



Customer Journey-in-a-Box | Playbook

# Converged Communications

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 **monetize the integrated communications & collaboration opportunities** with Microsoft Teams

## ⚡ Priority

- Converged Communications: Teams Phone & Teams Rooms

## 🕒 Segment

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

## 🗄️ Solution Area

- Modern Work

## ★ Hero SKU

- Teams Phone
- Teams Rooms

## 🏠 Up/cross sell path

- M365 E3 customers to M365 E5, or Teams Phone, Teams Rooms

## 📊 KPIs

- # Customer adds
- \$ CSP revenue
- # Workshops & Programs

## Audience, workshops & assessments

### Customer targeting (based on LXP)

- M365 E3 to M365 customers
- Post M365 E5

Align target list with your Microsoft contact.

### Buyer Persona

- Teams Rooms: CTO/CIO
- Teams Phone: ITDMs

### Workshops & assessments

#### Discover Workshops

- Teams Rooms BDMs: Sales, Marketing, HR, Finance, Exec, C-Level, IT supporting
- Teams Phone: BDM, CTO, ITDM, IT Pro

#### Build Intent Workshops

- **Hybrid Meetings and Rooms** 1,000+ Teams paid active users (PAU), and • Select customers above 300 seats may also be eligible for this workshop
- **Modernize Communications:** 1000+ Teams Paid Available Units (PAU), and • 300+ Teams Monthly Active Users (MAU) or greater than 15% Teams Monthly Active Users (MAU) • Select customers above 300 seats may also be eligible for this workshop

#### Solutions Assessments

- **Workforce productivity:** Helps customers simplify cloud adoption and reduce risk. It provides customers visibility into desktop and on-premise environments while helping them improve end user productivity.

## Campaign material

### Partner Led – Customer Trials

- Teams Phone Standard 50 seats, length 90 days
- Teams Rooms Standard 50 seats, length 90 days

### Sales Support Materials

#### Demos

- Microsoft Teams Phone - IT Pro
- Microsoft Phone – BDM, ITDBM
- Microsoft Teams Meetings Hero Demo
- M365 Business Voice

### Bill of Materials (BOMs)

#### Practice Development

- Developing Hybrid Meetings and Modernize Communications Practice.
  - Teams Rooms Practice
  - Teams Phone Practice
  - Teams Meetings Practice
- Customer facing Hybrid Work Microsoft site
- Partner Network: Microsoft Teams Playbook
- Microsoft 365 for Operators (Opportunities with Calling, Meetings and Devices)

### Campaigns

- Digital Marketing Content (DMC) Campaigns: Go Big with Hybrid Work (New FY23)
- Go-To-market Toolbox

# Partner

## Criteria

### ✔ Partner Targeting

- Teams Phone: Services, SIs, Operators
  - Services partners and Operators who deploy and manage Phone System with PSTN calling capabilities (1st party or 3rd party).
- Teams Rooms: Services, SIs, AVIs (Surface Hub partners and [MRPP partners](#))
  - Services and AV Integrators who deploy and manage Teams Rooms devices.
  - Services partners who deploy and manage online meetings services, and virtual events solutions.

### ✔ Build Intent Workshops Partner Eligibility Criteria

#### Modernize Communications Workshop:

- Partner Agreement: Microsoft Partner Program Agreement
- Program Enrollment: Microsoft Commerce Incentives
- Partner Qualification: 1) Gold/Silver Cloud Productivity or Communications Competency, or 2) Advanced Specialization for Teams Calling, or 3) Co-sell Ready

#### Hybrid Meetings and Rooms Workshop:

- Partner Agreement: Microsoft Partner Program Agreement
- Program Enrollment: Microsoft Commerce Incentives
- Partner Qualification: 1) Solutions partner for MW or 2) Gold/Silver Communications Competency, or 3) Advanced Specialization for Teams Meetings and Meeting Rooms

## Skilling and enablement

### Learning paths

- [Microsoft 365 and Security Learning Paths | Learning Paths](#)
- [Modernize Communications](#) learning path
- [Teams Phone](#) learning path
- [Microsoft Teams Meetings Rooms](#) learning path

### Microsoft Teams Meetings, Calling & Devices Learning Journey

- [Teams Practice Development Playbook](#)
- [Microsoft Teams Meetings, Calling, and Devices practice page](#)
- [Teams admin documentation](#)
- [Teams Blog](#)
- [Microsoft Teams Calling, Meetings and Devices Partners Yammer Community](#)

### Enablement Guides

- [Modern Work Partner Enablement Guide](#)

### Other resources

#### Operator Connect & Accelerator

- <https://aka.ms/OperatorConnect>

#### Operator Connect Mobile (New)

- <https://aka.ms/OperatorConnectMobile>

#### Modern Work Discover Workshop

- [Partner playbook](#)

#### MCI Workshops engagement

- [MCI Engagements Training Guide](#)
- [FY23 Microsoft Partner Commercial Incentives Guide](#)
- Webinar: Intro to [Build Intent Workshops](#)

#### Other Marketing Resources

- Converged Comms Teams Phone: [Deck](#) and [Talk Track](#)
- [Partner led marketing guidelines](#)

## 3 questions you should ask the customer:

- Are your employees able to communicate from any worksite on any device?
- Do you have classic calling features, but your organization requires flexible phone capabilities?
- Are you interested on learning more about cost-effective and easy to manage modern communication solutions?

# Customer Journey

## Tactics

## Funding & Incentives



### Listen & Consult

- Partner led ABM Digital Campaigns, Telemarketing, Events, Webinars All partner led marketing campaigns should drive demand to any of the 1.few and 1:1 pre-sales programs
- M365 Discover Workshop: Teams, Teams Phone, Teams Room <https://aka.ms/wsplaybook>

- Partner led Small group leadership roundtables
  - DMC Campaigns
- All partner led marketing campaigns should drive demand to the 1:1 Build Intent Workshops

- 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: 365



### Inspire & Design

- Build Intent Workshops
- Hybrid Meetings & Rooms Workshop
  - Modernize Communications Workshop

Modern Work Solution Assessment

- Partner-led trials
- Teams Phone Standard 50 seats, length 90 days
  - Teams Rooms Standard 50 seats, length 90 days

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

- MCI Build Intent Workshops
- \$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, PowerBI, Meeting Rooms, MMD, Windows 365

- Pre-sales ECIF
- >20x ROI
  - >10x ROI for M365 CA



### Realize Value

- CSP Incentives
- Microsoft 365 new commerce CSP incentive
  - Microsoft 365 customer add new commerce CSP incentive
  - 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 Teams Phone system
  - Teams Platform

Online Services Usage M365: Up to \$7.5 for Teams Meetings and Teams Phone (each). Rate card for details.

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