Microsoft

Hosted SaaS

GO TO MARKET PLAYBOOK

FOR PARTNERS HOSTING MICROSOFT SAAS FOR LINE OF BUSINESS APPLICATIONS – EXCHANGE, SHAREPOINT, LYNC, AND THE PRODUCTIVITY SUITE

MICROSOFT, HOSTED SAAS TEAM: MSOOD@MICROSOFT.COM

PARTNER-HOSTED SAAS PLAYBOOK—OVERVIEW

Audience

The core audience for this playbook are the Microsoft Hosting Service Providers (HSP) SaaS Partners.

Purpose & Scope

The purpose of this playbook is to empower Hosting Partners to grow their Hosting Services Provider business through Microsoft Productivity with Microsoft go-to-market perspective, campaigns, and resources.

This playbook focuses on the following:

1. How and why to grow your Hosted SaaS business by selling Microsoft Productivity, whether as individual SALs or as the SPLA Productivity SKU and the guidance needed to enable you to offer more value by adding more competencies and/or services in order to differentiate and scale in the commercial cloud space
2. Documented goals, strategies, tactics, resources and best practices for the "Plan," "Enable," and "Execute" phases for delivering Microsoft Productivity

How to Use This Playbook

This Playbook provides an overview for each topic area and links to access more detailed resources. Consider this playbook as a guide to the materials you need to understand the Application Platform "SaaS" business opportunity for Hosting Partners.

Contents

EXECUTIVE SUMMARY

Hosting Service Providers are emerging at the center of the shift toward the adoption of cloud computing and hosted SaaS. Partners that have diversified their Applications Hosting business beyond email hosting have the healthiest Applications business: Among all SPLA Partners, those that offer additional applications to complement their Hosted Exchange business are growing twice as fast those with Exchange only. For more details, see the Partner Opportunity section.

The following motions can be used to stimulate a differentiated and robust hosted applications business.

Product Pivot	Productivity	Lync	SharePoint	Exchange
GTM Priorities	1. Create a hero offer: Hosted Productivity Suite (powered by Exchange, SharePoint, and Lync). Leverage Productivity Suite SAL to provide 52% discount.	1. Cross sell: Lync Attach with IM/P (or Conferencing) to the Exchange base	1. Cross Sell: SharePoint Attach to existing Exchange and/or Lync customers. Leverage Productivity Suite SAL to provide 52% discount	1. Drive an upgrade to Exchange 2013 Campaign
	2. Attach Office 365 Pro Plus to existing base through Cloud Solution Provider Program when and where available	2. Upsell to Voice through V-Dedicated deployment (self-deployed or through White Label provider)	2. Partner with an ISV to create differentiated offers and capture demand through ISV partnership	2. Sell Exchange Enterprise to mid-market, Enterprise, and segments with compliance requirements
Key Resources	Hosted SaaS Playbook (this document) Productivity Suite GTM templates Microsoft.com/hosting marketing best practices	http://aka.ms/LyncTop - Hybrid topologies Lync Topologies on TechNet Lync Hosting on MPN	Hosted SharePoint Playbook Technical SP Guidance	Hosted Exchange training module Multi-tenant solution technical guidance

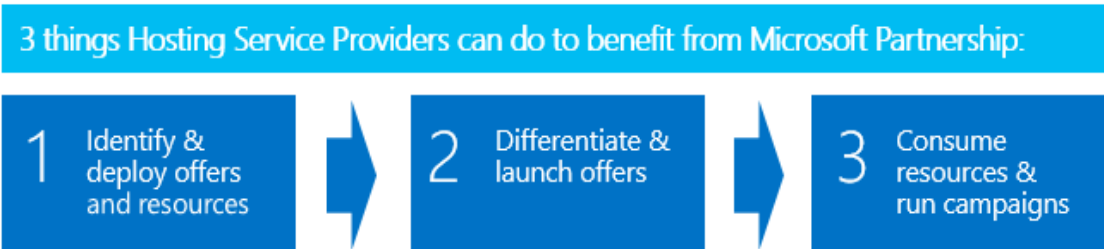Click here for other Productivity Hosting resources

PARTNER OPPORTUNITIES AND MARKET TRENDS

Use this section of the playbook to understand the market trends relevant to productivity and software as a service (SaaS), how these trends are impacting customers and the market landscape, and what this signifies in terms of opportunities for Microsoft Hosted SaaS Partners.

Immediate Partner Opportunity

How HSPs Can Benefit from a Microsoft Partnership

Hosting Service Providers are emerging at the center of the shift toward the adoption of cloud computing and hosted SaaS. Microsoft is looking to continue to grow the partnership through deeper investments in comprehensive technology for their offers as well as go-to-market campaigns to support growth for Hosting Service Providers. These investments are reflected in the hosting scenarios and offers that Hosting Service Providers can add to their portfolio to help customers quickly scale, ease IT management, and lower capital expenditures.

3 things Hosting Service Providers can do to benefit from Microsoft Partnership:

1. Identify & deploy offers and resources
2. Differentiate & launch offers
3. Consume resources & run campaigns

Gain Market Share - Differentiate in Market by Adding UC and Collaborations to your Hosted Messaging Business

The partner-hosted cloud is inundated with messaging hosting services providers offering a variety of solutions—to the tune of 10,000 and counting. The vast majority of Microsoft HSPs sell messaging-only as their primary offer. To succeed and grow market share, HSPs must differentiate and add value by offering not just product, but product plus capability.

Hosted Messaging — 10,000+ providers

Hosted Messaging + Lync + SharePoint — 100 providers

Drive Revenue Selling Productivity

As shown in the below diagram, based on HSP numbers, partners that are selling *all three* Microsoft products also have an increased revenue. Although this trend might not be corollary, it is safe to assume in light of the cloud customer's appetite for bundled and integrated solutions, when a partner broadens their SaaS line of business offerings, they create more value to their customers resulting in customer stickiness offering an end-to-end solution gaining more if not all of their customers cloud and/or outsourced IT business.
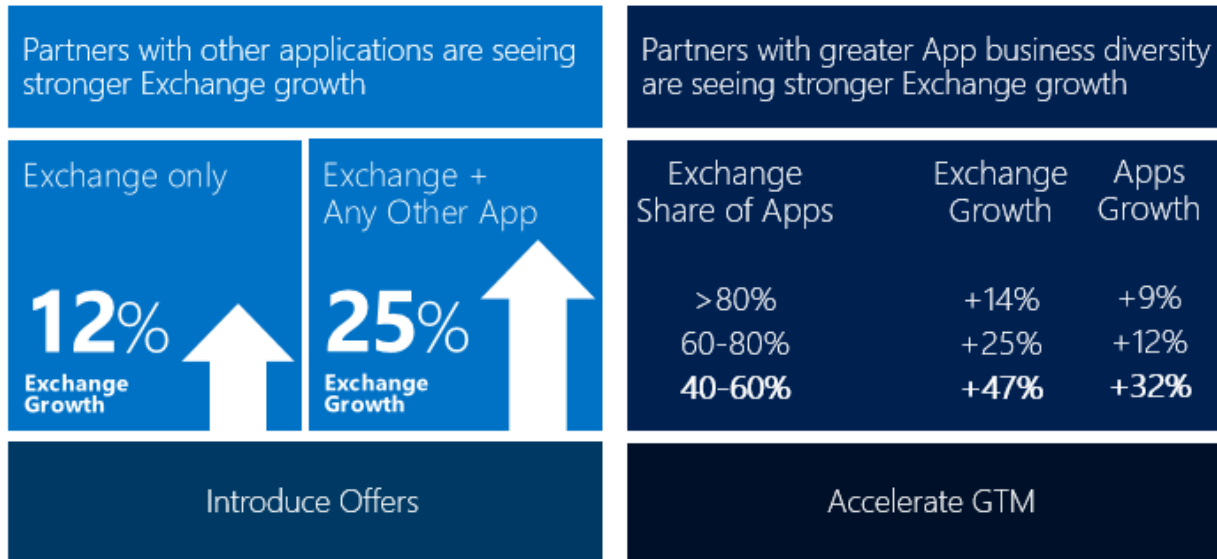
Stimulate Exchange growth by adding SharePoint and Lync
-Among all SPLA Partners, those offering Exchange only grew 12% in 12 months ending June 2014
-Partners that also offer another MSFT Hosted Application (SharePoint, Lync, etc.), grew their Exchange business by 25%

Increase Hosted Applications diversity and stimulate Exchange and Applications growth
- When Hosted Exchange makes up >80% of Applications business, Exchange growth is +14% and Applications growth is only +9%.

- Partners that drive more Lync and SharePoint seats and diversify their Hosted Applications business are seeing healthier Exchange and Applications growth. Partners with Exchange making up only 40-60% of their Applications business are seeing Exchange grow +47% and Applications +32%.

For more information about the correlation between Hosted Exchange and other Hosted Applications, please view the Hosted Exchange/Hosted Lync whitepaper.

Grow Average Revenue per User Moving up the Productivity Stack

Based on the trends and the marketplace, and the customer demand, there is an immediate opportunity for Hosting Services Providers to accelerate growth and drive Partner-Hosted SaaS in the commercial cloud space. Differentiate business in a competitive market by offering the productivity stack as a Unified Communications Productivity Suite. Offer your customers more value by adding additional competencies, products, and services in order to differentiate and scale.

- +Productivity Apps (Office)
- +Collaboration (SharePoint)
- +Voice (Lync Enterprise Plus)
- +Web Conferencing (Lync Enterprise)
- +Instant Messaging (Lync Standard)
- +Email Step-Up (Exchange Enterprise)
- Email (Exchange Standard)

ARPU
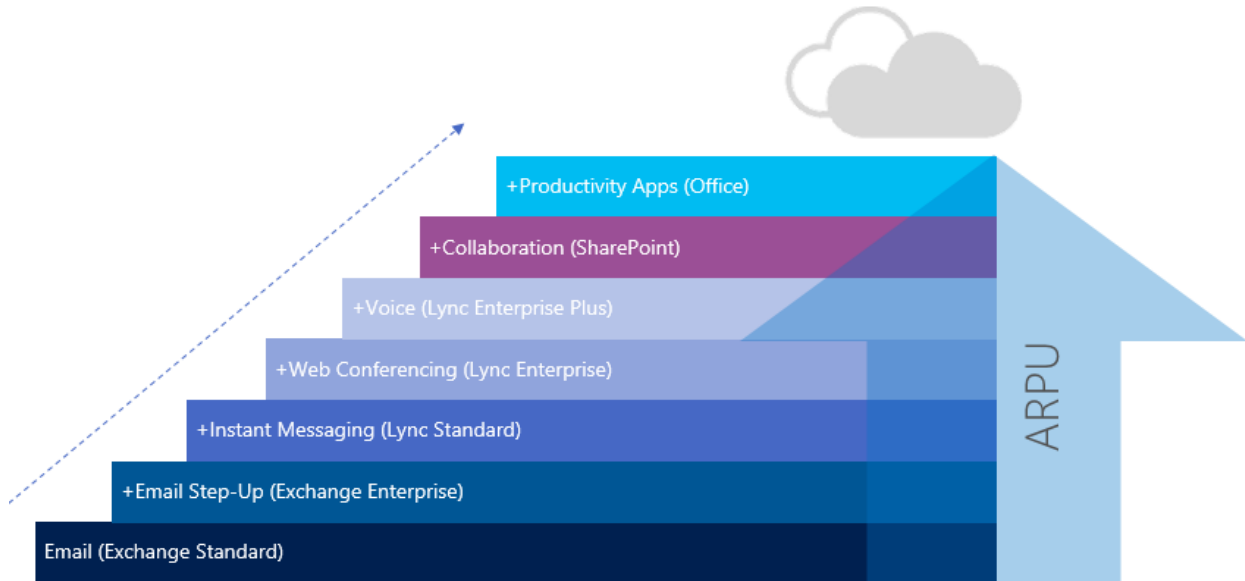
Enhance Margins by Reducing Licensing Costs

The Microsoft Hosting SPLA SKUs specifically designed to fit your needs. Licensing via the Productivity Suite SKU allows you to achieve substantial financial efficiencies. Specifically, if your customer is currently has the three SALs that are included in the productivity suite, you can save up to 52% vs the separate SALs.

License cost per seat / month

SharePoint Standard

Lync Enterprise

Exchange Standard

-52%

-30%

Productivity Suite

Stand Alone SAL   Productivity Suite
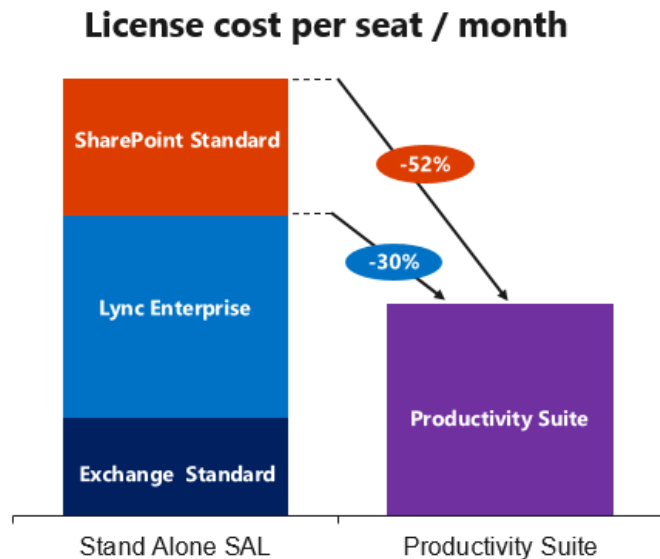
Market Trends: Transition to the Cloud and SaaS

Partner Hosted SaaS can meet unique needs in the market

What Customers Need from a Hosting Service Provider	• Easy Data Migration *#1 consideration in selecting an email provider* • Data in Local Country *24% of larger SMBs will pay premium* • Integration Requirements *Integrated Private & Public cloud environments*

Source: Edge Strategies Research, 2013

Customers have a lot to consider; What type of platform, cloud or hybrid? What level of integration, public and private cloud? What do customers want to manage onsite, if anything, or do they want to outsource completely? Are they bound by compliance and regulations to meet certain requirements on where the data resides, how it's accessed, and what the disaster recovery requirements are? All of these choices create gaps in the market and opportunities for Service Providers to develop new and innovative SaaS offerings when Office 365 is not a fit: Fast and easy data migration, data sovereignty issues, compliance and regulation requirements, integration requirements, and so on. Or, if the customer simply does not want to manage IT at all, even with something as turnkey as Office 365.

Taking a look at trends in the market place, the impact on our customers, and understanding the SMB Mindset

Mobile, Cloud, Social and Data. Customers are looking for the results the Productivity Suite can enable

whether they know it or not. The market need for productivity is generated by the primary concerns and mindsets in small and midsize businesses (SMBs), if we use the US SMB market as a microcosm of the world of HSPs.

The challenges facing the customer can be summarized by the economic uncertainties and new business realities they are facing. They majority of SMBs are showing decreased revenue and restricted cash flow. Cancelled orders, tightened credit and inventory constraints are leading to price reductions and slower receivables. At the same time, the trends in IT and communications (ITC) are changing fast and with the transition to the cloud as well as the new emerging routes to market with the rise of the Service Providers, Hosters, customers are inundated with options.

The ability to tie decision making to scalability and business goals is now critical in light of having affordable options when it comes to accessing sophisticated cloud-based applications and services. And with the rush towards the cloud, which also creates rising appetites for bundled cloud services, SMBs are experiencing the proliferation of mobility that demands collaborative and ubiquitous access resulting in the need for shifts in the paradigm of traditional IT support such as hosted servers and virtualization for resource optimization and BYOD policies.

It's an exciting time for customers, but many are overwhelmed by choice. The world is changing

for SMBs, as major technology areas like cloud services and mobile computing transform the business landscape. Cloud-based services are gaining serious momentum, with 24% annual spending growth. Virtualization is now gaining serious momentum with SMBs with 18% annual growth between 2012 and 2107. Mobility is now a fixed part of the landscape. 87% of SMB's have mobile workers and 44% have employees who are telecommuting today. Partners who can stay ahead of these trends will be best equipped to compete by helping customers navigate these changes and come out ahead.

The Addressable Market. With having so many choices to make and needing to operate in this new paradigm, this is a great opportunity for Hosting Service Providers, particularly in the small-to-mid market space:

- By 2017, 350K new SMBs with $114B in incremental IT/Telecom spending
- >65% SMB customers are on the road to cloud
- 75% will have less than 10 employees. 482K new PC SMBs will form, 75% with <25 PCs.
- 60% will come from firms with <50 employees and 55% from firms with <25 PCs.

Increase in Hosted Services - IaaS and a high demand for server infrastructure paves the way for hosted productivity. The likelihood of migrating more IT spending to hosted and cloud solutions translates into increased opportunity for bundled and integrated cloud offers. 23% of SBs and 49% of MBs are looking at increasing spend in hosted and cloud solutions. Specifically, there is an increased allocation of IT budget for SaaS; 76% in SB and 91% in MBs. The momentum is shifting towards hosted and virtualization, and IaaS is shifting towards hosted. This trend toward services translates into more opportunity for partner-hosted SaaS. Additionally, mid-market customers strongly prefer an integrated, end-to-end solution and also prefer to use a local service provider to deliver the solution and capabilities.

Gap in the market in SaaS – Productivity/Collaboration. Hosted infrastructure has been in demand, and it's being supplied. After IaaS, the customer need is around SaaS, where Productivity, BI, and Collaboration are in very high demand in the cloud/hosted space, but are not being provided. In the US, only 13% of partners offer those solutions to their customers. If you're interested in providing a bundled, integrated, end-to-end solution for your customer, you can't leave productivity and collaboration off your plate. Or they'll go somewhere else for it.

Source: AMI US SMB research, 2012.

KEYS TO SUCCESS – PARTNER ENABLEMENT

Keys to Success - Partner Enablement

What Do Partners Need To Be Successful?

There are many factors that lead to success, such as the following that have been identified in working with our HSPs that are selling one or all of the products in the Microsoft Hosted Productivity stack. To summarize what is reviewed in detail in the [Partner Go-to-Market Guide](#) in this playbook, these are the critical factors to a success partner-hosted SaaS productivity business:

	Productivity	Lync	SharePoint	Exchange
What is the Partner selling?	Sell the SPLA Productivity Suite on the value of replacing their current patchwork of small-business or consumer-oriented solutions with an enterprise-grade, integrated end-to-end solution that meets all of their unified communications and collaboration needs enabling productivity, scale, and the ability to work effectively in the new business paradigm. Sell the SPLA Productivity Suite to customers currently using all three products: SharePoint, Lync Enterprise, and Exchange Standard to realize a licensing savings of 52% (margin enhancement opportunity).	Sell the customer on the value of unified communications and collaborations (UC&C) to achieve a connected, productive organization where employees have quick access to knowledge, the ability to collaborate, and keep the organizations IP safe based on compliance or HR guidelines.	Sell the customer on the value of adding social collaboration to their existing mix of unified communications to achieve a connected, productive organization where employees have quick access to knowledge, the ability to collaborate, and apply the same level of compliance and security that currently exists in their messaging to their knowledge base, and internal and external websites.	Exchange Enterprise (or Enterprise Plus): Sell the customer on the value of premium messaging solution in a virtual-dedicated environment to meet augmented needs around control, security and compliance solution with Archiving, Rights Management across all devices.
Customer Value Proposition	• Value of Productivity • Cost Savings in the cloud • Devices and Mobility: A familiar experience and compliant solution across devices	• Light up messaging • Enable mobile workers, save costs on travel, work space • Advanced UC capabilities of integrated Audio, Video and Web conferencing, telephony	• Extensible, Platform, Social Collaboration	• Upgrade to Exchange 2013 that includes Archiving, Rights Management to meet augmented needs for compliance and regulation for customers needed a virtual-dedicated messaging solution

	Productivity	Lync	SharePoint	Exchange
Proof Points	• Productivity ranks 3rd in SMB capabilities in areas of IT Spend • After IaaS, customers want SaaS productivity	• Customers want their UCaaS provided by their email provider • UC&C - customers want UC and want to enable advanced UC capabilities • Connectivity/Communication ranks 2nd in SMB capabilities in areas of IT Spend. Key objectives: Improving bandwidth, integrated A/V/Web communications video solutions	• ERP/CRM & BI ranks 1st in SMB capabilities in areas of ITC (IT and Communications) spend. • Customers want SaaS for productivity; SharePoint has deep integration with all 3 areas of customer ranked priorities in ITC SaaS spend: 1) CRM 2) BI and analytics 3) SaaS: Productivity and collaboration suites	• UC&C: Customers want UCaaS same as email provider) • Mobility: Security for mobile devices, providing advanced communications to mobile staff
Partner Value Proposition	• Only 13% of cloud partners in the US sell productivity and collaboration solutions • SMB customers strongly prefer an integrated, end-to-end solution and prefer to use a local service provider to deliver the solution and capabilities	• Easy attach: Only 4.7% of the 5.4M MAPI seats have Lync attached • Lync facilitates Exchange migration • Differentiate & Scale: 10,000 HSPs offer Messaging; Need for Partners to differentiate • Grow the Exchange Base	• Only 13% of cloud partners in the US sell productivity and collaboration solutions • Create sticky solutions through SharePoint: Extensible, Platform • Light up your business with SharePoint to add scale and unique partner value.	• Offer a premium SKU to differentiate in amidst market place inundated with HSP messaging solutions
Partner Go-Do	• Create a hero offer with Productivity • Analyze existing customers for opportunities to sell the Suite at a discount	• Tell existing MAPI customers about Lync, trial, show videos, target with Analytics/BI, Promotions • Train resellers/VARs about the value of Lync • Train customers on Lync • Ideal Offer: Exchange + Lync suite on their web site	• Find SharePoint "win" opportunities in current customer base (Customer has SharePoint solution from an ISV, SI, or self-managed) • Sell customer on benefit of having their SharePoint solution hosted • Long-term opportunities: invest, become the SME and develop/support solutions in-house OR leverage partnerships or white labelling for a solid, long-term approach to selling SharePoint	• Look for upsell opportunities in Customer Base (industries or verticals with augmented needs around security and compliance) • Review feature set available in Exchange Enterprise.

ARTICULATING VALUE

Articulating the value proposition for Partner Hosted SaaS.

Why hosted?
The benefits of the cloud and the added value of hosted cloud.

Why you?
Your unique value as a Microsoft Hosting Partner

The key to delivering the customer value proposition of a Hosted Services is by starting with your unique value to your customer as a Microsoft Hosting Services provider.

Offering Superior Services: Create realized value through superior services that Microsoft's product enable you to provide to your customers (Exchange, Outlook, Lync, etc.)
Microsoft certified: Credible, trusted, integrated platform
Value add to "out of box" experience: Through app integration and customization, you can offer the customer an augmented value above and beyond the vanilla product experience available through the consumer cloud, particularly with SharePoint and Lync.
Differentiated Offerings: Not only does this give you the opportunity to upsell and cross sell, grow hosted SaaS business, it also creates opportunities to offer an integrated and customized layer of services and products to your customer.
Local Service Provider: Customers prefer a local service provider

Why Microsoft?
Proven value

The customer has access to great value through your Microsoft-Hosting services: Integrated platform, scalable, trustworthy, and familiar.

Why Productivity?
Business Value of your Modern Office

Customers want productivity, UCaaS, productivity achieved through social collaboration connected organization.
Product Value to Customer
Helps them manage trends in the new business paradigm and stay ahead of the curve
They want reduced costs, optimized and productive utilization of technology
They want a lot of the workloads and capabilities that Productivity facilitates or creates

DIFFERENTIATION FRAMEWORK

Each successful business must have has its unique value proposition enabled through some key differentiators. In the diagram below, we illustrate some of the levers of a differentiation model:

Core Competencies—is what characterizes your business even if others are selling the same product. Such characteristics like: How a partner sells its services, its business model, its support and SLA, focus on specific verticals (e.g. finance, education, health)

Products and Solutions—mainly describing what products are you selling, and what is unique about it.

Differentiate & Add Value to Scale

Opportunities to add value with Microsoft Hosting Offers

PARTNER GO-TO-MARKET GUIDE

Guidance on how to go to market with a new line of business.

Review the Partner go-to-market guidance to understand how to take go through all stages of plan, enable, and execute to get your offer in market regardless of which product or offer you plan to implement.

Partner Guidance

Plan
Enable
Execute

Go Do	**Identify Opportunities, Qualify Leads** Identify opportunities based on market research and planning, and then qualify leads and start building your pipeline based on the following activities and series of questions.
Activities	Market Research, Competitive Landscape, Resource & Investment Planning, Sales Strategy, Selling Motion, Qualify Lead, Define Ideal Profiles & Revenue Target, Account Planning
Questions to Ask	• What are my opportunities? • How do I assess opportunities? • How do I determine a qualified lead? Who is my ideal target? • What do I need to invest to be successful?

Market Research

Analyze Market Opportunities	**Segment, Industry, Vertical Focus** Review your existing client base to understand your target. To expand, use local or regional market research to understand your opportunities. Take the following into consideration: **What segment am I targeting?** • SMB (1-249 employees): Cost, looking professional, integrated bundled experience, local provider • Large Enterprise (249+): Scalability, end-to-end solutions, full-spectrum managed IT Services and planning, hybrid options, virtual dedicated. **What industry or vertical am I targeting?** You may want to determine a specific industry or vertical to help determine how to position your offers in market: • HR, Financial, Legal, Public Sector: Compliance and Security • Professional Services: Collaboration, Productivity • Sales, Manufacturing: Social Insights, Mobile Productivity For verticals or industries, it's a good idea to get information from your regulatory bodies in your government (in the US, FDIC, SEC, etc.,) to find out about any upcoming changes in

regulation or stringent requirements that will create a more immediate need within your customer base. For example, if the SEC creates a new regulation that all financial organizations must comply with by a certain date, that is an immediate need you can address by offering the compliance capabilities available with Enterprise Exchange in a dedicated virtual environment.

Analysis of Competitive Landscape	### What are your competitors doing? Review and improve upon.

Analysis of Competitive Landscape

What are your competitors doing? Review and improve upon.

It's always important to know what your competitor is doing before getting too deep into the planning phase. What are their offers? Custom solutions? What's their upsell? Get ideas from their marketing as well - their website, how they are positioning productivity solutions? What are they selling (Messaging, IM & Presence, Audio and Video Conferencing, Document Collaboration? Web Portals? Social)?
Walk through their sales process and become a customer. Create a report with full pros and cons of their entire process.

Know the competition for Productivity.

To secure customers on the integrated Microsoft platform for Productivity, it's critical to know the key competitors and be familiar with their products. Here are some of the key products:

- **Google**: Google Docs, Gmail, Drive, Voice, Sites
- **Citrix**: VoIP solutions, GoToMeeting, ShareFile
- **Cisco**: Conferencing, Video, Unified Communications, Collaboration Services, WebEx
- Others: **DropBox**, **LogMeIn**

Define Market Offer

Define Offer

You've read the business case for why you should have a Productivity offer in market. Now it's time to define your offer.

It is critical to sell product plus capability so you can stand out in a crowded market and differentiate. Integrate. Bundle. Add value. Click the link below to go to the specific go-to-market guidance:

- **Productivity Suite**
- **Exchange Upgrade and Upsell**
- **Lync Attach**
- **SharePoint**

Business Strategies

There are various ways to jumpstart or augment your new line of business or solution. These are strategies to consider when building defining your offer:

- Generate multiple revenue streams
- Expand your portfolio - Differentiate and customize
- Evaluate a White Label Partnership with another Hosting Partner
- Partner with an ISV or Developer
- Partner with an SI

Sales Strategy

Determine Selling Motion

Your key objective and primary motion is to attach Lync - and there are multiple ways you could consider doing so. Following are the key considerations and planning that needs to take place to ensure success in developing your sales strategy.

Top of Mind: Differentiate. Integrate. Bundle. Add value.
These are the prioritized sales motions for 2014/15.
1. Hero offer: Lync + Exchange (lead with Lync Conferencing &/or Voice)
2. Hero offer: Productivity Suite (lead with SharePoint or UC)

3. Cross sell: Lync Attach with IM/P (or Conferencing) to the Exchange base
4. Cross Sell: SharePoint Attach to UC base (Lync + Exchange)
5. Upsell Exchange Virtual-Dedicated to Exchange base

Sales Strategy Tips

Solution Sell-Make an emotional connection with customer. It is critical that your partners marketing and sales efforts create an immediate emotional connection with the customer as opposed to marketing by price point or feature or capability. Solution selling and selling by drivers and customer pain points is critical.

Meet needs in market. There's been an increase in Hosted Services within SMB, primarily in IaaS. Hosted infrastructure has been in demand, and it's being supplied. After IaaS, the customer need is around SaaS, where Productivity, BI, and Collaboration rank high in the cloud/hosted space, but are not being provided. In the US, only 13% of partners offer those solutions to their customers. If you're interested in providing a bundled, integrated, end-to-end solution for your customer, you can't leave productivity and collaboration off your plate. Or they'll go somewhere else for it. Additionally, mid-market customers prefer to use a local service provider to deliver the solution and capabilities.

More than Vanilla. To increase value to the customer, our partners need to offer solutions that include a partner-value add on top of what the out-of-box experience offered through public cloud solutions that abound. With Lync, there are multiple ways that a partner can achieve substantial margins by addressing higher-value needs including: application customization, data sovereignty and regulatory compliance, and enhanced contractual or network requirements to name a few. In turn, these create sticky solutions that reduce churn and help them keep their customers by gaining more of the customer spend.

Know your customer. Know enough about your customer base to be able to effectively target customers who are most likely to need the benefits of Lync (size, mobility, etc.).

Mid-market customers (>50 and Less than 1,000 employees) have greater needs than smaller customers for Lync capabilities less likely to be met by Skype, value full integration with Active Directory and other applications. A high percentage of these companies have out-of-date PBX.

Know the competition. Google, Citrix, Cisco. Know how to properly position Lync vs. Skype, Google, WebEx, or Go-To-Meeting. Sales professionals can sell the value of full integration with Active Directory and other applications.

Know the product. In your sales and marketing programs, make sure to maintain sufficient margin to invest in pre-sale education and post-sale adoption.

Educational as Marketing Vehicle: Using video demos on your website to give customers an immediate experience of the product.

Experience the product. Sell directly to your customers by giving them a hands-on experience. Educate your customer to remove sales blockers and maximize adoption with demos, trials, proof of concepts and pilots.

Sales Conversations: Timing and Positioning for various products. Understand that the customer may not want to adopt all of the productivity stack at the outset, but wants to know that their provider can offer the capabilities when they are ready, so keep the door open for future adoption. For example, the customer might not be ready to do web conferencing or voice, but they may be willing to do IM and Presence. This will help reduce the sales barrier to future Lync upsell opportunities. The same goes for SharePoint. They may see the benefits of social collaboration, but are not quite ready to take the leap yet. You should also consider selling the suite, and implement at a later date.

Stellar, high-touch sales and marketing programs. Have a high-touch sales program, direct face-to-face sales program, channel program or well-trained inbound and outbound sales organizations. Selling Productivity effectively requires more than a low touch, self-serve model. The productivity solution in hosting is still primarily a "Push" product with requires business oriented sales teams who can demo and fully explain the benefits of productivity as a solution and how it meets key customer pain points and enables business drivers. This requires a strong marketing program with clear messaging and positioning tailored to your sales strategy is also critical; implement an intensive upsell, cross-sell, and installed base marketing programs for existing customers. Know enough about your customer base to be able to effectively target customers who are most likely to need the benefits of your specific offer (size, need for scale, industry, vertical, etc.).

Sell the value. Solution selling vs. selling based on product features or capabilities help you create an emotional connection with your customer. By selling on the value of enhanced productivity rather than selling on price, or product features catches your customers eye because they hear you offering a solution to one of their blockers or critical pain points. A solution that can directly address what they are experiencing.

Hosted Partner Value Add - Application Integration, Customization, and Additional Hosting Services: A key opportunity to attract and add value to your solution for customers is to provide additional services and solutions that can piggyback onto your Lync Attach campaign. For more information on the key value points that customers see with hosting partners view the Partner-Hosted SaaS Value Proposition section.

Don't lead with hosted messaging (email).
* Messaging is becoming more of a commodity
* The margins narrow for the partners
* There is more and more parity with the out-of-box experience with Lync and Exchange

The future to your success in hosting Microsoft's hosted SaaS productivity is leading with SharePoint, Lync, or the suite.

Qualify Leads

Define Ideal Profiles & Targets	**Define Ideal Customer Profile** Use the Market analysis you performed earlier (segment, competitive, selling motion) as your criteria for defining your ideal customer profile whether they are new leads or in your existing pipeline (leads, installed base, etc.).
Account Planning	**Joint Account Planning** Joint account planning with your Microsoft Business Development Manager or Partner Account Manager is essential to ensure you are taking advantage of all of the resources available to Hosting Partners and also for their insight in existing/potential accounts. To get started with account planning, review existing development of Lync and/or SharePoint as a percentage of Exchange, looking at the business strategies, and conduct a brief financial analysis. To assist you in this endeavor, refer to the Campaign Planning Discussion Checklist. **Build Your Pipeline** Keep track of the leads you generate and follow them all the way through the sales cycle. This sets the stage for proper measurement of ROI so you know what you have to tweak next time around.

Go Do	**Sales and Technical Readiness - Learn How to Prove the Value to Customers**
	Enable sales by refining your sales strategy, ready all roles internal and external
Activities	Sales Readiness: Internal, Customer (Sales Strategy, Solution Focus, Positioning, Scenarios) Technical Readiness: Internal, Customer (Try It/Demo to Prove Value, Win Deal, Negotiate Terms, Close & Drive Adoption
Questions to Ask	• How am I selling? What do I sell them? Best approach? (Foot in the door, cold call, etc.) What do I say? What do I give them? • Selling: Who are the stakeholders? Who do I talk to? What's my relationship with them? • What are the barriers? What are the sales blockers? (Good enough, financial, competitive, distrust) What are the technical blockers? (TDMs, infrastructure, technical readiness) • What do I need to do to capture them? Understand the value, try it out, plan it, and adopt it. • What do I need to invest to be successful? How much to invest to succeed?

Sales Readiness

Sales Scenarios & Pivots	**Sales Readiness (Learning and Training) for Internal Roles** Sales readiness (learning and training) for internal roles is absolutely critical in the success of your new offer in market. A well-thought out sales strategy and training delivery will empower them to win in solution selling scenarios. The following lists the objectives and highlights of what you need to enable your sales force. **Key Components of Sales Readiness** **Sales Strategy:** Ensure that your sales force has clarity on your primary sales motion and selling strategy (upsell, cross sell, high-touch, etc.). **Messaging and Positioning:** Articulate the product value proposition, the product pillars, and the capabilities and features with both technical and business decision makers to win and close deals. **Solution Selling:** Articulate how the products and capabilities are a solution that address and solve the customer's business needs and pain point. **Address Sales and Technical Blockers:** Ability to assure the customer when voicing sales and technical blockers such as their current solution is "good enough," the cost or financial investment is too high, they have specific security requirements, etc. **Competitive Threat:** Ability to assure and convince the customer when discussing competitive scenarios. **Customer Readiness:** You may also want to invest in tools that help prove a business value assessment - something that shows the customer the resource savings and increased productivity they'll experience having you as their service provider. Additionally, you'll want to ensure that your

sales force is able to give the customer the product knowledge they need to go through a product demo or trial.

Sales Training Resources	Review the available sales training resources on the Microsoft Partner Network, such as:

- Delivering an effective Lync demo
- Free Lync partner training sessions
- Hosted Exchange partner training module

See general guidance throughout the playbook, including the Messaging and Sales Scenarios. You'll find many detailed resources and links to campaign and BOM items the Productivity Resource section.

Technical Readiness

Technical Training	**Technical Readiness** Readiness and training for both internal roles and customers is critical for success. The technical training materials and courses that you can leverage from Microsoft or create in-house both prepare your systems engineers to deploy the infrastructure to be ready for hosting, and inform the technical sales team to sell the product. The technical sales process should also enable internal roles to demo the product for the customer so they can prove the value of the technology and win the deal.
Customer Readiness	Educate your customer to remove sales blockers and maximize adoption Demos Trials
Partner Technical Readiness	To successfully sell and implement the different components of the Productivity suite as a Hoster, both in your organization's environment and in integrating with the customer environment, you will need to be well-versed in the technologies - both for your customer, and to deploy on premises. To get started, view resources on certification, infrastructure, and deployment for Exchange, SharePoint and Lync.

Go Do	**Execute on campaign and go to market**
	Bring your offer into market based on the strategy you've devised with the guidance and planning completed.
Activities	Execute on Partner Go-to-Market, define campaign and execute, Customer Phases (Demo to Prove Value, Trial, Close, Negotiate Terms) Drive Adoption, Monitor and Course Correct
Questions to Ask	• What do I need to do to bring my offer to market? • How do I define my Lync Attach campaign? • What sales and marketing materials can I leverage? • How should I advertise, create awareness, and demand? • How do I measure success?

Execute on Partner Go-to-Market

Execute Campaign	It's now time to execute on your productivity campaign. Your campaign go-to-market can be simplified in the following steps. Be sure to leverage the knowledge and progress you gained in going through this playbook, and refer to the links provided so you can leverage the content, samples and more to get your offer in market and close deals.
Top 10 Best Practice Checklist	• Defined a solution suite that includes Exchange, Lync , and/or SharePoint • Leverage communication framework to communicate solution/benefit oriented offer • Clarify motion (net new customers or cross sell to Exchange customers) • Target the mid-market (upstream) • Conduct active campaign tactics to seek target prospects • Ready your sales team and channel sellers • Understand competitive differences • Incorporate a Lync or SharePoint demo in sales process • Follow up media campaigns with telesales

Campaign Tactics/Vehicle:	Measurement:
Foundational tactics	
☐ Web landing page	# of hits
☐ Search Engine Optimization	Page hits
Active campaign tactics	
☐ Telesales campaign	Prospect conversion to lead
☐ Targeted Email blast(s)	Click through rate, conversion to lead
☐ Search Engine Marketing/Digital (online ad) - 2-3 versions to test	Ad click through rate
☐ Control Panel (try and buy offer)	Click through rate
☐ Loyalty/referral marketing	# of prospect referrals
☐ Webinar	Attendees, qualified leads generated
☐ Other (Radio, Direct Mail)	TBD

Monitor and Course Correct

Track and Measure

You should make sure to take the time to track your progress against the targets and goals that you have set.

Refine and Replicate

Using Your Results

After you have the campaign in market, you should look at doing a post-mortem after the first fiscal year half. Some of the questions you want to look at include:

- What were the most common objections encountered in the sales process?
- What tactic or tool was most effective in converting the prospect?

To find your answers, you should consider reviewing to achieve the following metrics:

Conversion:

- What % of leads convert to qualified prospects?
- What % of qualified prospects convert to customers?
- How many new seats were added (of IM/P, Conferencing, or Voice)?

ROI:

- What were the most cost effective acquisition/upsell tactics?

View the campaign planning checklist at the end of this playbook.

PRODUCT SOLUTIONS

Use the Sales Motions section of the playbook to understand the lines of business that you can build out as a Hosted SaaS Partner, and the snapshot view of the steps you need to take to be successful in each line of business whether it's accelerating your Exchange business by attaching Lync, creating customer "stickiness" by adding a SharePoint line of business, selling Productivity as a suite, or upgrading specific customers to Exchange Enterprise. Each of these sales motions include the following sections:

- Sales Motion: *What are we selling?*
- Target Customer, Solutions, Selling Guidance: *Product Basics, Overview, Licensing*
- Why this specific product? *Value as a Line of Business to the Customer and to the Partner*
- Jump starting a Line of Business
- Keys to success: *Sales Strategy and Tips*
- Customer Value Proposition
- Line of Business: *Quick Start, Details, Resources*

LYNC ATTACH

Accelerate and scale by attaching Lync to your existing Exchange business.

Partner Guidance

Go to Market with Partner-Hosted Lync

Sales Motion
What are we selling?

To stay on-strategy and on-goal, we need to be deliberate and precise in promoting partner-hosted solutions that incorporate productivity - whether as standalone SALs, or through the Suite, to enable selling on something other than price point or product features.

One building block of that strategy is the Lync Attach motion, which has a clear opportunity and a path of enablement: The market demand for UCaaS tied to email is enabled by the foot in the door with messaging, and the ability to jumpstart a hosted conferencing or voice line of business through white label partnerships.

Lync helps accelerate and differentiate to drive hosted SaaS growth.

Customers are increasingly choosing alternatives to On-Premises deployments seeking to reduce their upfront capital and ongoing maintenance costs. Lync can be hosted by a partner (either Single-Tenant or Multi-Tenant) or hosted by Microsoft in Lync Online. While Microsoft expects that many customers will choose to go with Lync Online for their basic needs, there is a great market opportunity for hosting partners to offer differentiated UCaaS solutions. Substantial margins can be

generated from addressing higher-value needs including: App customization, Data sovereignty & regulatory compliance, Enhanced contractual or network requirements.

Within the Lync Attach motion, there are two options for partner-hosted solutions, and the subsequent pieces of the playbook include the details and resources needed for partner enablement:

Primary Motion	Cross sell: Lync Attach with IM/P (or Conferencing) to the Exchange base
Secondary Motion	Hero offer: Lync + Exchange (lead with Lync Conferencing &/or Voice)

Target Customer, Solutions, Selling Guidance

	Primary Motion	Secondary Motion
Customer Existing Solution	UC/Exchange Only • Competitive Solutions: Go-to-Meeting, Citrix, WebX • Microsoft consumer products: Skype	No UC • Competitive Mix (Google Docs, Google Drive, Lotus/Gmail, Go2Meeting, LogMeIn, WebEx), • Microsoft consumer products (Skype, OneDrive)
Target Solution	Lync with IM/P (or Conferencing)	Lync + Exchange (lead with Lync Conferencing &/or Voice)
Selling Guidance	5. Enterprise Voice — Guidance	4. Managing Compliance — Guidance 5. Enterprise Voice — Guidance 8. Enterprise Class Solution to Replace Mixed-Platform Consumer Solutions

Product Basics
Overview, Licensing

Product Overview
Communications Today

Technology has brought us a long way in terms of how we communicate. But as communication and collaboration technologies have evolved, they have done so independently, in parallel, creating communication silos. For most companies today, telephony and voice mail, e-mail, IM, audio conferencing, video conferencing, Web conferencing, and group communication tools all live in their own disconnected silos. For consumer oriented tools and services we are using in our daily lives, we have to remember separate phone numbers, account names, and passwords, in addition to limited and "un" integrated communications experience with each device. These independent silos lead to redundancies and inefficiencies in our personal lives and for organizations it is expensive to maintain and to ensure each solution is in compliance with business and government regulations, and that it's secure and manageable in the long term.

The Microsoft Unified Communications Vision

Microsoft® Lync® 2013 is an enterprise-ready unified communications platform. Lync connects hundreds of millions of people everywhere, on Windows 8 and other devices, as part of their everyday productivity experience.

Lync reduces complexity by putting people at the center of the communications experience by integrating all of the ways we contact each other in a single environment— using a single client,

identity – while providing businesses with the power to choose how they provision those services—whether on their own premises, as cloud services, or in a hybrid mode.

Lync provides a consistent, single client experience for presence, instant messaging, voice, video and a great meeting experience, and best-of-breed integration in the Office family of apps so Lync users can focus less on how to use the tools and direct their energy to meeting the needs of their business.

With Lync as the UC platform, IT administrators are able to modernize their operations and simplify administration with Active Directory, common data store, and a shared set of archive and compliance tools, across multiple UC components (e.g. email and instant messaging).

Why Lync?

Value as a Line of Business to the customer and to the partner

Value to the Hosting Business: Meets customers demand

Here are some additional data points to understand why Lync is a key opportunities for partner selling hosted SaaS:
- Out of Productivity SaaS, UC is a top spend priority for mid-market organizations
- Organizations want their UCaaS providers to also provide their messaging solution
- UC&C - customers want UC, want advanced capabilities
- Connectivity/Communication ranks 2nd in SMB capabilities in areas of IT Spend. Key objectives: Improving bandwidth, integrated A/V/Web communications video solutions

Value to the Hosting Business: The opportunity for your business

Differentiate, Scale, Reduce Churn
- Revenue: Lync Partners expect higher overall Exchange (SPLA/HVS) growth vs. non-Lync Partners.
- Create Scale with Lync: Hosters who offer Lync have an ARPU of $35 compared to average of $5 ARPU for email-only packages
- Easy Attach: Only 4.7% of the 5.4M MAPI seats have Lync attached - so there is a clear opportunity
- Lync requires customers to migrate to Exchange 2013
- Builds the foundation for Productivity

Jump start Lync as a Line of Business

Help kick start your Lync business. These are the top-of-mind steps and go-do's that the partner must take and/or consider:
- Follow the motions, one or both.
  Note: Sell conferencing and/or voice as they create the stickiest offers.
- Target mid-market.
- Consider the business strategies:
  - Tell their existing MAPI customers about LYNC, trial, show videos, target with Analytics/BI, Promotions
  - Train their resellers/VARs about the value of Lync
  - Train their customers on Lync
  - Ideal Offer: Exchange + Lync suite on their web site

For all of these details and more, view the [Appendix for resources](#).

Keys to success: Sales strategy and tips

Mid-market customers (>50 and Less than 1,000 employees) have greater needs than smaller customers for Lync capabilities less likely to be met by Skype, value full integration with Active Directory and other applications. A high percentage of these companies have out-of-date PBX.
Know the competition. Google, Citrix, Cisco. Know how to properly position Lync vs. Skype, Google, WebEx, or Go-To-Meeting. Sales professionals can sell the value of full integration with Active Directory and other applications.
Experience the product. Sell directly to your customers by giving them a hands-on experience. Educate your customer to remove sales blockers and maximize adoption with demos, trials, proof of concepts and pilots. Make sure to view the resources and guidance in depth on the [Lync Rollout and Adoption Success Kit](#) and the [Lync end-user training sessions](#).

Sales Conversations: Timing and Positioning Lync. Understand that the customer may not want to adopt Lync companywide at the outset, but wants to know that their provider can offer the capabilities of Lync when they are ready, so keep the door open for future adoption. For example, the customer might not be ready to do web conferencing or voice, but they may be willing to do IM and Presence. This will help reduce the sales barrier to future Lync upsell opportunities.

Stellar, high-touch sales and marketing programs. Selling Lync effectively requires more than a low touch, self-serve model. Lync is still primarily a "Push" product with requires business oriented sales teams who can demo and fully explain the benefits of Lync.

What to sell and when. To determine which motion to go with, look at the product attach rate of Lync seats to MAPI customers:

  -Low Attach: Execute Lync cross-sell campaign to current MAPI seats

  -Some Lync Attach: Execute Lync cross-sell campaign to current MAPI seats. Upsell from IM/P to voice.

  -High Lync Attach: Execute Lync + Exchange campaign to net new prospects. Make sure you have Lync voice capabilities direct or through a white label partner.

Customer Value Prop

Sell the customer on the value of unified communications and collaborations (UC&C) to achieve a connected, productive organization where employees have quick access to knowledge, the ability to collaborate, and keep the organizations IP safe based on compliance or HR guidelines.

- Light up messaging
- Enable mobile workers, save costs on travel, work space
- Advanced UC capabilities of integrated Audio, Video and Web conferencing, telephony

Quick Start

JOINT PLANNING	READINESS MATERIALS	MEASURE RESULTS	REFINE AND REPLICATE
Where is the opportunity? Existing Exchange users? Net new customers? Who is your ideal target? [Campaign Discussion checklist in the Lync Appendix]	[View resources by topic]	Lync attach as a % of MAPI seats Campaign click-through Conversion: prospect>lead> customer Revenue/Margin per user	Course correct based on lessons learned, highlights, etc.

Details

Identify Opportunities:

1. Immediate Opportunities: Cross-Sell
    o   Short term immediate opportunities (finalize launch of offers in pipeline)
    o   Cross-sell
    Quick Steps: Readiness, Campaign ready (BOM, Website, etc.), GTM with Email Campaign

2. Long-Term/Seeding: New Hero Offers in Market
    Quick Steps:
    o   Identify high potential partners based on sales scenarios
    o   Review Battle Card
    o   Review Readiness
    o   Go-to-Market based on playbook advice or historical successful campaigns

Joint Account Plan:
Review existing attach rates of Lync, SharePoint or all three products (separate SALs), look at the business strategies, and conduct a brief analysis.

Look at product attach rate of Lync or SP seats to MAPI, and take the following steps:
-Low Attach: Execute Lync cross-sell campaign to current MAPI seats
-Some Lync Attach: Execute Lync cross-sell campaign to current MAPI seats. Upsell from IM/P to voice.

-High Lync Attach: Execute Lync + Exchange campaign to net new prospects. Ensure Partner has Lync voice capabilities direct or through a white label partner.

Keep the following as top-of-mind in your offers:
- Positioning, visibility with existing Exchange offers/info
- Synergy with Exchange offer (highlighting integration benefits)
- Bundled offers (is Lync IM/P bundled with Exchange offers?)
- Demos (is a demo video included on partner website?)
- Long term seeding: New Hero Offers in Market

Define Offer
Business strategies: Sell through (short term, long-term)
1. *One Time, Upfront fees*: Network Assessments, Design and Deployment Services, Device resale, etc.
2. *Recurring Revenue*: Network Services, Audio/Video Conferencing, SIP Trunking, etc.
3. *Upsell*: Interop/Bridging, Concierge, ISV Marketplace, Custom Business Applications, etc.

Note: If Voice is a blocker, start with IM/P and Conferencing, but identify long term voice strategy (align with white label partner if necessary)

Segment. Encourage Partner to move upstream to larger SMBs

Target Audience. Determine who your target audience and ensure you are properly positioning your messaging, how they uncover or arrive at your campaign (website/email, etc.)

Campaign execution
- What kind of investment (% of revenue) are they investing in Marketing?
- Execution vehicle (Telesales? Email? Website?)

Resources

Sales Guidance: [Partner Go-To-Market Guide](#)
[Appendix](#): Messaging Framework and Copy Blocks, White Papers, Research, White Label Partnerships and More

EXCHANGE ENTERPRISE

Upgrading specific customers to Exchange Enterprise

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Partner Guidance

Go to Market with Partner-Hosted Exchange

</div>

Sales Motion
What are we selling?

This section of the playbook provides a high-level look at the opportunities to upgrade the Exchange base by attaching Lync, or upsell Exchange Standard to Enterprise or Enterprise Plus.

One building block of that strategy is the Lync Attach motion, which has a clear opportunity and a path of enablement, and because Lync drives Exchange upgrade, this is a key go-do in terms of selling Exchange. Additionally, although it's challenging to sell Exchange Enterprise by price point, it's very worthwhile to sell it to meet customers' needs around compliance capabilities.

Primary Motion	1. Exchange Upgrade to 2013: Lync Attach
Secondary Motion	2. Upsell Exchange Virtual-Dedicated to Exchange base

Target Customer, Solutions, Selling Guidance

	Primary Motion	Secondary Motion
Customer Existing Solution	Exchange 2010 and earlier • Competitive Solutions: Go-to-Meeting, Citrix, WebEx • Microsoft consumer products: Skype	• Exchange Standard SAL • Competitive Platform
Target Solution	• Lync with IM/P (or Conferencing); Exchange 2013	• Exchange Enterprise (or Enterprise Plus) SAL in a Virtual-Dedicated hosting environment
Selling Guidance	4. Managing Compliance — Guidance 5. Enterprise Voice — Guidance 8. Enterprise Class Solution to Replace Mixed-Platform Consumer Solutions	4. Managing Compliance — Guidance 3. Social Collaboration — Guidance 7. Productivity with Unified Communications — Guidance

Why Exchange?

Value to the Hosting Business: Meets customers demand

Exchange and message are still and will always be a mission critical workload. However, here are some additional compelling reasons for "why Exchange."

Value as a Line of Business to the customer and to the partner	• Out of Productivity SaaS, UC is a top spend priority for mid-market organizations
	• Organizations want their UCaaS providers to also provide their messaging solution
	• Messaging and UC together are the foundation for productivity
	
	## Value to the Hosting Business: The opportunity for your business
	    • UC&C: Customers want UCaaS same as email provider
	    • Mobility: Security for mobile devices, providing advanced communications to mobile staff

Product Basics Overview, Licensing	## Product Overview
	Built to deliver the enterprise-grade security and reliability that businesses require, Microsoft Exchange provides email, calendar, and contacts on a PC, phone, and web browser. In addition, Exchange does the following:
	
	    • Helps organizations to tailor solutions based on their unique needs and ensures that communications are always available while they remain in control, on their terms—online, on-premises, or a hybrid of the two.
	    • Helps users be more productive by helping them manage increasing volumes of communications across multiple devices and work together more effectively as teams.
	    • Keeps the organization safe by enabling protection of business communications and sensitive information to meet internal and regulatory compliance requirements.

Value Proposition	## Remain in Control Online or On-Premises
	    • Through a number of performance and scalability enhancements, Exchange adds support for a wider range of storage hardware options, which gives users large mailboxes at a lower cost to the organization.
	    • Exchange offers the most flexible options available, with powerful migration and management tools that help an organization get the latest version of Exchange—from any version of Exchange or other email systems.
	    • Exchange introduces a simplified approach to high availability and disaster recovery, helping organizations achieve new levels of reliability and reduce the complexity of delivering business continuity.
	
	## Do More on Any Device
	    • Exchange gives users the freedom to access mobile email, calendar, and contacts on a phone and tablet by providing an always-available Microsoft Outlook messaging and collaboration client experience, while maintaining enterprise-grade security.
	    • Exchange makes it easier for users to connect and collaborate with others by giving them a more intuitive way to find the right people, schedule time, and share content.
	    • Exchange helps users accomplish more and save time by centralizing all daily activities, projects, and communications in an easy-to-navigate way.
	
	## Keep the Organization Safe
	    • Exchange delivers enhanced, integrated compliance functionality, including archiving, electronic discovery, and In-Place hold—focused on easing regulatory compliance and discovery challenges and cost.
	    • Through accurate, automatic, and centrally managed Data Loss Prevention capabilities, Exchange makes it easier to monitor and protect a company's sensitive and confidential information.
	    • Exchange actively protects communications with built-in defenses against viruses, spam, and phishing attacks.

How do I sell it?	## Profile accounts and identify compelling events:
	    • Change in leadership.
	    • Pending merger or acquisition.

- End-of-hardware life cycle.
- End of software agreement (for example, Microsoft Office, Exchange, Lotus Notes).
- Considering a cloud competitor.
- Cost/budget pressure—interest in "pay as you go."
- Real-estate issues—less physical space, higher anywhere-access needs.

Sell to "Why change existing email solutions?"

- Lower IT costs: Larger mailbox at lower storage costs, built-in protection, mobility, archiving, backup, and more.
- Better manage risks: Simplify regulatory compliance and legal discovery needs with integrated archiving and retention capabilities.
- Help improve user productivity: Consistent Microsoft Outlook experience on the PC, phone, and browser.
- Protect organization's information with Data Loss Prevention capabilities.

Sell to "Why go to Partner-Hosted cloud?"

- Easy data migration
- Retain Data in local country
- Hybrid environment requirements (private & public cloud)
- Application integration

Sell to "Why a Microsoft cloud email solution?"

- Single platform: Extend existing investment in Microsoft products (for example, Microsoft Office, Microsoft SharePoint Server, the Windows Server operating system, etc.) and interoperability.
- Lower training costs: Familiar Microsoft Office and Outlook experience on the PC, phone, and browser.
- Business email credibility: There is a dwindling market share amongst other enterprise-grade email solutions (Notes, GroupWise, etc.) and more than 90 percent Google users on free consumer email. This provides the opportunity to upsell to a premium hosted enterprise-class email solution.
- Deployment flexibility: Flexibility to deploy on-premises, online, or hybrid; migrate to cloud at their own pace.
- Anywhere access: Support for all major browsers (that is, Mozilla Firefox, Apple Safari, and Google Chrome) and virtually any devices, including BlackBerry and iPhone.
- Third-party certification: Leverage your certification if applicable (e.g. ISO27001, EU Safe Harbor Seal, SAS70 Type 1, FEPRA, FISMA, HIPAA, etc.)

Qualifying questions

Question	Short Response
What is your online/cloud strategy?	Microsoft Exchange offers deployment flexibility. You can get business-class email, whether on-premises, in the cloud, or a hybrid, in a way that best fits your business and technology needs.
How many mailboxes are you managing today?	With Exchange, you can help reduce the costs and complexity of delivering a more secure and manageable business-class email solution without compromising on user productivity.
What is your mailbox size?	You can provide a larger mailbox at lower costs with Microsoft Exchange. - Exchange provides a broad range of storage options, allowing you to lower storage costs while increasing mailbox size (Partner defines mailbox size options.

How do you serve users with remote or mobile access needs?	Microsoft Exchange provides built-in mobile access to email on the PC, phone, and browser. • Support for non-Microsoft browsers (Firefox, Safari, and Chrome). • Support for most major smartphone platforms, including Android, BlackBerry, iPhone, and Windows Phone.
What are you paying for separately (anti-virus/anti-spam, BlackBerry Enterprise Server, hosted archiving)?	You can consolidate costly third-party solutions and management costs with Microsoft Exchange. Exchange provides many capabilities out-of-the box, including anti-virus/anti-spam, mobility, archiving, disaster recovery, backup, and more.
How much are you spending for all of the above?	With Hosted Exchange, you get enterprise-class email at a lower cost by reducing the upfront costs of storage, infrastructure and more.

Keys to success: Sales strategy and tips	**Know the Industries, verticals that have augmented compliance and regulatory needs.** HR, Financial, Legal, Public Sector are great verticals and industries for the compliance and security capabilities that Exchange enables. Research regulatory bodies in your local government (in the US, FDIC, SEC, etc.,) to find out about any upcoming changes in regulation or stringent requirements that will create a more immediate need within your customer base. **Know the competition**. • Exchange vs. Google, selling guidance • Google: Google Docs, Gmail, Drive, Voice, Sites **Steps to Sell Exchange:** View the Exchange Selling Guidance found in the Exchange Appendix for details: • Profile accounts and identify compelling events • Sell to "Why change existing email solutions?" • Sell to "Why go to Partner-Hosted cloud?" Sell to "Why a Microsoft cloud email solution?"
Customer Value Prop	Sell the customer on the value of premium messaging solution in a virtual-dedicated environment to meet augmented needs around control, security and compliance solution with Archiving, Rights Management, eDiscovery. Devices and Mobility: A familiar experience and compliant solution across devices
Resources	Sales Guidance: Partner GTM Guide Messaging Framework Copy Blocks	Technical Resources for Virtual Dedicated: TechNet: Exchange 2013 Planning and Deployment Exchange 2013 virtualization Integration with SharePoint and Lync Deployment reference Multi-tenancy in Exchange 2013

SHAREPOINT

Creating customer "stickiness" by adding a SharePoint line of business.

What is SharePoint?

SharePoint Overview

SharePoint 2013 is an enterprise-grade collaboration platform that powers the rest of the Microsoft productivity suite: Office, Exchange, and Lync communications software. It includes capabilities for document and site management, collaboration, file sync and share, business intelligence (BI), enterprise search, and social.

What is new about SharePoint 2013?

A new and simplified user experience: Drag and drop content into document libraries, edit lists inline, and create sites in a few simple clicks.

A new way to work together: New social features allow users to share what they are working on, ask questions, and track what their colleagues are doing.

Grow a network: New search profile features help users connect to find answers to questions and discover experts they never knew existed.

Store and sync documents: Microsoft OneDrive for Business storage technology syncs users' content in SharePoint to their desktop.

Share documents: A new simple way users can share documents from Microsoft Office or OneDrive for Business with people inside and outside of their organization puts working together with anyone just a couple of clicks away.

Keep teams in sync: Set up a new team site in minutes with wizards built into SharePoint to help users set permissions, track meeting notes, and bring together all of their team's email and documents in one place.

Keep projects on track: SharePoint helps users organize their projects and tasks, giving them a view into upcoming deliverables across SharePoint, Outlook, and Microsoft Project.

Find relevant information easily: SharePoint helps users quickly customize and narrow their search to deliver more relevant results. It also provides recommendations on people and documents to follow.

Take SharePoint on the go: If users are running from meetings or out of the office, they can share documents or update their activity feed from their mobile device.

Do more with SharePoint apps: The SharePoint store is an online marketplace to discover and install apps that are designed to work with SharePoint.

How do I sell it?	### Selling Scenarios

While selling licenses for SharePoint, focus on user scenarios (not product capabilities) and highlight how the product makes it easy for users to achieve their collaboration needs. Do so by highlighting the following five key scenarios where people use SharePoint:

Share ideas and content. SharePoint is the place to share ideas, content and the vision of your company.

Discover experts & share insights. It's where you go to discover experts, share knowledge and uncover connections to information and people.

Organize teams and information. It's scalable enough to organize and manage all your information assets but it's also designed to organize and store documents to enable personal productivity, keep teams' in sync, and projects on track.

Build Apps and Websites in the cloud. It's a hub for developers to build and deploy modern apps and for designers to build eye-catching websites.

Manage costs, risk and time. Because it's built in the cloud IT Pros can manage cost, and meet the demands of compliance to manage risk.

Customer Value Proposition and Proof Points

The value of adding social collaboration to the existing mix of unified communications helps achieve a connected, productive organization where employees have quick access to knowledge, the ability to collaborate, and apply the same level of compliance and security that currently exists in their messaging to their knowledge base, and internal and external websites.
- Boost Productivity (by 20-25%)
- Reduce time searching for information (by 35%)
- Enable successful transformation (64%)

Target Customer, Solutions, Selling Guidance	

Channel strategy: Determine how to deliver the SharePoint solutions to your customers - new or existing. For all of these details and more, view the *SharePoint Channel Strategies: Building Your Hosted Line of Business* in the Hosted SharePoint Playbook.

Invest & Build	Partner Up:		
Expertise in-house	ISVs	Systems Integrators	White Label Hosting Partner
Build from the Ground Up: Acquire Subject Matter Expertise Ready the Channel Go-to-Market	Accommodate customer driven opportunity Reach out through Customers or ISV Developers Create a Stand-alone Offer	Research Partner Joint efforts	Partner with SharePoint ecosystem White Label partners in your region. Contact MSFT Account Manager to make introductions.

Keys to success: Sales strategy and tips	

No vanilla solutions. Don't offer a vanilla SharePoint solution as the value of SharePoint is the customization that you can offer to the customer. The vanilla SharePoint has parity with the out-of the box experience, so there is no additional partner value add aside from the benefits of hosting. This will also help you differentiate from the competition as more HSPs start adding SharePoint as a solution in their SaaS LOB offerings.

Connecting the dots for the customer. The partner's sales and marketing efforts need to help the customer see the connection between the trends and new realities in their new business paradigm, their organizational drivers, and how productivity and social collaboration can help them effectively survive and increase profitability.

Leverage ISVs and Developers. Leveraging SharePoint apps through ISVs and developers for a rich SharePoint Solution including forms, custom apps, enterprise content management, social, portals, workflows, websites and web content management.
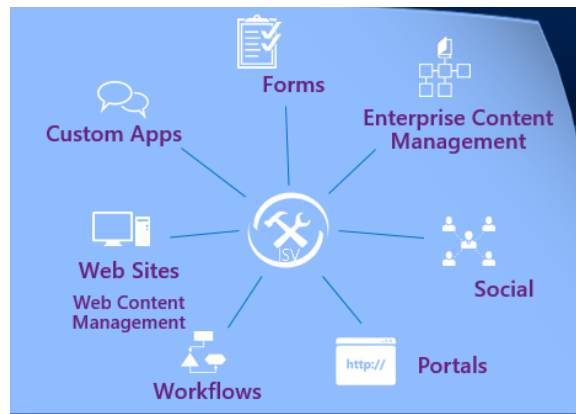
Why SharePoint
Value as a Line of Business to the customer and to the partner

Value to the Hosting Business: The opportunity for your business
Customers want SaaS for productivity; SharePoint has deep integration with all 3 areas of customer ranked priorities in ITC SaaS spend: 1) CRM 2) BI and analytics 3) SaaS: Productivity and collaboration suites.
- Only 13% of cloud partners in the US sell productivity and collaboration solutions
- Create sticky solutions through SharePoint: Extensible, Platform
- Light up your business with SharePoint to add scale and unique partner value.

	Top Trends	Partner Opportunity	Customer Solution with SharePoint
Mobility	**1 billion** smartphones by 2016, 350M of those being used at work. **150M SMB** employees will be telecommuting by 2016. **75%** of organizations allow for mobile device for business use.	Only **24%** of organizations have a BYOD policy in place.	Connected organization
Social	**82%** of the world's online population engages in social networking. **49%** of organizations require network contribution. Workplace demographics now span 3 generations.	**80%** of employees are ineffective at collaboration.	Social insights Finding Experts and information quickly Organizational collaboration
Cloud	**50%** of enterprise customers are "on the road" to cloud. **66%** in SMB. Strategic focus in cloud is shifting from Infrastructure, AppPlat becoming the largest spend in services.	**89% Mid-Market** customers feel it is important to buy services from a local provider. Only **31%** of Hosters offer document/collaboration SaaS.	Document collaboration Team sites and projects
Big Data	**40%** growth in global data generated in a year.	**62%** can't use it for effective decision making. Analytics & BI top technology priority for SMBs. App	Simple business insights
Compliance	**10K** new federal and industry regulations created in last 5 years	**93%** of employees admit to violating compliance policies.	

MESSAGING AND SALES SCENARIOS

Sales and messaging guidance based on trends and scenarios

Review the selling guidance to better understand the customer challenges, business drivers for the offers you plan to put into market. On the individual Go-to-Market pages, you will find that each motion has a "sales scenario" number attached to it. Use that as a recommendation as to which scenarios to leverage. These scenarios include some copy and messaging. Review the Resources Section to access more sales and marketing materials.

Messaging Guidance – How to craft the right message with your offers to solve specific needs
Productivity — Guidance
Mobile Productivity — Guidance
Social Collaboration — Guidance
Managing Compliance — Guidance
Enterprise Voice — Guidance

Sales Scenarios – How to pitch specific solutions
Turnkey Productivity — Guidance
Productivity with Unified Communications — Guidance
Enterprise Class Solution to Replace Mixed-Platform Consumer Solutions
Partner-Hosted SaaS Opportunities vs. Consumer Cloud — Guidance
Competitive Platform: Google — Guidance

1. Productivity — Guidance

Summary Pitch

Microsoft Productivity helps organizations navigate the new business paradigms of cloud, ubiquitous mobile access, overwhelming abundance of data, tightened economic conditions, and an ever-increasing connected workplace allowing them to get ahead of the curve, create a connected and productive organization, look professional and make strategic business decisions based on scalability and data insights.

	Top Trends	Partner Opportunity
Mobility	**1 billion** smartphones by 2016, 350M of those being used at work. **150M SMB** employees will be telecommuting by 2016. **75%** of organizations allow for mobile device for business use.	Only **24%** of organizations have a BYOD policy in place.
Social	**82%** of the world's online population engages in social networking. **49%** of organizations require network contribution. Workplace demographics now span 3 generations.	**80%** of employees are ineffective at collaboration.
Cloud	**50%** of enterprise customers are "on the road" to cloud. **66%** in SMB. Strategic focus in cloud is shifting from Infrastructure, AppPlat becoming the largest spend in services.	**89% Mid-Market** customers feel it is important to buy services from a local provider. Only **31%** of Hosters offer document/collaboration SaaS.
Big Data	**40%** growth in global data generated in a year.	**62%** can't use it for effective decision making. Analytics & BI top technology priority for SMBs. App
Compliance	**10K** new federal and industry regulations created in last 5 years	**93%** of employees admit to violating compliance policies.

2. Mobile Productivity — Guidance

Summary Pitch

Get Work Done...Anywhere, on your desktop, phone, laptop, tablet. Microsoft devices and services are architected for the always-on mobile world. Microsoft offers a complete and integrated Mobility offering that provides a seamless experience for users, empowering your workforce and engaging your customers. Microsoft offers a collaborative mobility solution that works across devices and helps to keep you data secure.

Benefits

Improve employee productivity and satisfaction to help attract and retain talent.
Improve business agility and make decisions faster.
Reduce costs with support for BYOD.
Reduce risk of sensitive information being disclosed.

Top Trends

56% of office workers said they are expected to be able to get work done no matter where they are.
Over **50%** of information workers use 3 or more devices for work.
More than half of office workers **(53%)** would be willing to work more hours — and one in five **(20%)** would be willing to take a pay cut — to have more flexibility in where and when they got work done.

Challenges

Increase in devices.
Inconsistent access to documents and experts when traveling.
Protection of sensitive customer data and IP needs be ensured.

Business Needs Mapped to Solution

Pillar	Business Need	Solution
Work Across Devices	Need for a consistent user experience across platforms	Apps across major platforms Device optimized, consistent experiences Full and familiar Office
Stay in Sync	Need to work anywhere, anytime, accessing key documents and collaborating with colleagues	Meetings with HD video; familiar apps with social experiences Offline access to docs; roaming docs and settings Mobile access to data
Keep in Control	Need to protect data across devices and the cloud	Set Policies by user, device, and location Selectively wipe enterprise data on devices Built-in data loss prevention (DLP) controls Compliant with industry standards

3. Social Collaboration — Guidance

Summary Pitch

Microsoft offers a complete and integrated social offering that provides a seamless experience for users, empowering your workforce and engaging your customers. The new Office integrates social networking capabilities within business applications to enable people to work in new, more productive ways. Social capabilities such as network feeds, presence, and co-authoring are brought directly into content creation and collaboration workspaces so that these capabilities result in faster time to value.

Top Trends and Challenges

Changes in How We Work

1.5 billion People around the globe have a social networking account.
72% of companies are deploying at least one social software tool.
Rise of the Powerful Consumer
Always-on — Consumers use an average of **4 devices every day**.
44% of consumers today complain about products & services on social networks, & they are more likely to accept what they hear through social networks rather than what they hear through advertising.
20% of online consumers who complain via social media expect response within one hour.

Challenges
Organizations going global need to find ways to work effectively with remote workers.
Rise of empowered social consumer that expects to be engaged.
28 hours a week spent by knowledge workers writing emails, searching for information, and collaborating.
58% of employees spend over an hour a day looking for information.

Business Needs Mapped to Solution

Pillar	Business Need	Solution
Employee Engagement	Give your people a voice and encourage them to make a difference Need to attract, engage, and retain employees	Find experts and information fast Share best practices and drive innovation by engaging employees in a two-way conversation via group conversations or creating a poll
Team Collaboration	Get more done by connecting employees, customers, and partners Need to connect, collaborate, and share with high performing teams	Improve team project alignment Collaborate on editing documents in the cloud Utilize newsfeed to say in sync, reducing email traffic and making it easier for people to know where things stand
Connected Organization	Bring your intranet to life with social, mobile, and business data	Employees have an intranet that is social, easy to use, and can connect employees and systems across the enterprise
Business Agility	Innovate and adapt in a world of constantly changing business needs	Gather feedback from appropriate external customers and partners Upload PowerPoint document, to iterate new concepts quickly, reducing time to market Crowd source new ideas

Benefits
Lower Turnover (by 51%)
Boost Productivity (by 20-25%); Reduce time searching for information (by 35%)
Enable successful transformation (64%)
Videos: Hotel, Bicycle company, Coffee Shop

4. Managing Compliance — Guidance

Summary Pitch to Customer

Ensure you retain what is needed, for the right time period, and ensuring that it can be located quickly. Organizations are under considerable and increasing pressure to comply with external and internal regulations. Microsoft's compliance solutions focus on Internal Controls, which are needed to ensure External or Regulatory Compliance. Microsoft solutions help alleviate that pressure with robust documentation workflow and visibility tools, plus a highly secure, trusted infrastructure. Microsoft eDiscovery is a platform capability among these tools, offering customers advanced preservation, search and management capabilities for easy and compliant data collection.

Top Trends and Challenges

Fines: LPL Financial was fined $9 million for 35 separate "significant email system failures."
Search and Process: eDiscovery represents 35% of the total cost of litigation. Companies that fail to produce information in a timely matter face the risk of paying huge fines.
Regulations: There were 1,400 new regulations introduced in 2013 alone. These plus the hundreds of internal controls add significant compliance pressure on organizations.

Challenges

Increasing number of regulatory requirements.
Increasing cost of compliance processes.
High cost to integrate and report on data from multiple sources.
Increasing burden on end user to change work style to meet requirements.

Business Needs Mapped to Solution

Pillar	Business Need	Solution
Risk Assessment and Control Documentation	Need to properly retain records and documents, place legal holds	In-place archive preserves data without changing the way users work Sites and repositories for compliance initiatives
Workflow Automation	Need to design efficient workflows, automation; work in familiar tools	Assigned tasks and workflow through familiar tools Managing versions, editing rights
Centralized Reporting and Corrective Action	Need to ensure controls, timely reporting, rapidly perform eDiscovery	Centralized reporting eDiscovery across multiple systems

Benefits

Improved visibility helps ensure compliance and reduces the risk of fines and legal action.
Spend less time on transactional day-to-day management, more time on strategic activities.
Simplified compliance reduces IT and end user burden, increasing productivity.

5. Enterprise Voice — Guidance

Summary Pitch

Microsoft provides Enterprise Voice capabilities with Lync Server that can enhance or replace traditional PBX systems. These capabilities include common calling features such as answer, forward, transfer, hold, divert, release, and park, along with Enhanced 9-1-1 calling for North America, support for analog devices and a broad range of both IP and USB user devices from partners. Users can access these features over the Internet without using a VPN connection.

Top Trends

90 of the Fortune 100 companies use Lync
There are 5 million Enterprise Voice users
Lync experienced a 30% year-over-year growth in Q3 2013
86% of US enterprises that trial Lync Voice plan to deploy

Challenges

Enable telecommuting: How do you enable flexible work schedules? How do you stay connected with employees who telecommute?
Collaboration across applications: How do you integrate productivity applications so that employees can collaborate seamlessly across solutions?
Reducing communications costs: How do you retire old communications systems to save costs without interrupting employee productivity?
Overwhelming IT: How do you improve communications without overwhelming IT staff or adding administration costs?

Business Needs Mapped to Solution

Pillar	Business Need	Solution
Work from Anywhere	Facilitate telecommuting and remote work for employees Provide real estate flexibility with hot-desking	Single number reach Flexible call management Enhanced 911 Bandwidth management
Work Across Devices	Deliver consistent, user-friendly experience across PC, smartphones tablets, office phones, and room systems	Windows 8 and Windows RT support Windows Phone, iOS, and Android Lync Web App; Lync Phone Edition
Connected Experiences	Speed business processes Enable communications from within popular applications	Call from within Office documents or emails Skype integration
Simple to Manage	Reduce administration Avoid need for specialized PBX knowledge Simplify moves, adds, and changes	Unified contact management Centralized administration Efficient disaster recovery Health-based monitoring Virtual infrastructures Automation of common administrative tasks
Deployment Flexibility	Connect to legacy voice and video infrastructure	Federation Interoperation with many PBX and VoIP solutions

6. Turnkey Productivity — Guidance

Company: "Growing Needs"

Profile
Fast-growing with multiple offices
Limited IT staff
Strong advocate of the cloud

Probing Questions
Is the current infrastructure scalable?
Are there tools in place for collaboration?
How much time is spent managing collaboration tools?

Business Drivers/Current Challenges
Fast-growing with multiple offices
Limited IT staff
Want to increase productivity
Create a connected workplace
Increase collaboration

Pitch: Turnkey Productivity with SharePoint

Simplify with hosted	Work better together	Find the Experts
Focus on your business while retaining the control you want	Effective meetings Easy to share files Follow sites/docs	Find and recognize the experts Solve issues faster Spend less time searching for content

Customer Value Prop
Easy to manage
Highly customizable platform that facilitates productivity through increased collaboration

SharePoint Barriers to Sale: Customer Perceptions

Current Perceptions	Desired Perception
Hard to manage	Easy to manage, one-click options to view edit and collaborate, access SMEs
Document Library	Extensible, highly customizable platform
Another OneDrive (Cloud Storage)	Extensible, highly customizable platform
Not secure	Very secure; deployed in silos ("sandbox" environment)
Not Mission Critical	Mission critical in helping achieve goals via increased collaboration and productivity to meet strategic business drivers

Summary Pitch

SharePoint Server is a secure, extensible and highly customizable platform that has redefined collaboration and document management offering a product that represents a new way to work together that puts people at the center of the experience. SharePoint facilitates productivity by creating a connected organization, providing a place to share ideas, find subject matter experts, and collaborate effective and efficiently. Use SharePoint to:

- **Share ideas and content.** SharePoint is the place to share ideas, content and the vision of your company.
- **Discover experts & share insights.** It's where you go to discover experts, share knowledge and uncover connections to information and people.
- **Organize teams and information.** It's scalable enough to organize and manage all your information assets but it's also designed to organize and store documents to enable personal productivity, keep teams' in sync, and projects on track.
- **Build Sites and manage.** It's a hub for developers to build and deploy modern apps and for designers to build eye-catching websites. And because it's built in the cloud IT Pros can manage cost, and meet the demands of compliance to manage risk. Finally, SharePoint 2013 has been built to handle almost anything our customers can throw at it so IT Pros can spend more time managing information, delivering innovation and manage their time effectively.

7. Productivity with Unified Communications — Guidance

Objective: Turnkey Productivity with Unified Communications with Lync, Exchange, and SharePoint

"Growing Needs"

Profile
Increased potential, increased workload
No IT strategy
Disparate workforce (multiple locations, mobile or deskless workforce)
Sees the value in cloud/Hosted

Probing Questions
Is the current infrastructure scalable?
Are there tools in place for collaboration?
How much time is spent managing collaboration tools?

Business Drivers
Fast-growing with multiple offices
Deploy technology quickly/cost-effectively
Empowering mobile workers
Communicate easily - whether with colleagues, channel, or customers
Improve customer service and satisfaction

Pitch: Turkey Productivity

Simplify with hosted	Work better together	Look more professional
Focus on your business while retaining the control you want	Effective meetings Easy to share files Follow sites/docs	Best-in-class tools Familiar experience Use your own domain

Customer Value Prop
Enterprise-class unified communications at a small-business price
Meet the growing array of customer and business demands that require unified company communications and productivity, including email, voice and video calls, instant messaging and collaboration services.
Scalable infrastructure
Empower your mobile workforce with a familiar experience across devices

Summary Pitch

To realize potential, SMBs need affordable, business-class Cloud services to help them improve the way that they communicate, collaborate, and conduct their business. Without unified company communications, many businesses may be unable to achieve key business drivers.

Microsoft Productivity helps organizations navigate the new business paradigms of cloud, ubiquitous mobile access, overwhelming abundance of data, tightened economic conditions, and an ever-increasing connected workplace allowing them to get ahead of the curve, create a connected and productive organization, look professional and make strategic business decisions based on scalability and data insights.

With Microsoft Exchange, SharePoint and Lync, you can have unified company communications and productivity at small-business prices. Microsoft Productivity brings together e-mail, document collaboration, project organization, voice and video calls, Lync meetings and instant messaging in a familiar, easy-to-use interface. As your business grows, you continue to benefit from the latest technology without incurring additional costs. And with hosted services, you can easily add new users without additional software or hardware investments.

8. Enterprise Class Solution to Replace Mixed-Platform Consumer Solutions — Guidance

Objective: Replace Mixed-Platform Consumer Solutions with Partner Hosted Productivity Cloud: The right choice for your business

"Mixed-Competitive Platform"

Profiles:
Patchwork of non-integrated applications and devices
Customer may be considering Google Apps
Using older version of Office apps in combo with "patchwork" or Google Apps because they don't know what Productivity Suite has to offer

Probing questions:
How reliable and business-ready are your current email and productivity tools?
Do your users use Office? Outlook?
How well will this solution scale as you grow?
Will it meet the needs of a larger organization?

Partner Hosted Productivity is the right choice for your business
Microsoft:

Predictable Costs	Google Apps may cost more than advertised
Efficient	Save time and effort with best-of-breed tools
Familiar	Productivity offers functionality that users expect
Choice	Work online or off on all of your devices
Trusted	Microsoft has credibility in productivity tools

Current Challenges:
Users frustrated with limited capabilities and privacy concerns, Limited IT budget, or Need a more professional/enterprise class productivity solution

Summary Pitch

Replaced your mixed platform of consumer solutions for the scalable, professional solution of partner hosted productivity:
Replace your current mixed platform of small-business or consumer-oriented solutions, such as WebEx, FileShare, Drop Box, GoToMeeting, Gmail, Google Drive and more, with an enterprise class, integrated end-to-end solution that meets all of your unified communications and collaboration needs enabling productivity and the ability to work effectively and productively in the new business paradigm.

Our Productivity Suite licensing models are specifically designed to fit our customers' needs and provide remarkable benefits to create a connected, productive, and efficient workforce. With Partner-Hosted Exchange, SharePoint and Lync, you can have unified company communications and productivity at small-business prices. Microsoft Productivity brings together e-mail, document collaboration, project organization, voice and video calls, Lync meetings and instant messaging in a familiar, easy-to-use interface. As your business grows, you continue to benefit from the latest technology without incurring additional costs. And with hosted services, you can easily add new users without additional software or hardware investments.

Microsoft Productivity helps organizations navigate the new business paradigms of cloud, ubiquitous mobile access, overwhelming abundance of data, tightened economic conditions, and an ever-increasing connected workplace allowing them to get ahead of the curve, create a connected and productive organization, look professional and make strategic business decisions based on scalability and data insights.

9. Partner-Hosted SaaS Opportunities vs. Consumer Cloud — Guidance

Objective: Microsoft in the Partner Cloud: Lync, Exchange, and SharePoint

"Old Server or Web mail"

Profile:
Running an old email server or web-based email
Worried about security and cost
Open to the cloud/not too familiar
Self-service IT, prefer simpler solutions

Probing questions:
How protected is your data?
How reliable is your web mail/how often is email down?
Are server costs preventing an upgrade?
How much time is spent managing servers?

Current Challenges:
Concerned about data protection
Issues with unplanned downtime
Users frustrated with unfamiliar and multiple dis-connected tools

Pitch: Partner Hosted Productivity

Simplify with hosted	Look more professional	Best investment
Focus on your business while retaining the control you want	Best-in-class tools Familiar experience	No upfront cost Always up to date Predictable cost Effective meetings Easy to share files Follow sites/docs

Customer Value Prop
A service compliance requirement, such as data sovereignty (e.g. Public Sector)
Industry-specific compliance (e.g. healthcare or financial services)
Customization and additional functionality (not covered by Office 365). For more information regarding additional functionality, please refer to Appendix A of this document, "Comparison of Office 365 and Partner-Hosted."
Geographies where Office 365 is not available
Hosted Voice (For more information regarding Hosted Voice, please see the URL for "Lync Feature Comparison Chart" within the Resources Section of this [Appendix](#).)
Private Cloud

Summary Pitch
Our Productivity Suite licensing models are specifically designed to fit our customers' needs and provide remarkable benefits to create a connected, productive, and efficient workforce. With Partner-Hosted Exchange, SharePoint and Lync, you can have unified company communications and productivity at small-business prices. Microsoft Productivity brings together e-mail, document collaboration, project organization, voice and video calls, Lync meetings and instant messaging in a familiar, easy-to-use interface. As your business grows, you continue to benefit from the latest technology without incurring additional costs. And with hosted services, you can easily add new users without additional software or hardware investments.

10. Competitive Platform: Google — Guidance

Objective: Microsoft in the Partner Cloud: Lync, Exchange, and SharePoint - the right choice for your business

"Google Competitive Platform"

Profiles

Existing Google Apps customers
Customers considering Google Apps
Using older version of Office apps in combo with Google Apps because they don't know what Office 365 has to offer

Probing questions

How reliable and business-ready are your current email and productivity tools?
Do your users use Office? Outlook?

Current Challenges

Users frustrated with limited capabilities and privacy concerns
Limited IT budget

Partner Hosted Productivity is the right choice for your business

Predictable Costs	Google Apps may cost more than advertised
Efficient	Save time and effort with best-of-breed tools
Familiar	Productivity offers functionality that users expect
Choice	Work online or off on all of your devices
Trusted	Microsoft has credibility in productivity tools

Summary Pitch

Our Productivity Suite licensing models are specifically designed to fit our customers' needs and provide remarkable benefits to create a connected, productive, and efficient workforce. With Partner-Hosted Exchange, SharePoint and Lync, you can have unified company communications and productivity at small-business prices. Microsoft Productivity brings together e-mail, document collaboration, project organization, voice and video calls, Lync meetings and instant messaging in a familiar, easy-to-use interface. As your business grows, you continue to benefit from the latest technology without incurring additional costs. And with hosted services, you can easily add new users without additional software or hardware investments.

[Compete: Google — Sales Conversation Guidance](#)

PRODUCTIVITY RESOURCES

Product	Asset	Description	URL
All Apps	Productivity Case Study	Genisys + Hew Hanover County: "New Hanover County Adopts Hosted Services to Boost Employee Productivity and Ease Compliance"	http://www.microsoft.com/casestudies/Microsoft-Exchange-Server-2013/New-Hanover-County/County-Adopts-Hosted-Services-to-Boost-Employee-Productivity-and-Ease-Compliance/710000003005
All Apps	Productivity Video Case Study	Genisys + Hew Hanover County: "New Hanover County Adopts Hosted Services to Boost Employee Productivity and Ease Compliance"	https://microsoft.sharepoint.com/teams/Hosting/offers/Hosted%20Apps%20Offers/To%20Partner/NHanoverCounty_3MIN_V6-WMV.wmv
All Apps	Productivity Case Study	TeleComputing - IT Firm Attracts Customers, Increases Average Annual Revenue by 24 Percent with Hosted Solutions	http://www.microsoft.com/casestudies/Microsoft-Office-2010-Suites/TeleComputing/IT-Firm-Attracts-Customers-Increases-Average-Annual-Revenue-by-24-Percent-with-Hosted-Solutions/710000000329
All Apps	GTM Templates and digital marketing guide	Ready-to-go templates: Email, flyer, datasheet, landing page, copy blocks and digital marketing strategies guide book.	https://readytogo.microsoft.com/global/_layouts/RTG/CampaignViewer.aspx?CampaignUrl=https://readytogo.microsoft.com/global/Campaign/Pages/Hosting%20Service%20Provider%20-%20Unified%20Company%20Communications.aspx
All Apps	Online marketing best practices	Self-guided tour of best practices of selling hosted solutions	http://www.microsoft.com/hosting/en/us/marketing/default.aspx
All Apps	Exchange + Lync Whitepaper	Whitepaper illustrating the correlation between Hosted Exchange and Hosted Lync.	http://aka.ms/hsp_ms_edge
Exchange	Exchange Server 2013 hosting and multi-tenancy solutions and guidance	Guidance for hosters and control panel vendors to assist in developing solutions that are supported.	http://technet.microsoft.com/en-us/exchange/jj720331
Exchange	Multi-Tenant Scalability Guidance for Exchange Server 2013	This document provides scalability and deployment guidance for multi-tenant deployment based on Microsoft Exchange Server 2013.	http://www.microsoft.com/en-us/download/details.aspx?id=39941
Exchange	Sales Specialist Assessment for Messaging – Hosting	Hosted Exchange Partner training module – The Value of Hosted Exchange	https://mspartnerlp.mspartner.microsoft.com/LearningPath/LearningPath/DLPaths?trackId=141&rowId=2117&trackPathId=8035
Lync	Lync 2013 Multi-Forest Architecture	Deploying Lync in a Multi-Forest Architecture (Partner Hosted Lync with Exchange Hybrid)	http://www.microsoft.com/en-us/download/details.aspx?id=44276

Lync	Lync 2013 Hybrid Reference Topologies	The Lync Server 2013 Reference Topologies white paper describes approaches that are supported by Microsoft for adding Lync Server to an enterprise IT infrastructure.	http://aka.ms/LyncTop
Lync	Lync Deployment Planning and Topologies on Technet	Technical resources for Lync deployment planning	http://technet.microsoft.com/en-us/library/gg413071.aspx
Lync	Lync Right Start Kit	BDM deck to assist the customer along their journey from legacy technology to Lync. Partner facing resource links included.	http://aka.ms/LyncRSKit
Lync	Lync Rollout and Adoption Success Kit	The Lync Rollout and Adoption Success Kit (RASK) is designed to help you achieve rapid, sustained adoption of Lync 2013 and long-term operational success: org readiness, change management, etc.	http://technet.microsoft.com/en-us/lync/jj879331
Lync	Lync Copy Blocks	Key Lync functionality and benefits	http://office.microsoft.com/en-us/lync/microsoft-lync-top-features-video-conferencing-and-instant-messaging-FX103789488.aspx
Lync	Love Lync Campaign	Partner facing marketing materials (UK best practices)	https://readytogo.microsoft.com/en-gb/_layouts/RTG/CampaignViewer.aspx?CampaignUrl=https://readytogo.microsoft.com/en-gb/Campaign/Pages/Love%20Lync%20Campaign%20%28UK%29.aspx
Lync	Lync SPLA and license mobility partner ready	Licensing Guidance	https://mspartner.microsoft.com/en/us/pages/solutions/downloads/lync-hosting-licensing-overview.aspx
Lync	Lync Server Product Guide	Detailed Lync Server 2013 product information.	http://download.microsoft.com/download/1/2/2/12233C7C-A549-4663-A339-D55379B658A1/Lync%20Product%20Guide.pdf
Lync	Lync for Hosting Service Providers on MPN	Partner facing Lync for Hosting Service Providers site on Microsoft Partner network	https://mspartner.microsoft.com/en/us/Pages/Solutions/lync-for-service-providers.aspx
Lync	Lync Server on MSDN	Find API references, how-to documentation, training, and SDKs for Microsoft Lync 2013, Microsoft Lync Server 2013, Microsoft Lync Server 2013 Persistent Chat and related products.	http://msdn.microsoft.com/en-us/library/gg455051.aspx
Lync	Training: Delivering an Effective Lync Demo module	Partner facing training resources on MPN - Demo	https://training.partner.microsoft.com/learning/app/management/LMS_ActDetails.aspx?UserMode=0&ActivityId=842263
Lync	Training: Partner Readiness modules on MPN	Partner facing training resources on MPN	https://mspartnerlp.mspartner.microsoft.com/LearningPath/LearningPath/DLPaths?trackId=122&rowId=705

Lync	Training: Partner training sessions	Attend one of our FREE instructor-led sessions to learn firsthand how easy it is to get started successfully with Microsoft Lync	http://office.microsoft.com/en-us/communicator-help/lync-instructor-led-training-HA102465959.asp
Lync	Compete: Lync vs Cisco	Compare Microsoft to Cisco and you'll see why Microsoft is the obvious choice for truly unified communications.	http://www.whymicrosoft.com/Pages/cisco.aspx
Lync	Compete: Lync vs Cisco Jabber Deck	Learn how to differentiate your business with this comparison between Cisco Jabber and Lync features, platform, and customer benefits.	https://mspartner.microsoft.com/en/us/pages/solutions/downloads/cisco-jabber-compete-presentation.aspx
Lync	Deployment Guide: Lync 2013	TechNet site to help partner/customer determine what environment you want to deploy and guide you through the deployment process.	http://technet.microsoft.com/en-us/library/gg412892
Lync	Lync trial telesales script	Scrip and FAQ for Hosting partner to for customer conversations	https://mspartner.microsoft.com/en/us/Pages/Solutions/Downloads/lync-trial-telesales-script.aspx
Lync	Customer Ready Lync Value Proposition	To customer sales presentation with Lync positioning and feature/benefits to aid in sell through	https://mspartner.microsoft.com/en/us/pages/solutions/downloads/lync-to-customer-value-proposition.aspx
Lync	Public facing Lync content	Public facing Lync content	http://office.microsoft.com/en-us/microsoft-lync-video-conferencing-and-instant-messaging-FX102004552.aspx
SharePoint	Hosted SharePoint Partner Playbook	Guidance for hosters to assist in developing a Hosted SharePoint offer, including technical and GTM resources.	http://aka.ms/hsp_ms_hostsp
SharePoint	Hosted Environment Planning article on Technet	Technical guidance for dedicated and multi-tenant Hosted SharePoint deployment	http://technet.microsoft.com/en-us/library/dn659290(v=office.15).aspx
SharePoint	Microsoft Partner Network - Competency	SharePoint competency	https://mspartner.microsoft.com/en/hk/Pages/Membership/collaboration-and-content-competency.aspx
SharePoint	SharePoint Partners	About SharePoint Partners	http://sharepoint.microsoft.com/en-us/partners/Pages/default.aspx
SharePoint	Microsoft Partner Network - SharePoint	SharePoint 2013 on Microsoft Partner Network	https://partner.microsoft.com/global/productssolutions/servers/pssharepoint/
SharePoint	TechNet	SharePoint on TechNet	http://technet.microsoft.com/en-us/sharepoint/ee198298.aspx
SharePoint	Microsoft.com	Microsoft SharePoint product page	http://office.microsoft.com/en-us/sharepoint/
SharePoint	Microsoft Virtual Academy	SharePoint on Microsoft Virtual Academy	http://www.microsoftvirtualacademy.com/Studies/SearchResult.aspx?q=SharePoint

SAMPLE LYNC CAMPAIGN PLANNING CHECKLIST

Offer:
- ☐ Is Lync positioned as a suite with Exchange in a combined offer?
- ☐ Is the margin higher for the combined offer vs Exchange only?
- ☐ Does the offer include options for Instant Messaging (Standard), Conferencing (Enterprise) or Voice (Plus)?

Sales Motion (target):
- ☐ Cross sell to existing Exchange customers?
  - o Will partner share customer data to conduct a retention/churn analysis? Do they experience higher retention rates for customers with Lync?
- ☐ Net new customer acquisition?

Target Attributes:

Existing customers (cross sell):
- ☐ Customer size (is this different from average Exchange customer size? Is the target upstream?)
- ☐ Which customers are experiencing growth (and more likely to need a Lync solution)?
- ☐ What % of existing business does the target segment(s) represent?

New customers
- ☐ Is target list filtered on size to focus on mid-market?

Campaign Messaging:
- ☐ Key solution benefits (Leverage Positioning and Messaging framework)
- ☐ Call to action (have you considered any of the following):
  - o Try and Buy, Demo, Add and Save, Limited time discounted price

Campaign Tactics/Vehicle:	Measurement:
Foundational tactics	
☐ Web landing page	# of hits
☐ Search Engine Optimization	Page hits
Active campaign tactics	
☐ Telesales campaign	Prospect conversion to lead
☐ Targeted Email blast(s)	Click through rate, conversion to lead
☐ Search Engine Marketing/Digital (online ad) - 2-3 versions to test	Ad click through rate
☐ Control Panel (try and buy offer)	Click through rate
☐ Loyalty/referral marketing	# of prospect referrals
☐ Webinar	Attendees, qualified leads generated
☐ Other (Radio, Direct Mail)	TBD

Campaign metrics:
- ☐ Reach (how many targets/leads will receive campaign?)

☐   Frequency (how often will the prospect be touched?

Pricing:
   ☐   Will the Lync offer be priced to enhance margins vs Exchange offer?
   ☐   Is the initial goal to use Instant Messaging as a loss leader, with long term goal to upsell to Conferencing (Enterprise) or Voice (Enterprise Plus)?
   ☐   Will the Lync campaign include a discounted offer?

Execution

Top 10 Best Practices checklist:
   ☐   Defined a solution suite that includes Exchange and Lync
   ☐   Leverage communication framework to communicate solution/benefit oriented offer
   ☐   Clarify motion (net new customers or cross sell to Exchange customers)
   ☐   Target the mid-market (upstream)
   ☐   Conduct active campaign tactics to seek target prospects
   ☐   Ready your sales team and channel sellers
   ☐   Understand competitive differences
   ☐   Incorporate a Lync demo in sales process
   ☐   Follow up media campaigns with telesales

Results

What were the most common objections encountered in the sales process?
What tactic or tool was most effective in converting the prospect?
Conversion:
   ☐   What % of leads convert to qualified prospects?
   ☐   What % of qualified prospects convert to customers?
   ☐   How many new seats were added (of IM/P, Conferencing, or Voice)?
ROI:
   ☐   What were the most cost effective acquisition/upsell tactics?