



The Agent's Guide to Selling M365

How to position M365 as the ideal productivity & security
solution for modern workplaces

About This Guide

This guide breaks down the features and benefits of Microsoft 365 and provides advice for selling it to your clients.

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WHAT IS M365?

Productivity + Security

Microsoft 365 (M365) Business Premium offers a single, integrated technology solution that combines the Microsoft Office productivity apps users know and love with device management and best-in-class security features, such as Advanced Threat Protection and Windows Defender. M365 Business Premium 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

ADVANCED SECURITY

External Threat Protection

Microsoft Defender for O365
Multi-Factor Authentication
Windows Defender
BitLocker

Internal Data Leak Prevention

Data Loss Prevention
Azure Information Protection

DEVICE MANAGEMENT

Device Management

Microsoft Intune
Windows 10 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

WHAT IS M365?

Breaking Down the Features & Functions

Advanced Security Features

Microsoft Defender (formerly Advanced Threat Protection): Cloud-based email protection against malicious links, phishing, and spoofing.

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.

Data Protection & 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 it 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.

WHY MOVE TO M365 FROM O365?

Modernizing the Workplace

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

Office 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 files¹



Windows 10 OS Upgrade

Microsoft's Windows 7 End-of-Support took effect on January 14, 2020. To avoid the security risks of an unsupported OS, your clients on Windows 7 need to upgrade to Windows 10, which they can do automatically by moving to Microsoft 365 Business Premium.



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.

53% of companies have over 1,000 sensitive files open to every employee² GDPR fines totaled \$63 million in its first year³



Device Management

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

**39% of the global workforce is mobile¹
45% of business-critical applications are accessed by mobile devices¹**

WHY MOVE TO M365?

Comparison to O365

	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
Office Apps	Install Office on up to 5 PCs/Macs + 5 tablets + 5 smartphones per user Word, Excel, PowerPoint, OneNote, Access, Office Online	Business	Business	ProPlus	ProPlus
Email & Calendar	Outlook, Exchange Online	50GB	50GB	unlimited	unlimited
Hub for Teamwork	Chat-based workspace, online meetings, and more in Microsoft Teams	●	●	●	●
File Storage	OneDrive for Business	1TB/user	1TB/user	unlimited	unlimited
Social, Video, Sites	Yammer, SharePoint Online, Planner	●	●	●	●
	Stream		●	●	●
Business Apps	Scheduling Apps – Bookings ¹ , StaffHub	●	●	●	●
	Business Apps – Outlook Customer Manager, MileIQ ¹	●	●		
Threat Protection	Microsoft Advanced Threat Analytics, Device Guard, Credential Guard, App Locker, Enterprise Data Protection			●	●
	Office 365 Advanced Threat Protection		●		●
	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 ²		●	●	●
	Advanced eDiscovery, Customer Lockbox, Advanced Data Governance				●
Analytics	Power BI Pro, MyAnalytics				●
Voice	PSTN Conferencing, Cloud PBX				●

SELLING THE SOLUTION

Client Targeting

M365 Business Premium 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
- Clients with high employee turnover will care about the ability to remote wipe devices
- 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

Use market moments as compelling reasons to move to M365

Market Moment	M365 Business Premium Benefit
With new data breaches and ransomware attacks reported every day, security is top-of-mind for businesses of all sizes	M365 Business Premium has advanced security features to protect email, apps, and data
Windows 7 reached End-of-Support in January 2020	M365 Business Premium includes a Windows 10 OS upgrade
GDPR and other regulations are emphasizing the need to maintain compliance	M365 Business Premium offers built-in data loss protection to keep sensitive information safe

SELLING THE SOLUTION

Sample Email Template

While we don't recommend blasting your entire client base, sending an email to a targeted list of your clients currently using Microsoft Office 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 for assistance on talking about M365!

Subject Line: There's a better (more secure!) way to do Microsoft

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

Cyber attacks are on the rise and I want to make sure your business stays safe while remaining as efficient and productive as ever.

That's why I recommend that **[CLIENT COMPANY NAME]** make the move to Microsoft 365 Business Premium to protect your systems, data, employees, and customers. M365 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, Advanced Threat Protection for email, 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.

Let's set up a call to discuss if M365 Business Premium is the right move for your business. What's your availability this week?

Thanks,
[AGENT NAME]

SELLING THE SOLUTION

Other Resources



DOWNLOAD:

Playbook – Co-Managed Cloud Solutions with Pax8

Want to discuss moving your clients to M365?

Become a Partner

SOURCES

1. [Pax8, 8 Steps to Secure Microsoft 365](#)
2. [Varonis, 2019 Global Data Risk Report](#)
3. [GDPR, Fines after one year: key takeaways](#)