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Power up with Microsoft Productivity and Unified Security

Partner success guide for Microsoft 365

About this guide

This guide outlines key features and benefits of using Microsoft 365 and provides advice for selling it to your clients.

What is M365?

Why move to M365?

Productivity and security

Microsoft 365 Business Premium offers a single, integrated technology solution that combines the Office productivity apps users know and love with granular device management and best-in-class security features, such as Exchange Online Protection and Microsoft Defender. Designed for the needs of small- to mid-sized businesses (SMBs), M365 empowers your clients to communicate and collaborate while keeping their data protected.

Productivity

Office applications
Word, Excel, PowerPoint, Outlook, and more

Online services
Exchange, OneDrive (1 TB), Teams, and more

Advanced services
Exchange Online Archiving

Remote enablement
Azure Virtual Desktop (AVD)

Advanced security

External threat protection
- Microsoft Defender for O365
- Multi-Factor Authentication
- Enforce Windows Defender to be on Enforce BitLocker

Internal data leak prevention
- Data loss prevention
- Azure information protection
- Microsoft Defender for Business

Device management

Device management Microsoft Intune
- Microsoft Intune
- Windows Defender Credential Guard
- SSO > 10 Apps
- Conditional access
- Shared computer activation

Deployment assistance
- Windows Autopilot
- Azure information protection
- Auto-installation of Office apps
- AAD auto-enroll

Breaking down the features and functions

Advanced security features

- **Windows Defender for Business:** Vulnerability management and automated response.

- **Multi-factor authentication (MFA):** Safeguards access to apps and data by requiring a second form of authentication.

- **Data loss prevention (DLP):** Identifies, monitors, and automatically protects sensitive information across many locations.

- **Windows Exploit Guard Enforcement:** Protects devices from ransomware and malicious websites at device end points.

- **Microsoft Defender for Business:** Endpoint protection against threats, including malware and ransomware.

Data protection and compliance

- **Azure Information Protection (AIP):** Controls and manages how sensitive content is accessed by providing classification labels on documents and email.

- **Exchange online archiving:** 100GB archiving and preservation policies help recover data and remain compliant.

- **BitLocker enforcement:** Encrypts data on devices to protect them if devices are lost or stolen.

Device management

- **Intune:** Manages devices and apps from the cloud, protecting company information on employee devices.

- **Single Sign-On (SSO):** Allows users to access multiple applications and resources by logging in only once, with one account.

- **Active Directory (AD):** Manages permissions and access to shared network resources such as servers, printers, and user accounts.

- **Autopilot:** Simplifies the new device configuration and deployment process for IT and end users.

Comparing Microsoft 365 plans

Features	Microsoft 365 Business Standard	Microsoft 365 Business Premium	Microsoft 365 E3	Microsoft 365 E5
Estimated retail price per user per month $USD with annual commitment	$12.50	$20	$32	$57
Maximum number of users	300	300	unlimited	unlimited

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

(Comparison sheet)

Power up with premium features

Most of your clients are probably using the Office suite for their productivity needs and may not be familiar with the additional benefits that M365 Business Premium offers. M365 Business Premium includes all the Office apps, such as Outlook, Word, Excel, and Powerpoint, that users are familiar with using in their day-to-day work, but offers additional capabilities in several key areas:

Advanced security

Security is a key enabler of technological success. Innovation and enhanced productivity can only be achieved by introducing security measures that make organizations as resilient as possible against modern attacks.

Office 365 is the #1 target for phishing attacks, and it doesn't provide the more advanced security solutions needed to fully detect and prevent phishing attacks.

48% of malicious email attachments are Microsoft Office files.[1]

Data protection and compliance

Microsoft 365 Business Premium checks all the boxes for data protection and compliance with HIPAA and PCI. It also aligns well with the functions of the NIST Cybersecurity Framework.

90% of SMBs do not use data protection for company and customer information.[2]

31% of SMBs say they do not comply with any security guidelines or standards.[1]

Office 2013 end-of-support

Microsoft's Office 2013 reaches end-of-support on April 11, 2023. If your clients are still using Office 2013, move them to Microsoft 365 to continue to support them securely. By moving to Microsoft 365 Business Premium, you can upgrade to the latest version of Windows Pro for the most up-to-date experience.

Security datapoints

Our unique vantage point

- **37bn** email threats blocked.
- **34.7bn** identity threats blocked.
- **2.5bn** endpoint signals analyzed daily.
- **43tn** signals synthesized daily, using sophisticated data analytics and AI algorithms to understand and protect against digital threats and criminal cyber-activity.
- **8,500+** engineers, researchers, data scientists, cybersecurity experts, threat hunters, geopolitical analysts, investigators, and frontline responders across 77 countries.
- **15,000+** partners in our security ecosystem who increase cyber resilience for our customers.

July 1, 2021, through June 30, 2022

Device management

Microsoft 365 Business Premium's granular device management enables businesses to securely communicate and collaborate with team members anytime and anywhere.

38% of the global workforce is mobile.[1]

Level up with the Microsoft Cloud Partner Program

In 2022, Microsoft launched their updated Microsoft Cloud Partner Program (MCPP) replacing the previous Microsoft Partner Network program. This refresh in the partner program reflects the evolution of Microsoft's business, operations, and the ongoing ways they plan to support partners in the future, like streamlining program requirements and benefits to better align with partner needs. To achieve this, Microsoft has refined their designations from the previous Gold and Silver to focus on proficiency in six solution areas aligned to the Microsoft Cloud:

	Solutions partner for business applications		Solutions partner for modern work		Solutions partner for security		Solutions partner for infrastructure, data & AI, digital & app innovation (Azure)	
Performance	Net customer adds	15pts	Net customer adds	20pts	Net customer adds	20pts	Net customer adds	30pts
Skilling	Intermediate certs	20pts	Intermediate certs	10pts	Intermediate certs	40pts	Intermediate certs	20pts
	Advanced certs	15pts	Advanced certs	15pts			Advanced certs	20pts
Customer Success	Usage growth	30pts	Usage growth	30pts	Usage growth	20pts	Usage growth	20pts
	Deployments	20pts	Deployments	25pts	Deployments	20pts	Deployments	10pts

To learn more about the Microsoft Cloud Partner Program and how you can start earning a designation, click here.

Selling the solution and the value for the client

M365 has a LOT of functionality, so instead of overwhelming clients with a long list of features that they may not even understand or care about, you should position the value and benefits of M365 to clients based on their unique needs, requirements, and experiences.

Potential value-selling scenarios:

- Clients with remote workers, BYOD policies, or multiple locations will benefit from the device management features of Intune.
- Remote wipe and redeploy devices to cover both ends of the employee cycle.
- Clients who have experienced a data breach will be concerned about improving security.
- Clients in regulated industries will be able to utilize features that enable compliance.

Target medium clients

- Focus on SMBs with 25–300 seats.
- Look for clients with compliance requirements (e.g., healthcare, financial services, legal, consulting, and manufacturing).

Choose a profile

- M365 Business Standard (formerly known as O365 Business Premium) clients.
- O365 E3 clients.
- Clients with EMS + competitive security solutions (could benefit from consolidation).
- Clients on legacy Office and Windows.

Use market moments

- Security is top-of-mind for businesses of all sizes, and Business Premium's Defender features are built for SMBs.
- Office 2013 reaches end-of-support in April 2023.
- Clients are forced to reconsider compliance with the introduction of GDPR and other regional regulations.

> " *Each time we describe what's included with Microsoft 365, clients want to move forward, recognizing immediately the value to their business, security, and success.* "
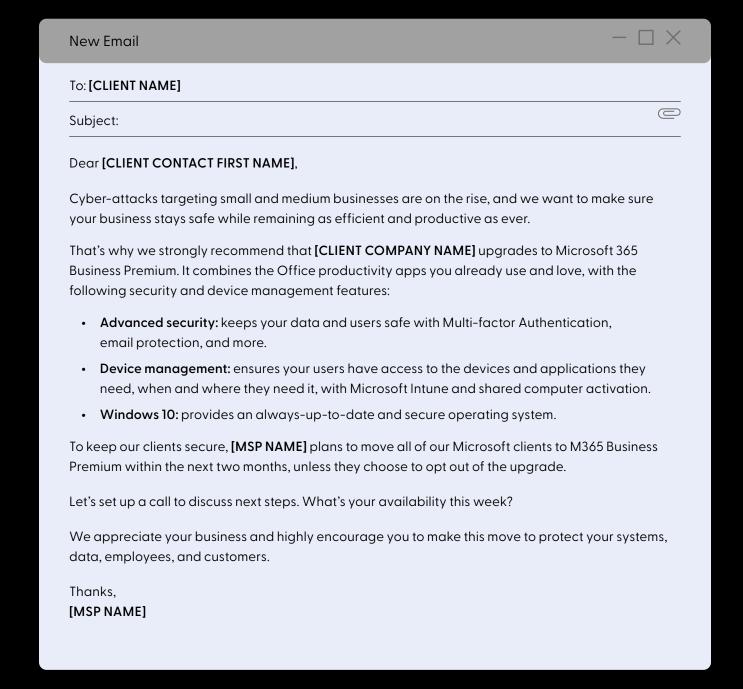>
> **President | machineLOGIC**

Sample email template

While we don't recommend blasting your entire client base, sending an email to a targeted list of your Microsoft clients who are a good fit for M365 Business Premium can be a great way to start a conversation about why moving to M365 makes sense. Below is a sample email template you can customize for use with your clients – and feel free to reach out to Pax8 assistance on talking about M365!

New Email   — ☐ ✕

To: **[CLIENT NAME]**

Subject:

Dear **[CLIENT CONTACT FIRST NAME]**,

Cyber-attacks targeting small and medium businesses are on the rise, and we want to make sure your business stays safe while remaining as efficient and productive as ever.

That's why we strongly recommend that **[CLIENT COMPANY NAME]** upgrades to Microsoft 365 Business Premium. It combines the Office productivity apps you already use and love, with the following security and device management features:

- **Advanced security:** keeps your data and users safe with Multi-factor Authentication, email protection, and more.
- **Device management:** ensures your users have access to the devices and applications they need, when and where they need it, with Microsoft Intune and shared computer activation.
- **Windows 10:** provides an always-up-to-date and secure operating system.

To keep our clients secure, **[MSP NAME]** plans to move all of our Microsoft clients to M365 Business Premium within the next two months, unless they choose to opt out of the upgrade.

Let's set up a call to discuss next steps. What's your availability this week?

We appreciate your business and highly encourage you to make this move to protect your systems, data, employees, and customers.

Thanks,
[MSP NAME]

Other resources

Attend:

- [Pax8 Events page](#)
- [Pax8 Cloud YouTube channel](#)
- [TECHnically Unraveled – Pax8 Podcast](#)

Optimize:

- [The Pax8 and Microsoft Playbook](#)

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Want to discuss moving your clients to M365?

Pax8 is here to help.

Schedule a call

Sources
1. Great Expectations: Making Hybrid Work Work
2. UPS Capital, Hacked: Just Because It's In the Cloud, Doesn't Mean the Bad Guys Can't Reach It
3. Digital Defense Report 2022
4. M365 Matrix FY23