HOW YOU SHOULD BE SELLING

Microsoft 365

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Help your customers move to Microsoft 365

How to use this guide

Use this guide to start a conversation with your SMB customers about their technology strategy and its direct impact on their business. Help them understand how Microsoft 365 allows them to securely manage and grow their business.

SMBs simply don't have the resources of large companies, and take a cautious approach to technology upgrades, with concerns about cost, business continuity, and employee adoption. This is important to keep in mind so that your offers are concrete and realistic.

As a technology advisor, you have a tremendous opportunity to help SMBs buy the right technology that delivers the return on investment they expect, and support them in onboarding, adoption, security, and ongoing management.

When you recommend the right solutions to a client, you gain their trust and the right to sell them more services and become their only trusted advisor.

While selling traditional services to your customers may have once made you indispensable, this is no longer enough if you want to keep pace with your competitors and the needs of your customers.

For many technology advisors, Microsoft 365 is an ideal entry point to build a strong and lasting relationship with the customers. Many industry experts believe that Microsoft 365, which includes Word, Excel, Outlook, PowerPoint, OneNote, and OneDrive, in addition to many other cloud features, remains the best productivity solution for businesses.

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Why you should sell Microsoft 365

Microsoft 365 is one of Microsoft's fastest growing services and one of the most powerful enterprise solutions ever created, with more than 50 million monthly active business customers. And that's just the tip of the iceberg, as an increasing number of SMBs move their technology to the cloud.

Microsoft 365 is an unmatched productivity and collaboration platform with powerful applications. You can help your customers choose the right package for their needs. This is where your knowledge and skills as an advisor come into play, and where you may want to consider working with ITCloud.ca who has the expertise to support you and your customers, from the pre-sales phase to after-sales support.

Many SMBs that have Microsoft or other office applications focus primarily on email and other basic tools like document creation. There's a good chance they'll miss out on key features they pay for but don't use, and in doing so, they're not benefiting from the potential productivity gains. In addition, they might not have the right package for their needs and not be aware of important security considerations that could affect their customers and business.

Best practices for selling Microsoft 365

The market for productivity solutions is competitive, with many managed service providers, resellers, and other advisors competing for your customers' business. It's essential to approach your customers with a solid plan to differentiate your offering and gain their trust.

Your plan to sell Microsoft 365 should include the following:

Learn about the key features and benefits of Microsoft 365

Know the typical issues that Microsoft 365 can solve

Assess your client›s business needs

Differentiate your offer from the competition

Create a customer roadmap to the cloud with Microsoft 365 as a first step

Identify complementary services to meet specific needs

Know how to respond to customer objections

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Learn about the key features and benefits of Microsoft 365

You don't need to be an expert on Microsoft 365, but you do need enough understanding to discuss what it is, its key features, typical customer use cases, and why they should be interested.

If your discussions with a customer require a deeper understanding, **you can work with one of our advisors at ITCloud.ca to accompany you every step of the way**, from planning and pre-sales meetings to post-implementation support.

ITCloud.ca has given and continues to give free presentations on Microsoft 365 that you can access to fill in the gaps in your knowledge. All presentations can be viewed on **your partner portal ITCloud.ca,** in the **Documentation** section, **Webinars** tab.

If you're not already using Microsoft 365, you can also sign up for a free trial to familiarize yourself with its features.

Know the typical issues that Microsoft 365 can solve

Key indicators that your customers could benefit from Microsoft 365:

- They use outdated versions of Microsoft applications, such as Word, PowerPoint, Excel, and Outlook

- They want to improve employee productivity and collaboration

- They're ready to move to the cloud, but to minimize the learning curve and ensure adoption, they want tools that their employees already know.

- They need to be able to quickly deploy services to enable employees to be operational effectively

- They want to address financial concerns to achieve more predictable costs. In this context, they want to reduce their capital spending and the overall costs associated with internal software.

- They want to give their employees the opportunity to work remotely and from anywhere.

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Assess your client's business needs

Even if you've worked with a client for years, you might be surprised to find gaps in your understanding of their current business and technology challenges, needs, and goals. So, meet them to learn about their current needs.

Make sure you talk to the right people in the customer's organization. What your customer is telling you may only scratch the surface and be a symptom of bigger underlying issues, so be prepared to dig deeper.

Before meeting with your client, prepare questions that will help you properly document their needs. We've provided a few questions you can use or adapt to help you get started. Be sure to ask open-ended questions that require them to provide details, rather than yes/no questions that give little information. Ask compelling questions and explain how Microsoft 365 helps address their challenges.

Assess your customers' current business and technology environment.

- Be aware of the basics of customers' business, their industry, and the technology challenges they face.
- Do they have a regularly updated IT policy?
- Do they support remote work? BYOD? Third-party services?
- How do they protect their data from cyberattacks? Have they been confronted with it?
- How often do they refresh hardware and software?
- What features would they like to have but don't currently have? Teamwork solutions? Online meetings? Cloud file storage?

Differentiate your offer from the competition

When you move on to the proposal phase, define what differentiates your business from your competitors.

- List your unique knowledge, expertise, and support

- By partnering with ITCloud.ca you can incorporate our expertise into your proposal to demonstrate the breadth of solutions and technical support you can offer your customer.

- By partnering with ITCloud.ca, you can offer access to an online portal where your customer can manage their own subscriptions and licenses.

- You can add Microsoft 365 product training to your proposal by reselling our ITCloud Academy training for end customers.

Create a customer roadmap to the cloud with Microsoft 365 as a first step

Whether your customers have approached you with a specific issue or questions about their email system or Microsoft licenses, or you have approached them proactively, the proposal you're presenting should include a cloud roadmap. Making Microsoft 365 the first step in this roadmap paves the way for you to support the entire customer cloud journey.

You can take the opportunity to educate your customers on how Microsoft 365 would allow them to easily transition to a comprehensive cloud-based productivity platform that can offer solutions to business problems they might not have thought of.

You can add additional recommendations for other cloud services they need to consider like Azure, as well as for management, security, disaster recovery, business continuity, and other options.

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Identify complementary services to meet specific needs

Research indicates that clients prefer to work with a technology advisor who can provide a one-stop shop to meet all or at least most of their technology needs. If they need Microsoft 365 but also have specific requirements that Microsoft 365 can't meet, there are a multitude of services and apps that work seamlessly with it. And remember that adding services that customers need to your proposal also increases your rebates.
Here are some examples:

- Office 365 Backup + M365 Protect
- Backup En ligne
- Acronis Cyber Protect
- Microsoft Teams Phone
- Bitdefender ou Microsoft Defender for Business
- Microsoft Azure
- Azure Virtual Desktop
- And more

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FAQ

Know how to respond to customer objections

When customers are facing budget constraints and other challenges, updating their technology can be the last thing they want to think about, so you need to be prepared to handle the objections that are common when companies are reluctant to change. Objections can arise at any stage of your discussions with customers, and you should always have a checklist ready to handle them.

We've identified five main reasons why companies are generally reluctant to engage in a business discussion about Microsoft 365. Here is the list of common objections (**Obj**) and answers (**Ans**) to get useful replies that you can use to restart your discussion with your customer.

Obj   *"We use free software or an older version of Microsoft Office, and it works well for most of our employees."*

Ans   Without up-to-date enterprise software, you expose yourself to security breaches, downtime, and compliance issues. You need to consider the risks to your business if employees can't work for an hour, a day, or a week.

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Know how to respond to customer objections
(continued)

Obj *" I'm concerned about the subscription-based price versus the one-time expense I'm used to. I'm not sure I want a monthly subscription or an annual contract."*

Ans Any Microsoft 365 plan provides an all-in-one solution for collaboration, communication, and security and addresses the needs of hybrid work. That's a lot more valuable than the software you buy all at once.

Updates with the latest features are regularly part of the subscription services.

In addition, Microsoft 365 is cheaper and easier to manage than a comparable set of third-party solutions from other vendors. Microsoft 365 Business Standard is $16/user/month (with an annual commitment), while the estimated cost of a set of comparable competing solutions is over $35/user/month.

Obj *" I'm not comfortable moving to the cloud. "*

Ans Traditional desktop software doesn't solve the digital transformation challenges of enabling the secure, real-time collaboration that employees and customers now expect. Microsoft 365 enables your employees to collaborate in real time, with secure access to your data; from virtually anywhere and on a variety of devices, for an easy-to-use, complete, and cost-effective solution.

Obj *" I am concerned about training and implementation costs. "*

Ans Microsoft 365 brings video conferencing, chat, file storage, and document editing in one place with Microsoft Teams, making training easier and potentially reducing costs compared to using separate apps from different vendors.

Obj *" My business is too small to be affected by cyber threats of phishing attacks. "*

Ans 61% of small businesses that have recently experienced a cyberattack have not been able to operate with an average cost of a data breach of $108,000.

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Ready to take the next step?

Many resellers have misconceptions and uncertainties about how to sell cloud solutions to their customers and how to support their customers during the onboarding, adoption, and management phases.

With ITCloud.ca as your partner, benefit from training, expertise, and access to a large market across Canada. Let us help you prepare and help you become your clients' trusted advisor.

Book a call with one of our advisors