



Customer Journey-in-a-Box | Playbook

Digital Workforce

Modern Work

January 2023



For every \$1 of Microsoft revenue partners in Western Europe sell, customers purchase an additional average of \$6.70 of the partner's services and products.

\$1 =
USD



\$6.70
Western Europe



\$6.10
Total (Worldwide)



For every \$1 of
Microsoft revenue

Resale-led
partners make
\$2.21
in economic value

Services-led
partners make
\$5.75
in economic value

Software-led
partners make
\$7.86
in economic value

Customer Journey Insights

This Playbook provides your organization with the key guidance, tools and programs to win new customers and growth your business with Microsoft 365.

⚡ Priority

- Customer Adds ME3 w/ Digital Workforce

🕒 Segment

- Strategic
- Major Commercial & Public Sector
- Corporate and SMB Scale

🗄️ Solution Area

- Modern Work

★ Hero SKU

- M365 E3

🏠 Up/cross sell path

- Pre M365 E3 customers or existing with unhealthy usage

📊 KPIs

- # ME3 Customer adds
- ME3 Revenue
- ME3 Usage
- # Workshops & Programs

Audience, workshops & assessments

Overall Customer Targeting

- Pre M365 E3 customers and/or existing M365 E3 customers with unhealthy usage. Work with Microsoft team to align on target lists.

Main Customer Scenarios

- OnPrem to MW Cloud / Enable security and collaboration w/ O365 to M365 / Office 2013 End of Support

Buyer Persona

- CIOs and Digital Transformation BDMs (CTO, CFO, CHRO, etc.)
- ITDMs

Discover Workshops

- Teams, Viva, Frontline Workers
- Business Decision Makers, IT Decision Makers, End User

Solution Assessments

- **Workforce productivity:** The Modern Workplace Assessment helps customers understand the collaboration tools and technology available for improving productivity, suggesting recommendations to achieve optimal security against Cyber threats for Workforce Productivity.

Build Intent Workshops

- **M365 Digital Workforce** Customers without Office 365 or Microsoft 365 today and > 1000 PC Install Base. Select customers without Office 365 or Microsoft 365 and > 300 PC Install Base
- **Hybrid Meetings and Rooms** 1,000+ Teams paid active users (PAU), and Select customers above 300 seats may also be eligible for this workshop
- **Endpoint Management with Security** 1000+ Office 365, EM + S, or Microsoft 365 E3 licenses, and 40% or less Intune Monthly ActiveUsage (MAU), and Select customers above 300 seats may also be eligible for this workshop
- **Next-Gen Windows:** 1,000+ Microsoft 365 E3 or Microsoft 365 E5 PAU • 15% or greater Intune usage • Windows devices currently under Intune management
- **Enable Frontline:** Customers with potential to purchase M365 F1/F3, or O365 with >1000 seats or Customers with >3500 seats of M365 F1/F3 or O365 F3 and <40% Teams MAU (F SKUs only)

Campaign material

Partner Led – Customer Trials

- M365 E3 50 seats, length 60 days
- M365 F3, 500 seats, 90 days
- W365 E, 5 seats, 60 days
- Visit the [partner-led customer trials website](#) to learn more about eligible workshops, available trials, and criteria.

Practice Development

- A [new framework](#) for developing your Modern Work practice
- Customer facing [Hybrid Work](#) Microsoft site
- Partner Network: [Microsoft Teams Playbook](#)
- Developing [Hybrid Meetings Practice](#). Specific for Developing [Teams Meetings Practice](#)
- Developing [Enable Frontline Practice](#)

Engage with Customers

- [Microsoft Teams Adoption Guide](#)
- [Hybrid Work Guide for Business Decision Makers](#)
- [Hybrid Work Guide for End Users](#)

DMC Campaigns

- [M365 enables you to Do More With Less](#)
- [Digital Workforce \(FY23 update\)](#)
- [Go Big with Hybrid Work \(FY23 Update\)](#)

Demos

- Modernizing Productivity
- Microsoft Teams Meetings Hero Demo
- M365 by Industry (Retail, Manufacturing and others)
- Webinars with Microsoft Teams
- Modern Work Customer Immersion experience
- ... and more

Partner

Criteria

✔ Partner Targeting

- GSIs, Services, CSPs
- Services partners with Cloud endpoint management Identity & access mgmt. & Teams meeting practice offerings to help drive the value of Microsoft 365 suite
- Transacting partners leading with business value conversations on Microsoft 365 Suite

✔ MCI Build Intent Workshops Partner Eligibility Criteria

- Partner Agreement: Microsoft Partner Network Agreement
- Program Enrollment: Microsoft Commerce Incentives
- Partner Qualification: Specific by Workshop. [Check Microsoft Commercial Incentives Guide](#)

Skilling and enablement

Learning paths

- [Microsoft 365 and Security Learning Paths | Learning Paths](#)

Microsoft Teams Learning Journey

- [Teams Practice Development Playbook](#)
- [Partner Yammer Community](#)
- [Sales Content, Demos, Interactive guides](#)

Enablement Guides

- [Modern Work Partner Enablement Guide](#)

Enable Frontline Learning Journey

- [Practice Page](#)
- [Frontline opportunity and sales guidance](#)

Endpoint Management Learning Journey

- [Practice Page](#)
- [Customer Presentation](#)
- [Windows 11 Presentation \(L-100\)](#)
- [Partner Yammer community](#)

Other resources

MCI Workshops engagement

- [Microsoft Commercial Incentives Guide](#)
- [Microsoft Commerce Incentive Resources](#)
- [Microsoft Commercial Incentives FAQ](#)

Modern Work Discover Workshop

- [Partner playbook](#)

Additional Marketing Resources

- [Go-To-market Toolbox](#)
- Digital Workforce : Inspire [Deck](#) and [Talk Track](#)
- [Partner led marketing guidelines](#)
- [Brand Central](#)

3 questions
you should ask
the customer:

- How do you make everyone feel included in hybrid-work?
- How do you secure hybrid-work?
- How do you manage complex hybrid-work environments?

Customer Journey

Tactics

Funding & Incentives



Listen & Consult

- Partner led ABM Digital Campaigns, Telemarketing, Events, Webinars
- Partner led Small group leadership roundtables
- DMC Campaigns

- Discover Workshops Teams Rooms, Teams Phone and FLW. <https://aka.ms/wsplaybook>
- All partner led marketing campaigns should drive demand to any of the 1.few and 1:1 pre-sales programs.

- Demand gen activities are eligible for Cooperative Marketing Funds

Through Partner Marketing

- Marketing funds available for partners selected by the corresponding subsidiary according to the required characteristic:



Inspire & Design

- Modern Workplace Assessment: Provides visibility into customer IT environment while helping improve end-user productivity.

- MCI Build Intent Workshops: M365 Digital Workforce; Hybrid Meetings & Rooms; NextGen Windows Workshop; Enable Frontline; Endpoint Management;
- Partner Led – Customer Trials
 - M365 E3 50 seats, length 60 days
 - M365 F3, 500 seats, 90 days
 - W365 E, 5 seats, 60 days

Solution Assessments partner incentives: not available until end of June 2023

MCI Build Intent Workshops

- \$3.5K for Digital Workforce Workshop, others \$5K per workshop



Empower & Achieve

Pre-Sales ECIF

- Microsoft sellers nomination. Drive MW incremental revenue (specially E5). Eligible workloads: Primary: ALL MW E5. Also includes MW E3, New component E3, F1 & F3, Viva, Power BI, Meeting Rooms, MMD, Windows 365

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Pre-sales - ECIF Value

- >20x ROI
- >10x ROI for M365 New Customer Acquisition



Realize Value

CSP Incentives

- CSP Indirect Reseller Incentives
- CSP Direct Bill Partner Incentives

CSP Incentives: Up to 20%.

Check FY23 Incentives guide for details.



Manage & Optimize

Online Services Usage M365

Post-Sales Usage ECIF

- Drive usage of priority MW workloads such as Teams

Online Services Usage Workloads

- Teams Meetings, Intune
- FRP Only: SharePoint Online, Azure Active Directory Premium, Exchange Online, M365 Apps

Online Services Usage M365 : Up to \$14 for Teams Meetings and Intune. Rate card for details.

Post-Sales ECIF: <\$5/seat for Meeting MAU, Platform MAU / <\$7/seat for Phones