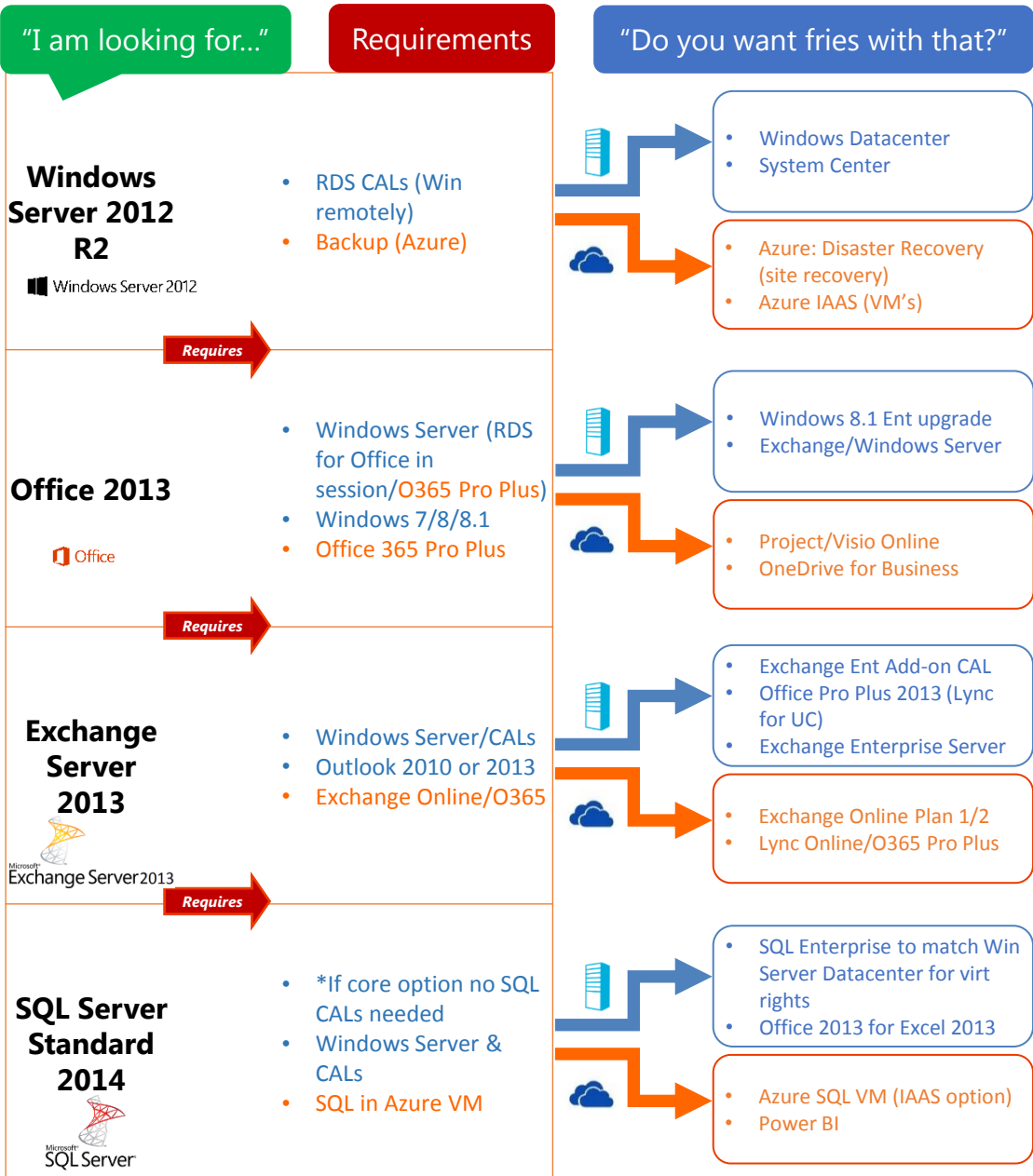


# Call Map: Guiding the Opportunity

# Solution Selling: Growing the Opportunity

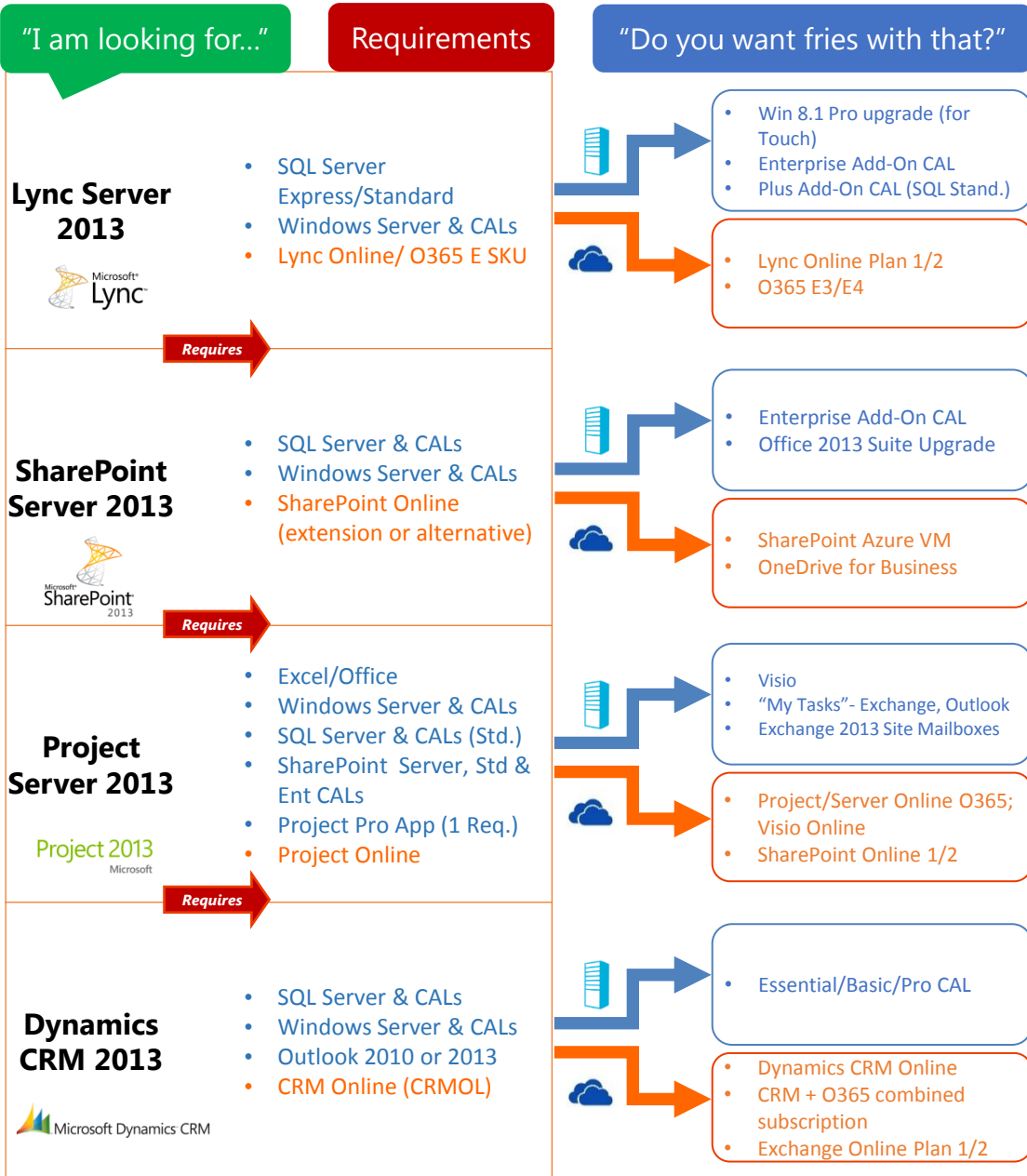


## Up-Sell, Cross-Sell, and Additional Speak-to's alongside Cloud First conversation points

- ▲ Upsell    ☉ Cross-Sell    ⊕ Additionally    ▲ Cloud Up-sell & Cross-Sell    ✦ Key Resources
- ▲ **Upsell:** Purchase [Datacenter](#) to increase the number of VMs per license for maximum virtualization (powerful h/w servers that can handle 10+ VMs), and add on RDS CALs to enable [RDS Services](#)—huge value add in SMB space (especially with SPLA Rs.)
  - ☉ **Cross-Sell:** Discuss [System Center](#) as a companion to [Windows Server](#) as a means of centralized management tools across infrastructure, both Server MLs (SC Standard/Datacenter) and Client MLs (SC Config Manager/Management Suite—both available per OSE/user).
  - ⊕ **Additionally:** [Azure](#)—add Azure Backup and/or Site Recovery (DR) for the on premises Win Server deployment—[Azure](#) in Open MCs.
  - ▲ **Cloud Up-sell and Cross-Sell:** Extend Windows Server to [Azure](#) (a VM in [IAAS](#) via Open), and highlight that all licenses are included (except RDS CAL). Provision with Open Monetary Credit SKU. Position: 1. Backup 2. Disaster Recovery (Site Recovery (as of 12/11/14 no System Center required)). 3. [Production VMs](#) with Server and SQL Server 4. [Active Directory](#) 5. Remote Desktop Services (RDS—CALs purchased separately) and Remote App with Office.
  - ✦ **Key Resources:** 1. [Azure in Open Quoting Tool](#) 2. [Azure SureStep Portal](#) 3. [Azure Consumption Estimation Tool \(for partner deployment at customer\)](#) 4. [Production Team Blog](#) 5. [Azure VM FAQ](#)
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- ▲ **Upsell:** Cloud first: Solution Sell E3 or Office 365 ProPlus for premium client apps and expandability. Windows 8.1 Pro mobile devices (Surface, etc.)—Form factor and Input method support and awareness for **mobility**. Windows Intune subscription for mobile device mgmt (including non-Windows devices like iPad)
  - ☉ **Cross-Sell:** 2013 Office Server upgrades in tandem to support new/advanced features (Exchange/SharePoint/Lync 2013 or Online). Microsoft Azure Rights Mgmt Services for easy deployment of doc encryption to Office 2013 client apps and email.
  - ⊕ **Additionally:** Incent 2013/O365 ProPlus upgrade with VAR Rebates + Renew to the Cloud + SMB Advantage + Office 365 ProPlus Option = Never a better time to upgrade ( Office 2003 EOS). **VL SA gives 3 devices**, O365 ProPlus gives 5+5
  - ▲ **Cloud Up-sell & Cross-sell:** Always lead with **E3** (for Suite) and **Pro Plus** (for Client only) to keep the customer in the Enterprise family. Step down to Business Family subscriptions based on price/competition sensitivity. **Upsell** Devices (touch) and premium subscriptions for the best Office experience across all devices, and cross-sell with complementary plans like Project Online and [Visio Pro Online](#).
  - ✦ **Key Resources:** 1. [Subscription Comparison Chart](#) 2. [O365 Surestep Portal](#) 3. [Service Descriptions](#) 4. [Business Blog](#) 5. [Office in RDS](#) 6. [Plan Comparison](#) 7. [IT Blog](#) 8. [Partner Site](#) 9. [YouTube Channel](#)
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- ▲ **Upsell:** Upgrade to [Exchange 2013 Enterprise](#) for Mobile Device/Touch Support; DLP (for industry security/privacy templates (HIPPA, Sox, etc.), Archiving/eDiscovery, [Site Mailboxes](#) (Project-lite integration with SharePoint). These [features](#) are located in the Enterprise Add-On CAL.
  - ☉ **Cross-Sell:** Grow simple email sale to **Unified Communications** (UC) conversation—Exchange + **Lync** (messaging & real-time com)
  - ⊕ **Additionally:** Position the **UC** competency as a major opportunity for partners to attain. Demand for **Lync integration** in SMB is HUGE!!!
  - ▲ **Cloud Up-sell & Cross-sell:** **Upsell** [Exchange Online](#) Plan 1 to Plan 2 or Business Premium/E3 Subscription. **Cross-sell** Archiving and e-Discovery add-on, or via higher subscription. Also, position devices/mobility and **Unified Communications** adoption via E3 online or E4 on-prem (Lync, soon to be rebranded Skype for Business).
  - ✦ **Key Resources:** 1. [Online plan comparison](#) 2. [UC demo](#) 3. [Outlook Requirements for Exchange](#) 4. [Service Description](#)
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- ▲ **Upsell:** Must find out **why they are buying SQL** (Application backend (called “runtime”), Development, or BI)? This allows you to position Premium SKUs vs. Standard ([Enterprise](#)/BI Edition vs. [Standard](#)). SPLAR’s see great value in Premium edition due to SA Benefits and Portability
  - ☉ **Cross-Sell:** **Office 2013** for Excel, PowerPivot and PowerView for all their BI/Analytics reporting needs! BI must be positioned proactively—very rare that it is asked for in SMB, but the demand is there and it’s never been easier now that Excel is the front-end for all things BI.
  - ⊕ **Additionally:** SA on **Enterprise** allows Unlimited Virtualization Rights, VM Portability and Passive Standby—this becomes very important to customers engaged in mission critical applications, complimented with dense virtualization.
  - ▲ **Cloud Up-sell & Cross-sell:** **Upsell** Backup via **Site Recovery DR** capabilities within Azure IAAS. Be sure to understand the differences between Azure SQL and SQL in an Azure VM.
  - ✦ **Key Resources:** 1. [Azure SQL Database](#) 2. [SQL Edition Comparison](#) 3. [Azure SQL Database VS SQL Server in Azure VM](#)

# Call Map: Guiding the Opportunity

# Solution Selling: Growing the Opportunity



## Up-Sell, Cross-Sell, and Additional Speak-to's alongside Cloud First conversation points

- ▲ Upsell: To **Enterprise for Voice/Video** (Telephony partner needed). **Lync** is the Gartner Leader in **UC**; ROI is measureable, even for SMB—Save by removing proprietary hardware and eliminating the desktop handset.
- ☎ Cross-Sell: **Office 2013** upgrade for new Lync client (**Office Pro Plus**) and integration with Outlook and the entire New Office experience. Also, **Exchange 2013** upgrade to complete the integration of real-time communication and messaging (email) = **Unified Communications**, as well as **Archiving** to store Lync content. Lync on Mobile devices (touch) to upsell Mobility/Surface Pro 3.
- ⊕ **Additionally: Office 365 Plan E4** with the purchase of a couple Lync 2013 Servers allows for an easy, lower-cost and integrated roll-out of Lync with full **Enterprise Voice** (phone replacement) on premise, while Exchange and SharePoint stay in the cloud. Dial tone to be offered in FY15 (PSTN) in Lync Online.
- ▲ **Cloud Up-sell & Cross-sell: Ups-ell** to higher Lync Online Plan 2 and Voice via moving to **E4** plan and selling Lync Server for on-prem deployment (with O365 integration for full UC). **Lync Voice** (PSTN = Dialtone coming CY15; E3 or higher needed). **Cross-sell** the entire E3/E4 Suite and device/mobility.
- ✦ **Key Resources:** 1. [Plan Comparison](#) 2. [Service Descriptions](#) 3. [UC/Lync Demo](#)
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- ▲ **Upsell:** Ask *why do they want SharePoint Server* (app integration, doc mgmt, BI, websites, collab, intranet, etc.). This will allow you to position SharePoint Enterprise and SharePoint Online vs. the free version of SharePoint (Foundation) that comes with the Windows Server OS. Yammer integration and Forms/Workflow are big selling points.
- ☎ **Cross-Sell:** Office, Office! **Office 2013!** The deep integration b/t Office and SharePoint is what expands use once deployed.
- ⊕ **Additionally:** When competing vs. Web 2.0's (ie., Box, DropBox, etc.), **OneDrive** is the focus with advanced capabilities of forms/workflow, B.I./Dashboarding, etc.; always the stress deep integration with Office clients. Position E3 and E4 as cloud solutions that incorporate both SharePoint and Office Pro Plus.
- ▲ **Cloud Up-sell & Cross-sell:** SharePoint Online allows virtual parity with the on-prem SharePoint Portal product. Forms/Workflow, BI, Records Mgmt, Document and Webcontent Mgmt all full-featured in the Online version. Inclusive of new capabilities (ie, Delve, Yammer, Groups, Matter Center, etc.). **Up-sell** to premium plan and encourage Partner configuration and build out, starting with **OneDrive for Business** (personal doc storage with unlimited space cap).
- ✦ **Key Resources:** 1. [Service Description](#) 2. [Plan Comparison](#) 3. [SharePoint Online App Dev \(for Partners\)](#)
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- ▲ **Upsell:** **Project Server Online** is now available — Still requires Project Client, but SharePoint integration is included. **Project Server** competent VAR is key for on-prem and online implementation and configuration.
- ☎ **Cross-Sell:** Stress the **SharePoint** integration to expand usage opportunity. Speak to **Exchange 2013** Site Mailboxes to enhance expanded usage and the "My Tasks" function of Exchange to improve collaboration and organization (**Lync** can also be discussed).
- ⊕ **Additionally:** Microsoft includes Project templates for all Office Server deployments with their **Rollout and Adoption Success Kits (RASKs)**. Position an Office 365 solution as a much cheaper way to consume Project over a full, company wide on-premise build.
- ▲ **Cloud Up-sell & Cross-sell: Up-sell Project Lite** add on to Project Online for users needing access to projects within context of Project Online subscription without full feature function, and position **Project Pro** with Project Online for full feature function. **Cross-sell** on-prem Project Pro client to users without a cloud client, and discuss Project as being part of the larger Office family.
- ✦ **Key Resources:** 1. [Service Description \(comparison to on-Prem\)](#) 2. [Plan Comparison](#) 3. [Project Online Get Started](#)
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- ▲ **Upsell:** **Dynamics** and CRM Partners will be the primary purchasers; , **CRM Online** is the best value and experience for SMB partners without competency (pre-deployed and basic configuration of app and SQL). Many solutions can be configured beyond CRM (XRM = Marketing Mgmt, Enterprise Contact Mgmt, Facilities Mgmt, Asset Mgmt, Fleet Mgmt, Call Center, Work Order etc.)
- ☎ **Cross-Sell:** **Office 2013** for the full functional capabilities of the **Outlook 2013** front-end to CRM (position Exchange as well, stressing its deep value). \*Office 365 ProPlus works as well., and Device/Mobility Upsell with touch-enable XRM clients easily deployable.
- ⊕ **Additionally:** Future Opportunity—CRM is how MS EPG teams are making their quotas. Deals can quickly escalate to 6 and 7 figures \$\$
- ▲ **Cloud Up-sell & Cross-sell: Up-sell** into the a CRM and Office 365 combined subscription for a full online experience. **Cross-sell** Exchange Online for integration and more capabilities.
- ✦ **Key Resources:** 1. [CRM Comparison On-Prem Vs Online](#) 2. [Certification](#) 3. [Combining with O365](#) 4. [Building a new CRMOL Practice](#) 5. [Service Description](#)