# How Microsoft Partners Can Unlock Revenue and Customer Success



Copyright ©2025 Pax8 | All rights reserved

# Why Renewal and Upsell Matter

In today's cloud-driven market, Microsoft partners have a significant opportunity to drive revenue growth by focusing on renewal and upsell, especially through value-added services. Since renewals are seven times more cost-effective[2] than acquiring new customers, prioritizing retention is a strategic move for sustainable growth.

Integrating Microsoft 365 Copilot and enhanced security into renewal conversations boosts engagement, streamlines workflows and delivers greater business value. This approach strengthens customer relationships and positions partners as trusted advisors, driving long-term success.

**>80%**

of CSP partners generate at least 25% of their revenue from value-added services and support.[1]

**21%**

are already offering AI services.[1]

**42%**

are actively working towards implementation.[1]

For every **$1 of Microsoft revenue, partners who provide services generate $8.45**, while those who develop software generate $10.93[3,4]

1. Microsoft Research + Insights "CSP Playbook". December 2023.
2. Markinblog.com; Customer Acquisition vs. Customer Retention: What Data Says?
3. Microsoft Partner blog; IDC study on partner profitability with Microsoft AI, September 2024
4. All currency is in US dollars.

Copyright ©2025 Pax8 | All rights reserved

# Focus on Key Benefits to Foster Trust and Increase Revenue

Prioritizing renewal and upsell benefits both partners and customers, creating a win-win scenario for long-term success.

## Benefits for Your Business

### Strengthen relationships
Become a trusted advisor for AI and cloud transformation.

### Maximize Microsoft incentives
Tap into CSP incentives, which make up most of the available rewards.

### Boost retention and revenue
Keep customers engaged and build steady, predictable income.

## Benefits for Your Customers

### Enhance productivity
Use AI tools like Microsoft 365 Copilot for workflow efficiency.

### Improve security and compliance
Stay protected with the latest Microsoft 365 security features.

### Optimize costs
Pay only for the services that match evolving business needs.

Copyright ©2025 Pax8 | All rights reserved

# Build a 90-Day Renewal Plan and Prioritize Early Customer Discussions

A 90-day renewal plan helps partners proactively identify opportunities, offer tailored solutions, strengthen customer relationships and close deals efficiently. By utilizing upsell opportunities focused on premium security in preparation for AI adoption, partners can maximize retention, boost revenue and position customers for future innovation.

**Did you know large/complex renewals often require 90-plus days? Get started now!**

## T-90 Days: Plan and Prioritize

- Analyze customer data using Microsoft 365 Lighthouse and CloudAscent to predict renewal and upsell opportunities.
- Train salespeople (for example, Microsoft OneCloud Program, Pax8 Academy).
- Prioritize and build renewal pitches (based on upsell propensity, scale, complexity, auto-renew setting, etc.).
- Plan for sales capacity (staffing).
- Contact customers to understand their needs and highlight key dates.

## T-60 Days: Engage

- Take advantage of engagement resources (such as renewal emails, Pax8 Hands-on Labs)
- Land value-add pitches tailored for each customer discussion.
- Engage prioritized customers 1:1 (for example, highest propensity).
- Engage other customers through automation/systems

## T-30 Days: Finalize and Close

- Take advantage of incentives and promos to structure and close deals.
- Complete on-time renewals of existing subscriptions with all customers.
- Document learnings from customer discussions.
- Use learnings to refine future engagements.

Copyright ©2025 Pax8 | All rights reserved

# Guide Security- and AI-Focused Discussions with These Scenarios

## General Questions

- How do you plan on taking advantage of AI to meet your objectives?
- AI technology can help boost productivity—is your platform AI ready?
- Are you looking to gain greater insights from your data?
- Is time often lost catching up, preparing and following up with emails?

Listen for opportunities to:

- Build a Zero Trust foundation to protect hybrid work devices from cyberthreats.
- Enhance security, productivity and collaboration with the Microsoft 365 solution appropriate for your customer's business size.
- Prepare for the future of productivity by ensuring an AI-ready platform.
- Reduce disruptions to workflows by keeping people, data and devices protected.

## Microsoft Business Basic or Standard → Microsoft 365 Business Premium or E3

- What are your most critical security challenges when trying to meet your cybersecurity objectives?
- What criteria is most important to you when considering new security solutions?
- Have you had any recent security incidents like phishing or ransomware?
- Do you have a way to quickly identify attacks and mitigate risk and liability?

Listen for opportunities to:

- Safeguard against password loss or theft with advanced multifactor authentication.
- Help employees securely access business apps wherever they work with conditional access.
- Defend businesses against advanced cyberthreats with sophisticated phishing and ransomware protection.
- Control access to sensitive information using encryption to help keep data from being accidentally shared.

## AI and Copilot for Microsoft 365 Use Cases

- What are your organization's top business objectives for the next 12 to 18 months?
- Are you looking to boost productivity, improve security and better manage a remote/hybrid work environment while reducing costs?
- Does a hybrid and remote work environment pose concerns about employee productivity?
- Are you able to manage employee access to data and devices?

Listen for opportunities to:

- Help your business grow and thrive by spending less time on menial tasks and leaving more time for what matters.
- Maximize employee productivity and creativity while saving time with Copilot for Microsoft 365.
- Explore and understand your data more easily and efficiently with Copilot in Excel.
- Clear your inbox in minutes by summarizing long email threads and quickly drafting suggested replies with Copilot in Outlook.

pax8

Review the renewals guide for more information on these scenarios.

Copyright ©2025 Pax8 | All rights reserved

# Use These Partner-Ready Tools and Incentives to Drive Success

| Microsoft 365 Lighthouse | CloudAscent | CSP Partner Incentives | Cohort Guides and Sales Playbooks | Promotions |
|---|---|---|---|---|
| AI-driven insights for renewal and customer health tracking. | Predictive analytics, customer promo eligibility, CSP renewal dates and cross-sell opportunities. | Increased earnings for selling Microsoft 365 E3, Microsoft 365 E5 and Microsoft 365 Copilot. | Marketing materials for Drive Business Transformation with Copilot, Secure Productivity and Threat Protection. | Drive upsell and cross-sell with the promo readiness guide. |

Copyright ©2025 Pax8 | All rights reserved

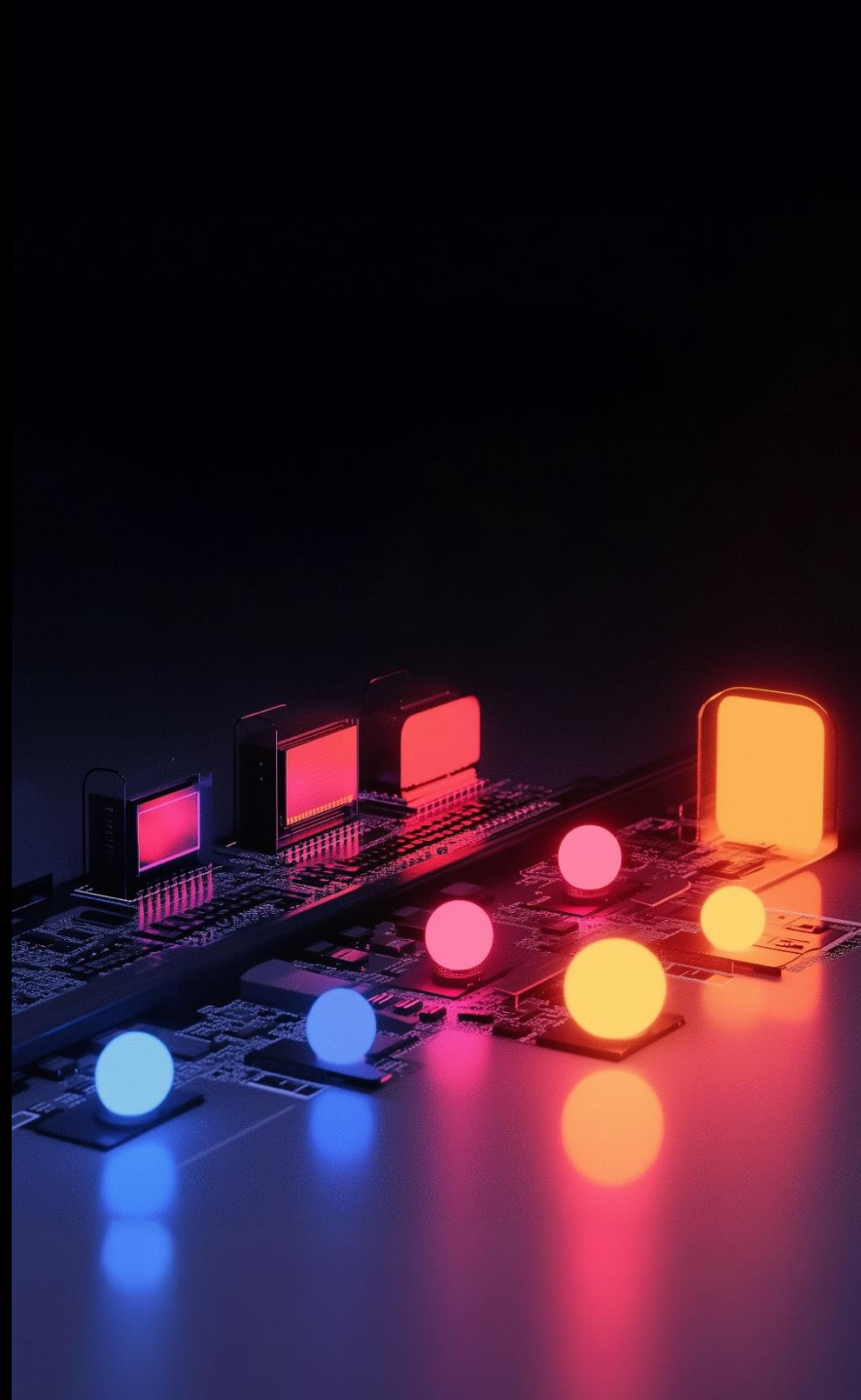
# How to Get Started

Drive growth and enhance value by taking advantage of these partner tools to boost retention and increase revenue.

**Get started today!**

1. Identify high propensity customers with CloudAscent and/or use Microsoft 365 Lighthouse to identify renewal customers and those most likely to upgrade.
2. Utilize the customizable marketing assets of the Campaign-in-a-Box, including emails and e-books to help with renewal conversations.
3. Get co-op details at Co-op Funds Resources to utilize funding mechanisms.
4. Schedule a Microsoft Business Review with a Pax8 expert for assistance with CSP renewals.

For more in-depth renewal and upsell guidance, review the resources provided in the Campaign-in-a-Box asset library.



Copyright ©2025 Pax8 | All rights reserved