Exploratory users, Teams Free users, etc.) that need higher capabilities from Teams or a more consistent experience

### Buyer Persona

- BDM audience to land [Digital Workforce customer presentation](#) and introduce the value of Teams Essentials features: [Teams Essentials data sheet](#)
- Technical audience to showcase [Teams Essentials features one-pager](#)

## 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 Teams Essentials](#)

### SMB Digital Workforce

- Visit the Teams Essentials partner portal and learn more on this new stand-alone version of [Microsoft Teams](#) for SMB customers.
  - [Customer overview pricing sheet](#)
  - [One-page product overview](#) for sharing with customers
- Get familiar with Microsoft [Go to Market Strategy for SMB segment](#).

### 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 On Premise, or single point-solution or Compete users.
- ✓ Partner that want to build and add a Managed Service practice in the Productivity and Collaboration field for their customers.

## Skilling and enablement

### Modern Work SMB Practice Development

- [SMB Go To Market Partner Portal](#)
- [Modern Work Practice Development Guide](#)
- [Virtual workshops and training](#)
- [FAQ about promos and channel investments](#)
- [Microsoft Modern Workplace Plays for SMB](#)
- [SMB Workshops](#)

### Partner Enablement Guides

[Modern Work](#)

[SMB Masters Program](#)

[Teams Essentials – Enabling Hybrid Work](#)

[Grow Your Business with Teams Essentials and Teams Phone](#)

### Partner Playbooks

- [Teams Essentials](#)
- [Project Orland](#)

### Additional resources

- [Go-To-market Toolbox](#)
- SMB: [Deck](#) and [Talk Track](#)
- [Partner led marketing guidelines](#)
- [Brand Central](#)
- [Teams Essentials partner opportunity deck](#)
- [Teams Essentials FAQ](#)
- [Comparison between Teams Essentials \(MSA\) and Teams Essentials Partner \(AAD\)](#)
- [Partner-to-partner opportunities](#), such as enabling Teams and voice bundles
- [Profitability Calculator](#)

2 questions you should ask the customer:

- Are you looking for a trusted solution, easy to use, that can help you host online meetings and chats?
- Do you want to enable your employees to collaborate in team and stay productive from anywhere?

# 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 1:1 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 through Partner Marketing funds in your corresponding Microsoft subsidiary



Inspire  
& Design

### SMB 1:1 few Workshops

- Acquisition / Cross-sell to M365 Business Basic, Standard or Teams Essentials

ModernWork & Security Assessments

- 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



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 available for all Business SKU



Manage  
& Optimize