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Microsoft 365 Renewals Guide

Optimize Your Customer Renewal Cycles

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About This Guide

According to Microsoft, approximately 45% of customer seats are up for renewal between January and March. These tend to take time, often three or more months, so we can ensure customers are set up for success. The time to act is now. We'll help you get started.

The purpose of this guide is to help structure your renewal planning with three key priorities in mind: to upsell high-propensity customers, to ensure on-time renewals for all your customer base and, finally, to navigate the coming annual/monthly price increase.

1

Q3 renewals

Use guidance on the Q3 renewals wave as an opportunity to upsell key customers with a T-90 strategic plan that includes doing your research, leveraging the best go-to-market tools and preparing for customer conversations.

2

Annual/monthly price increase

Familiarize yourself with the coming annual/ monthly price increase, its implications for customers and key scenarios you can use to drive the best outcomes for your customers – especially those impacted with end-of-sales SKUs with Teams.

3

Go-to-market strategy

Leverage the most impactful marketing content, signal tooling and accelerators to build your renewals winning formula spanning pre- and post-sales stages that maximize each of your customer engagements while growing your business.

Consider These Four Opportunities for Your Renewals Strategy

1. Secure on-time renewals

- Maintain revenue, seats and minimize churn
- Leverage opportunity to upsell and attach

2. Attach Microsoft 365 Copilot

- Take advantage of high customer interest
- Drive departmental usage

3. Up-sell to Premium

- Optimize customers for Copilot security, management and data governance
- Leverage these security sales resources to upsell to Business Premium, Microsoft 365 E3 or Microsoft 365 E5

4. Get Copilot ready

- Get customers on to the pre-requisite licenses for Copilot
- Leverage the security sales resources

Build 90-Day Renewals Plan and Prioritize Early Customer Discussions

Days until renewal deadline...

90+ Plan/Prioritize

- Map top upcoming renewals (<u>Lighthouse</u>/Sales Advisor).
- Train salespeople (e.g., <u>Microsoft OneCloud Program</u>, <u>Pax8 Academy</u>).
- Prioritize and build renewals pitches (based on upsell propensity, scale, complexity, auto-renew setting, etc.).
- Plan for sales capacity (i.e., staffing).
- Contact customers to highlight key dates and required actions.

60 Engage

- Leverage engagement resources (such as renewal emails, <u>Pax8 Hands-on Labs</u>).
- Land pitches tailored for each customer discussion.
- Engage prioritized customers 1:1 (e.g., highest propensity).
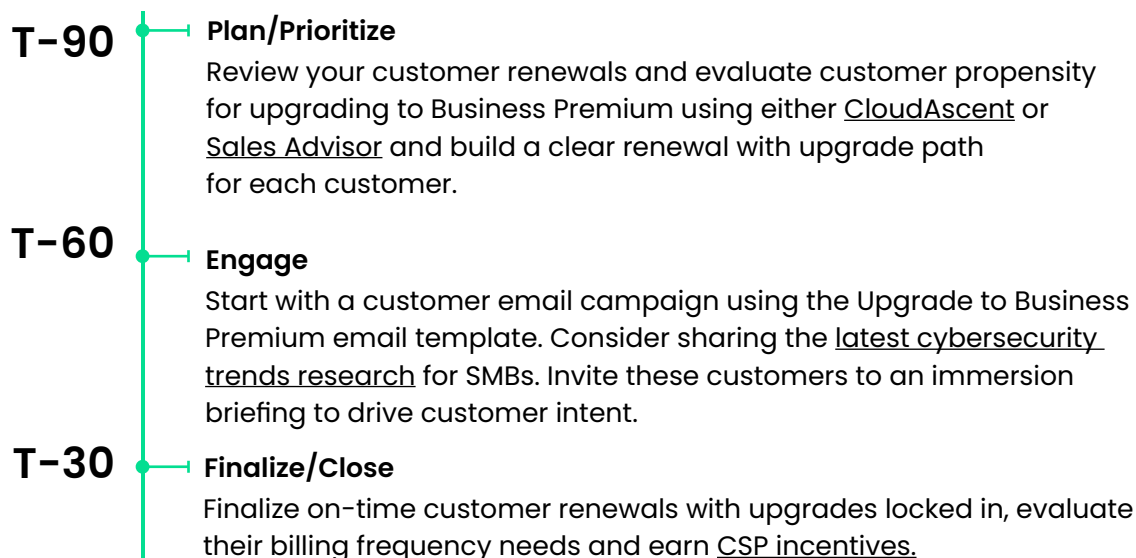- Engage other customers through automation/systems.

30 Finalize/Close

- Leverage <u>incentives</u> and <u>promos</u> to close deals.
- Complete on-time renewals of existing subscriptions with all customers.
- Document learnings from discussions.
- Use learnings to refine future engagements.

Renewals that are large or complex often require 90+ days, so it's important to start now.

SCENARIO 1

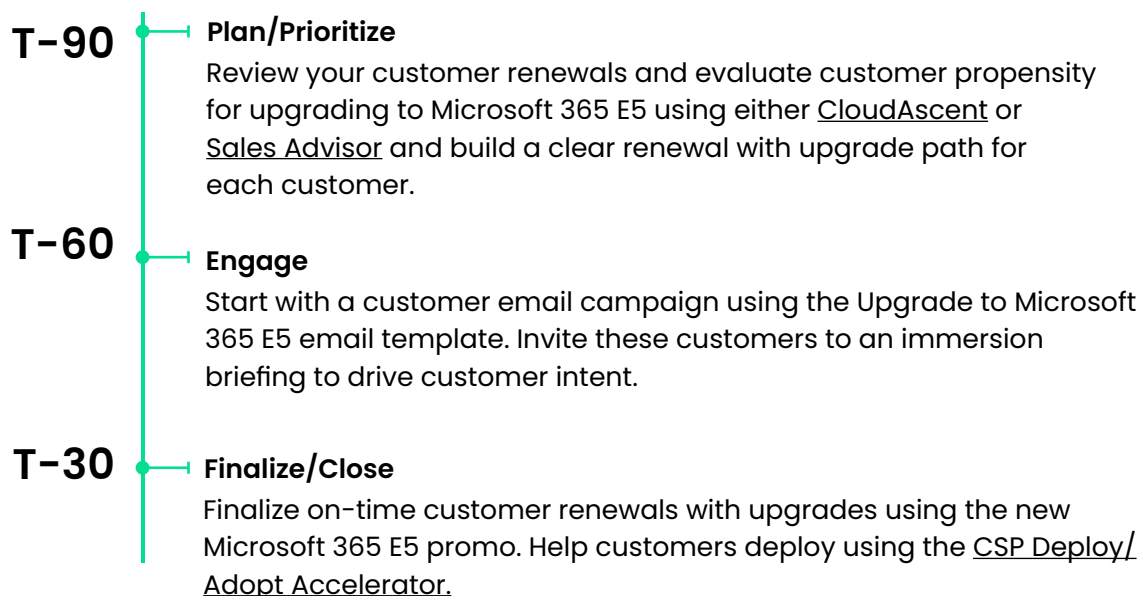## Business Basic/Business Standard → Business Premium

Unlock Peace of Mind with Premium Security

T-90 — **Plan/Prioritize**

Review your customer renewals and evaluate customer propensity for upgrading to Business Premium using either <u>CloudAscent</u> or <u>Sales Advisor</u> and build a clear renewal with upgrade path for each customer.

T-60 — **Engage**

Start with a customer email campaign using the Upgrade to Business Premium email template. Consider sharing the <u>latest cybersecurity trends research</u> for SMBs. Invite these customers to an immersion briefing to drive customer intent.

T-30 — **Finalize/Close**

Finalize on-time customer renewals with upgrades locked in, evaluate their billing frequency needs and earn <u>CSP incentives.</u>

SCENARIO 2

Microsoft 365 E3 → Microsoft 365 E5

Elevate your business with Microsoft E5.

T-90 — **Plan/Prioritize**

Review your customer renewals and evaluate customer propensity for upgrading to Microsoft 365 E5 using either <u>CloudAscent</u> or <u>Sales Advisor</u> and build a clear renewal with upgrade path for each customer.

T-60 — **Engage**

Start with a customer email campaign using the Upgrade to Microsoft 365 E5 email template. Invite these customers to an immersion briefing to drive customer intent.

T-30 — **Finalize/Close**

Finalize on-time customer renewals with upgrades using the new Microsoft 365 E5 promo. Help customers deploy using the <u>CSP Deploy/ Adopt Accelerator.</u>

Accessing Your Renewal Data in CloudAscent

Partner Center

Who can access this data? Any partner that has existing customers transacting with Microsoft.

What customers are included in the dataset? Only Microsoft unmanaged customers (no account team assigned).

1. Navigate to https://partner.microsoft.com/ and select **Partner Center**.

2. Sign in using your company email.

3. To download the report insights into Excel, select the **Downloads Hub** in the left-hand navigation.

4. Within the Downloads Hub, **create a new report**, ensure you have **cloud product performance** selected, choose the **basic download** option and download "CloudAscent – M365 Propensity."

5. Once open, navigate to Column "AS" to view and filter upcoming CSP Renewal Dates.

If you need additional support with accessing your renewal data in CloudAscent, explore resources in our **Microsoft OneCloud Guided Growth program**.

Understanding CSP Renewal Data in CloudAscent

1

A TPID can possess several Tenant IDs, with each Tenant ID potentially containing multiple Subscription IDs.

2

The subscription terms are determined by the period between the start date and the end date of a subscription. If the duration is less than 31 days, it falls under monthly terms.

3

CSP Renewal applies exclusively to subscriptions with annual terms.

4

CloudAscent displays the nearest renewal date for all subscriptions that have annual terms.

TPID	Tenant ID	Subscription ID	Product	Paid Seats	Subscription Start Date	Subscription End Date	Terms	Billing
103982	A	1	M365 Business Premium	24	1/27/2024	1/27/2025	Annual	Monthly
103982	A	2	Defender for Business	30	1/27/2024	1/27/2025	Annual	Monthly
103982	A	3	Copilot	2	7/6/2024	7/6/2025	Annual	Annual
103982	A	4	Entra Plan 1	90	10/28/2024	11/27/2024	Monthly	Monthly
103982	B	5	M365 Business Basic	60	12/16/2023	12/16/2024	Annual	Annual
103982	B	6	Exchange Online Plan 1	30	12/16/2023	12/16/2024	Annual	Annual

Plan Your Renewal GTM Approach

Leverage programs and offers designed to help close deals and support productive conversations.

1

Plan/Prioritize

Build your 90+ day plan

Identify, plan and prioritize customer discussions to maximize revenue upside.

CLAS | Microsoft 365 Lighthouse | Microsoft OneCloud Program

2

Engage

Engage customers

Drive customer intent and engage with tailored events/ resources.

Security Toolkit | Sales Guide | CSP Renewals Toolkit

3

Finalize/Close

Close the deal

Influence and close deals, document learnings and provide post-deal support.

CSP Promotions | CSP Incentives

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Need Additional CSP Renewals Support? Schedule a Strategic Business Review (MBR).

Connect with a Pax8 Microsoft expert to align upsell opportunities, incentives and tailored renewal strategies.