

A universal toolkit built for teamwork

Steps to sell

1. Learn about current collaboration environment and obstacles and CISO's security concerns about sharing company data in the cloud.
2. Share the Microsoft 365 vision and emphasize how secure collaboration capabilities align with digital transformation story.
3. Work with a partner to set up a PoC of Microsoft Teams and other collaboration workloads to demonstrate value.
4. Complete a business case to demonstrate cost savings or takeouts for third-party meeting and collaboration tools.
5. Deliver a high quality Customer Success Plan.

Discovery questions:


- How do you work together among employees, contractors, others?
- How are you ensuring employee and customer information is secure?
- How many different tools do you use to share information?
- How do you cater to different collaboration styles in your company?

DISCOVER	ENVISION	VALIDATE	COMMIT	ONBOARD	REALISE VALUE
Unblocking Workplace Collaboration Ultimate Guide to Chat Based Tools Events Mechanics GEP, Web	Value Discovery Workshop Collaboration pitch deck	CIE Value Calculator Customer Evidence SMC Stories* Forrester TEI* Forrester Wave Gartner Industry Addressability Report	Offers & Incentives* Win Room* Battlecards End Customer Investment Funds (ECIF)*	FastTrack and FastTrack Assets Microsoft 365 Partner Portal Modern Desktop Deployment Program*	Productivity Library

*NOTE: Engage with your Territory Channel Manager for more information

Best practices

- **Talk about business solutions in your customer's language-** Rather talking about capabilities and products, focus discussions on understanding business needs and use their language. Actively listen and ask open-ended, clarifying questions. Tailor your questions based on the strength of your existing relationship – avoid asking invasive questions.
- **Tell the single platform story-** Tell the all-up Microsoft 365 story to show the full value of the stack to the customer. It's hard to find one vendor that offers the products we offer that are interlocked and at the price we offer.
- **Test drive the capabilities-** Solutions like Microsoft Teams should be experienced by the customer. New capabilities like this are important for attracting younger workers.
- **Get them up and running-** If the customer is licensed for Office 365 but has not deployed, begin discussions at least 12 months before the renewal date to get on track for deployment.
- **Tell one story-** Align on one version of the business benefits and stay with that version throughout the sales cycle.

"I work on strategic planning with every department across the business, and there isn't one meeting where we are not trying to connect with people all over the United States. With Office 365, we've finally answered a major pain point: collaboration across distance!" -Betsy Grider, Strategic Development, NASCAR 

How to tailor the conversation

Situation	Talk to... (Role)	Focus on helping the customer understand...
Retail	Sales and Marketing leaders	How to keep marketing teams in sync on campaign details. How to better analyze sales performance to optimize marketing decisions.
Manufacturing	Operations	How to collaborate better with experts, supply chain partners to solve problems faster and minimize disruptions. How to improve information sharing with access to portal, visual manuals. Demonstrate on different devices: Mobile, Surface, Surface Hub.
Public Sector	Government Leaders	How to reduce cost and improve agility while staying informed and connected with staff and citizens, in the office or on the road.
Financial Services	Managing Directors	How to manage a large multifunctional department in a complex organization. How to better collaborate with direct reports and their respective teams.
Education	Educators	How the world can be the classroom, reaching students and educators anywhere.
Healthcare	Clinicians	How to enhance care and improve health for populations with telehealth or virtual care. How to better collaborate with internal and external healthcare providers.

