Microsoft Teams

Microsoft Practice Development Playbook

Microsoft

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About this Playbook

This playbook is intended for the business and technical leadership for new and existing Microsoft partners focused on implementing Microsoft Teams (Teams) or modernizing legacy applications and bringing them into Teams.

Objectives

The goal of this playbook is to help partners understand the growth opportunity that Microsoft Teams (Teams) provides so that they can accelerate or optimize their Teams-focused practice. This playbook will offer guidance and best practices on selling and deploying Teams as well as extending Teams with custom solutions.

For the business side, this playbook provides an understanding of the strategies partners can take to build a Teams practice, including which areas of Teams to focus on, how to cross sell leveraging Teams, and how to build a technical team.

For the technical side, this playbook provides detailed guidance on how to manage Teams and how to approach governance. It also provides guidance on various add-ons to Teams and the areas of Teams that can be customized and extended for customers.

How this playbook was made

This playbook is part of a series of guidance written by Microsoft Partner Opsgility, in conjunction with the Microsoft One Commercial Partner group.

Content in this playbook is based on in-depth interviews with 8 Teams partners, specially selected for their depth of expertise and proven track record in delivering successful Teams projects.

To validate the guidance provided in this playbook, we worked with MDC Research to conduct a survey of global partners, with responses from 387 partners currently offering Teams. In this survey, we gathered insights on a range of topics, including how partners hire, compensate and train resources; their business model, revenue and profitability; what practices and services they offer; and what skillsets they have in place to support their offers. The results of this survey are provided in-line with the guidance found within this playbook

CONTRIBUTING PARTNERS			
Adopt and Embrace	Cognizant	IT Improvement	
Avanade	Empired	NTT Data	
Cobweb / Vuzion	Engage²		

Using the playbook effectively

Quickly read through the playbook to become familiar with the layout and content. Each section includes an executive summary and key actions for that specific topic. Review these summaries first to decide which areas to focus on. Go over the content several times, if needed, then share within the team.

TO GET THE MOST VALUE OUT OF THIS PLAYBOOK:

- ☑ Get teams together and discuss which pieces of the strategy each person is responsible for.
- ☑ Share the playbook with sales, marketing, support, technical, and managed services teams.
- ☑ Leverage the resources available from Microsoft to help maximize profitability.
- ☑ Share feedback on how to improve this and other playbooks by emailing playbookfeedback@microsoft.com.

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March 2020

Digital Transformation

As organizations transform their businesses with cloud technologies, they quickly find new and better methods of collaboration and customer engagement, as well as more effective ways to measure productivity and sales effectiveness.

Source: Developing a Teamwork Adoption and Change Management Practice Partner Guide

Today's workforce is more mobile, social, and global, and the devices and digital tools they use to get their work done reflect those changes. But people also have different backgrounds in technology and different expectations about their communication and collaboration activities, adding to the diversity of devices and tools and management complexity. Organizations are finding tremendous value in bringing new workstyles and customer touchpoints together into a cohesive collaboration platform. And partners who combine their knowledge of customer business processes with the skills to help make the needed technology and cultural shifts are delivering that value leveraging modern communication and collaboration offerings based on Teams.

Teams can help partners move forward across all four pillars of digital transformation to:

1. **Empower employees** by delivering self-serve, efficient information search and sharing, employee engagement measurement, and learning and development activities.
2. **Engage better with customers** by enabling timely feedback loops, customer support, sales associate productivity measurement, and much more.
3. **Optimize operations** with effective execution of business processes, delivery management, and live tracking of in-flight products or services.
4. **Transform products** along with their workforce, ranging from project management to engineering workflows, through to managing service incidents and design collaboration.

FURTHER READING

→ Microsoft Digital Transformation eBook Series

The Teamwork Opportunity

Modern collaboration platforms such as Teams allow colleagues to connect with each other and their customers anywhere, on any device via chat or audio and video calls and meetings, sharing and collaborating on documents and workflows securely in real time.

More effective communications improve business outcomes and reduce telephony costs, while the integrated collaboration capabilities provide better uptime, performance, scalability, security and compliance. A Teams practice can highlight a partner's expertise with adoption and change management services, helping customers take full advantage of tools and to find more productive ways of working. The Teams approach to collaboration helps employees become more receptive to change and increases employee satisfaction.

This connected collaboration experience represents the largest and fastest expanding Microsoft 365 opportunity for partners across all four delivery areas: deployment, advisory and adoption services, business solutions, and managed services.

US $934

Three-year best-in-class partner revenue per user from a complete Teamwork (including Calling and Meetings for enterprise) customer journey.

US $30 Per user, per month

Potential revenue by adding Calling and Meetings to your teamwork practice; an increase of up to 36%.

US $1500 Per room, per year

Managed services for Teams Rooms.

US $15.70 Per user, per month

More than half of the total revenue opportunity; a 23% increase in managed services revenue.

Source: The Microsoft Teams Partner Guide

WHY MICROSOFT

As part of Office 365 and Microsoft 365, Teams delivers an integrated and comprehensive communications, collaboration, and workflow platform. To understand more about Microsoft's differentiated value proposition, see www.whymicrosoft.com for specific guidance on the advantages of Teams over Slack and why Skype for Business customers should upgrade to Teams rather than switch to a third-party offering.

Partner Practice Development Framework

The partner practice development framework defines how to take a practice from concept to growth. It is the foundation of this playbook, and each phase of the framework is covered in a dedicated chapter.

Define Strategy

Define your offer, benchmark your practice, and identify required resources.

Hire & Train

Hire talent, train resources, and complete certifications.

Operationalize

Prepare for launch with systems, tools, and processes in place.

Go to Market & Close Deals

Execute your sales and marketing strategy to find your first customers and close deals with winning proposals.

Optimize & Grow

Collect feedback, identify expansion opportunities, optimize your practice, grow partnerships, and refine your offer.

Microsoft
Partner
Network

Define Your Strategy

Microsoft Teams

aka.ms/practiceplaybooks

Microsoft

Executive Summary

Now that everyone understands the opportunities of building a practice focused on modern teamwork, it is time to build a strategy and determine which parts of Teams an organization will pursue.

We begin by providing an overview of the areas of expertise within a teamwork practice: deployment, voice calling and virtual meetings, education and user adoption, and custom and ISV solutions. An organizations practice may have expertise in all these areas, just one of these areas, or any combination. For each opportunity, we provide details about the business nature of the opportunity and the key areas leveraged in delivering solutions that capitalize on the opportunity.

Next, we will guide everyone through the process of defining their offer and its value proposition to customers. Simply stated, this is what partners will sell and why customers will want to buy it.

If partners are not yet a Microsoft partner, we will give a tour of the Microsoft Partner Network, the programs to leverage to grow a practice, how to earn competencies that yield additional benefits, and how to maximize the benefits from the program.

We will follow that up with an overview of potential service offerings and offer tips for how to identify potential customers to help partners build their practice.

We will conclude this section with how partners can support their customers. This includes guides on how to support customers, support offerings from Microsoft related to a practice, and the support-related benefits from establishing competencies within the Microsoft Partner Network.

Top 4 things to do

Define a business strategy. Here are the top 4 things partners should absolutely do when defining a Teams strategy.

- ☑ Understand the Teams opportunity
- ☑ Identify common customer collaboration scenarios
- ☑ Define a service and solution offering
- ☑ Define a pricing strategy

Define Your Practice Focus

With a Teams practice partners can enable customers to accelerate their business in new ways through open communication, on any device, from anywhere, at any time.

DEPLOYMENT, SECURITY, GOVERNANCE

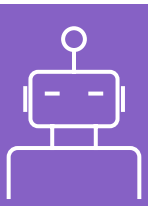
Before customers can take advantage of Teams, partners will have to deploy it. Make the most of the Teams opportunity by deploying Teams in a manner that is consistent with customers' needs for security, data retention, compliance, and more.

EDUCATION AND USER ADOPTION

Leverage proven adoption and change management (ACM) methodologies to drive increased adoption, enabling customers to bring new business use cases to life and maximize the value of their Teams investment.

VOICE CALLING AND VIRTUAL MEETINGS

Make the most of the Microsoft 365 opportunity by combining and expanding communications and collaboration practices with Teams' calling and meetings offerings. Enhance offerings by including Teams devices for users and meeting rooms.

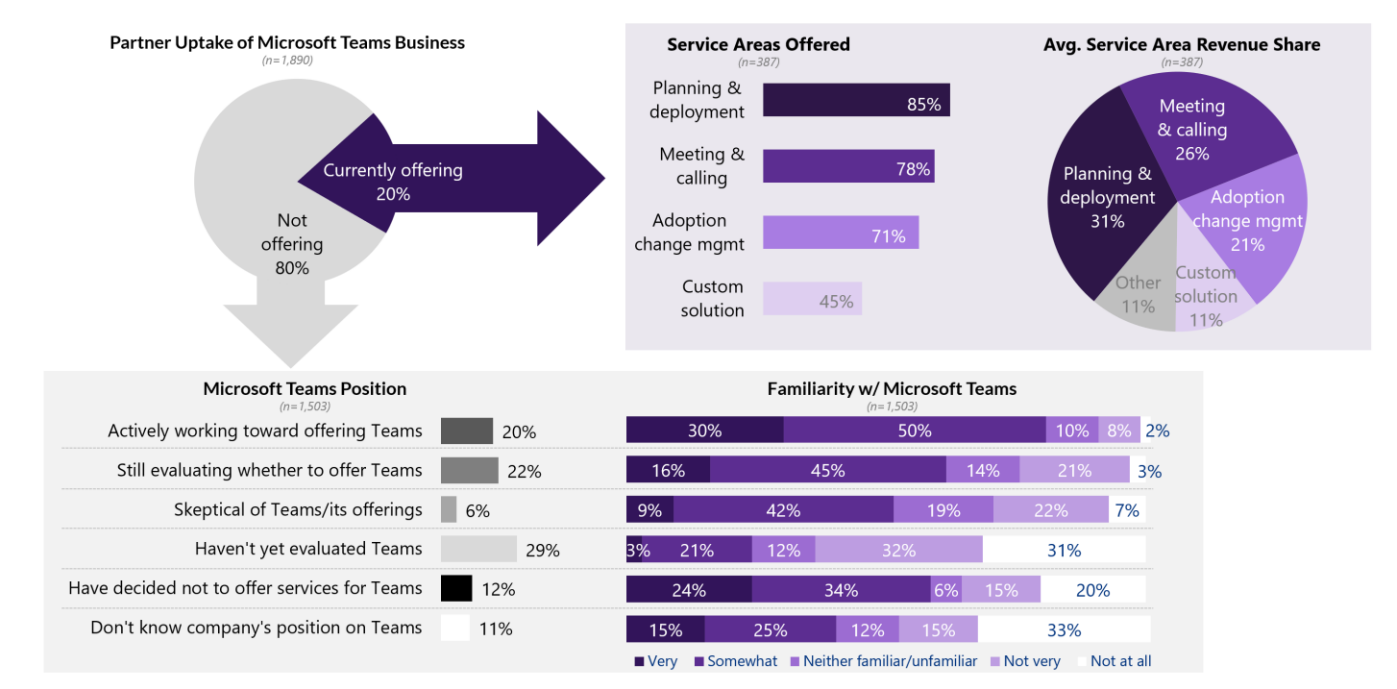


CUSTOM AND ISV SOLUTIONS

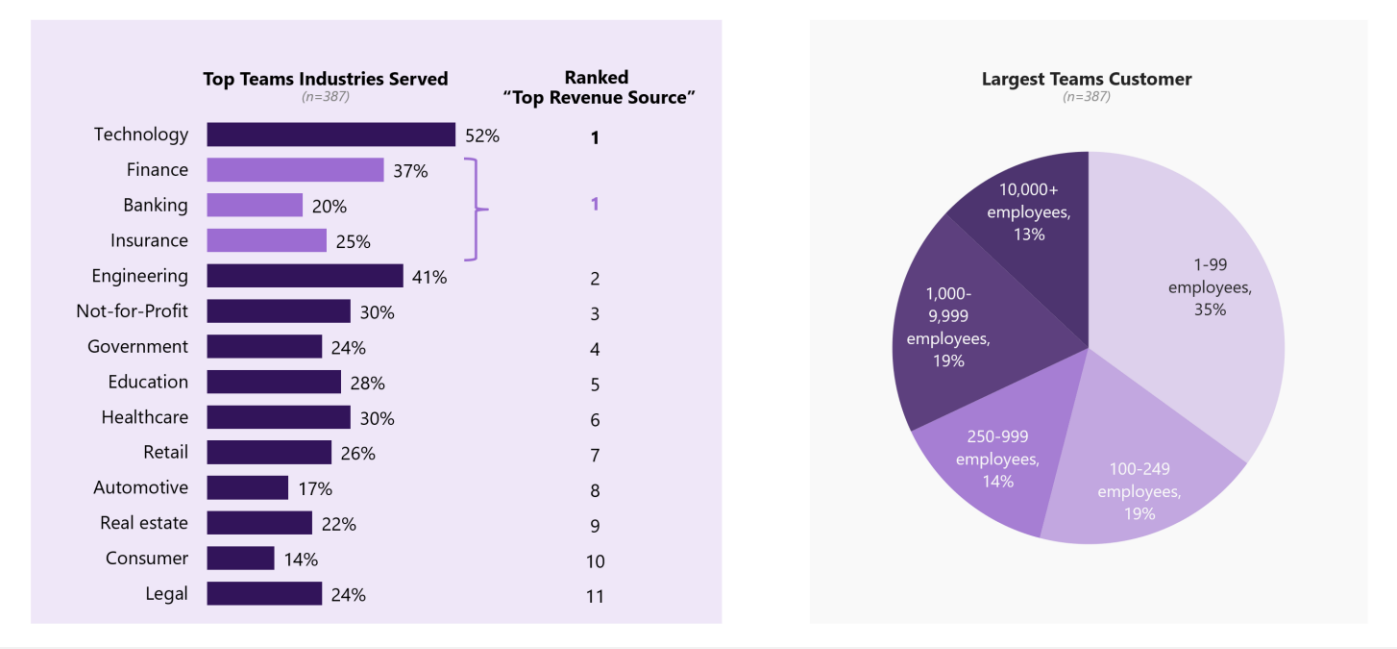
Teams is the universal hub for teamwork, allowing the customization and extension of the workspace with third-party apps, processes, and devices in addition to building SaaS or custom apps on top of Teams.

SURVEY DATA

Of all survey respondents, one in five are ahead of the curve and already offer Teams services, and a similar number are already evaluating the Teams opportunity. Of those already offering Teams, planning and deployment services were the most common offering, and custom solutions the least common.



Technology and financial sector customers are the top revenue sources for Teams partners, with technology companies generating most revenue.



Source: Microsoft Teams Playbook Study, MDC Research, November 2019

Understanding the Teams Practice

Teams is a hub for teamwork, which brings together everything a team needs: chat and threaded conversations, meetings & video conferencing, Public Switched Telephone Network (PSTN) calling, content collaboration with the power of Office 365 applications, and the ability to create and integrate apps and workflows that businesses rely on.

The Deployment, Security, and Governance Opportunity

As partners consider where they will focus their practice, almost all practices will have an opportunity to deploy Teams. Some examples include device implementation, offering configuration and management services to help customers better secure and govern their Teams environment as well as surrounding workloads such as Exchange and SharePoint.

But a practice does not end with planning and deployment. Deployment is an on-ramp to architecture and security planning along with services such as migration from existing collaboration solutions to Microsoft 365.

There are multiple services partners can offer as a part of a practice, including:

PROJECT SERVICES	
Build strategy and roadmap assessment for Teams	Security and compliance evaluation and configuration
Deployment of Teams	Project management
Network and Active Directory readiness assessment	

These types of services build the foundation of a practice and lead to stronger relationships with customers. As a follow on, partners can continue to expand their practice into pull-through project services such as change management or specialized industry-specfic offers.

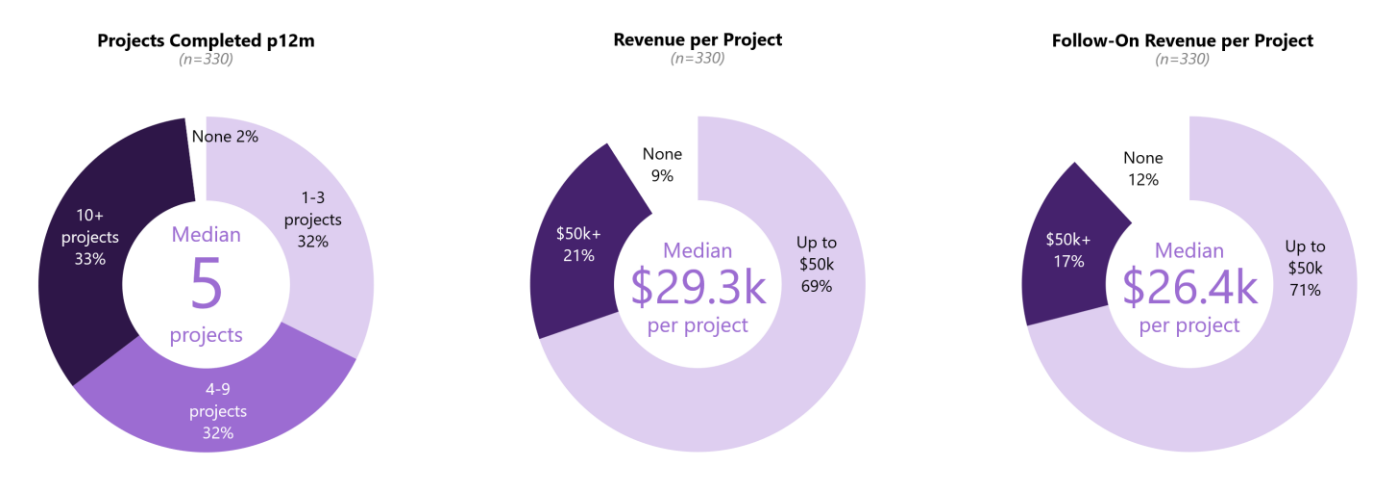
Partners will also find that post-deployment managed services become an opportunity to not only forge a lasting relationship with customers, but also become an integral part of their business. Examples of managed services include:

MANAGED SERVICES	
Modular technical and end-user support	End-to-end network quality monitoring
On-demand content creation customization	Proactive quality management and administration
Ongoing adoption engagements	Repeatable tools for simplified admin and front-end access
IT service management processes	Organizational change management and reporting
Phone system with direct routing as service	Adoption measurement and organizational analytics
Voice Calling and Virtual Meetings, monitoring and optimization	Microsoft 365 cross-workload offering (Security, Compliance, Modern Desktop)
Devices as a Service (DaaS)	

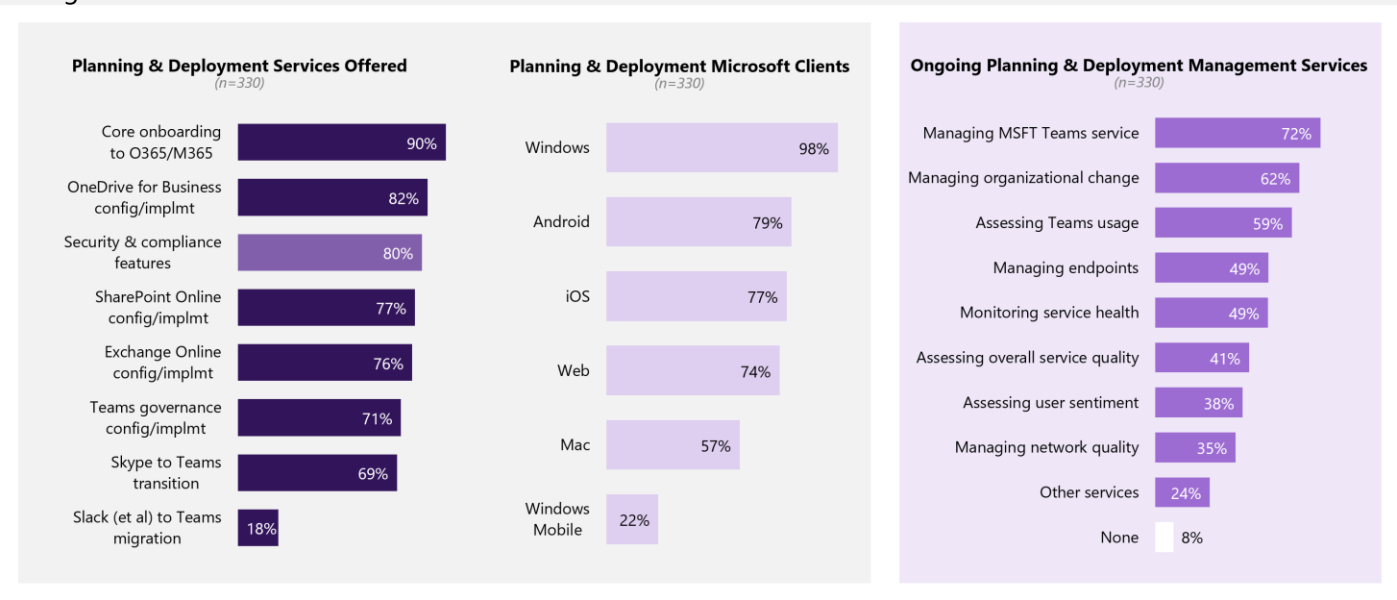
SURVEY DATA

Many partners are still at an early stage of delivering Teams services, as is reflected in the median figures below. Note the darker band in each chart showing the larger volumes and revenues achieved by more established Teams practices.

85% of Teams partners surveyed offer **planning and deployment services**, averaging almost $150k/year in revenue over the past 12 months, with roughly $130k/year in follow-on revenue for additional services.



Top planning and deployment services offered include core onboarding to Office 365/Microsoft 365, and configuration and implementation of OneDrive for Business; 9 in 10 Teams partners provide ongoing planning and deployment management services.



Source: Microsoft Teams Playbook Study, MDC Research, November 2019

The Education and User Adoption Opportunity

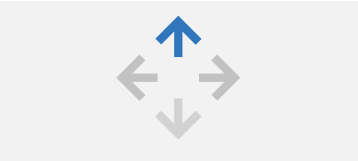
Deploying Teams is just the beginning. To help customers realize their desired business outcomes and return on their Microsoft 365 teamwork investments, it's critical for partners to help them ensure not only that users adopt new services, but also that they embrace those services and use them as part of their natural rhythm of work. Recent studies show that organizations are six times more likely to meet or exceed business objectives when effective change management is in place. (Source: Prosci, Best Practices in Change Management, 2018)

Offering adoption and change management (ACM) services for Microsoft 365 – and more specifically Teams – enables partners to create value for customers by educating and motivating users to take full advantage of best-in-class productivity and collaboration tools that lead to new ways of working. The overall market for change management related to Microsoft technologies for 2019 is US$9.5 billion, growing 7 percent annually. (Source: IDC, A commissioned study of ACM services on Microsoft technologies, 2018)

In addition, a Forrester Total Economic Impact study that measured partners' profitability in different business models found that partners with adoption and change management practices grew their businesses by 10 percent year over year.

CUSTOMER BENEFITS

Customers benefit from ACM services in multiple ways. By focusing on employee-centric outcomes, partners will bring more than a set of products to your customers – they will bring them a different, more efficient way of working.



Improve the likelihood of a successful deployment by reinforcing the use of Teams and ensuring it meets the needs not just the business, but also the people who make it run.

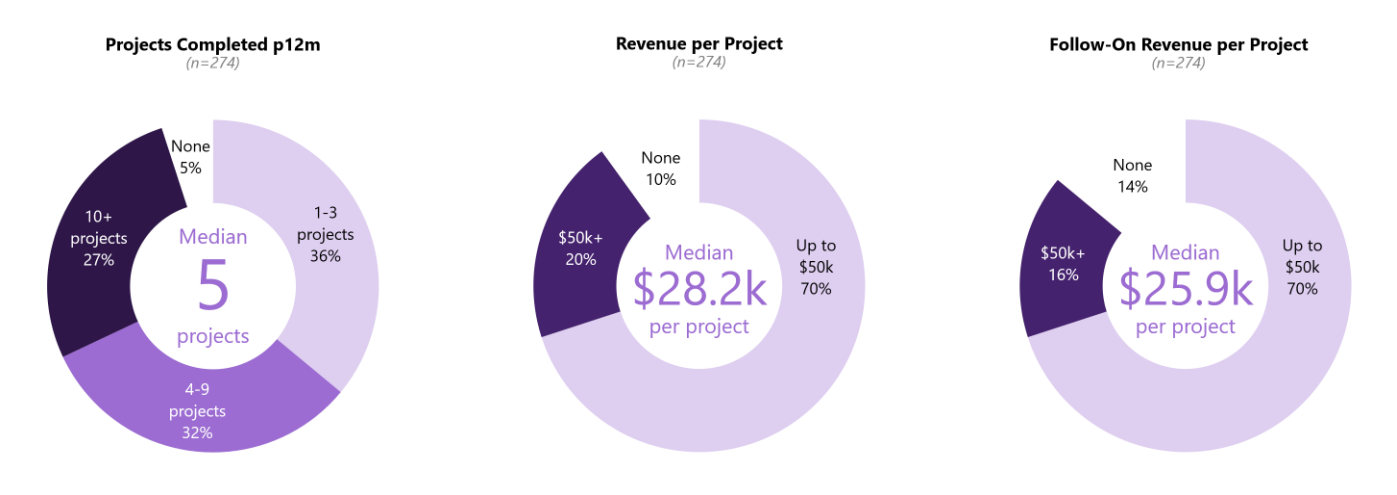
Help employees become more receptive to change, increasing usage of Teams and revenue opportunity.

Drive employee-centric outcomes, where people are the engine that drives change, with Teams enabling that change.

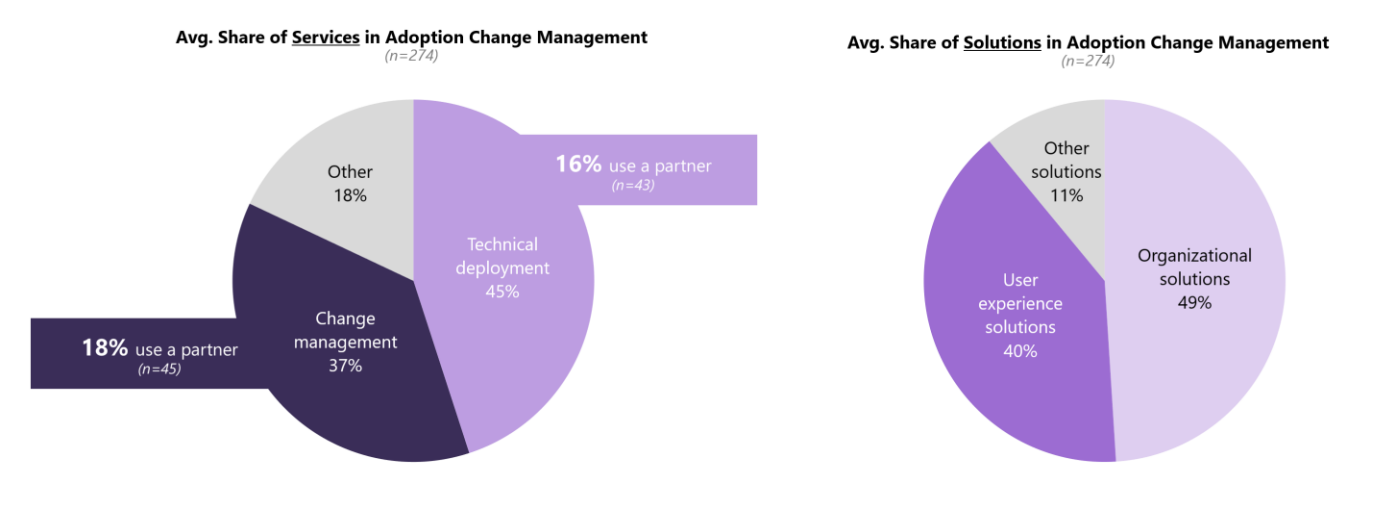
Make change a part of your customer's culture, supporting their unique challenges and delivering business outcomes.

SURVEY DATA

71% of Teams partners surveyed offer **adoption and change management services**, averaging over $140k/year in revenue over the past 12 months, and another $130k/year in follow-on revenue for additional services.



Technical deployment and change management are offered in balance, and very few work in partnership with other companies to deliver these services.



Source: Microsoft Teams Playbook Study, MDC Research, November 2019

The Voice Calling and Virtual Meetings Opportunity

Teams delivers immersive experiences that can help customers work more efficiently across their organization and stay connected wherever they are, on any device. They can make the most of this opportunity by offering integrated messaging, calling, and meeting solutions built on Teams.

The opportunity surrounding calling and meetings is grounded in Teams being the hub for teamwork for customers through the implementation of meetings, calling, and devices. There is an increasing opportunity to integrate meeting services, meeting rooms and calling into a unified collaboration and communication solution for enterprise customers. In addition, by migrating existing Skype for Business accounts to Teams, partners can create significant additional opportunities, such as custom solutions.

Microsoft has published additional guidance on building a Calling and Meetings Practice. This includes information on the value proposition, partner opportunity, practice building and go-to-market planning.

VOICE CALLING

Deepen customer engagements and simplify communication and collaboration for customers by adding PSTN calling capabilities in Office 365 and Teams. Phone System, when paired with Calling Plan and/or Direct Routing, provides a rich cloud-based calling experience through Teams for Office 365 users, globally.

VIRTUAL MEETINGS

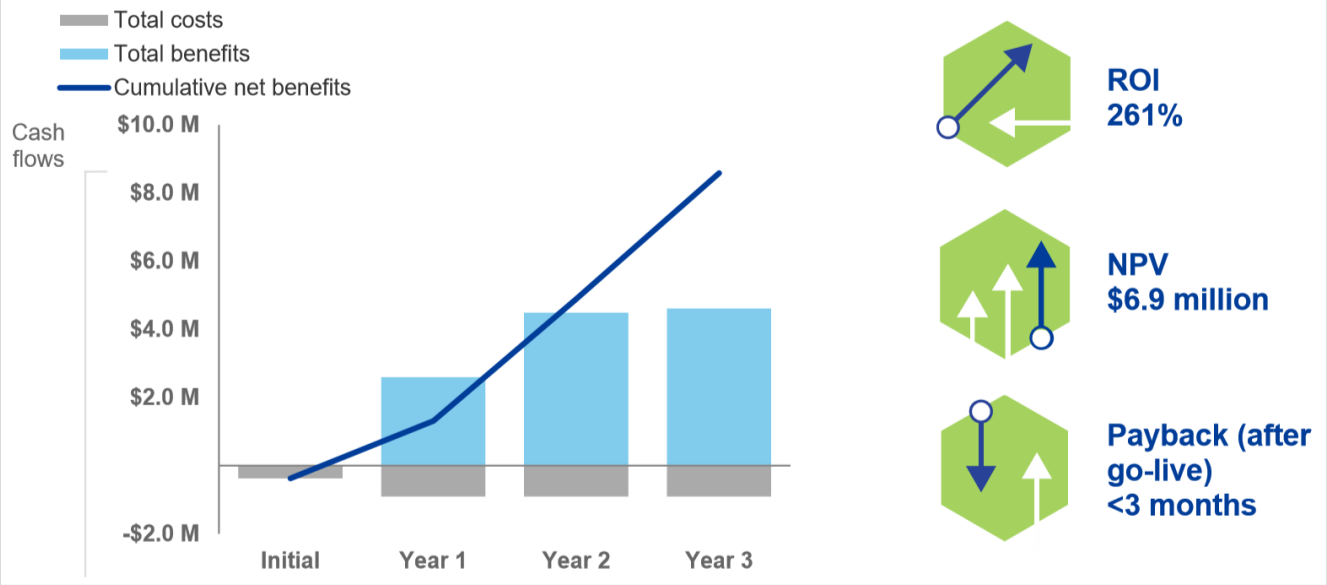
Teams meetings deliver a rich, high-definition audio and video experience that enable users to interact and collaborate easily, regardless of the device or network. Whether it's one-on-one video calls on mobile and desktop devices, conference meetings held across boardrooms all over the world, or global live events delivered to thousands of people, Teams meetings provides a seamless, scalable, and secure experience for users. And, because Teams supports a range of best-in-class devices, partners can offer customers more immersive experiences to improve collaboration across teams.

DEVICES

For every work experience, and space and working style, there is a Teams device to choose from. The Teams user interface delivers seamless Teams experiences across a variety of certified devices. In addition, Teams Rooms brings a modern, easy-to-use, and consistent experience to meeting spaces with one touch join and a rich set of artificial intelligence-enabled (AI-enabled) capabilities.

CUSTOMER BENEFITS

Forrester Research recently completed a Total Economic Impact study of Microsoft 365 Cloud Voice adoption. The financial business case for Cloud Voice was compelling: Forrester concluded that Cloud Voice has the following three-year financial impact: $9.5M in benefits versus costs of $2.6M, resulting in a net present value (NPV) of $6.9M and an ROI of 261%.



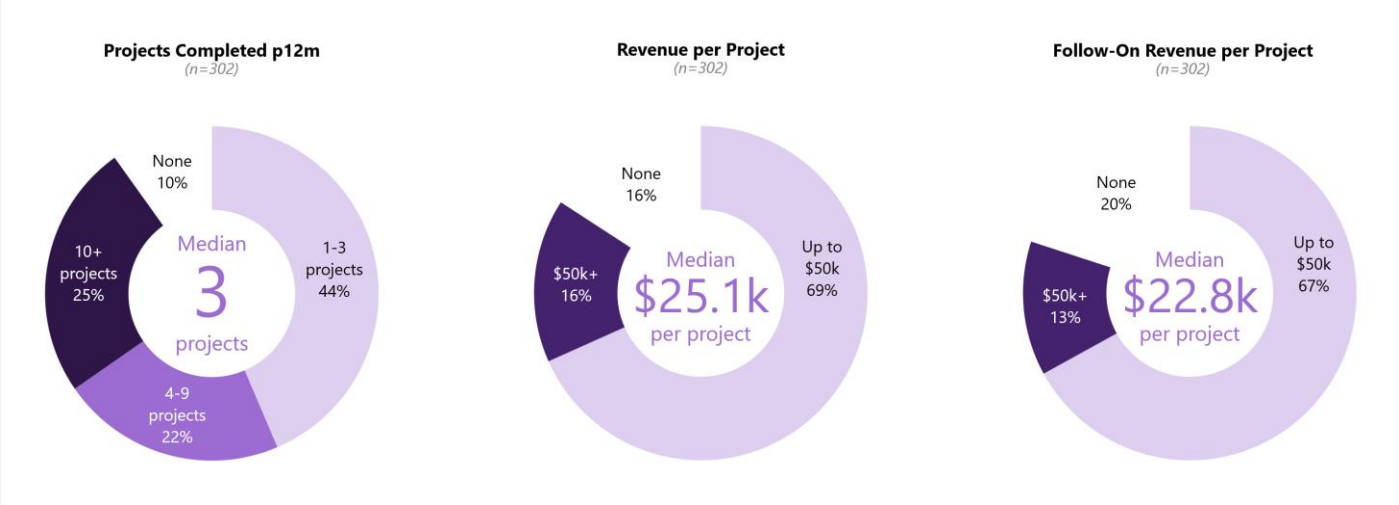
In addition, Forrester identified the following benefits of Cloud Voice over the previous telephony system:

- Better voice communication saves time, increases collaboration, and improves mobility.
- More effective voice communication as part of an integrated collaboration solution improves business outcomes, such as increased revenues and decreased time-to-market.
- Eliminating previous telephony solutions partially or fully offsets the cost of Cloud Voice.
- Individual user telephony costs are also reduced, for example through reduced international and mobile roaming call charges.
- Cloud Voice improves security and compliance.
- Cloud Voice provides better uptime, performance, and scalability than the previous solutions.
- Cloud Voice, as part of Teams, improves employee satisfaction, with the number of employees reporting as 'very happy' increasing from 15% to 85%.

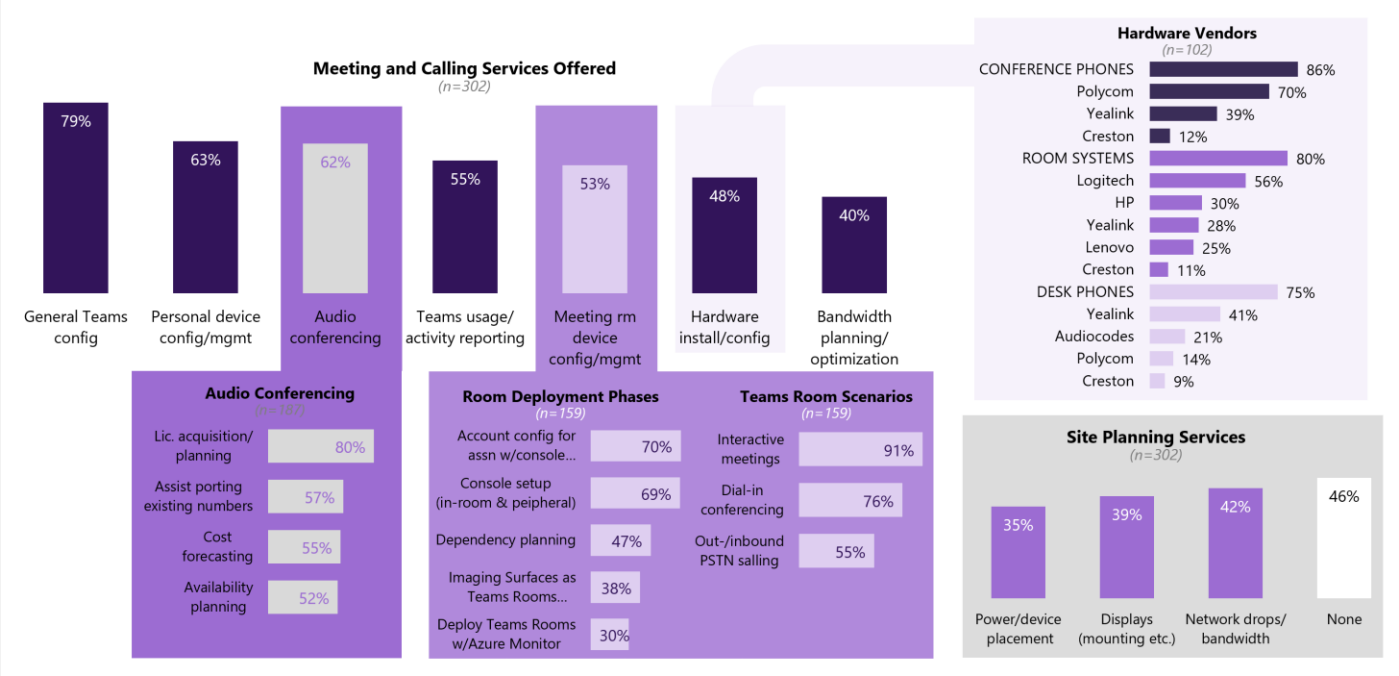
CONNECT EVERYWHERE	MORE EFFICIENT MEETINGS	COMPREHENSIVE ECOSYSTEM	A STRONG FOUNDATION
A single intelligent communications and collaboration experience for chat, calling, and meetings with a portfolio of purpose-built devices to choose from.	An intelligent backend delivers adaptive and immersive meeting experiences that drive efficiencies by providing transparent access to information and contextual insights drawn from usage patterns.	Supported by a best-in-class ecosystem of partners with solutions ranging from devices to third-party integration—extending the value and capabilities of Teams for Calling and Meetings.	Teams is built for modern communications that ensure optimal audio and video experiences regardless of device or network. Organizations and users can work with confidence—on a platform designed to deliver security, control, and compliance.

SURVEY DATA

78% of Teams partners surveyed offer **calling and meeting services**, averaging just over $75k/year in revenue over the past 12 months, and nearly $69k/year in follow-on revenue for additional services.



A wide range of meeting and calling services are offered, with those involving physical sites and hardware installation or configuration being the least common.



Source: Microsoft Teams Playbook Study, MDC Research, November 2019

The Custom and ISV Solutions Opportunity

A recent Forrester Total Economic Impact study measuring partner profitability under different business models found that partner business solution practices have grown 17 percent year over year. The rapid increase in Teams users and new sets of Teams platform capabilities have opened enormous opportunities for partners to customize and extend the Teams platform to build tailored Teams workspaces to meet customer needs.

Each team has its own set of personas, applications, and workflows, such as sales dashboards, employee onboarding, and process workflows. Key to success is understanding the customer's specific needs and desired business outcomes and engaging with customers to learn about their requirements unlocks this untapped opportunity. The opportunities within Teams continues to expand with the rapid growth of Teams as a product. Begin with a focus on solving customer problems.

20M+
More than 20M daily active Teams users

500,000+
More than 500,000 organizations use Teams

91%
91 Fortune 100 companies use Teams

10,000+
Over 200 organizations have 10,000 or more active Teams users

OPPORTUNITY ONE: SOLVING CUSTOMER CHALLENGES

Every team has unique needs. Teams is the canvas to create innovative new solutions that are tailored to address those needs and help customers drive their desired business outcomes. Develop custom solutions to bring together the applications and services customers are familiar with, along with their own line-of-business apps, into one Teams hub.

OPPORTUNITY TWO: CUSTOMIZE AND EXTEND

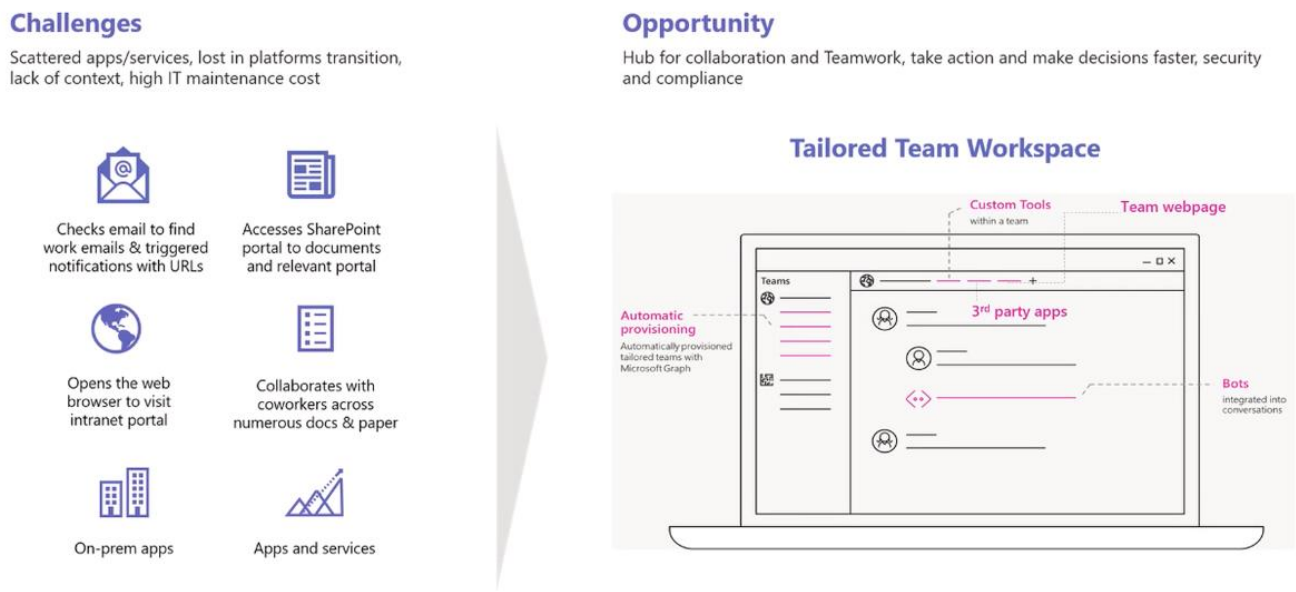
While every team is unique, each consistently needs a variety of apps and tools for productivity. Teams is the universal hub for teamwork that infuses them together, allowing the customization and extension of workspace with third-party apps, processes, and devices. Teams offers an extensible platform that allows for a personalized experience in order to get work done better, more efficiently, and more transparently.

The workspace itself is improved by pinning important files, apps or dashboard at the top of each channel for easy reference. Infusing Teams with the applications used every day allows users to better leverage the apps and tools they love—giving them access to the information they need right in the context of Teams. By connecting a customer's workplace tools into one single hub, users can simplify processes and accelerate decision-making. This provides an excellent opportunity for partners to assist and build Teams applications to create a tailored Team workspace and bring all the applications into a unified experience for the customer.

The first part of customizing and extending Teams might be as simple as bringing together all familiar Microsoft Office applications, reducing context switching and creating conversations around content.

The second part of this infusion of tools is bringing together all the other apps and services necessary for everyday productivity. This is where partners can optimize value to a customer. The Teams store currently has more than 400 partner applications and integrations available, and this continues to grow.

Teams also provides the ability to extend the experience to leverage the apps and services that an organization has built and provide employees the line-of-business applications they need. Imagine a day where all an organization's applications not only show up in one single user interface, but also work better together, allowing users to stay in the flow of their work. Partners can make this vision become a reality, by taking customer applications and integrating them into a modern workplace.



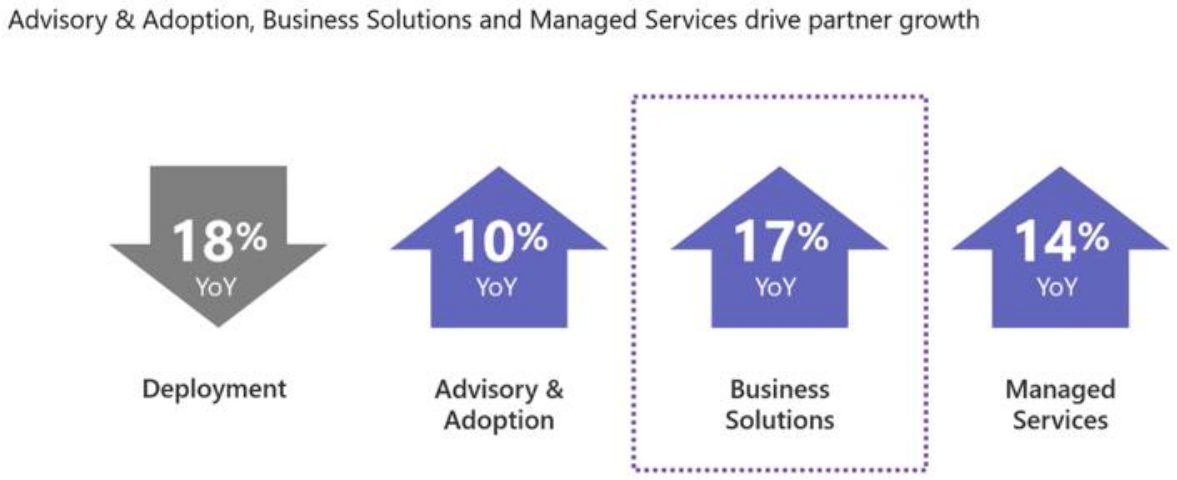
OPPORTUNITY THREE: INCREASE PARTNER PROFITABILITY

In addition to the opportunity that the tools and ideas with Teams provides to partners and customers, the continuous innovation of the Teams product in the modern workplace not only provides a better experience for customers, but also growing partner opportunities.

A Forrester Research study commissioned by Microsoft studied partner opportunities across the Microsoft 365 offerings and revealed that partners can make up to $45

per user per month if offering solutions in the areas of security, General Data Protection Regulation (GDPR), teamwork, and modern desktop. Teams is central to this offering.

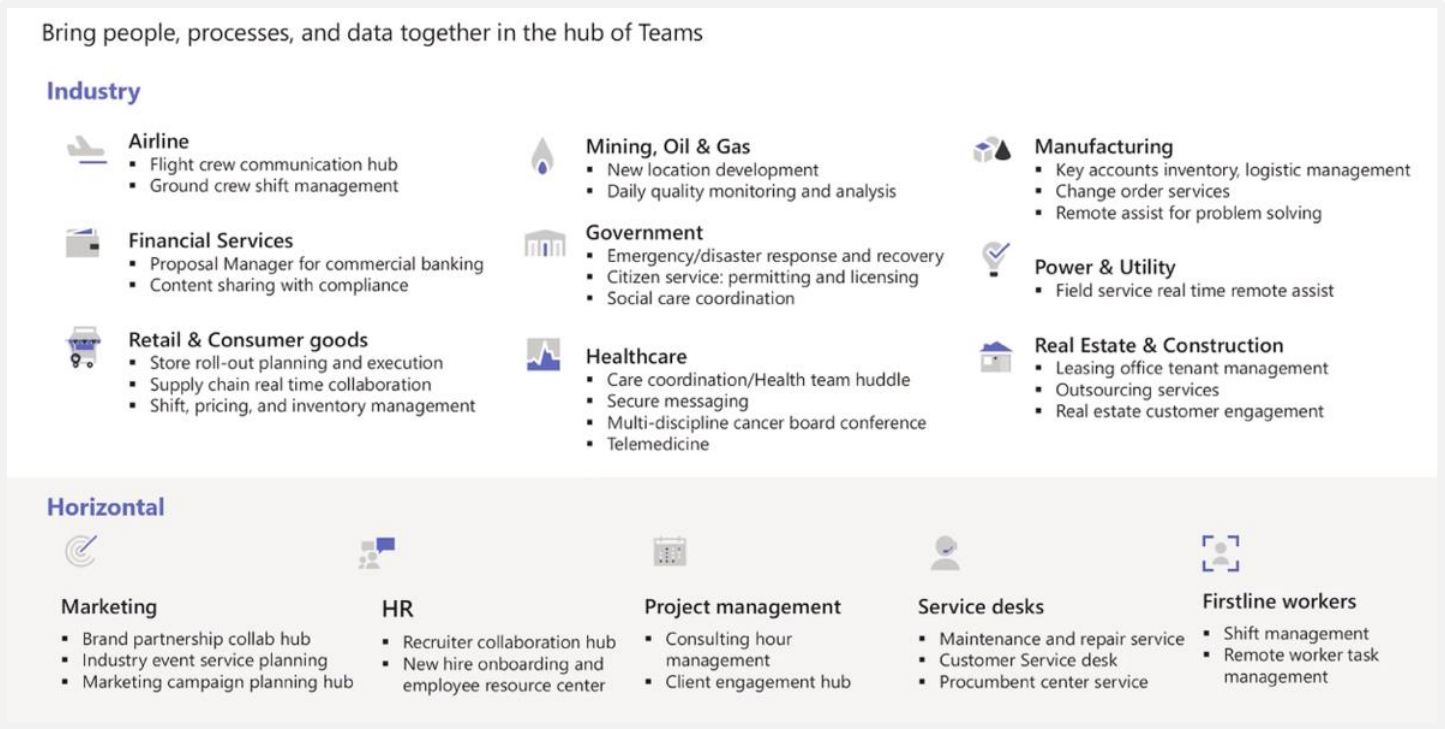
Specifically, there are also significant growth opportunities in advisory and adoption services, business solutions, and managed services. Business solutions were reported as the area with the most growth year over year and will continue to grow as companies centralize their work in Teams.



Source: Developing a Teamwork Adoption and Change Management Practice Partner Guide

OPPORTUNITY FOUR: INDUSTRIES AND HORIZONTALS

Focusing on a specific industry or horizontal enables partners to envision with customers, understand their business process and teamwork needs, and connect Teams to the tools and services they use every day to help them optimize the value of Teams.



OPPORTUNITY FIVE: MICROSOFT APPSOURCE AND TEAMS APP STORE

Reach a broader audience by publishing to the Microsoft AppSource or Teams app store. Adapting, packaging, and publishing repeatable intellectual property (IP) solutions to Microsoft AppSource, increases the potential for adoption and leverage the growth of Teams.

Publishing to Microsoft AppSource also makes solutions available in the Teams store and discoverable by a broad audience of business and end users using productivity tools.

Learn best practices for apps for Teams and how to package, test, and publish solutions to Microsoft AppSource through the Building Apps for Microsoft Teams guidebook and the Learn How to Build Microsoft Teams Apps webinar.

Teams Sales Formula

The sales motion for Teams starts with understanding customers' needs for digital transformation. As customers begin to use Microsoft 365 and the Office 365 productivity suite, partners can educate them on the value of the products they already have as they deploy Teams and increase adoption.

Teams adoption is accelerating for many reasons, including macro trends that will benefit partners as a Microsoft partner. For example, companies are accelerating their pace of digital transformation in order to improve business outcomes and increase internal and external collaboration. In a 2018 research report, Forrester predicted that: "Collaboration will emerge as an anchor technology for digital transformation. Collaboration helps workers share information, coordinate projects, discuss best practices, and build communities within and across the enterprise." Furthermore, a Forrester survey published in the same year found that 82% of global technology decision makers have already begun or will begin enterprise collaboration initiatives in the next 12 months. Taken together, increased digital transformation and collaboration initiatives translate into more Teams opportunities for partners.

SHARE A VISION FOR HOW CUSTOMERS FACE THOSE CHALLENGES HEAD-ON

Teams empowers users to "collaborate with deeply integrated Office 365 apps." Organizations have provided many examples of improved collaboration, freeing up time for information and first line workers to focus on higher-value activities. Teams also gives users better access to people and resources to make smarter and faster decisions. Improved collaboration also provides benefits around increasing employee satisfaction, helping in cross-generational understanding, and creating a common culture.

Example scenarios of how to improve collaboration using Microsoft 365 can be found in the Microsoft 365 Productivity Library.

EDUCATE THE CUSTOMER ON TEAMS AS A PART OF THE OFFICE 365 PRODUCTIVITY SUITE

Teams leads to significant time savings in collaboration activities for both Information and first line workers by adding Teams to an existing Microsoft 365 implementation. This includes time saved on coauthoring and version control and the time spent seeking out the right information and colleagues. Companies also reported a reduction in emails sent because users could

request and share information in the Teams focused workspace using conversation threads.

Teams improves worker decision making by allowing them to quickly make contact, communicate with fellow employees, and review all the information they need to make decisions more efficiently.

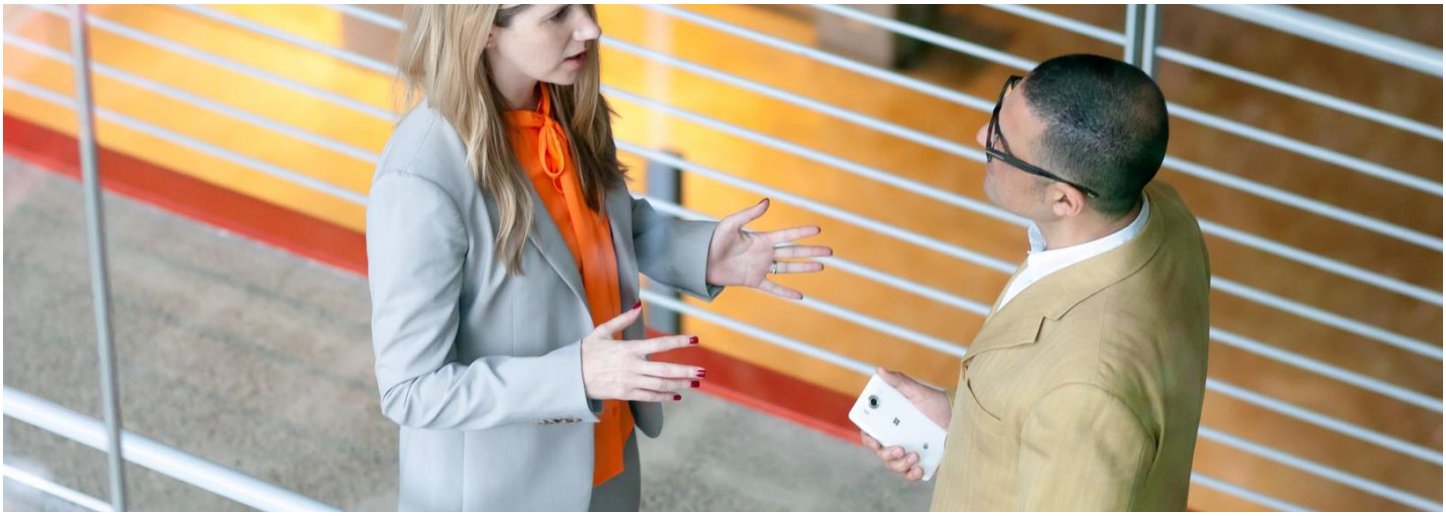
Additionally, Teams improves employee satisfaction and better connected them to the organization. Younger workers specifically expect to have the same modern IT experiences in the workplace that they experience in their personal lives. All of this can reduce employee turnover and the associated costs to find and onboard replacements. Furthermore, the cost to train new hires is reduced because they do not need to be trained on multiple solutions.

MICROSOFT 365 BUSINESS VALUE PROGRAM

Microsoft Business Value Programs and transform.microsoft.com have long been go-to locations for partners to get the latest sales tools, deliver the best demos, and have value-based conversations with customers. Microsoft continues to work with partners, champion communities, and Microsoft product marketing managers to consolidate multiple platforms, repositories, and content and demo experiences across these sites to deliver the best experiences and content for partners.

Being a Microsoft partner provides access to all the resources within the transform.microsoft.com site that will help in demonstrating the value of Teams to customers:

- Customer Content Assembler – Deliver high-quality content and the latest marketing-approved messaging, in a consistent format.
- Customer Digital Experiences – Find demos, Customer Immersion Experience (CIE), and labs.
- Return on Investment – Use real customer data to show return on investment with Microsoft 365 and Office 365.
- Workshops and Assessments – Assess customer's current state to recommend the best course of action.



Upsell and Cross-Sell Opportunities

Teams can be used to both upsell and cross sell across Microsoft 365 and the Office 365 productivity suite. As the hub for teamwork, Teams builds on a foundation of Office 365 services and is included in every Office 365 subscription.

With the growth of Teams, it is an ideal service to start with. It also provides a solid foundation to cross sell additional licensing.

- ➔ Teams is included in every Office 365 subscription, so often there is room to upgrade to a higher Office 365 plan. Office 365 E1 → Office 365 E3 → Office 365 E5, or even upgrade to Microsoft 365.
- ➔ Teams leverages Office 365 services including SharePoint, Exchange, OneNote, and PowerBI. This provides an opportunity to upsell to services related to these additional Office 365 offerings.
- ➔ Enterprise Mobility + Security (EM + S) provides additional security and management for Office 365. Mobile Device Management, Dynamic Office 365 Groups and Conditional access to Teams are additional security considerations most customers will want to consider when deploying Teams, and provide an upsell opportunity to Microsoft 365 licenses.

CROSS SELLING ADDITIONAL SERVICES

When deploying Teams, partners have to opportunity to incorporate additional services to their offer, including ongoing managed services. This is in addition to the upsell and cross-sell opportunities provided by Teams itself, such as governance advisory services and custom Teams solutions. Here are some additional services to consider:

- Migrating file shares or other cloud storage providers to SharePoint and OneDrive
- Migrating on-premises email or another email provider into Exchange Online
- Deployment of Office 365 ProPlus, with the Teams Client, to the desktop
- A health check of Active Directory and configuration of Azure AD Sync
- Migration from Skype for Business (on premises or in the cloud) to Teams.
- Deployment of additional security features included in EMS licensing
- Securing corporate data in Office 365 with Azure Information Protection (AIP) and Data Loss Prevention (DLP)
- Additional Microsoft 365 services including the suite of Office 365, EMS, and Windows 10 products.

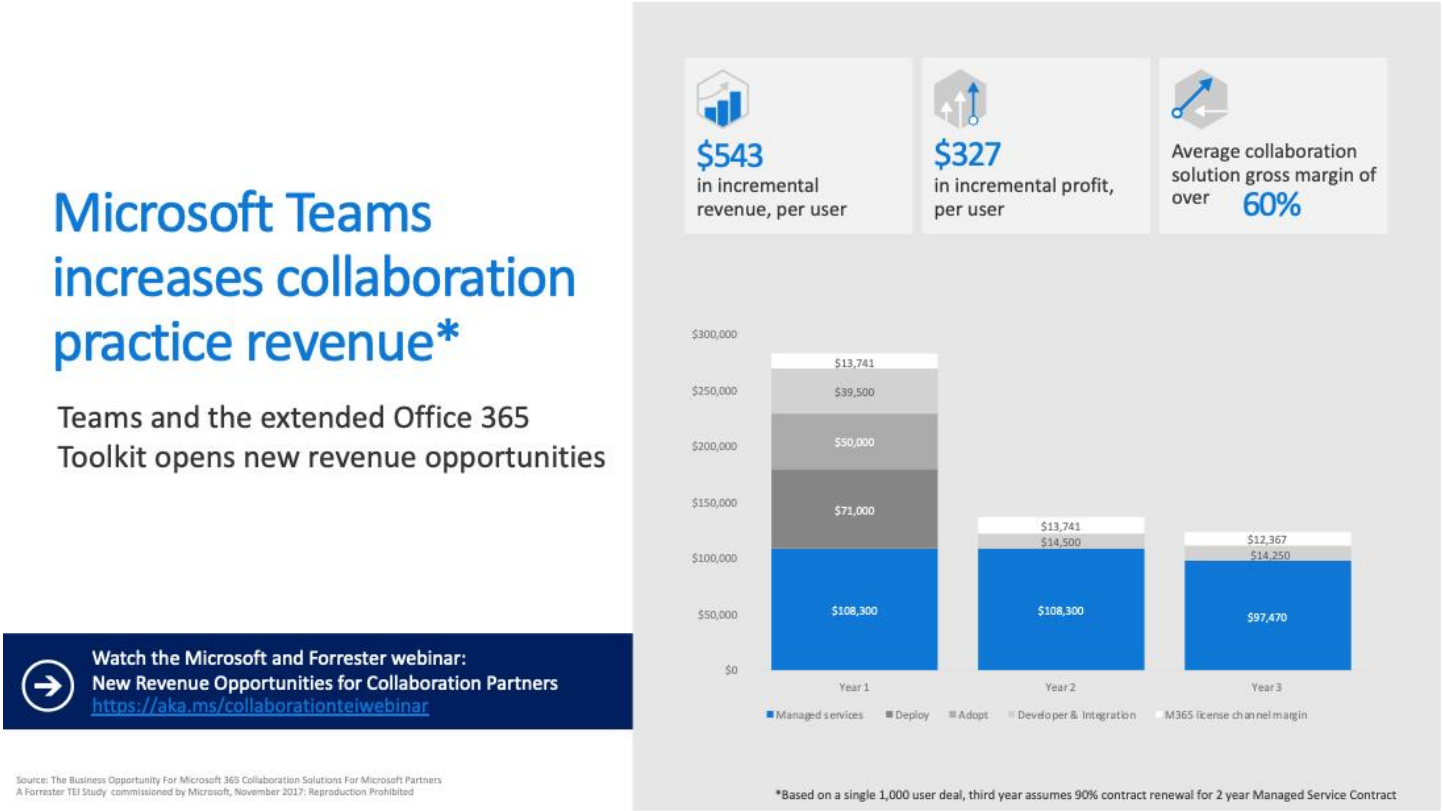
With the breadth and depth of Office 365, and even more with Microsoft 365, there are any number of services partners can upsell to outside of just Teams. The number of services in Office 365 that Teams leverages provides an easy pathway.

VOICE AND CALLING OPPORTUNITIES

There are a range of additional sales opportunities relating to Teams calling, meetings and devices. The phone system license drives upsell from Office 365 E3 to Offices 365 E5 licenses. It can also be sold as an add-on SKU on top of either E1 or E3 licenses. Phone system represents up to a 36% revenue growth opportunity for partners when adding calling and/or meetings to a teamwork practice. Audio conferencing represents an upsell opportunity especially for licensing sales and can ultimately drive an E5 license upsell sales motion.

Additional opportunities for cross selling related to voice and calling come from devices, such as phones, headsets, and room systems. Devices for cloud voice are mostly provided by third parties. Microsoft provides a list of Teams devices partners can use when planning which physical devices are needed for the deployment. This list includes personal devices as well as room systems to be deployed to meeting rooms and conferences rooms.

Finally, there are good opportunities to provide professional services for calling, meetings and devices deployment, migration and configuration, and to move into the managed services space for on-going management.



Firstline Workers Opportunity

As the hub for teamwork, Teams was built to work for every organization, regardless of industry or vertical. It delivers the tools that every employee - from the boardroom to the firstline - need to do their work.

Firstline workers often compose most of the workforce and are in roles where they are:

- First to engage customers
- First to see products and services in action
- First to represent a customer's brand

It is their ambition, creativity and action that can unlock new ideas, differentiate the customer experience, and bring the strategies of the organization to life. Partners cannot ignore the unique opportunity and potential that these workers represent, and the tremendous value that can be unlocked by empowering them to do their best work. As partners consider their practice focus and the services they will offer, consider targeting services directly at firstline workers.

WHO ARE FIRSTLINE WORKERS?

Firstline workers across all enterprise organizations total about 690 million team members, and 78% of business leaders say that connecting these firstline workers is critical. Increasing the efficiency of firstline worker is the primary driver for business leaders. Research has shown that by deploying Office 365 to firstline workers:

- An average of 116 work hours per year are saved for each firstline employee
- Reduces turnover an average of 8%
- Security breaches are cut by 61%

A focus on these firstline workers is also key in several industries, including:

Manufacturing	• Shop Floor Workers • Warehouse Clerks • Service Technicians • Maintenance
Retail	• Cashiers • Sales Associates • Store Managers • Inventory Associates
Transportation	• Ground Crew • Drivers • Flight Crew • Maintenance Crew
Hospitality	• Front-of-house staff • Guest Services • Event Staff • Housekeepers
Public Service	• Clerks • Fire Fighters • Police Officers • Parks & Recreation
Healthcare	• Providers • First Responders • Nurses

Getting Started with Firstline Workers

Firstline engagements most often start from a consultant assessment.

This is a critical step to understand customers' pain points. Through an assessment, partners can provide customers with a roadmap that details their end-to-end digital transformation and helps them understand how it can be broken down into multiple waves. The firstline wave, or services that impact firstline workers the most in the Office 365 productivity suite and Teams, are normally Exchange Online, followed by Teams, SharePoint and OneDrive.

COMMON CHALLENGES

Firstline workers present several challenges for customers, both when it comes to communicating and collaborating as well as empowerment and engagement that Teams can address. These include:

- C-suite and corporate users are unable to communicate with firstline workers and coordinate activities and efforts between distributed teams
- Firstline workers are unable to communicate with each other to find and share best practices and contribute towards communities of people who share their role or interests
- Organizations are unable to tap into the insights, expertise, and knowledge of their firstline workers to gather new ideas and find solutions to problems
- Firstline worker are unable to communicate in real-time with a subject matter expert if they need assistance completing a complex task
- It is costly and time consuming to onboard new firstline workers, but business operations and customer service is negatively impacted if not done properly
- Managing firstline worker schedules and tasks are costly and cumbersome to create
- Continuously training the firstline workforce to ensure they stay current and effective
- Losing the knowledge of experienced firstline workers when they leave or retire

LICENSING FIRSTLINE WORKERS

Office 365 includes a license specifically tailored to empower firstline workers in the F1 SKU. The F1 SKU provide access to:

- **Microsoft StaffHub** – Roll out Microsoft StaffHub to enable corporate announcements and news to flow all the way to firstline workers.
- **Teams Live Events** – Enable live all-hands meetings to facilitate communications between the C-suite and the firstline workforce that can result in better engaged and more informed employees
- **Microsoft Teams** – Enable Teams and drive adoption engagements to allow companies to coordinate distributed teams with the hub for teamwork that includes persistent chat in real time across remote sites from any supported device and instant access to relevant content and tools.
- **Yammer** – Enable Yammer and drive adoption engagements to help workers share and find best practices across the company and facilitate the crowdsourcing of new ideas and solutions
- **SharePoint** – Build SharePoint based portals to support inclusive communities of interest

While the F1 SKU enables these features of the Office 365 productivity suite, it is a partner who can provide services to allow customer to leverage these solutions.

FOSTER CULTURE AND COMMUNITY

A strong culture is vital to any successful organization, and it should reflect an organization's digital aspirations. Too often, culture is treated as a sounding board to create positive feelings about the workplace, instead of sharing a way to help everyone work better together. A high-performing culture is about results, driven by employee empowerment, engagement, and passion for what the company does. Nowhere is this more important than on a company's firstline.

Examples:

- Broadcast interactive town hall meetings
- Coordinate distributed teams with a hub for teamwork
- Share and find best practices across the company
- Build inclusive communities of interest

Culture helps connect the firstline workforce to the company's strategic vision, which provides a compass for decision making, innovation and action.

DIGITIZE BUSINESS PROCESS

Companies have always wanted to get close to their customers. Digital transformation allows them to do that – without the pressure to do so quickly.

Examples:

- Create, update and manage schedules and tasks
- Automate everyday activities and workflows
- Optimize resource allocation using IoT-based signals

Benefits include improvements in the customer experience and greater consistency across the business in spotting and resolving problems. Digitizing the firstline workplace allows organizations to accelerate performance to keep pace with the demands of the digital age.

TRAIN AND UPSKILL EMPLOYEES

Regardless of industry, a critical question for executives is whether they are effectively developing and equipping their employees for success in the digital age. In the firstline workforce, this means addressing the tremendous variability in workers roles, needs, tenure and profile. As a partner, use Teams to provide the skills, confidence, and access to information these workers need to do their best work.

Examples:

- Distribute onboarding materials and training to any supported device
- Share dynamic, role-based content and video
- Enable employees to find and build on the work of others
- Retain and manage institutional knowledge in one place

Employees want to be more versatile and valuable to an organization. Effective training and upskilling programs help employees gain and apply new skills. If done well, the payoff can be substantial in terms of loyalty, talent, knowledge retention, and performance for customers.

DELIVER REAL-TIME EXPERTISE

In our experience, the biggest challenge is not in the understanding or expertise associated with new technology or operating in a digital workplace – we know and can apply that. The biggest problem is our inability to provide the expertise we have today, in the environment that our workforce operates.

Examples:

- Crowdsource new ideas and solutions
- Work in context across physical and virtual space with mixed reality
- Connect across remote sites on any device
- Tap available talent when and where it's needed

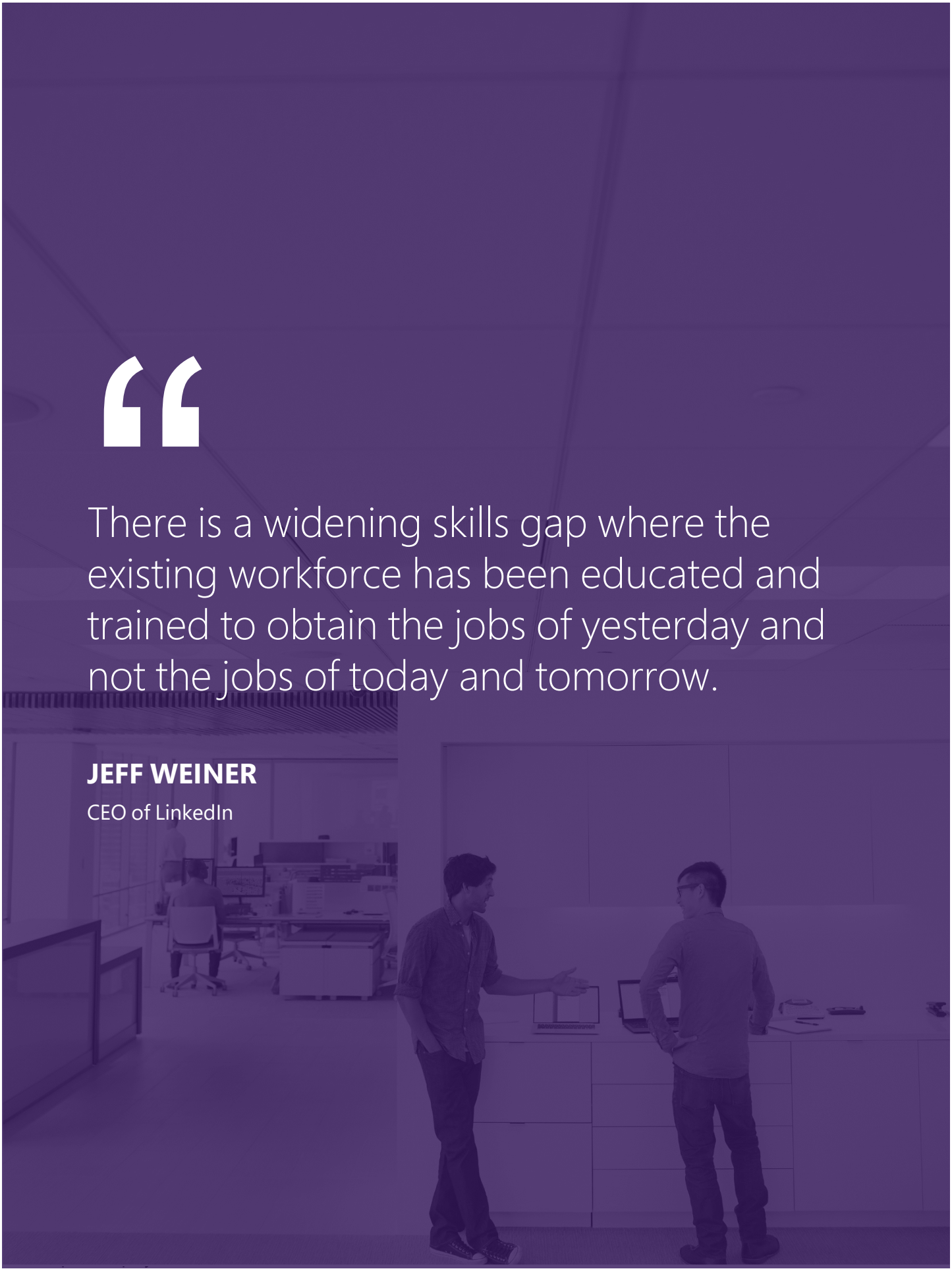
Teams offer companies modern tools to transform the access, application, and availability of real-time expertise to solve business problems and as a partner they can enable this culture within their customer's organization.

MINIMIZE RISK AND COST

The firstline and cyber-threat landscape continues to evolve, and challenges are real for IT and have real impact on individuals and businesses. As customers continue to spread digital transformation across the organization and to all workers, through services partners can streamline IT management and extend the security and protection of Office 365 to all employees, endpoints and environments.

Examples:

- Streamline management across devices, including kiosks and signage
- Secure firstline access to corporate apps with identity-driven protection
- Meet evolving workplace regulatory requirements
- Accelerate GDPR compliance



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There is a widening skills gap where the existing workforce has been educated and trained to obtain the jobs of yesterday and not the jobs of today and tomorrow.

JEFF WEINER

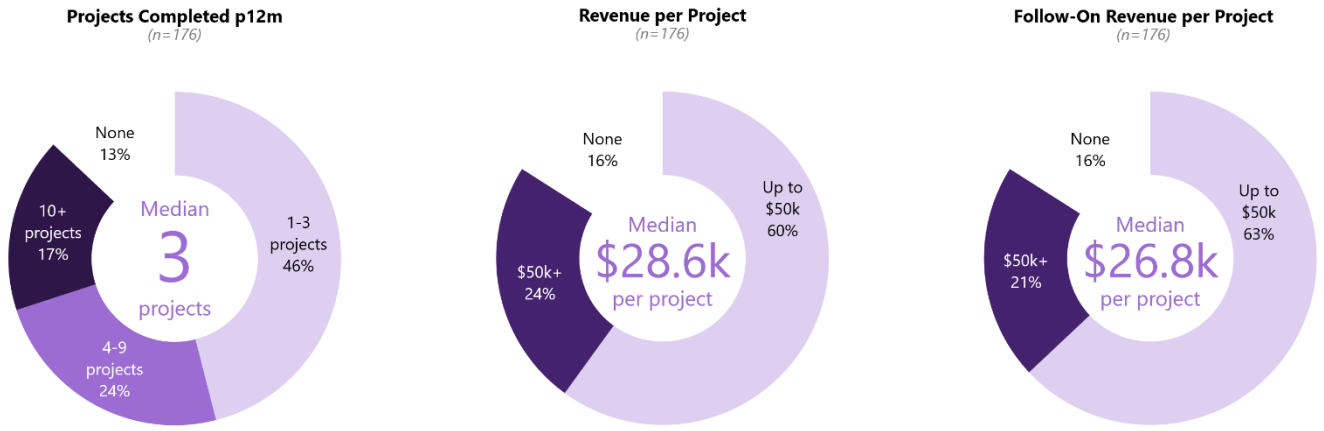
CEO of LinkedIn

Define Service and Solution Offerings

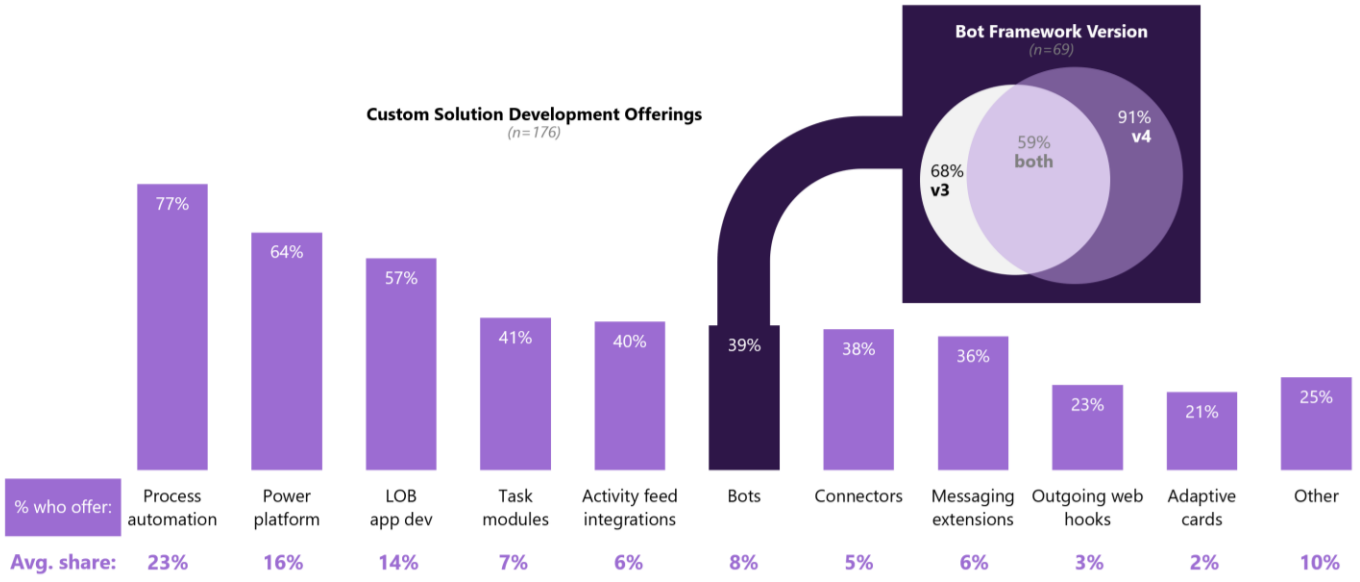
Now that partners understand some of the core capabilities of Teams, let's start looking at how to build a practice. Partners may feel like they are building a new business from the ground up. It is important to start with the basics and expand into more complex offerings as they and their customers grow.

SURVEY DATA

45% of Teams partners surveyed offer **custom solution deployment services**, averaging over $80k/year in revenue over the past 12 months, as well as in follow-on revenue for additional services.



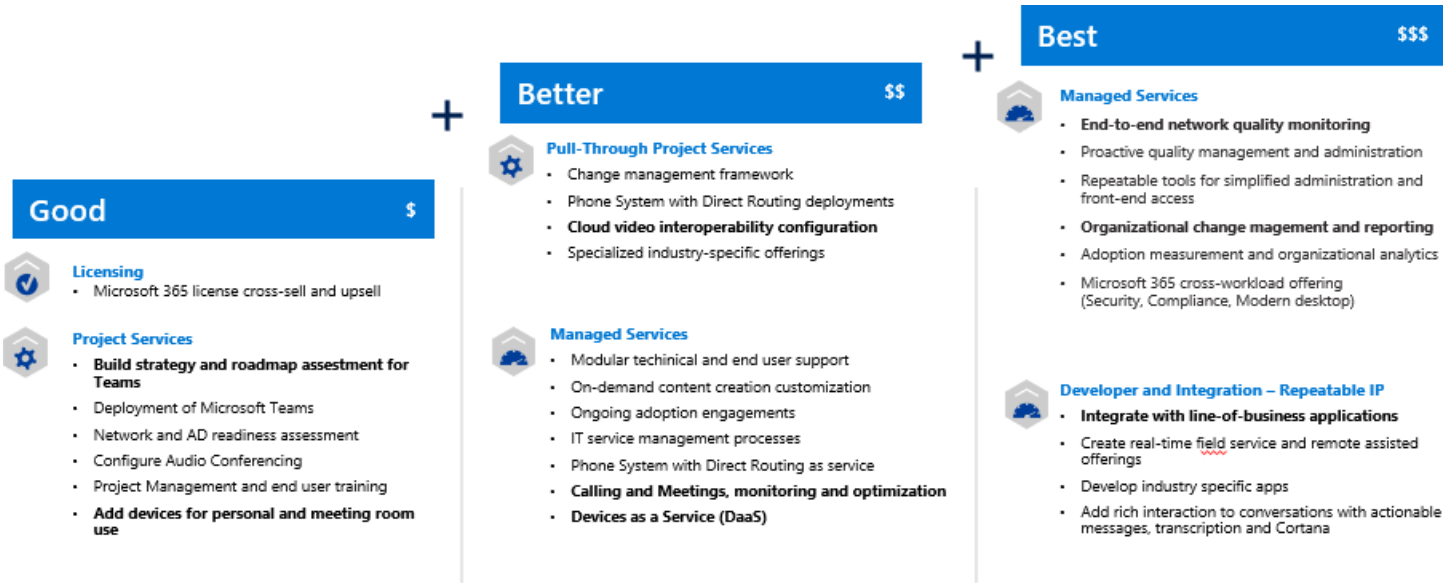
Process automation is the #1 custom solution development offering:



Source: Microsoft Teams Playbook Study, MDC Research, November 2019

Partner offerings will typically fall into one or more of three categories: project-based services, managed services, and reusable IP. In any of these categories, partners may offer solutions that focus on an industry or vertical, but overall, the categories will be the same.

These categories are all a part or continuum that partners can think of as good, better, and best. Partners may choose to focus on one, or all of them. It is important to recognize that they are complementary. If partners are just getting started, project services may offer the quickest and easiest path and as their business matures, they can take on more profitable services with repeatable revenue built-in to the service offering.



Project Services

As customers move into a cloud-first world, they will need help getting there.

There is a hurdle to transitioning from on-premises servers and software to Software-as-a-Service (SaaS) offerings such as Microsoft 365 and the Office 365 productivity suite. One type of service partners can provide customers is professional services. Project services tend to be a one-time, project-based delivery, although as they expand into more complex offerings they will have the opportunity to offer pull-through project services such as change management or ongoing training and customer education initiatives.

Examples of project services include migrating customers from on-premises to the cloud, putting IT controls and information architecture in place, or setting up cloud-based security. While customers may come back to them for multiple project service engagements, this type of offering will not have the recurring revenue streams they will find in categories such as managed services.

If they do not enjoy the ongoing maintenance of a system once it's been deployed, or they like performing challenging implementations and nailing down every detail, this is one type of service they could focus on. In the following section, we will explore a few.

MIGRATION

Organizations typically own and maintain multiple repositories – file shares, legacy SharePoint sites, cloud-based file repositories such as Box, and Exchange public folders. This leads to increased compliance risk, lack of clarity for end-users around teamwork and increased cost to own and maintain multiple repositories. When customers do not fully leverage their investment in Office 365, end-users experience friction and a loss in productivity when using legacy tools and repositories.

Customers need guidance on what to migrate, and how to migrate to new teamwork repositories. As a partner, they can assist customers by helping to reduce their IT spend by consolidating content into files within Teams. Moving content from file shares and other legacy repositories into a cloud offering that meets the latest requirements helps to increase security and compliance. Migrating to Teams can also help customers increase their productivity. Providing guidance on migrating to Teams and executing migrations can help accelerate customer's digital transformation.

IT CONTROLS AND INFORMATION ARCHITECTURE

When customers adopt Teams and the Office 365 productivity suite, they are concerned about IT controls and governance around SharePoint / Teams / Groups and lifecycle management. Partners who are familiar with the governance and compliance controls that exist around Teams and Office 365 have an opportunity to offer project services around implementing these controls.

These controls decrease the risk of litigation for customers as content is controlled, discoverable, and retained as required. While these controls exist, customers often find it too burdensome and time consuming to implement despite the increased risk.

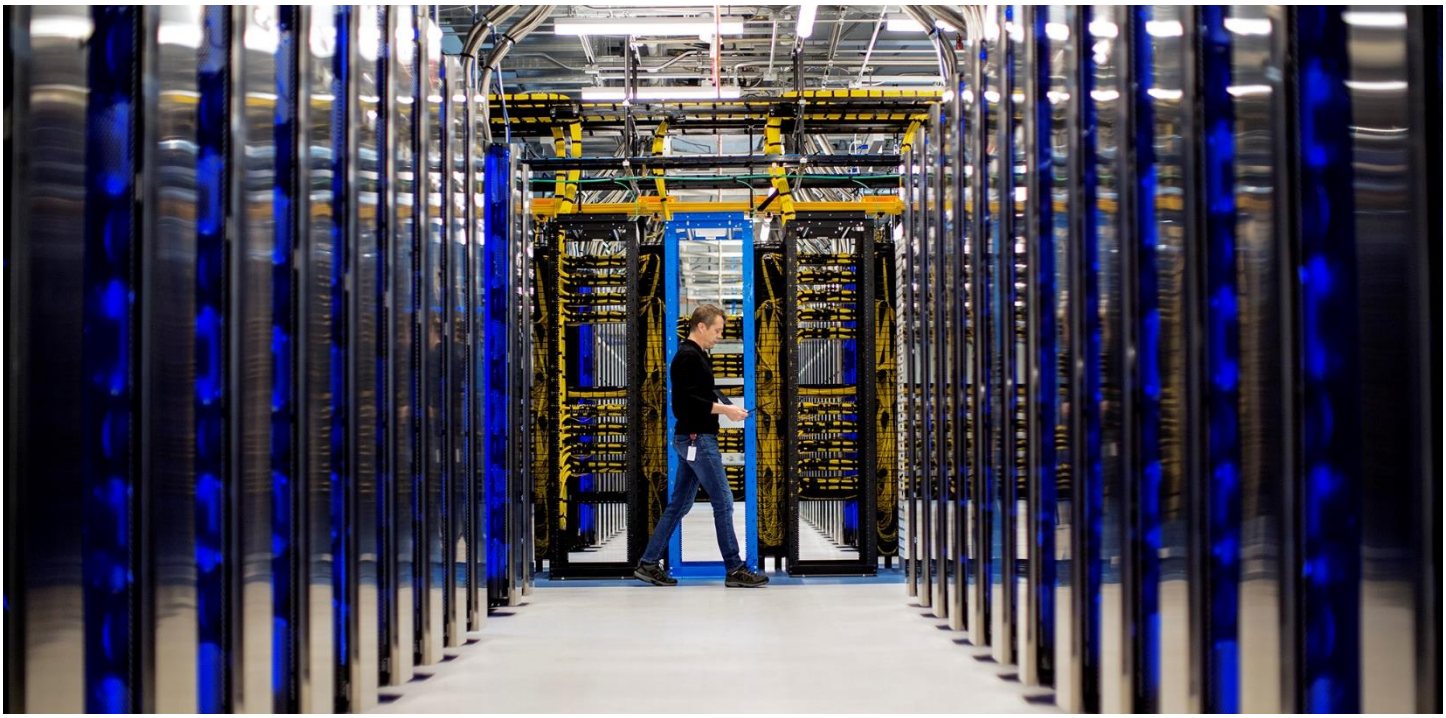
This an excellent opportunity for partners to bring value to their customer and significant potential monetary savings by implementing retention policies, labels, and other controls based on the workloads they consume. Other governance controls such as naming policies can provide consistency in what otherwise would be an inconsistent teamwork toolkit. This consistency eliminates concerns over information stored in Teams being difficult and time consuming to locate.

When partners help customers implement controls for security, governance, and compliance they offer not only project services, but also become a trusted advisor to their customers, advising and educating them on when to use the right tool. This increases engagement and adoption and provides the potential for follow-on service delivery.

INFORMATION PROTECTION

As the workforce gets more and more mobile, Chief Security Officers (CSOs) are concerned about keeping their sensitive information from being accidently leaked. Organizations want to ensure that security is enhanced as they embrace Microsoft cloud services and they need layers of protection and control based on content sensitivity. Customers also want to control the level of access from unmanaged devices and when data is accessed. They need visibility into and control of external users accessing corporate content. Finally, customers need policies in place that not only assure alerts for suspicious behavior, but also containment of the breach.

As security is paramount to any organization, this provides partners an opportunity to build a project services offering around information and data protection. This involves partners working with customers to build comprehensive information protection plans that provides balance between productivity and security. Partners can also assist in optimizing customers' investment in Microsoft 365 by retiring traditional security products and introducing the value of content classification through automatic and manual classification using services such as Azure Information Protection (AIP). Another important area of information protection is to work with customers to leverage Data Loss Prevention (DLP). Implementation of these tools and services helps customers not only to keep their data safe, but also compliant with security or regulatory requirements while using Microsoft productivity tools in a way that doesn't impede productivity.



Managed Services

In a cloud-first world, it's no longer enough to sell a project and simply move on to the next one. Partners need to think differently.

Offering managed services and becoming a Managed Services Provider (MSP) allows partners to focus on developing customers as opposed to project services where they develop and sell projects. It is now more crucial than ever to complement any solutions partners may provide with a full services team to support clients as efficiently and effectively as possible. The days of the system integrator and project resellers are fast disappearing.

WHAT IS THE MSP HUB?

The Managed Services Provider hub on the Microsoft Partner Network is a one-stop guide to researching, building, and growing a managed services provider offering. This site provides partners with key information on how to build and grow their own managed services practice from square one. And once they get started, they learn how to further differentiate, promote, and expand the scope of their business, to provide customers with long-term value and partners with long-term profitability.

MORE THAN A VENDOR, A TRUSTED ADVISOR

MSPs deliver a set of services to clients, either proactively or as needed. For more than 20 years, large enterprises have relied on managed services businesses to manage information and customer workloads. Adding managed services to a business helps address customers' needs by uncovering opportunities that provide long-term value with ongoing services and potentially intellectual property. Additionally, adopting managed services is an efficient way to stay up to date on technology, access necessary skills, and address a range of issues related to cost, quality, and risk.

Take Generation-e for example. Once they added managed services to their business, they saw an almost immediate cash flow benefit with 36% of their revenue now coming from their managed services offering. Loryan Strant, the cloud CTO at Generation-e, refers to this as "long-term revenue", meaning they have stronger customer engagement beyond just an IT solution.

Managed services are premium services provided on an ongoing contractual basis, rather than a cost-per-project. It's a long-term investment—not only in their own business, but also in the customers' operations. The average margins for a managed services provider are 50-60% compared to that of a reseller, which are less than 20%, meaning an MSP model is more than twice as profitable.

While the idea of adding managed services to their business may feel intimidating—and it is a major shift—it is important to understand the evidence and opportunities to help educate customers through the process. While there may be benefits to businesses in which vendors are called in on a per-project basis, providing proactive services under a long-term contract is inherently more sustainable than relying on a break-and-fix business. According to an IDC study, managed services account for a 45% increase in profits, higher than both resale and professional services.

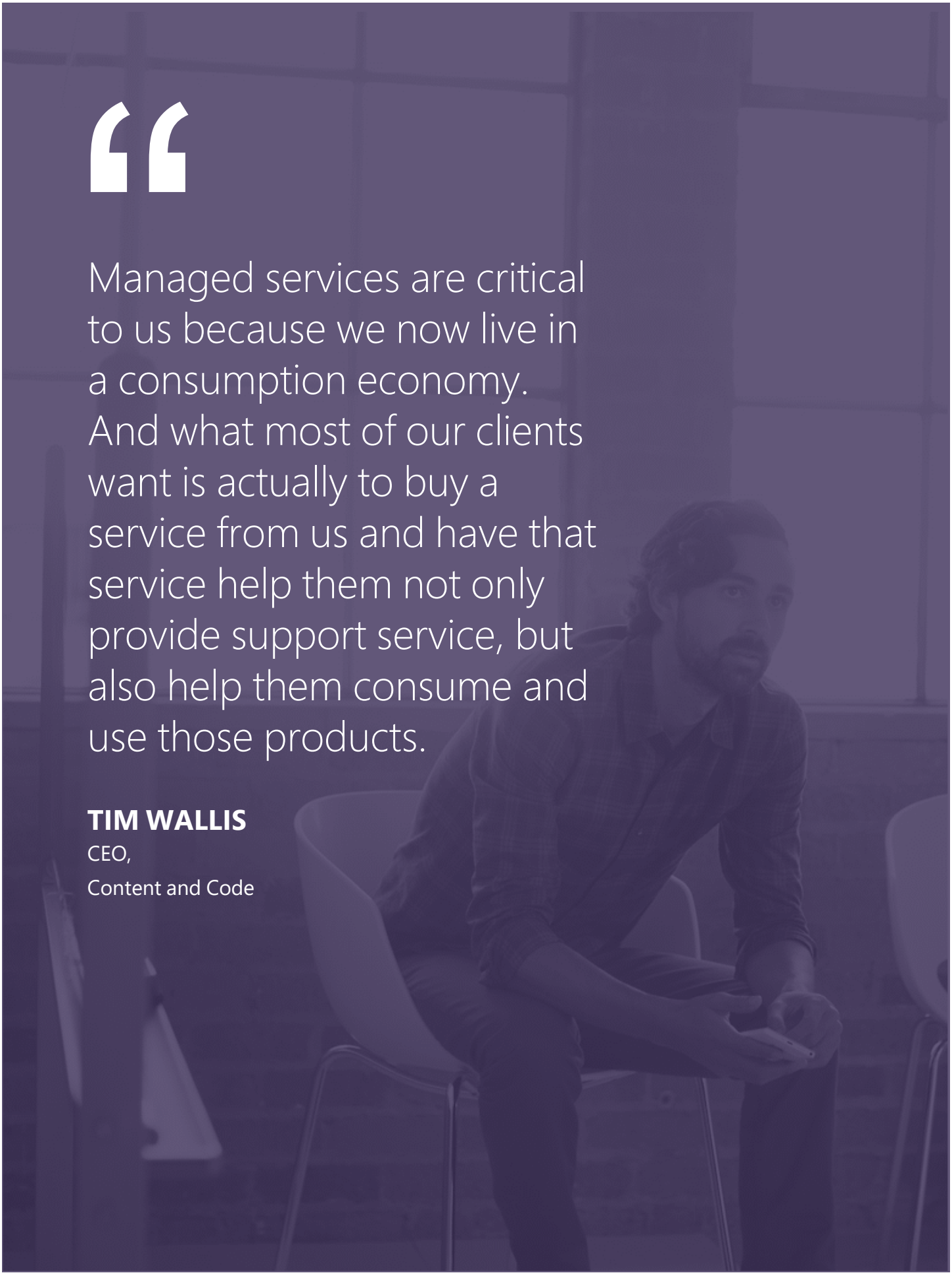
Additionally, when building cloud solutions on top of a managed services offering, they are future proofing their business. Managed services revenue for cloud services will grow from $17 billion in 2014 to $43 billion in 2018 — 60% faster than revenue from infrastructure-only services.

GETTING STARTED WITH MANAGED SERVICES

The most valuable part of a managed services business is right in the name -- services.

The MSP Hub will provide the necessary solutions and products to help a business optimize its services and truly engage with customers to meet their needs and solidify relationships. Those relationships will ensure a recurring revenue stream that grows as a customer's consumption and subsequently, their business grows. We've provided step-by-step guidance to implement the appropriate Microsoft solutions to not only help build a managed services business but also grow one.

One of the best ways to fully optimize their managed services business is through our Cloud Solutions Provider (CSP) program. CSP enables a business's transition to the cloud, allowing for MSPs to embrace transformation and begin taking ownership of end-to-end relationships. With CSP, partners can future-proof their business by combining high-margin service offerings with Microsoft cloud products.



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Managed services are critical to us because we now live in a consumption economy. And what most of our clients want is actually to buy a service from us and have that service help them not only provide support service, but also help them consume and use those products.

TIM WALLIS
CEO,
Content and Code

Reusable IP

If partners did something custom that was successful for one client, there may be more customers that would benefit from solving the same problem.

The idea of coming up with "productized" IP may sound daunting, but many partners find that they already had IP, and it just wasn't packaged that way. For Teams, partners reusable intellectual property falls under broader categorization of custom app development. A custom app development service offering is quite a bit different than project services or managed services. For partners that offer application development services for Teams, the focus is going to be writing code and building applications, rather than more of the administration type tasks of the previously mentioned services.

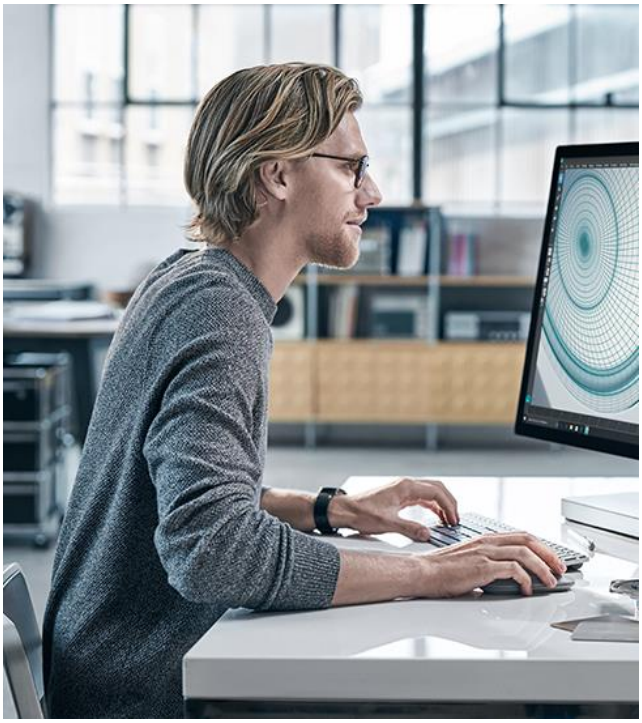
However, this application development can take many forms. As this document covers later, there are several verticals within Teams development that a partner can take advantage of. There are many ways to build applications with Teams, such as:

- Messaging extensions
- Tabs
- Bots
- Line of business applications integrated with Graph API

Application development can also take some of the benefits from both project services and managed services. Partners can provide custom application development in Teams where they assist customers in moving legacy applications into Teams by recreating the app to be hosted on Teams, or simply integrating the application into Teams. Partners can also create their own application that integrates with Teams to solve a common business problem.

With custom applications for customers, it is like project services in that it is a single engagement where the partner handles all the details and problem solving to tie the custom application into Teams. When creating an application to sell, partners may choose to sell it using a subscription-based model, common in cloud scenarios, where they are able to generate recurring revenue, sell additional upgrades, and develop a long-term relationship with the customer as they purchase and use the application they developed.

Both options for development services can be chosen, and often can even be done simultaneously. It is also possible that an application that starts out as a custom application for a single customer could turn into an application that can be resold to multiple customers.



Developing Teams Offerings

Developing a Deployment, Security and Governance Offering

Let's get started by thinking about the core usage scenarios enabled by Teams, and how these are supported by the core architecture. We'll then look at how to deploy Teams, together with security and governance.

A team is a collection of people, content, and tools surrounding different projects and outcomes within an organization or organization wide.

- Teams can be created to be private to only invited users.
- Teams can be created to be private and discoverable. They can be seen but are only available to invited users.
- Teams can be created to be public and open to anyone within an organization to join (up to 5000 members).

A team is designed to bring together a group of people who work closely to get things done. Teams can be dynamic for project-based work (for example, launching a product, creating a digital war room), as well as ongoing, to reflect the internal structure of their organization (for example, departments and office locations).

ORGANIZATION-WIDE TEAMS

If their customer has no more than 5,000 users, they can create an org-wide team. Org-wide teams provide an automatic way for everyone in an organization to be a part of a single team for collaboration. For more information, including best practices for creating and managing an org-wide team, see Create an org-wide team in Microsoft Teams.

DISCOVERABLE PRIVATE TEAMS

Discoverable private teams can only be joined when the team owner adds users to them. When they make a private team discoverable, the team is included in the list of suggested teams and search results in the Teams gallery. Use discoverable private teams for projects and groups within an organization that everyone is aware of and where access to conversations and files in the team need to be controlled. Examples include a team for their HR department, a team for all managers in their organization, and a team for a manager and their direct reports.

NON-DISCOVERABLE PRIVATE TEAMS

Non-discoverable private teams can only be joined when the team owner adds users to them. When they make a private team not discoverable, it's hidden from the list of suggested teams and removed from search results in the Teams gallery. Use non-discoverable teams to collaborate on sensitive and highly confidential topics. Examples include a team to discuss an upcoming acquisition and a team to discuss a change in an organization's strategic direction.

PUBLIC TEAMS

Public teams are available for all users in an organization to join. Public teams are visible to everyone in the Teams gallery, and users can join a public team without having to get approval from the team owner. Examples of public teams include a team to discuss technology news, a team to get feedback about their products, and a team for people carpooling to work.

Teams Architecture

Teams is built on Office 365 groups, Microsoft Graph, and the same enterprise-level security, compliance, and manageability as the rest of Office 365. Teams leverages identities stored in Azure Active Directory (Azure AD).

THE STRUCTURE OF TEAMS

To see where Teams fits in the context of Microsoft 365, check out the Teams as part of Microsoft 365 architecture poster.

When a team is created, here's what gets created:

- A new Office 365 group
- A SharePoint Online site and document library to store team files
- An Exchange Online shared mailbox and calendar
- A OneNote notebook hosted in the SharePoint Online site
- Ties into other Office 365 apps such as Planner and Power BI

When they create a team from an existing group, that group's membership, site, mailbox, and notebook are surfaced in Teams. To learn more, check out the Groups in Microsoft 365 for IT Architects poster.

To customize and extend Teams, add third-party apps through apps, bots, and connectors. With Teams, they can include people from outside their organization by adding them as a guest to a team or channel. As part of Office 365, Teams offers a robust development platform so they can build the teamwork hub they need for their organization.

Team channels

Conversations, files and notes across team channels are only visible to members of the team. Channels are dedicated sections within a team to keep conversations organized by specific topics, projects, disciplines—-whatever works for their team. Files that they share in a channel (on the Files tab) are stored in SharePoint. To learn more, read How SharePoint Online and OneDrive for Business interact with Teams.

- **Team channels** are places where everyone on the team can openly have conversations. Private chats are only visible to those people in the chat (and files that they share in a chat are stored in OneDrive for Business).
- **Channels** are most valuable when extended with apps that include tabs, connectors, and bots that increase their value to the members of the team. To learn more, see Apps, bots, & connectors in Teams.

Team membership

When Teams is activated for an entire organization, designated team owners can invite any employee they work with to join their team. Teams makes it easy for team owners to add people in the organization based on their name. Depending on the organization's settings, guests who are team members but outside of their organization can also be added. See Guest Access in Microsoft Teams for more information.

Team owners can also create a team based on an existing Office 365 Group. Any changes made to the group will be synced with Teams automatically. Creating a team based on an existing Office 365 Group not only simplifies the process of inviting and managing members, but also syncs group files inside of Teams.

Team roles

There are two main roles in Teams:

- **Team owner** is the person who creates the team. Team owners can make any member of their team a co-owner when they invite them to the team or at any point after they've joined the team. Having multiple team owners lets them share the responsibilities of managing settings and membership, including invitations.
- **Team members** are the people who the owners invite to join their team.
- In addition, if moderation is set up, team owners and members can have moderator capabilities for a channel. Moderators can start new posts in the channel and control whether team members can reply to existing channel messages. Team owners can assign moderators within a channel. (Team owners have moderator capabilities by default.) Moderators within a channel can add or remove other moderators within that channel. For more information, see Set up and manage channel moderation in Microsoft Teams.

Team settings

Team owners can manage team-wide settings directly in Teams. Settings include the ability to add a team picture, set permissions across team members for creating channels, adding tabs and connectors, @mentioning the entire team or channel, and the usage of GIFs, stickers, and memes.

Chat and messages

Chat is at the center of whatever they do in Teams. Chats can be one-on-one or in a group. Sometimes they'll want to talk one-on-one with someone. Other times, they'll want to have a small group chat. In Teams, they can do either. Use a group chat when they need to talk to a small group of people. They can also have chat conversations within a Team channel as well. These chats are visible by everyone in the Team and all members of the Team can participate in these chats.

Meetings and live events

Meetings in Teams include audio, video, and sharing. And because they're online, they'll always have a meeting space and never need a room or projector. Teams meetings are a great way to come together with their colleagues and clients both inside and outside of their organization. They don't need to be a member of an organization – or even have a Teams account – to join a Teams meeting. Live events are an extension of Teams meetings that enable them to schedule and produce events that stream to large online audiences. These are usually one (or maybe a few) presenting to large group of people rather than the collaborative type environment of a meeting.

Calling

Calling in Teams enables users to make and receive phone calls, including features such as hold, voicemail, and call transfers. Direct Routing allows customers to connect their telecom voice trunks directly to Office 365 so users can make and receive traditional phone calls, as well making IP-based voice and video calls between Teams clients.

Apps

Apps are a package of capabilities that partners host and that can be distributed through Teams or installed by individual teams. The Teams developer platform makes it easy for developers to integrate their own line-of-business apps and services within Teams to add value, improve productivity, make decisions faster, provide focus (by reducing context switching), and create collaboration around existing content and workflows.

Deployment Guidance

There are several things to consider when partners start to build a deployment plan for Teams

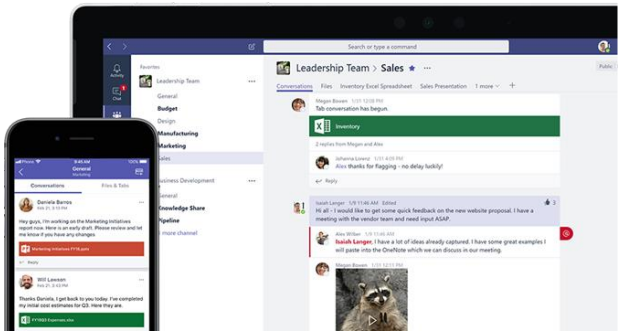
RESOURCES:

- How to roll out Microsoft Teams
- Check your Environments Readiness for Teams
- Prepare your Organizations Network
- Learn the Benefits of Desktop, Web, and Mobile Clients

Whether a customer is a small business or a multi-national enterprise, to get started quickly on Teams, we recommend partners roll out Teams to two or three teams and channels for a select group of early adopters that they'll work closely with during the pilot.

FOUR STEPS TO ENABLE EARLY ADOPTERS

- Step 1: Create a first teams and channels
- Step 2: Onboard early adopters
- Step 3: Monitor usage and feedback
- Step 4: Get resources to plan organization-wide rollouts



BEFORE A LARGE-SCALE ROLLOUT

Several factors could impact a large-scale rollout of Teams. These could range anywhere from ensuring the customer's network is prepared for a Teams deployment, to ensuring that security and compliance of user data is considered, to existing workloads such as existing Office 365 or Skype for Business deployments.

Here are several resources to read through to get started. We'll cover these topics in more detail later in the playbook.

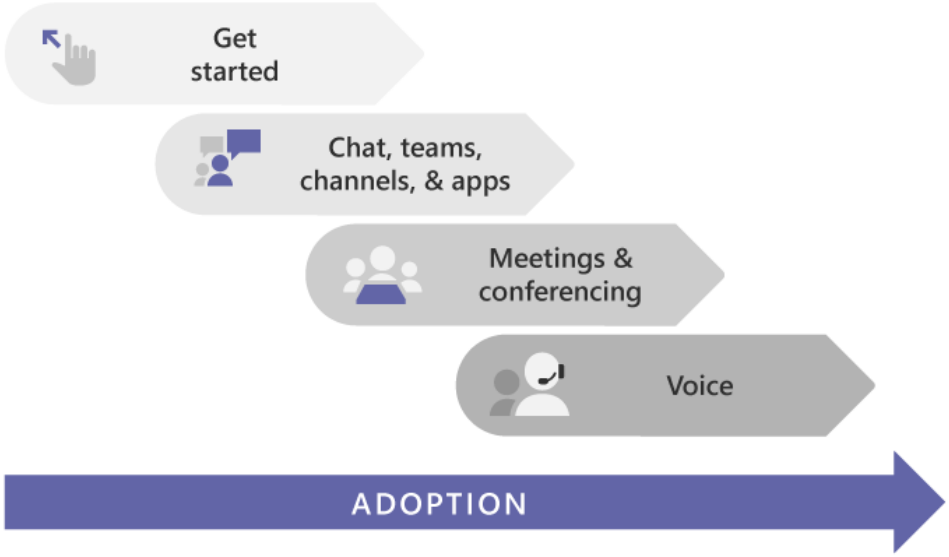
- Check your Environments Readiness for Teams
- Prepare your Organizations Network
- Learn the Benefits of Desktop, Web, and Mobile Clients

Rolling Out Services Workload-by-Workload

Using the staged approach to roll out Teams workload-by-workload may be a good fit for larger organizations.

When implementing Teams project, it's not necessary to roll out all Teams services at once. Partners don't have to complete a stage before they move to the next. Here are the Teams workloads, in the recommended order for rolling them out:

There is also an Adoption hub resource available. Throughout their Teams rollout, be sure to take advantage of the resources here to help drive Teams adoption.



RESOURCES:

- Getting Started
- Chat, Teams, Channels & Apps
- Meetings & Conferencing
- Cloud Voice
- Adoption Hub

Starting from Skype for Business

There are several scenarios to consider when moving customers from Skype for Business to Teams.

RESOURCES:

- Upgrade to Teams
- Plan Hybrid Connectivity
- Recommended Path to Teams
- Plan Direct Routing

If customers are coming to Teams from Skype for Business (online or on premises), or if they need a hybrid configuration, partners still want to follow the recommended path for rolling out Teams, but first they need to do some extra planning with their customer. Start by reviewing the guidance in this table that applies to the organization's profile

Organization profile	Guidance
Currently using Skype for Business Online, and ready to move to Teams.	Go to Upgrade to Teams.
The organization is running Skype for Business Server and wants to roll out Teams.	For a full-scale Teams rollout, first configure hybrid connectivity between on-premises environment and Microsoft 365. Start by reading Plan hybrid connectivity between Skype for Business Server and Office 365. Also review Upgrade to Teams.
The organization does not have Skype for Business Server, but they do have an on-premises PSTN solution. They want to roll out Teams but want to keep their on-premises PSTN solution.	Roll out Teams following the recommended path above. Then read Plan Direct Routing to learn about using Phone System Direct Routing to hook up an on-premises PSTN solution with Teams.

Skype for Business to Teams Upgrade Planning

The Skype for Business to Teams Upgrade Planning engagement is designed to run in 3, 5, and 10 days.

RESOURCES:

- Customer Deployment Roadmap
- Skype for Business to Microsoft Teams Upgrade Planning Engagement

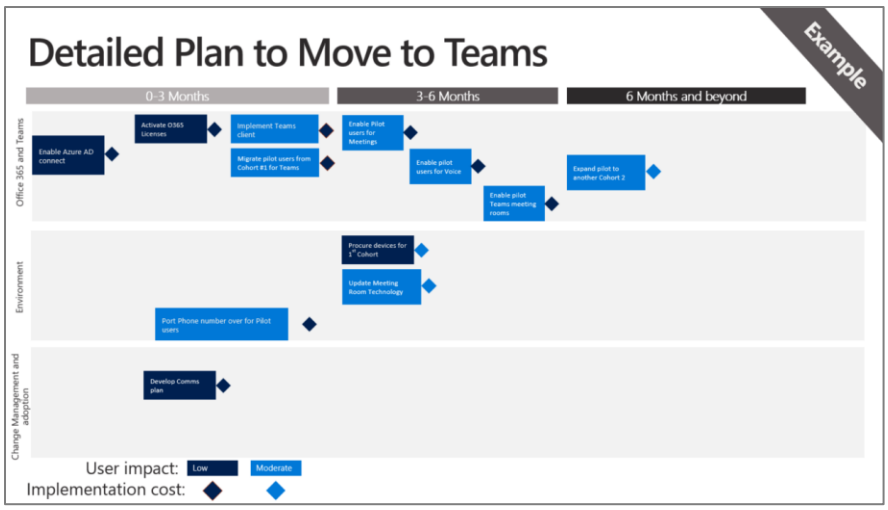
This engagement allows partners to provide customers with a roadmap and journey for their upgrade from Skype for Business to Teams. The engagement focuses on assessing the current infrastructure, examining use cases, and identifying blockers in order to complete an upgrade from Skype for Business to Teams.

OBJECTIVE

- Provide an overview of Teams and desired functionality
- Environmental, network, and workload assessment
- Persona analysis and service mapping
- Determine building blocks and migration approach
- Guidance and a timeline for a successful upgrade to Teams

OUTCOME

This engagement is designed to provide customers a clear understanding of what is required to upgrade to Teams and a path forward for their organization. The outputs will be critical both in the upgrade and for the adoption and consumption of Teams.



Example customer deployment roadmap

Chat, Teams, and Channels Planning

Out of the box, the default collaboration experiences for most organizations will work well. However, there are some considerations depending on a customer's organization profile and business requirements before getting started.

RESOURCES:

- Detailed Deployment Guidance
- Office 365 Licensing for Teams
- Check your environment's readiness for Teams
- Prepare your organization's network for Teams
- Office 365 Uls and IP Address Ranges
- Plan for Office 365 Groups when Creating Teams

CHAT DEPLOYMENT PRE-REQUISITES

To get the full Teams experience, customers must have deployed Exchange Online and SharePoint Online as well as ensure the locations have the necessary connectivity to connect to Office 365. Ensure users have the current licenses to use the features they're rolling out.

CORE DEPLOYMENT DECISIONS

Plan for reviewing the default settings of chat, teams, channels and even the various roles and permissions Teams provides to see if they need to be changed to aligned to their customers environment. The following are some of the common settings they may need to change.

- Teams administrators - Microsoft Teams Admin Roles
- Teams owners and members
  - Who should be assigned to each role?
  - Setup and manage channel moderation.
- Messaging policies - Manage messaging policies
- External access - Plan for external access
- Guest access
  - Turn on or off guest access
  - Authorize guest access
- Teams settings - Configure Teams settings
- Teams clients - Get Clients for Teams
- Teams usage reporting
  - Accessing Teams Usage through Microsoft 365 Usage Analytics
  - Permissions for Usage Reporting

Apps, Bots and Connectors Planning

Apps let partners find content from their favorite services and share it right in Teams.

RESOURCES:

- Overview of Apps in Teams
- Deploy Apps, Bots, and Connectors

The apps in Teams help with doing things such as pin services at the top of a channel, chat with bots, or share and assign tasks. Like other settings, the out-of-the box settings will work well for most organizations. There are some settings that they should be aware of prior to rollout if changing them works better for their customer.

The following are some of the more common settings they may make when deploying apps, bots, and connectors.

- App Availability Settings
  - Admin settings for apps in Microsoft Teams
- App Permissions
  - Microsoft Teams app permissions and considerations
  - Publish apps in the Teams tenant apps catalog
- Bots for private chats and channels
  - Add bots for Private chats and channels in Microsoft Teams
  - Admin settings for Apps in Microsoft Teams
- Built-in and custom tabs
  - Using built-in and custom tabs in Teams
- Office 365 and custom connect connectors
  - Use Office 365 and custom connectors in Teams

Managing Teams

In addition to the deployment and adoption of Teams, partners need to plan for the ongoing management of Teams and continuing to integrate it into their customer's organization.

RESOURCES:

- Microsoft Teams Management Documentation
- Microsoft Teams Admin Portal
- Microsoft Teams PowerShell

Managing Teams has several aspects that need to be considered. Teams is a product within the Microsoft 365 suites of products, but also brings several other Microsoft 365 products together. When thinking about Teams management, not only should the management of Teams be considered, but also the aspects of the other services that end up included in the Teams such as SharePoint files.

There are also various locations Teams needs to be managed. Current locations for Teams management include the Office 365 Admin Center, the Teams Admin center and then some management from within the Teams client itself. The management of Teams can be a big job, especially when there isn't a full understanding of everything involved in management Teams.

MICROSOFT TEAMS ADMIN CENTER

The Teams Admin center is their focal point for managing Teams-centric features such as Teams, Channels, Teams Apps, Policies, Analytics & Reporting as well as setting org-wide settings. The Admin Center can be accessed from the Microsoft 365 Admin Center or directly via https://admin.teams.microsoft.com/.

MICROSOFT TEAMS POWERSHELL

Teams has a rich set of PowerShell cmdlets to help automate common tasks such as cleanup and reporting. They can be used directly by an administrator or even as scheduled jobs in Azure Automation.
The documentation for the Teams PowerShell cmdlets can be found here: https://docs.microsoft.com/en-us/microsoftteams/teams-powershell-overview.

MICROSOFT 365 ADMIN CENTER

The Microsoft 365 Admin center is where they will create users, assign licenses and is also the central point for the security and compliance aspects of Teams. The Admin Center can be accessed from the Microsoft 365 Admin Center or directly via https://admin.microsoft.com/.

Organizing Teams

Learn early the best practices for organizing teams to maximize adoption.

RESOURCES:

- Best Practices Organizing Teams
- Working in Teams
- Setting Up Moderation
- Working in Channels

BUILD TEAMS GRADUALLY

A Team usually starts with a small number of team members to brainstorm as the team moves forward, and then add new people or groups as it goes. The great thing with Teams, is that when new people or groups are added, they can quickly get up to speed on what has already been discussed as the conversations and files are available to users regardless of when they join. Try to avoid creating different Teams that have the same set of members, as this approach may not provide the desired focus to deliver the project or goal. Outlook is a great tool for sharing those types of group-wide communications.

CREATE CHANNELS TO FOCUS DISCUSSIONS

Once a Team has been created, it's a good idea to start to think about the different areas of conversations that will drive towards the goal and create initial channels so that people know where to contribute and to find existing conversations. Be descriptive when naming channels to make it easier to understand what the conversation in the channel there is to achieve. New tabs can be added to channels to add tools like OneNote, Power BI, or links to web pages and other content to make it easy for people to find content and share their thoughts.

Microsoft's best practice guidance is to create teams with a larger set of members and more channels. To maintain a high-quality user experience, it is helpful to minimize the number of teams that require a person's participation. Channels within a team should be thought of as topics or workstreams to aid the team in organizing their work to deliver on their join objectives. There is no specific number of channels that should be created. Each team should craft channels based on their work, priorities, and style. Larger organizations may want to create teams as "templates" to standardize the information they capture about specific types of work. This is useful for strategic customer management, classroom management, health care scenarios, claims management, incident management, and other scenarios appropriate to a specific industry.

USE THE GENERAL CHANNEL

By default, the General channel is created when a Team is created. There are many useful purposes for this channel:

- Use it to share an overview of what the team wants to achieve such as a project charter or who's who in the team.
- Use it for new team member onboarding and other high-level information that a new team member would find useful.
- Use it for announcements or configure the SharePoint News connector to post their modern status reports to this channel.

For new or single purpose teams, it may be the only channel at the beginning as the team decides how Teams can best support their goals.

CONSIDER SETTING UP MODERATION IN CHANNELS

Team owners can turn on moderation for a channel to control who can start new posts and reply to posts in that channel. When they set up moderation, they can choose one or more team members to be moderators (Team owners are moderators by default).

Interoperability with Office 365

Teams is tightly integrated with other services in Office 365, such as SharePoint Online, OneDrive for Business and Exchange online.

RESOURCES:

- Video Foundations of Microsoft Teams
- Coexistence and Upgrade Settings
- Office 365 Groups and Microsoft Teams
- How Exchange and Teams Interact
- How SharePoint Online and OneDrive for Business interact with Microsoft Teams

For the full Teams experience, every user should be enabled for Exchange Online, SharePoint Online, and Office 365 Group creation.

SETTING COEXISTENCE AND UPGRADE SETTINGS

When they upgrade Skype for Business users to use Teams, they have several options to help them make it a seamless process for their users. They have the option to make coexistence and upgrade settings for all of the users in their organization at once, or they can make settings changes for a single or set of users in their organization. Learn more about these settings.

OFFICE 365 GROUPS AND TEAMS

Office 365 Groups is the cross-application membership service in Office 365. At the basic level, an Office 365 Group is an object in Azure Active Directory with a list of members and a loose coupling to related workloads including a SharePoint team site, Yammer Group, shared Exchange mailbox resources, Planner, Power BI and OneNote. They can add or remove people to the group just as they would any other group-based security object in Active Directory. Learn more here.

HOW EXCHANGE AND TEAMS INTERACT

It is important to understand how Teams and Exchange interact as they work with organizations that have a hybrid Exchange environment or an on-premises environment. Learn more about these scenarios here.

HOW SHAREPOINT ONLINE AND ONEDRIVE FOR BUSINESS INTERACT WITH TEAMS

Teams, Files, Tabs, and Channels are modeled and backed by SharePoint Online and OneDrive for business. It's critical to understand the architecture and interactions between these two services for deployment and ongoing support. Learn more about SharePoint Online and OneDrive for business interact.

Plan for Governance in Teams

Governance is essential for streamlining the deployment of products and technologies within an organization.

RESOURCES:

- Video - Governance, management and lifecycle in Microsoft Teams
- Managing policies in Microsoft Teams
- Office 365 Groups usage guidelines
- Office 365 Groups naming policy
- Sensitivity labels for Microsoft Teams
- Setup Channel Moderation in Microsoft Teams
- Group policies and information protection.

The purpose of governance is to help keep customer's Teams deployment secure and compliant. It also helps to ensure the best return on customers' investments in teams and provides the structure for the organization to expand and grow in a save and controlled manner.

PLAN FOR GOVERNANCE IN TEAMS

When planning for governance in Teams, there are two aspects to consider.

- **Configuration:** These are global settings and user specific configuration settings that much be configured. These are static, once they are defined, they are rarely changed. These settings are normally defined and configured by administrators. This would include things like Teams creation, naming Teams, meeting policies, messaging policies, and other configuration settings.
- **Lifecycle:** This can be unique to each team. It consists of three phases. The initiation phase in which the Team is requested and created. The Active phase where the Team is being used regularly by users. Finally, the sunset phase when the Team is no longer needed, and it is archived and deleted.

MANAGING TEAMS POLICIES

As an admin, they can use policies in Teams to control what users in their organization can do in teams and channels. For example, they can set whether users can discover private teams in search results and in the team gallery and whether users can create private channels.

Learn more about managing policies in Microsoft Teams.

GROUP AND TEAM CREATION, NAMING, AND CLASSIFICATION

Their customer's organization might require that they implement strict controls on how teams are named and classified, whether guests can be added as team members, and who can create teams. They can configure each of these areas by using Azure Active Directory (Azure AD).

GROUP NAMING POLICIES

Group naming policies are used to enforce a consistent naming strategy for groups created by users in an organization. A naming policy can help identify the function of the group, membership, geographic region, or who created the group. The naming policy can also help categorize groups in the address book. The policy can also be used to block specific words from being used in group names and aliases. Learn more about Office 365 Groups naming policy.

GROUP POLICIES & INFORMATION PROTECTION

As Teams is built on the advanced security and compliance capabilities of Office 365 and supports classifications, auditing and reporting, compliance content search, e-discovery, Legal Hold, and retention policies. When it comes to polices and information protection, there is a set of core functionality available for Teams governance. Learn more about group policies and information protection.

SENSITIVE LABELS FOR TEAMS

Sensitivity labels allow Teams admins to regulate access to sensitive organizational content created during collaboration within teams. They can define sensitivity labels and their associated policies in the Security & Compliance Center. These labels and policies are automatically applied to teams in their organization.
Learn more about sensitivity labels for Microsoft Teams

SET UP AND MANAGE CHANNEL MODERATION IN TEAMS

In Teams, team owners can turn on moderation for a channel to control who can start new posts and reply to posts in that channel. Team owners can also add team members as moderators. A team owner might not have the subject matter expertise at the channel level to best support channel moderation. By allowing specific team members to moderate a channel, the responsibility of managing content and context within a channel is shared between team owners and channel moderators. For example, a team owner can add business owners or content owners as moderators, which lets them control information sharing in that channel. Learn more about setting up and managing channel moderation in Microsoft Teams

Plan for Lifecycle Management in Teams

Teams provides a rich set of tools to implement collaboration lifecycle management processes for an organization.

RESOURCES:

- Video - Governance, management and lifecycle in Microsoft Teams
- Team expiration and renewal in Microsoft Teams
- Archive or delete a team in Microsoft Teams
- Plan for lifecycle management in Teams

A valuable service partners can provide to customers is to guide them through the right questions to determine their requirements for lifecycle management and implementing the tools to use to meet them. Planning for lifecycle management is important, because it means building a plan to get work done effectively. Most projects consist of a beginning, middle, and end. Teams do too, but they can be constructed and used in such a variety of ways that it's not always obvious which stage of their lifecycle they're in. Having a plan for lifecycle management will help track an organization's projects as they go through these stages.

The following summarizes the stages of Teams lifecycle management. Read the full article for more details

STAGE 1: BEGINNING

Create the team

The first step is to define the goal of the team (which can range from business processes to org structure to projects, or simply creating an open, unstructured collaboration hub). Defining the team goal goes hand in hand with identifying the right people. As far as practicable, it's a good idea to foster open collaboration by aiming for broad membership.

STAGE 2: MIDDLE

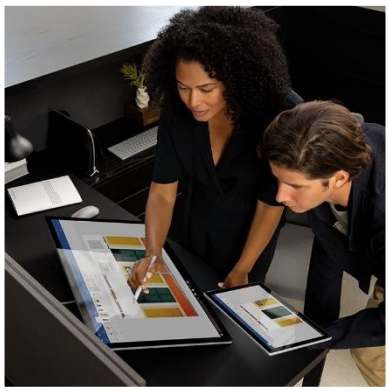
As the teamwork begins, the team membership probably begins to evolve, along with the channel hierarchy. Unless the team needs to be strictly controlled and locked down, it's a good idea to encourage exploration even if it leads to dead ends. As users get more comfortable, they can experiment with @team mentions, marking channels as favorite, and using the General channel to get comfortable with posting. Each team is different; let usage guide the evolution of the design. Monitor the usage and health of the team via Teams reporting capabilities

STAGE 3: END

When the work of a team has run its course, it's important to formally acknowledge that it's over. This gives team members a sense of closure and prevents anyone from accessing outdated, stale information. Use the team itself to conduct closure rituals like post-mortems and executive summaries. Delete teams that are known to no longer be need (for example, a team created purely for testing or a team that contains sensitive data). Teams are deleted with a "soft delete" that IT can reverse for up to 21 days (30 days for Office 365 Groups). Deleting teams doesn't affect any chats or content that were retained in accordance with compliance policies

Security and Compliance

Teams is built on the Office 365 hyper-scale, enterprise-grade cloud, delivering the advanced security and compliance capabilities our customers expect.



RESOURCES:

- Overview of Security and Compliance in Microsoft Teams
- Content Search in Office 365

AUDITING AND REPORTING

Audit logs are accessed through the Office 365 Security & Compliance Center and exposes the ability to set alerts and report on events and exporting/filtering of data for further analysis.

COMPLIANCE CONTENT SEARCH

Teams data (Chat, Channel Messages, Meetings and Calls) can be searched with rich filtering capabilities for compliance and litigation support.

EDISCOVERY

Electronic discovery is the electronic aspect of identifying, collecting and producing electronically stored information (ESI) in response to a request for production in a lawsuit or investigation. Capabilities include case management, preservation, search, analysis, and export of Teams data. This includes chat, messaging and files, meeting and call summaries. For Teams meetings and Calls, a summary of the events that happened in the meeting and call are created and made available in eDiscovery.

LEGAL HOLD

During a litigation, it is often required that all data associated with a user (custodian) or a Team is preserved immutably so it can be used as evidence for the case. This is achieved by placing either a user (user mailbox) or a Team on legal hold. When any team within Teams is put on In-Place Hold (subset of the mailbox or site collection thru targeted queries or filtered content) or Litigation Hold (entire mailbox or site collection), the hold is placed on the groups mailbox. This ensures that even if end users delete or edit channel messages that are ingested into the group mailbox, immutable copies of that content are maintained and available in eDiscovery search. Legal Holds are generally applied within the context of an eDiscovery case. When should information barriers be used?

Information Barriers

Information barriers are policies that an admin can configure to prevent individuals or groups from communicating with each other.

RESOURCES:

- Information Barriers in Microsoft Teams
- Defining Policies for Information Barriers

This is useful if, for example, if one department is handling information that shouldn't be shared with other departments or a group needs to be prevented, or isolated, from communicating with anyone outside of that group. Information barrier policies also prevent lookups and discovery. This means that if users attempt to communicate with someone they should not be communicating with, the user will not find the person they wish to communicate with in the people picker.

WHEN SHOULD INFORMATION BARRIERS BE USED?

Information barriers might be used in situations such as:

- A team must be prevented from communicating or sharing data with a specific other team.
- A team must not communicate or share data with anyone outside of the team.

The Information Barrier Policy Evaluation Service determines whether a communication complies with information barrier policies.

MANAGING INFORMATION BARRIER POLICIES

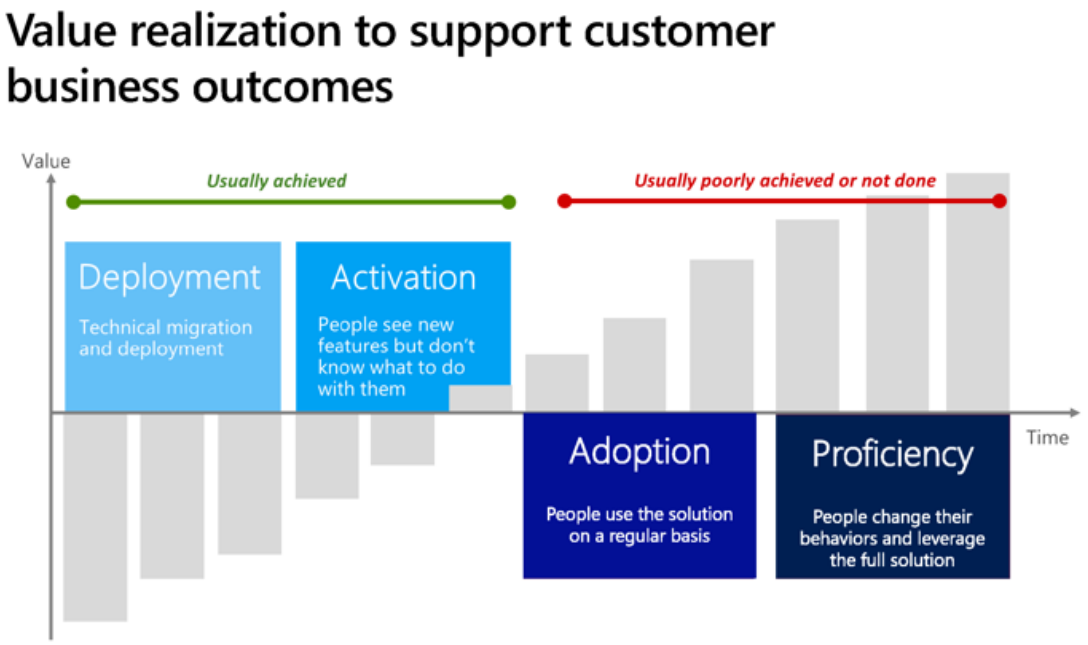
Information barrier policies are managed in the Office 365 Security & Compliance Center (SCC) using PowerShell cmdlets. For more information, see Define policies for information barriers.

Developing an Education and User Adoption Offering

Teams is more than a set of products – it is a fundamentally different way of working. Along with technology changes, partners will need to help manage changes to users' expectations and behaviors.

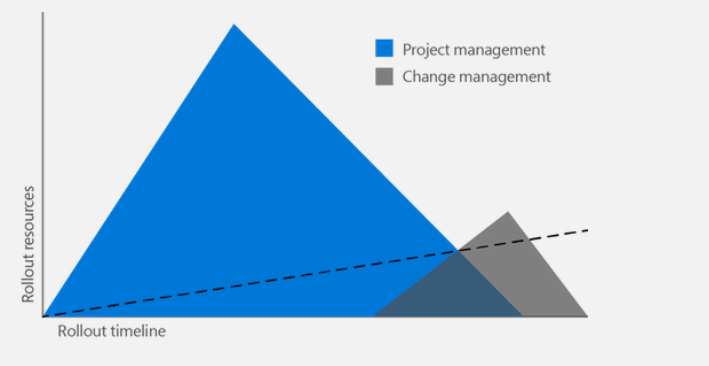
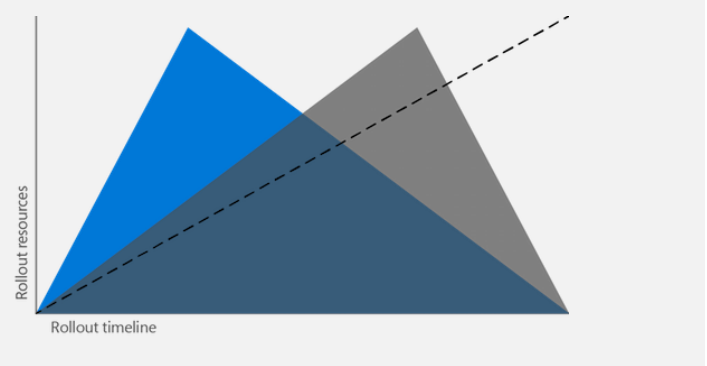
Today's workforce is more mobile, social, and global than ever. People have different backgrounds in technology and different expectations about communication and collaboration tools. Regardless of the tools people prefer, one thing is clear: most of their time is spent collaborating. Partners can make that easier with Teams and delivering services related to Adoption and Change Management (ACM).

Research from Microsoft has shown that the ACM opportunity is not in the deployment of these technologies, which has fallen 18% YoY, but in Advisory and Adoption, Business Solutions, and Managed Services, all of which are up 10%, 17%, and 15% YoY respectively. This is across an overall change management market of $9.5 billion in 2019 and growing 7% annually. Typically, deployment and activation of these servers is achieved, but the adoption and proficiency are where the problems are.



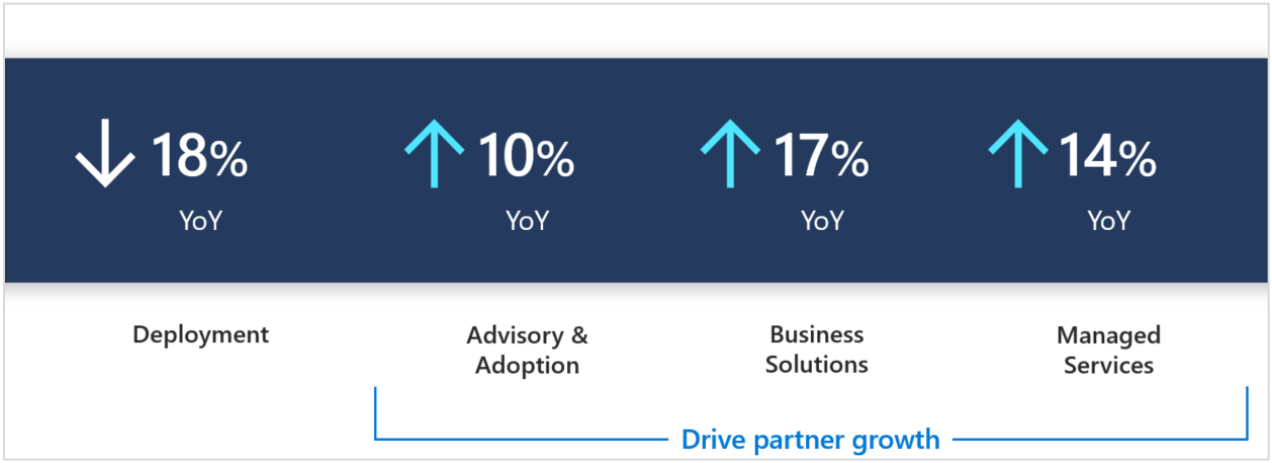
The real change management opportunities are in helping the people change their way of thinking and working, thus reducing the customer risk and increasing their value as a partner.

To implement Teams in customer environments, they'll need to employ two complementary disciplines to help customers make a successful transition: project management and change management. Project management focuses on deployment planning and the implementation of the Teams technical component. Change management—the human side of the transformation—focuses on the activities required to prepare organizations for the delivered change. To facilitate the transition from the old way of working to the future state. And to embed the change as the new norm.

Common approach	Ideal approach
	
User focus is an afterthought. Rather than engaging users in the process, an email containing a link to training, for example, is sent post-deployment.	User adoption is a parallel, integrated work stream that includes deployment.

INCREASE PROFITABILITY

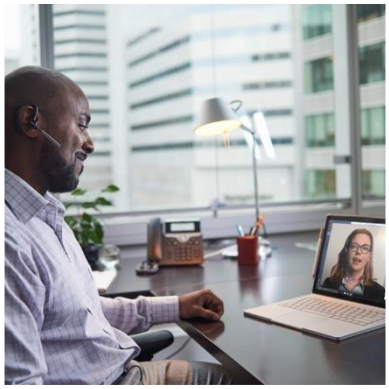
In 2018, Microsoft commissioned Forrester Research to look at partner opportunities across Microsoft 365 offerings. Through the study, we learned partners can make up to $45 per user, per month if they offer solutions across Security, GDPR, Teamwork and Modern Desktop. Specifically, there are significant growth opportunities in Advisory and Adoption services, Business Solutions and Managed Services.



Source: [Developing a Teamwork Adoption and Change Management Practice Partner Guide]

Driving User Adoption in Teams

By driving adoption of Teams, partners can deliver an excellent user experience and increased business value.



RESOURCES:

- Teams Adoption Phase 1
- Teams Adoption Phase 2
- Teams Adoption Phase 3
- Change Management Framework for Partners

Deploying Teams is just a first step. Changing existing work habits requires both motivation and effort, and so effective change management is key to a successful Teams adoption. For many of the partners we interviewed when writing this playbook, change management to drive adoption is a critical part of their service offering and a key income stream. The Change Management Framework for Partners provides more information on how to develop an Adoption and Change Management practice.

Every adoption project varies in size and complexity based on their environment, but the initial steps are identical across the board. The Office 365 Adoption Framework breaks them down into three phases.

START

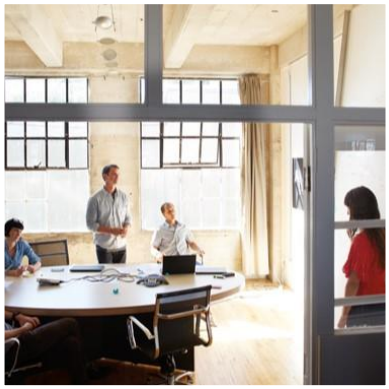
In this first phase, they'll gather their team together, set up their initial teams, and use Teams to begin planning Teams adoption. This approach will increase their technical familiarity with the product and help them build the skills necessary to successfully complete subsequent phases.

EXPERIMENT

In this phase of controlled growth, they'll bring their internal champions and early adopters onboard. They'll speak with their business users to identify scenarios that would immediately benefit from the collaboration and communications capabilities that Teams provides. They'll gather feedback that will inform their broad-scale adoption phase, and they'll make service decisions about governance and lifecycle management that will ensure a successful deployment.

SCALE

This is the broad-scale deployment phase in which they'll turn on Teams capabilities for all their employees. In this phase, the size of their organization will determine whether this is a “go big” project that will turn on Teams for all employees simultaneously or if they'll approach this by region, business unit, or other method of segmenting their employee population. In this phase they'll move to a continuous delivery model. Employees, leaders, and business units will want to expand their use of Teams and will require training and their engagement to understand how to best use Teams and other features of Office 365.



RESOURCES:

- Identify Key Stakeholders
- Adoption Project Plans
- Persona and Workstyles
- Workstream Templates
- Day in the Life Quick Sheets
- Embeddable Videos
- Prepare your Help Desk
- Teams Adoption Guide
- Teams Customer Success Kit

Tools for Driving Adoption

Leverage existing assets to build services around Teams adoption.

ADOPTION PROJECT PLANS

Download the sample Adoption Project Plans to use as scaffolding for adoption projects.

EXAMPLE PERSONAL AND WORK STYLES

The example personas and workstyles can be used as part of their deployment planning to map to their customer targets.

WORKSTREAM TEMPLATES

This template can be used to assign workstreams to key team members and communicate to stakeholders.

DAY IN THE LIFE QUICK SHEETS

Inspire customer's employees with these Day in the Life quick sheets.

EMBEDDABLE VIDEOS

Leverage the Microsoft 365 Learning Pathways to help build champions within their customers for increased adoption.

PREP HELPDESK

Use these resources to help prepare help desk to support Teams.

TEAMS ADOPTION GUIDE

Check out the Teams adoption flipbook, an online guide that will help partners roll out Teams in their company. It includes many downloadable tools, templates, and other resources to help them along their Teams adoption journey.

TEAMS CUSTOMER SUCCESS KIT

The Teams Customer Success Kit provides tools to help roll out Teams in their organization. It includes email templates for announcements, flyers posters, countdown, and tips & tricks. It also includes Getting Started guides for team leaders and IT administrators.

Change Management Certifications

Build change management practice on a sound foundation by leveraging established industry methodologies and certifications.

Evaluate leading change management organizations to learn about methodologies, training and accreditation for change professionals to determine the right approach to support their offering.

INDUSTRY LEADING CHANGE MANAGEMENT ORGANIZATIONS

Prsci – https://www.prosci.com/	Prosci PEOPLE. CHANGE. RESULTS.
Change First https://www.changefirst.com/	Changefirst
Association of Change Management Professionals (ACMP) https://www.acmpglobal.org/	Association of Change Management Professionals ACMP
Change Management Institute https://www.change-management-institute.com/	Change Management Institute

Note: Microsoft customer success managers align to the Prosci® methodology.

Leveraging Teams Adoption and Change Management Planning Workshop

This workshop is designed to assist partners in effectively engaging with customer business leaders by helping them better understand their vision and outcomes, define use case scenarios, and determine measures of success to successfully adopt Microsoft 365 solutions for Teamwork in their organization.

The workshop guide brings together elements from the Microsoft 365 adoption guide, global best practices and new content built to support the customer engagement.

Title	Role	Recommended Skills
Account Manager	Translate customer needs to consultant's delivery process Be the customer's advocate Review and approve final recommendations on the report	Knows and understands the needs of the customer Basic understanding of Microsoft 365 Basic understanding of Teams
Architect or Consultant	Prepares for the assessment with account manager to understand customer challenges Delivers/facilitates/moderates the assessment with the customer Creates and delivers the final report Acts as a facilitator throughout the workshop process	Has prior design and implementation experience of the Microsoft 365 products including: • Identity • Teams • Skype for Business • SharePoint • Exchange • Yammer Has knowledge of adoption & change management practices

Developing a Voice Calling and Virtual Meetings Offering

As the market for calling and meetings shifts, Teams offers a differentiated service with client support across mobile, desktop, and the web along with dedicated devices certified for Teams.

COLLABORATION TRENDS

The Microsoft 365 Teamwork Partner Opportunity Total Economic Impact Study has identified collaboration as one of the most important initiatives and challenges that companies are facing over the next 12 months and forecasts that they will spend $40 billion on collaboration solution licenses and subscriptions in 2019.

80%
of time employees spend in collaborating with others

61%
of apps that go undetected by IT in an enterprise

86%
of executives cite lack of collaboration or ineffective communication for workplace failures

CONSIDER MANAGED SERVICES

Managed services increase revenues, provide better margins than project-based delivery, and create more strategic relationships with customers. The focus on Teams by Microsoft and partners has created enormous new opportunities with larger potential than previous solutions such as Skype for Business. One global partner specializing in collaboration, meeting and voice reported 40% year-on-year revenue growth and margins increasing from the mid-30% to the low 50% by moving from project services to managed services.

BUILDING A SERVICES PORTFOLIO

Building a service offering surrounding voice calling and virtual meetings involves a spectrum of services. There are opportunities to offer services from envision and planning through to support. Four common phases offered by partners are:

- **Envision** – planning and design services lay the groundwork for a smooth rollout and provides the opportunity to establish the customer relationship. Examples include helping a customer plan and design the next phase of their communications journey, which could be greenfield or migration planning.
- **Enablement** – project-based engagements that typically light up Teams with follow-on activity to their basic planning and envisioning engagements. Examples include providing best practices for network and devices, basic user enablement for licensing, or user enablement along with policy creation.
- **Usage** – services to drive usage and adoption of modern communications, that are typically longer engagements. Examples include adoption and change management services or utilizing bots and customs solutions.
- **Support** – managed services focusing on monitoring, management, reporting, and support of Teams. Support provides a recurring revenue model for the ongoing management and operation of a customer deployment.

Virtual Meetings in Teams

Virtual meetings in Teams are a rich, high definition audio and video experience that incorporates screen sharing and a complete collaboration experience built on the Office 365 platform. From the mobile phone to the boardroom, Teams meetings create an opportunity to improve productivity and efficiency of communication and collaboration. Partners have a variety of opportunities from professional services to end-to-end managed services to provide value to customers.

- **Teams Rooms** – Teams Rooms bring the power of Teams into customer's meeting rooms. They'll have the ability to start their meetings on time with one touch meeting join, experience rich HD audio and video, and share content with the room and remote participants easily.
- **Meetings Services Portfolio** – The services portfolio is composed of several elements that help customers to have more efficient online meetings. This portfolio can range from enabling and provisioning of users for the meeting service in Teams to managing the end to end experience in each of their conference rooms.

Phase one: Envision

Planning and design services for Teams meetings lay the groundwork for a smooth rollout. This phase is critical to help customers with their requirement gathering and scoping of meeting services. This can be a great way to initiate the relationship with a customer and support overall modern workplace transformation discussions.

Online meetings delivered by Teams enables a partner to help a customer plan and design the next phase of their communications and meeting journey. This can range from infrastructure and network readiness to developing a device strategy including meeting rooms. These engagements can be greenfield or migration from an existing solution. Building an initial offer as a workshop or envisioning engagement can lead to lead to larger opportunities.

EXAMPLE CUSTOMER SCENARIO

A customer that is moving from a traditional audio-conferencing solution to the rich Teams experience will need a partner to help them develop a strategy around their devices to help all different persona and spaces successfully join Teams meetings with the highest quality.

TYPICAL SERVICES OFFERED

- ➔ Plan and design services
- ➔ Network assessment
- ➔ Device strategy
- ➔ Meeting room assessment
- ➔ Migration planning
- ➔ Skype for Business to Teams Planning
- ➔ Advisory

Phase two: Enablement

Enablement starts with project-based engagements that light up online meetings and devices by enabling them in Teams. Professional services for Teams meetings in this phase are known as deployment. Enabling a customer to use meetings is the first step to helping them realize the value of their investment in Teams for improved productivity. This is a direct follow-on to an envisioning engagement that puts the customers plans and designs into action.

This can range from basic user and room licensing enablement and policy creation to time and material engagements around network and other services. The installation, provisioning and configuration of meeting room devices creates a new opportunity for partners to grow their service portfolio.

EXAMPLE CUSTOMER SCENARIO

A customer is looking to modernize their project management process to incorporate Agile methodologies and creates an opportunity for partners to help the customer use the entire meeting lifecycle and tools to improve standups and information sharing through channel meeting best practices.

TYPICAL SERVICES OFFERED

- Network and room remediation
- Configure Meetings First
- Training and adoption services
- Live event SDN
- Audio conferencing configuration
- Cloud video interop development
- Devices procurement and deployment
- Teams Rooms deployment and configuration

Phase three: Usage

Usage is all about offering services to drive adoption of Teams Meetings. These are typically longer engagements for adoption and change management services or the opportunity to utilize bots, and solutions to drive usage.

Usage and Meetings are a critical part of growing the services portfolio for a partner. These engagements tend to be longer in nature and can be characterized as adoption and change management as a service. Due to the changing culture of meetings and how people work, this can be a growth area for communications partners.

EXAMPLE CUSTOMER SCENARIO

A customer has rolled out the technology changes needed to enable Teams-based meetings and calls but has yet to see widespread adoption as staff continue with existing work practices.

TYPICAL SERVICES OFFERED

- Migration assistance
- Meetings culture change
- Ongoing change management services
- Ongoing training and adoption services

Phase four: Support

This phase of the service portfolio becomes an ongoing engagement to provide monitoring, management, reporting and support of different elements within the service or deployment and tends to be a recurring revenue model.

Teams meetings brings several options for partners to build an end to end approach to supporting a customer's meetings experience ranging from service deck to service desk support to conference room equipment break-fix.

EXAMPLE CUSTOMER SCENARIO

A customer is using Teams meetings and a partner can report on their usage and quality while proactively proposing areas of improvement within their infrastructure and usage patterns.

TYPICAL SERVICES OFFERED

- Quality reporting and monitoring
- Network and usage monitoring
- Device management
- Room Systems break-fix
- Tier 1-4 support
- Managed Teams Live Events
- Meeting Room insights

Teams Rooms

Transform meeting spaces ranging from small huddle areas to large conference rooms with a rich, collaborative Teams experience that's simple to use, deploy, and manage.

Help customers optimize and enhance their conference and meetings experience with the addition of Teams Room systems. Deliver consistent high-quality video and audio with easy set-up and management to share content with the room and remote participants.

Customers can choose how and where they want to work and select devices designed for their space from one of our partners: Yealink, Logitech, Crestron, Polycom, Lenovo, and HP.

Design and deliver professional services around all three stages of a Teams Rooms implementation: Plan, Deploy and Manage.

RESOURCES:

- Plan
- Deploy
- Manage
- Microsoft Teams Customer Pitch Deck

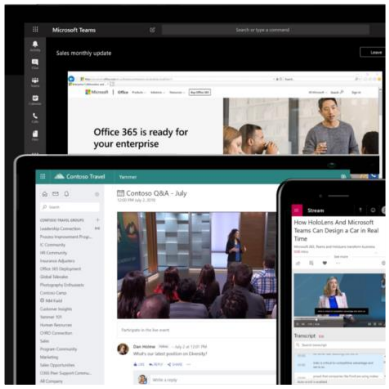
Source: The Microsoft 365 Teamwork Partner Opportunity: A Forrester Total Economic Impact study

$1500 room/year **revenue**

When adding scheduling solutions, usage and performance monitoring, and break-fix services

Live Events with Teams

Live Events with Teams enables customers to broadcast video and meeting content to large online audiences.



RESOURCES:

- [Microsoft 365 Live Events Pitch Deck]
- [What are Teams Live Events?]

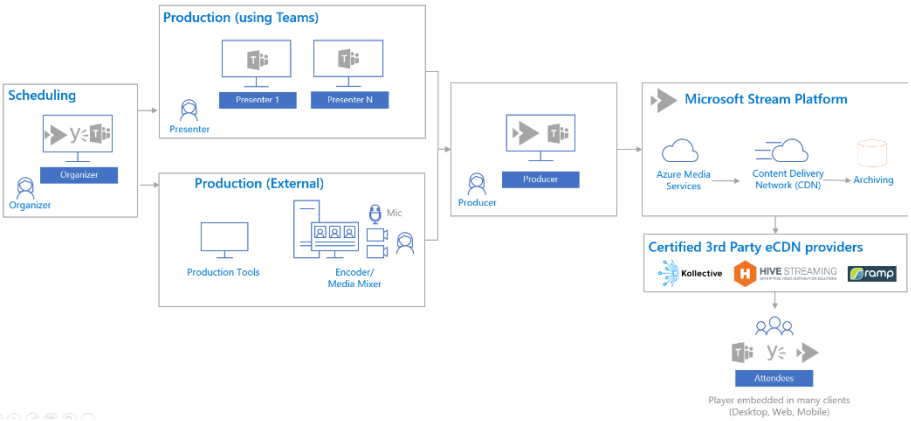
Microsoft 365 Live Events allows customers to create a live event wherever their audience, team, or community resides, using Microsoft Stream, Teams, or Yammer.

AND ENCOURAGE CONNECTION THROUGHOUT THE ENTIRE ENGAGEMENT WITH ATTENDEES BEFORE, DURING, AND AFTER EVENT BENEFITS

- Share knowledge and expertise quickly and easily
- Reach any audience, anywhere, anytime with immersive communications
- Deliver a spectrum of events, from informal webcasts to professional studio broadcasts
- Drive engagement with real-time discussion, interactions and video
- Unlock content with AI to find every moment that matters

HIGH LEVEL COMPONENTS WITH MICROSOFT 365 LIVE EVENTS

The following diagram highlights some of the key components of Microsoft 365 Live Events.



[Learn more about all the components of a Microsoft 365 Live event]

PLAN FOR LIVE EVENTS IN TEAMS

When they're planning Teams live events to hold large meetings in their organization, there are several factors that to consider before starting to set it all up.

Learn more about planning for live events

SETUP FOR TEAMS LIVE EVENTS

When they're setting up for live events, there are several steps that they must take.

- Step 1: Setup their network for live events in Teams
  - Prepare their organizations network for Teams
- Step 2: Get and assign licenses
  - Who can create and schedule live events
  - Who can watch live events
- Step 3: Setup live events policies

Learn more about setup for live events in Microsoft Teams

USE POWERSHELL TO SET TEAMS LIVE EVENTS POLICIES

They will use PowerShell to set and assign policy settings for live events.

Learn more about the PowerShell cmdlets

CONFIGURE TEAMS LIVE EVENTS SETTING

Use Teams live events settings to configure settings for live events that are held in their organization. They can set up a support URL and configure a third-party video distribution provider. These settings apply to all live events that are created in their organization.

Learn more about configuring live event settings in Microsoft Teams

LEARN HOW MICROSOFT AND CUSTOMERS ARE USING LIVE EVENTS

Learn how Microsoft and their customers are enabling better employee engagement and learning across their organizations.

		
Chasing the sun with a live event in Microsoft Teams	Improving employee engagement with live events in Microsoft 365	Employee engagement soars as Shell energizes internal communication with Office 365

Teams Calling

Teams in Office 365 provides business calling for people on a global scale, combining Phone System with Direct Routing and/or Calling Plans. Phone System enables call control and private branch exchange (PBX) capabilities in Office 365, effectively replacing their on-premises telephony hardware. Pair it with Direct Routing or Calling Plans and their users will get full calling capabilities in Office 365. Direct Routing allows a company to choose who provides voice lines to Office 365.

TEAMS CALLING PARTNER SERVICES PORTFOLIO

Partners are updating their business model to support the cloud, especially in voice and telephony arenas. This transition to the cloud along with trends in technology, demographics and the business landscape creates an opportunity for partners in traditional telephony-centric businesses. Enabling users to take their phone number anywhere they are and delivering dial-tone all around the world helps partners capitalize on this shift to voice in the cloud.

As partners shift their business to the cloud for telephony, they are applying their expertise for organizations to integrate new ways of working and innovative technologies.

Phase one: Envision

This phase of the service portfolio is comprised of planning and design services for telephony and calling, which is fundamental to establishing a successful customer relationship and Teams calling deployment. The scope within this phase is helping a customer plan and design all elements of the voice implementation and move to Teams.

The complexity of Enterprise Voice and telephony makes this a critical phase in successful migration from legacy or on-premises voice solutions. This is an opportunity to start migrating to Teams and help a customer understand the next steps and actions required to move to Teams for calling.

EXAMPLE CUSTOMER SCENARIO

A customer is currently on a legacy PBX and wants to move to Teams. A partner would engage in a migration plan across their voice estate through an envisioning session.

TYPICAL SERVICES OFFERED

- Telephony planning
- Network assessment
- Workflow analysis
- Device strategy
- Advisory
- Skype for Business to Teams Planning
- Personal analysis

Phase two: Enablement

These are project-based services that focus on lighting up Teams calling, with a direct follow-on from an envisioning engagement to set up Teams Phone System and connectivity to public switched telephone network (PSTN) services. These services can range from basic enablement and handset configuration to complex enterprise voice deployments with workflow and dial plan implementation.

There is significant opportunity for partners to offer deep expertise and resources to enable Teams calling as customers transition from existing voice platforms.

EXAMPLE CUSTOMER SCENARIO

A customer is moving to Teams Phone System for their voice platform, giving a partner an opportunity to configure all Call Queues and Auto Attendants for different offices and call groups.

TYPICAL SERVICES OFFERED

- Network remediation
- Phone system configuration
- Call Queues and Auto Attendants
- Direct Routing configuration
- Devices procurement and deployment
- Contact Center integrations
- Line of business integrations and Bots

Phase three: Usage

Driving usage is critical in the migration to modern communications. It is an opportunity to help customers realize the shift from a physical phone to headsets and mobility. This shift in the way people work will require a partner to guide all generations to adopt new technologies, especially in communications.

The opportunity for partners can range from training on phones and headsets to change management for receptionists using a new attendant console to manage calls that historically was managed from a PBX console.

EXAMPLE CUSTOMER SCENARIO

A customer is moving their executive team to Teams. The executive assistant needs to manage boss/admin delegation and Shared Line Appearance. This is an opportunity for a partner to work with the executive assistant community to facilitate the shift to the new Teams experience.

TYPICAL SERVICES OFFERED

- Training and adoption services
- Device deployment
- Change management services
- Contact center

Phase four: Support

These ongoing engagements are built to provide monitoring, management, reporting and support of the Teams calling deployment. Customers have relied on partners to support telephony and Enterprise Voice for years and the transition to Teams continues this opportunity.

Teams calling enables several options for partners to build an end-to-end approach that supports a customer's calling and voice experience, ranging from service desk to service desk support to complete quality reporting and remediation along with providing dial tone through Direct Routing.

EXAMPLE CUSTOMER SCENARIO

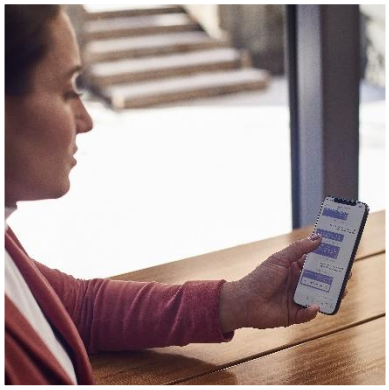
A customer is acquiring another company and is looking to integrate voice capabilities into their Teams ecosystem. A partner would engage to provide dial tone and monthly billing for the usage through Direct Routing as a service.

TYPICAL SERVICES OFFERED

- Quality reporting and monitoring
- Device management
- SBC management
- Tier 1-4 support
- Network monitoring

Cloud Voice in Teams

Teams with chat, teams, channels, and apps has been deployed across a customer's organization. Maybe meetings and conferencing has been deployed. Now the customer is ready to add cloud voice capabilities for its users.



RESOURCES:

- Plan your Cloud Voice Deployment
- Phone System with Calling Plans
- Phone System with Direct Routing

CORE DEPLOYMENT DECISIONS

These are the settings that most organizations want to change (if the Teams default settings don't work for the organization).

Phone system (Office 365)

Phone System is Microsoft's technology for enabling call control and private branch exchange (PBX) capabilities in the Office 365 cloud. What is Phone System in Office 365.

Connection to the public switched telephone network (PSTN)

To connect Phone System to the PSTN so that users can make phone calls around the world, there are options based on business needs. Ask the following:

- Phone System with Calling Plans
- Phone System with Direct Routing

Additional deployment decisions

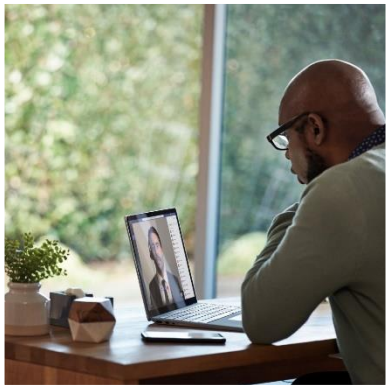
The following settings may also need to be changed, based on their organization's needs and configuration:

- Voicemail
- Calling identity
- Phone numbers from Microsoft
- Dial plans
- Call queues

Learn more about these settings.

Microsoft 365 Business Voice

Microsoft 365 Business Voice makes it easy for small and medium-sized organizations to turn Teams into a powerful and flexible telephone system.



RESOURCES:

- Business Voice for Partners
- What is Business Voice?
- Microsoft 365 Business Voice Service Description

Business Voice is a replacement for traditional telephony providers and in-house phone systems that can be difficult and costly to manage. They can set up both toll and toll-free numbers, call menus to help callers get to the right department, audio conferencing so they can host meetings with anyone, and more. They can even give people their own phone numbers so they can get calls directly.

Business Voice does all of this by wrapping up Microsoft 365 Phone System features into a single and easy-to-manage bundle. They don't need to worry about choosing the right plan or feature; they're all there and set up for them. Because Phone System is a part of Teams, they can turn any PC, Mac, or mobile device, into a phone that can use their Business Voice phone number.

Business Voice is aimed at organizations with up to 300 staff. It is currently only available in the UK and Canada, with global roll-out planned for CY2020.

Business Voice Partner Practice Guide

The Microsoft 365 Business Voice Partner Practice guide helps partners effectively build a practice for Microsoft 365 Business Voice.

RESOURCES:

➔ Download the Practice Guide

This guidance is designed to help partners focused on small and medium businesses understand the partner opportunity and how to build and implement a Teamwork practice for Microsoft 365 Business Voice.

TOPICS INCLUDE:

- Microsoft 365 Business Voice value proposition and pricing
- Partner Opportunity
- Building and expanding Teamwork practice with Business Voice
- Resources and call to action

RESOURCES IN THE GUIDE

After it is downloaded and extracted, the practice guide is divided into three folders:

LEARN

The learn folder containers a FAQ focused on business voice, as well as specific guidance for partners on building their practice.

This folder also contains a set of **Training workshop content** that they can use to execute sales and technical training events.

MARKET

The market folder contains pre-built resources such as email templates, flyers, and day in the life infographics they can use for their marketing efforts.

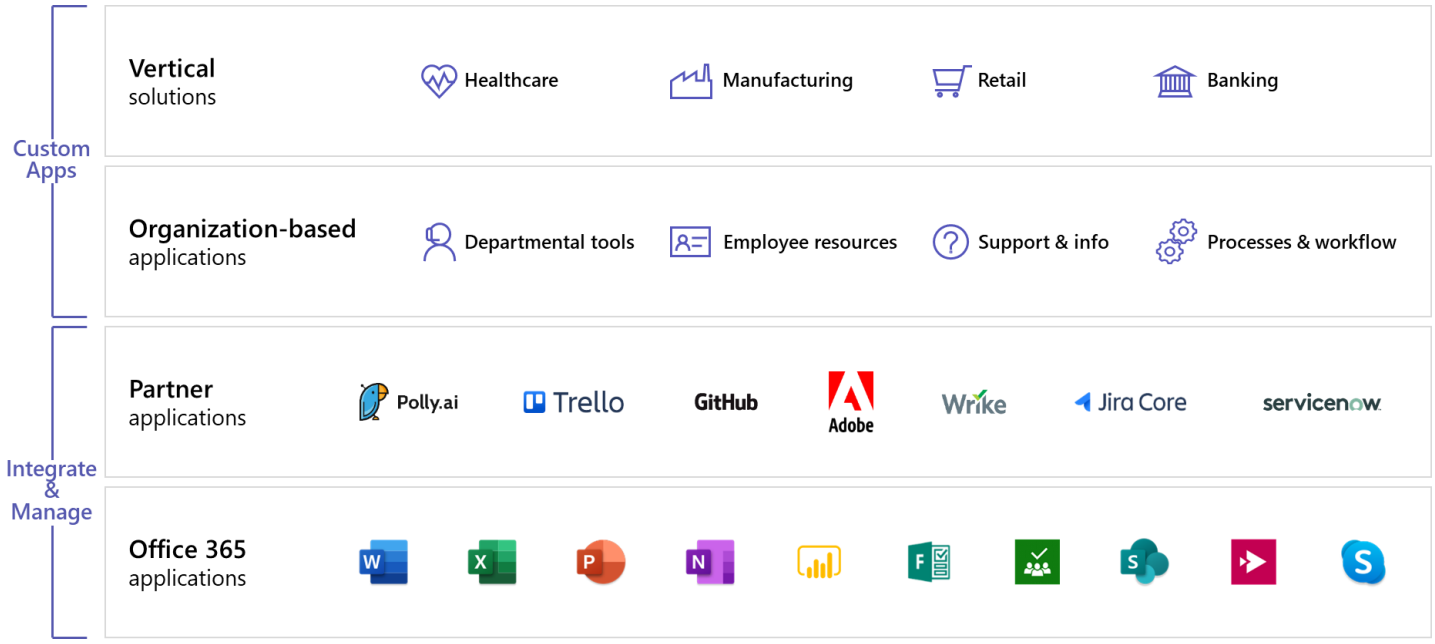
SELL

The sell folder contains pre-built resources for their sellers to use such as SOW templates, pitch decks, play cards, and even demo scripts for showcasing the product.

Developing Custom and ISV Solutions

Potential offerings for partners to build and implement a Teams practice.

Teams includes integrations with the Office 365 productivity suite and partner applications out of the box. The value-add of extending Teams comes from the customization's partners can build and deploy that allow them to reduce context switching and create conversation around content.



DECISION CRITERIA

When partners ask themselves if custom or ISV solutions development is right for their customers, there are questions they can ask themselves.

- **Does it solve a real problem?** Solutions should always have a measurable impact. This allows partners to define success for their customers.
- **How often will it be used?** Solutions that are not going to be used often or that are hard to use drive engagement and adoption of Teams in the wrong direction.
- **How widely will it be used?** The more users that consume theirr solution, the more users they can drive other services for through cross sell and upsell.
- **How does it improve business outcomes?** Beyond delivering solutions that solve real problems, solutions will a measurable return on investment (ROI) for a problem and will lasting impact.

APP SCENARIOS ACROSS INDUSTRY VERTICALS AND HORIZONTALS

With a rich extensibility model, the business solution opportunities around Teams and teamwork are endless. Partners can envision with their customers, understand their business processes and teamwork needs, and connect Teams to the tools and services they use every day to help them fully realize the value of Teams.

INDUSTRY VERTICAL	APP SCENARIOS
Retail and consumer goods	Supply chain real time collaboration Shift, pricing, and inventory management
Healthcare	Patient care coordination Telemedicine
Airlines / Transportation	Flight / route crew communication hub Local crew shift management
Mining, Oil, and Gas	New location development Daily quality monitoring and analysis
Government	Emergency/disaster response and recovery Citizen service: permitting and licensing
Financial Services	Proposal Manager for commercial banking Content sharing with compliance
Manufacturing	Key accounts inventory, logistics Change order services
Power and Utilities	Field service real time remote assist Billing and customer management
Real Estate and Construction	Leasing office tenant management Real estate customer engagement

Looking horizontally, here are some common personas or areas of the business and app scenarios they may find within their customers:

FIRSTLINE WORKERS	MARKETING	HR	PROJECT MANAGMENT	SERVICE DESK
Shift management Remote worker task management	Brand partnership hub Industry event planning Marketing hub	Recruiting tool New hire onboarding and support tools	Billable hours management Client engagement hub	Self-service knowledge base Customer service desk Procurement center service

Application Modernization

There is a three-step process to follow when looking to modernize applications for a customer. Following this step will help identify those areas where an organization can benefit from a custom Teams solution for application modernization.

EVALUATE THE CUSTOMER OPPORTUNITY

The first step of any custom teamwork solution should be to evaluate the opportunity. Make sure they are solving a specific problem that will improve a customer's day-to-day operations.

- **LoB, third party app integration** – What line of business (LoB) systems is the customer using? What third party apps do they use? Is there an opportunity here to centralize employee work into Teams? This could be integration with CRM/ERP, or maybe some other third-party service integration. Other modernization opportunities could include embedding other business data into teams or a service integration in a specific vertical.
- **Secured & compliance communication** – In every organization, communication needs to happen between employees. This can take many forms and span a multitude of products, which can lead to insecure and non-compliant communications, especially when it comes to healthcare and legal. As Teams is integrated into Office 365, it gives them a communication platform that is secure and compliant, but also tightly integrated with other secure, compliant platforms for storing files, sending messages, and collaborating with other employees.
- **Business process & workflow automation** – Every company has business processes and workflows it must follow. With the integration of PowerApps and Flow into Teams, this enables a perfect opportunity for centralizing those process and workflows in Teams. Look for modernization opportunities within an organization that can be improved with these tools within Office 365 and Teams.
- **Knowledge management solutions** – A fourth opportunity for modernization is the knowledge management space. SharePoint gives organizations a location to store files within a tab in Teams. This could be documents for HR or new employee onboarding resources. Evaluate opportunities to bring this knowledge into Teams using SharePoint, OneNote, or other tabs within a Team.

ENROLL IN TEAMWORK SOLUTIONS ACCELERATOR

Customers are looking for solutions that can meet their unique teamwork needs. The Teamwork Solutions Accelerator initiative provides deep technical training and support to help them build custom solutions on Teams platform. Eligible partners receive access to an exclusive Yammer community, technical previews, and support, along with case study and promotional opportunities. Partners with a specific custom solution to build for customers can leverage this program to create these solutions. There are some criteria partners must meet to be accepted.

ENGAGE CUSTOMERS WITH A TEAMWORK WORKSHOP

Finally, engage with customers using a Teamwork Assessment to discover business needs that can be solved by the solution and drive the intent to purchase and/or deploy Microsoft 365 teamwork services they have to offer. The goal is to drive the customer interest to a proposal in three days. Microsoft provides partners with downloadable assessment materials. The Teamwork Assessment enables engagement with business and IT leaders to identify customer use cases, create strategic alignment, and define actionable roadmaps that deliver transformational business value. The Business Decision Maker Workshop drives customer intent through "art of the possible" demonstrations and identifying customer-prioritized use cases. Planning workshops deliver deep dive guidance across three Teamwork priority areas—education and user adoption, voice calling and virtual meetings, and customer and ISV solutions.

Build a Teams Custom Solutions Practice

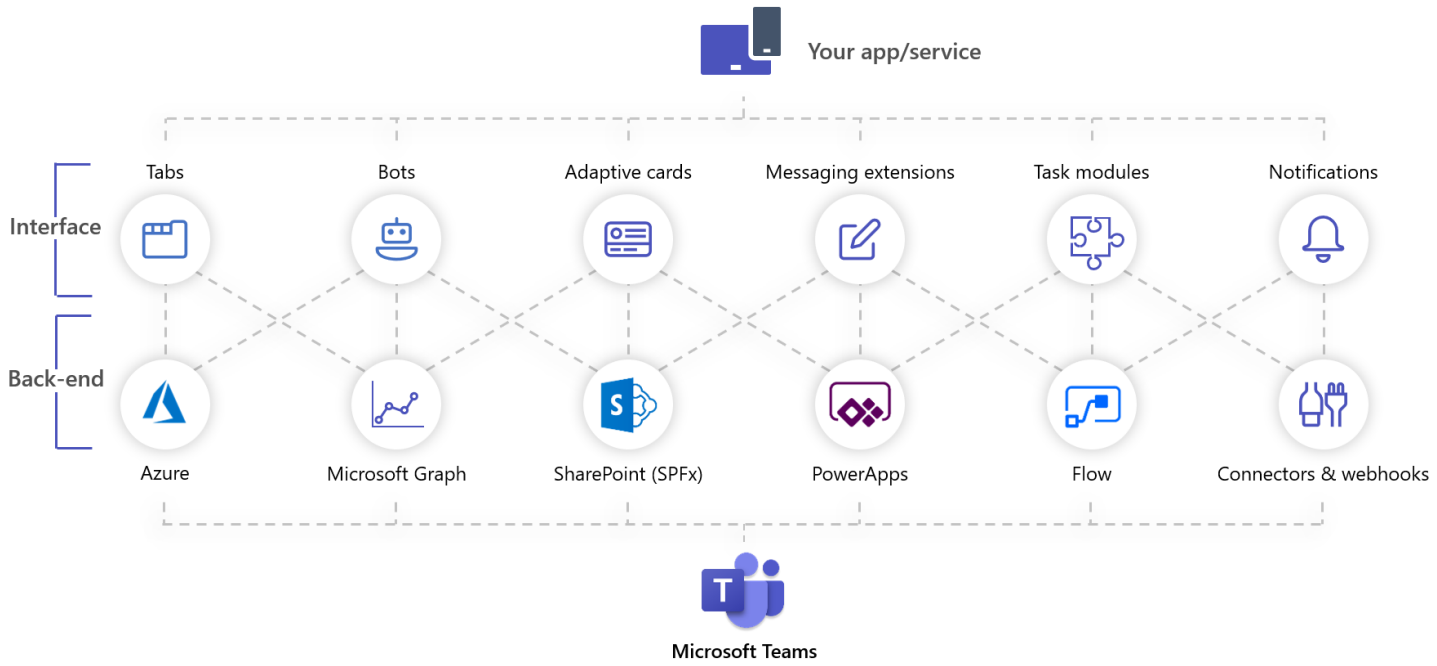
Help customers realize the full value of Teams with a custom solution that integrates workflows and business processes in a single hub for teamwork, increasing productivity across the organization. Follow the 'Building a Microsoft Teams Custom Solutions Practice' guide to build a practice, gain insights into current market landscape, understand partner opportunity and how to build a custom solutions practice. In addition, learn how to conduct a Solution Envisioning Workshop with easy to follow step by step instructions and then create an offer based on a solution envisioned, designed and built for customers.

RESOURCES

- Workshop Guide
- Building a Microsoft Teams Custom Solutions Practice
- "How-to" webinar and guidebook on building apps for Teams. Find step-by-step guidance for how to envision, design, build, and publish an app—as well as links to in-depth information on all of these topics.
- Advanced Teams Solution Development course – a series of virtual instructor-led trainings between 1 and 2 hours each—which introduces the skills required for success in developing custom applications for Teams.

Teamwork Extensibility

Teams has plenty of functionality right out of the box that can be leveraged without the need to extend teams any further. However, one thing partners can get big wins from is the extensibility of Teams.



This could be in automation business process or creating rich business applications that extend teams and take it to the next level.

To extend Teams, an app can be created—a package of capabilities that the developer hosts and that can be distributed through Teams or installed by individual teams.

BUSINESS APPLICATION

The Teams developer platform makes it easy for developers to integrate their own line-of-business apps and services within Teams to add value, improve productivity, make decisions faster, provide focus (by reducing context switching), and create collaboration around existing content and workflows.

Teams line-of-business apps integrate the custom apps and services that an organization developed or created new capabilities to meet the needs of users that can't be met via commonly available, off-the-shelf software or public Teams apps.

Teams provides a rich collaborative environment to drive development in addition to a set of developer platform features to use to develop Teams line-of-business apps, which can then be rolled out and managed for an enterprise through Teams.

What's in it for a partner?

Create enterprise-specific solutions for customers by integrating with existing internal services and processes. Publish a Teams line-of-business app to their private app source and follow up by using dedicated channels for feedback and resolving issues.

When an existing app or service is fully integrated into Teams, complexity will be reduced in both development

and testing by removing legacy browser compatibility requirements. This benefit is realized when Teams becomes the entry point for apps.

Does this support a customer organization's digital transformation strategy?

Yes, Teams customers are engaging on their digital transformation journeys to transform the way that they do business. A key component of any business consists of the conversations that they routinely have as part of their daily work. The modern Teams workplace is encouraging people to consider these conversations and explore how they can be turned into actions by bringing internal and external information into the hub of the conversation and using that information to make decisions in a more informed and timely manner. There are over 200 "first-party" (created by Microsoft) and third-party Teams apps to use to enhance these conversations, but sometimes there's a need for a custom app to leverage internal systems and data.

Teams line-of-business apps give partners the opportunity to reimagine common, repetitive collaborative processes in which people must get information from multiple systems before they can come to a conclusion, a conclusion that often needs to be discussed before it's acted on.

Here are two approaches that can be delivered through Teams line-of-business apps. (These are just examples; let their imagination and business needs guide investigations!)

ACTING ON INTELLIGENT INSIGHTS

People are provided with insights from several internal and external sources via bots and connectors in a Teams channel or conversation, and then they discuss the most appropriate action and initiate a follow-up.

Consider several sources where these insights might come from:

- Microsoft Cognitive Services
- Platform metadata (Azure)
- Microsoft Graph (user interaction, usage, etc.)
- Connection from external and internal systems

What actions could be taken then?

- Engage with humans (that is, have further conversation in the channel)
- Trigger predefined workflows (Microsoft Flow)
- Trigger Azure Automation events
- Pass control sentences to another bot to execute the outcomes

In the following example, a team uses Azure sentiment analysis services via the bot framework to inform them about changes in customer sentiment.

Example: The marketing team has an Instant Response channel with a bot that uses the social media sentiment analysis approach described in this article. The bot pings the Instant Response channel to alert the team when customers are unhappy. The team collaborates quickly to create a response, which is then posted on Twitter via a connector, a bot, or a flow that has an approval chain.

Turn conversations into actions

Imagine a second category of this type of conversational enhancement where Teams extensions are used to create and package a Teams app that executes standardized actions from regular meetings or common processes. Consider which internal processes in an organization would be enhanced if people were able to take direct action from within a conversation:

- Real-time incident response
- Sports events
- Crowd management
- Weekly triage meetings
- FAQ bot

Example: Imagine a sales meeting support bot: a salesperson pings the bot with the customer name, and the bot interacts with several internal customer systems on the back end and returns a simple summary with the top 10 "top of mind" items. These might include sales figures, key contacts, customer sentiment, key blockers, opportunities, ice-breaker topics for conversation from social media, or news events relevant to the customer.

My customer already has line-of-business apps, why should their organization invest here?

One great place to start is to consider how much application and context switching are users of the current custom apps forced to undertake. Changing focus from

one app to another takes time and can cause a person to lose focus on the task at hand.

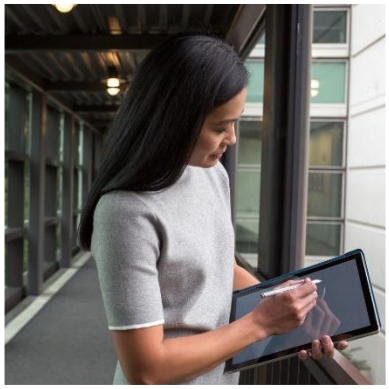
Another area to consider is the daily discussions related to standard business items such as invoices, leads, tickets, or open job positions. Bring these items into the Teams conversation via developer platform features so the conversation and the item are all in the same place.

Consider two possible approaches:

- If the current line-of-business apps have browser-based presentations, they can simply pin the pages in a channel, to give easy access to the apps that are part of a workflow and to drive conversation in Teams.
- If the current line-of-business apps are used to gather information or data that is then summarized, why not create a bot that can interface with each app and return the summarized data in a single response or card into the channel? This way, the data will be accessible where it's needed to support conversations, and to drive key decisions and next steps.

App Templates for Teams

App templates are production-ready apps for Teams that are community driven, open-source, and available on GitHub.



RESOURCES:

➔ App templates

Each app template contains detailed instructions for deploying and installing apps for customers, providing a ready-to-use app that they can install and begin using immediately. The complete source code is available as well, so they can explore it in detail, or fork the code and alter it to meet a customer's specific needs.

There are several key benefits of using app templates:

- Plug and play experience: All app templates include deployments scripts that will allow them to host all necessary services in Microsoft Azure. No coding is required to deploy the apps.
- Production-ready code: The app templates conform to recommended best practices around security and infrastructure, and all community submitted changes to them are reviewed to ensure continued conformance.
- Customizable and extensible: While all app templates are ready to deploy as they are, Microsoft provides the entire code base and deployment scripts so that they can easily customize or extend them to fit a customer's unique needs.
- Detailed documentation & support: All app templates are accompanied by end-to-end documentation on solution architecture, deployment, and configuration steps.

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Industry Solution Accelerators

Microsoft has developed open source projects for ready-made industry solutions. Just like app templates, these are customizable and extensible.

RESOURCES:

- Huddle
- Hand Hygiene Tracking Starter Solution
- Proposal Manager

Partners have access to the entire code base and deployment scripts and because they are hosted on GitHub, they can be even be forked and commercialized under the MIT license.

These solutions leverage Teams, Office 365 apps, PowerApps, Flow, Power BI, and even Azure services. Even if they do not deploy the apps for customers, they are excellent examples of what can be done by bringing multiple services together through a Teams app.

HEALTHCARE SOLUTIONS

Huddle is a process improvement solution that uses Teams, Bots, Microsoft Planner, and Power BI to drive more effective huddle teams.

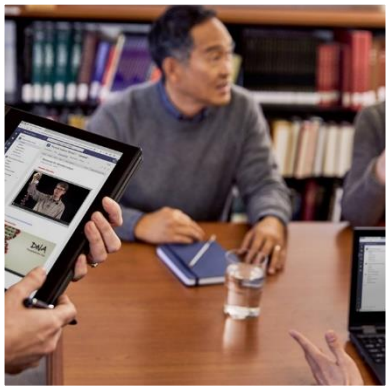
The Hand Hygiene Tracking Starter Solution showcases Teams, PowerApps, Flow, Power BI, and Azure SQL.

FINANCIAL SOLUTIONS

Proposal Manager is a solution built on the Microsoft 365 platform that uses Teams, Azure web app, Excel, Word, and Microsoft Dynamics to show what can be done to implement a streamlined corporate lending loan origination process.

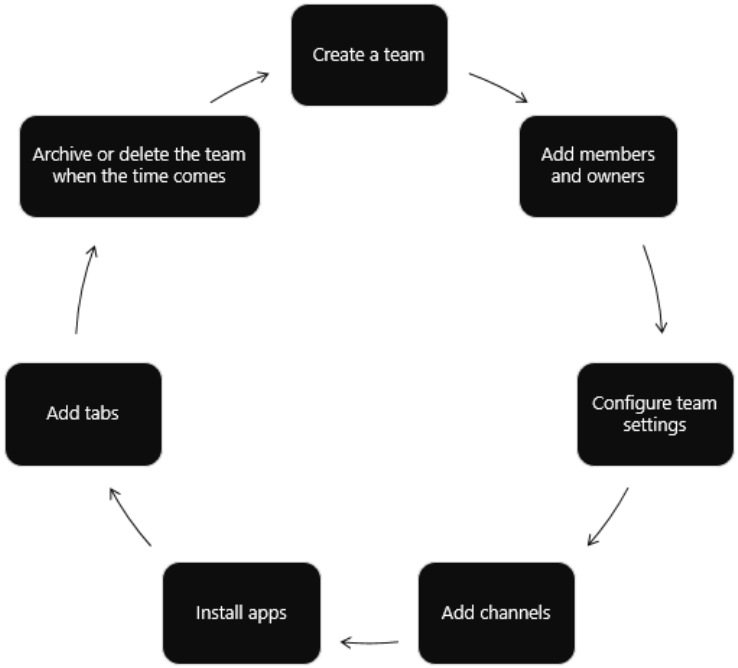
Teams and the Graph API

Integrate existing or new applications with Teams using the Microsoft Graph API.



RESOURCES:

- Microsoft Teams API Overview
- Authentication and Authorization Basics
- Microsoft Graph Permissions



EXAMPLE INTEGRATION – AUTOMATE TEAM LIFECYCLES

Use Microsoft Graph to create a new virtual team when a new business issue arises, add the right people to the team, and configure the team with channels, tabs, and apps. If they want to get the new team together to discuss the business issue,

MICROSOFT GRAPH PERMISSIONS

For their app to access data in Microsoft Graph, the user or administrator must grant it the correct permissions via a consent process. This topic lists the permissions associated with each major set of Microsoft Graph APIs. It also provides guidance about how to use the permissions.

Extending Teams

An app built on the Teams platform extends the Teams client (web, mobile, and desktop) with web services a partner can host.

TEAMS, CHANNELS AND GROUP CHATS

The app will have access to APIs to get information about members in a conversation, channels in a team and meta data about the team or conversion.

Extensibility opportunities include Conversational Bots, Configurable Tabs, and Webhooks and Connectors.

MESSAGES

With a messaging extension action command, their app can allow users to invoke their app's API from a message, sending the contents of the message to their app for processing or action. Their app can respond by presenting a form (a task module) to the user to collect more information, sending a reply to the original message, or sending a message directly to the user.

There are three ways their app can help users create better messages

- Messaging Extension - search commands allowing them to quickly search an external system, preview the results of that search, then insert the result into the chat as a rich card.
- Messaging Extension - link unfurling allows their app to monitor web domains they're interested in. When a URL containing that domain is pasted into the compose message box, their app's API will be invoked, allowing them to add a rich card to the message with additional information about the item being linked to.
- Messaging Extension - action commands present their user with a modal form (a task module), submit the results of the form to their app, then either insert a message into the conversation directly, or create part of a message the user can edit before sending to the conversation.

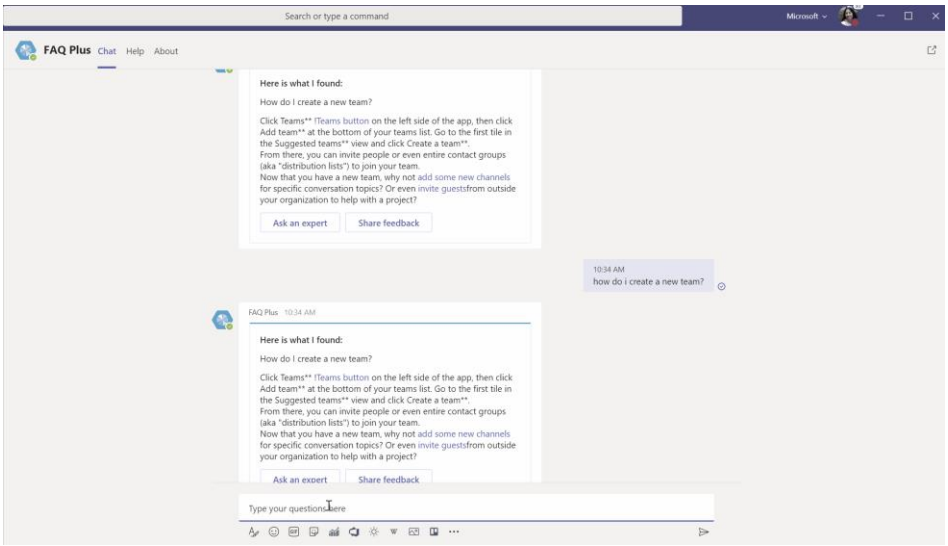
RESOURCES

- ➔ Webinar: Learn How to Build Microsoft Teams Apps
- ➔ Guidebook: Building Apps for Microsoft Teams
- ➔ Deep Dive on Teams Extensibility
- ➔ Conversational Bots
- ➔ Configurable Tabs
- ➔ Webhooks and Connectors
- ➔ Messaging Extensions

Building Conversational Bots

Conversational bots allow users to interact with their web service through text, interactive cards, and task modules.

They are incredibly flexible - a conversational bot can be everything from a few simple commands, to a complex artificial intelligence and natural language processing powered virtual assistants. They can be one aspect of a larger application, or completely stand on their own.



PREPARE THEIR DEVELOPMENT ENVIRONMENT

The first step is to make sure that custom app uploading is enabled for the Office 365 subscription they want to build the app in. If they need a dedicated tenant, they can sign up for the Office 365 developer program.

CREATE THEIR WEB SERVICE

The heart of their bot is their web service. It will define a single route, typically /api/messages, on which to receive all requests. If they're getting started from scratch, they have a few options to choose from.

- Start with quick start tutorials
- Bot samples: C#/dotnet or JavaScript
- Create from scratch by leveraging the bot framework SDK for their language

RESOURCES:

- ➔ What are Conversational Bots?
- ➔ Create a Bot for Microsoft Teams
- ➔ Quick Start Tutorials
- ➔ C# Bot Samples
- ➔ JavaScript Bot Samples
- ➔ Bot framework SDK

Building Configurable Tabs

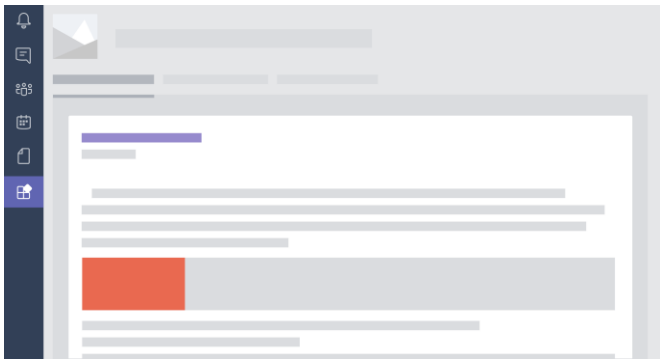
Tabs are Teams-aware webpages embedded in Teams. They can be added as part of a channel inside a team, a group chat or as a personal app for an individual user.

The following are some of the common user scenarios of why they would extend their app with a configurable Tab.

- **Scenario:** Bring an existing web-based resource inside Teams.
- **Example:** They create a personal tab in their Teams app that presents an informational corporate website to users.
- **Scenario:** Add support pages to a Teams bot or messaging extension.
- **Example:** They create personal tabs that provide about and help webpage content to users.
- **Scenario:** Provide access to items that their users interact with regularly for cooperative dialogue and collaboration.
- **Example:** They create a channel/group tab with deep linking to individual items.

Whether they present their tab within the personal or channel/group scope, it will consist of one or more HTML pages that they host. Tabs with a personal scope consist of a single content page, while tabs with a channel or group scope will require a configuration page that sets the URL of the content page based on user input at the time of installation. There are three types of tab pages:

1. Content page, the page displayed in a tab.
2. Configuration page, the page used to set or update the content page URL, and add it to a channel/group tab.
3. Removal page, an optional page that is displayed when a channel/group tab is removed.



RESOURCES:

- Add tabs to your App
- Designing your Tabs
- Create a content page
- Create a configuration page
- Create a removal page
- Authentication flow for Tabs

Task Modules and Cards

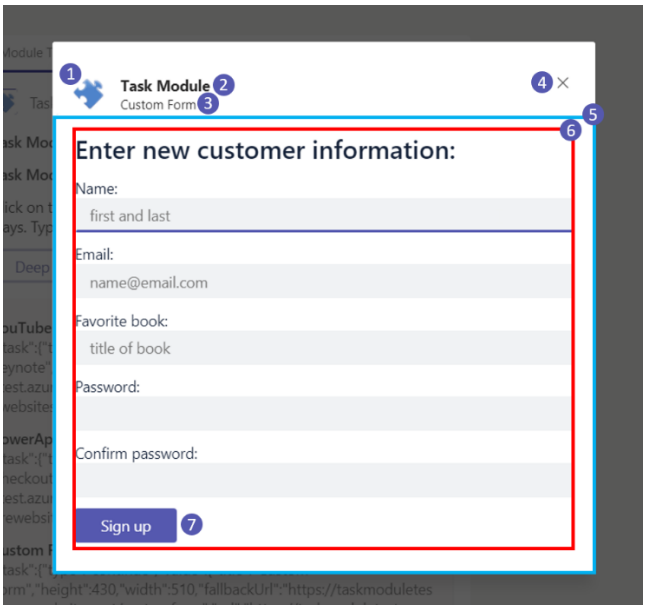
Task modules allow partners to create modal popup experiences in their Teams application. A card is a user-interface (UI) container for short or related pieces of information. Cards can have multiple properties and attachments.

There are several different card types to choose from when building their app:

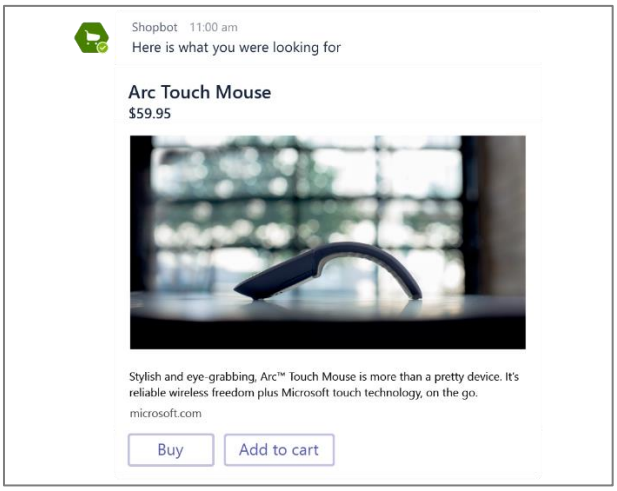
Card Type	Description
Adaptive Card	Highly customizable card that can contain any combination of text, speech, images, buttons and input fields.
Hero Card	Typically contains a single large image, one or more buttons, and a small amount of text.
List Card	A scrolling list of items.
Office 365 Connector Card	Flexible layout with multiple sections, fields, images and actions.
Receipt Card	Provides a receipt to the user.
Signin Card	Enables a bot to request that a user sign in.
Thumbnail Card	Typically contains a single thumbnail image, some short text, and one or more buttons.
Card Collections	Used to return multiple items in a single response

EXAMPLE TASK MODULE

Here's what a task module looks like when invoked from a bot (color rectangles and numbered circles for reference only):



EXAMPLE CARD



Webhooks and Connectors

Webhooks and connectors are a simple way to connect their web services to channels and teams inside Teams.

Create a web hook to allow their users to send text messages from a channel to their web services. Once configured, users will be able to @mention their outgoing web hook and send a message to their service.

Outgoing webhooks are configured on a per-team basis, cannot be included as part of a normal Teams app. They are best suited for completing team-specific workloads that don't require large amounts of information to be collected or exchanged.

CONNECTORS

Use connectors to allow users to subscribe to receive notifications and messages from their webservices via an HTTP endpoint for their service to post messages to.

Incoming webhooks

Incoming web hooks are a quick and easy way to connect a channel to their service and are best used for scenarios that are unique to a particular team. For example, they could create an incoming webhook in their DevOps channel and configure their build, deployment and monitoring services to send alerts.

Create an incoming webhook

Office 365 Connectors

Office 365 Connectors allow partners to create a custom configuration page for their incoming webhook, and package them as part of a Teams app. They can then distribute that app more broadly, or even to our app store. They send messages primarily using Office 365 Connector cards and have the ability to add a limited set of card actions to them as well. A good example of this is a weather connector that allows users to choose a location and time of day to receive updates about tomorrow's weather. They are configured on a channel level but are installed at a team level.

Create an Office 365 Connector

RESOURCES:

- What are Webhooks and Connectors
- Create an incoming webhook
- Create an outgoing webhook
- Create an Office 365 Connector

Application Development Resources

Now that they know about the extensibility points and opportunities for building custom solutions on Teams, let's look at the process of creating and publishing their app.

DESIGN THEIR APP

Some practical guidance is to start with understanding their user case and be clear on what problem they're trying to solve. Plan early for requirements such as authentication and think about what their onboarding experience will be like.

For UI elements, ensure they use the approved neutral pallet for backgrounds, notifications, text and buttons to ensure their app feels at home in teams.

BUILD AND TEST THEIR APP

App Studio makes it easy to start creating or integrating their own Teams apps, whether they develop custom apps for their enterprise or SaaS applications for teams around the world by streamlining the creation of the manifest and package for their app and providing useful tools like the Card Editor and a React control library.

Read the guidance for creating an app package for their Microsoft Teams app. This includes detailed information for creating a manifest for their app and details on icon requirements.

There are three ways they can debug their application while in development: Purely local, locally hosted, in Teams, or hosted in the cloud. Read this guidance for more details.

DEPLOY AND PUBLISH THEIR APP

Read the guidance here to learn how to upload an app package to teams. This guidance also provides detailed guidance on how to publish their app through the Commercial Marketplace.

AUTHENTICATION IN TEAMS APPS

For their app to access user information protected by Azure Active Directory, as well as access data from other services like Facebook and Twitter, their app will have to establish a trusted connection with those providers. If their app needs to use Microsoft Graph APIs in the user scope, they'll also need to authenticate the user to retrieve the appropriate authentication tokens.

Read more about Authentication in Teams

RESOURCES:

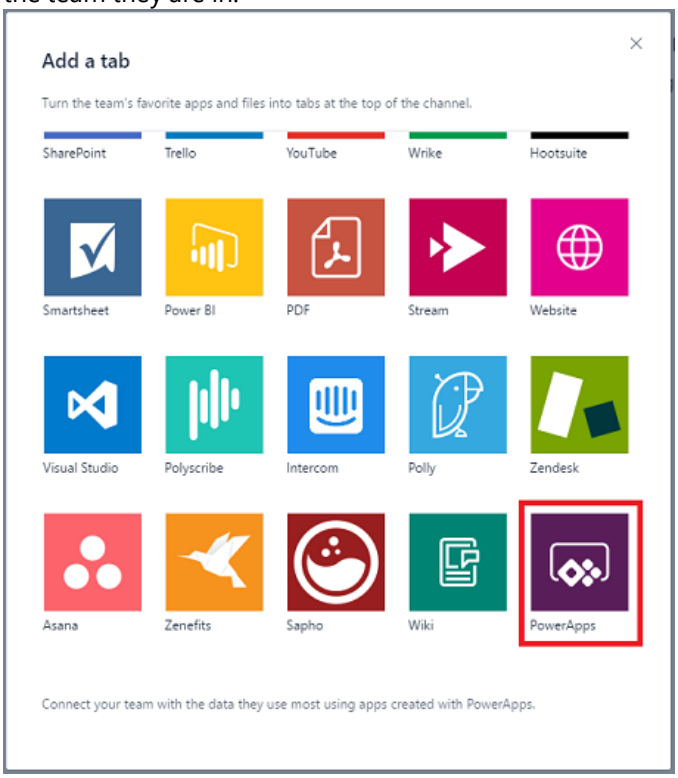
- Understand use case
- Designing UI Components
- App Studio
- Creating an App Package
- Debugging an App
- Upload an App Package to Teams
- Authentication in Teams

Power Platform Including Power Apps & Flow

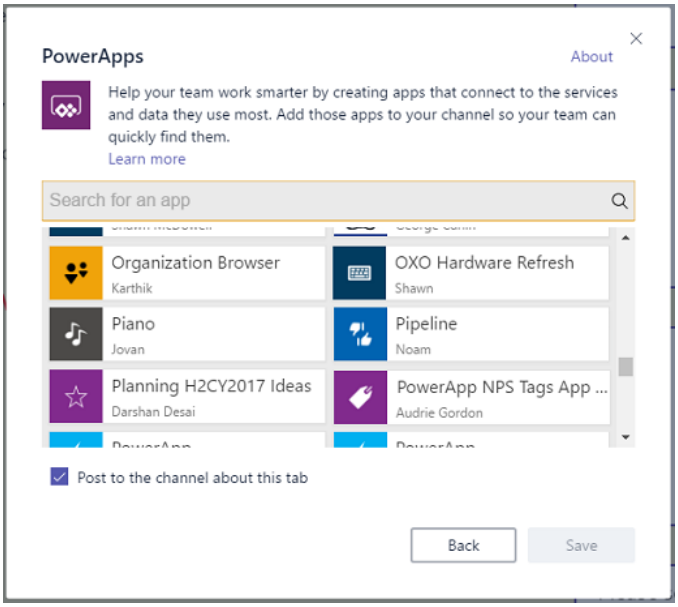
Partners can leverage the Power Platform in Office 365 to quickly build low-code apps, process automation, and reporting.

POWERAPPS

PowerApps can be embedded directly into Teams. This enables creating rich applications in PowerApps (or apps customers have previously built) and bringing them into Teams to further enable a singular place to completely work. To add a PowerApps to Teams, users can select + to add any app to any of team channels or conversations in the team they are in.



Teams will show all the apps available to the user. A user can narrow down the app list by searching for app name, author or environment. They can then choose the app that they want to add to their channel:

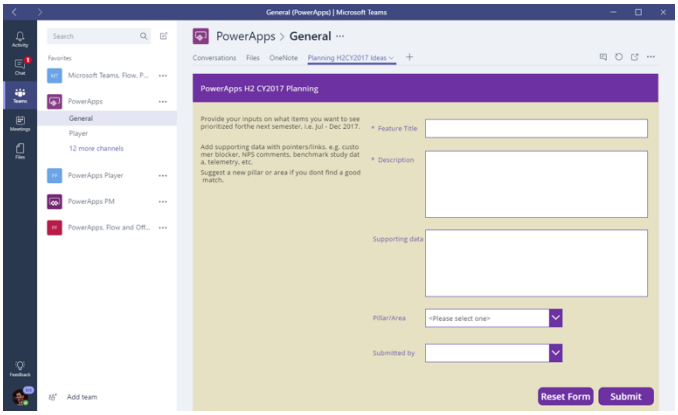


The app appears as a tile under **Tabs for their team**. An admin can upload the app, so it shows up for **all** teams in their tenant under the **All tabs section**. See Share an app in Microsoft Teams.

The app and the data sources will have to be shared with team members as this will not happen automatically. Learn about sharing an app in PowerApps.

That is all that needs to be done to have an app running within a team channel.

Here is an example of an idea's submission app running in a Team channel:



Microsoft

MICROSOFT FLOW

Not only can PowerApps be added directly to Teams, but provides Microsoft Flow integration in Teams as well. With this integration, right from within Teams, Flows can be created and managed, received and sent approvals can be reviewed, and flows launched with the Flow Bot. This provides endless opportunities when it comes to automating activities and tasks within Teams and well as providing updates to a Teams channel, again, keeping users productive by providing the relevant information to them directly within Teams.

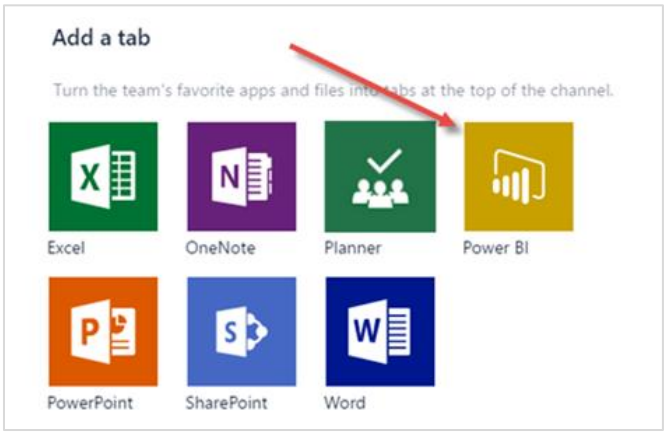
An example Flow it times might be a Chief Compliance Officer at the Legal department at Contoso Inc. This compliance officer wants to send out an approval request whenever a new document is uploaded to the Legal folder in a SharePoint document library. To inform approvers and ensure everyone has visibility into any feedback, notifications need to be sent to teammates on Teams. With the Flow integration in Teams, they can quickly create a flow to post this notification and boost the team's productivity

POWER BI

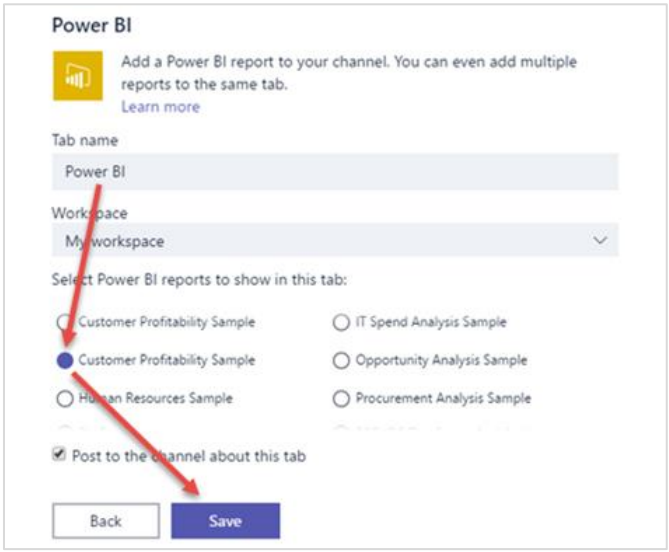
The last product in the Power Platform stack that integrates with Teams is Power BI. Groups in Power BI are built on Office 365 groups which as they know by now is also what drives Teams. So, they can add and interact with Power BI groups as well in their Teams as they really are just the same Office 365 Group under the covers. As a partner, this provides an opportunity to include rich visuals and reports in Teams right alongside all the additional important information a user is accessing in Teams. This also empowers their customer to have conversations around reports with numbers they may not look correct. Once again, the integration with these additional Microsoft 365 services provides limitless opportunities for their customer which lead to limitless ways to provide value to them.

If a user has permissions to in their Teams channel, they just tap the + sign, then add Power BI as a tab in the channel.

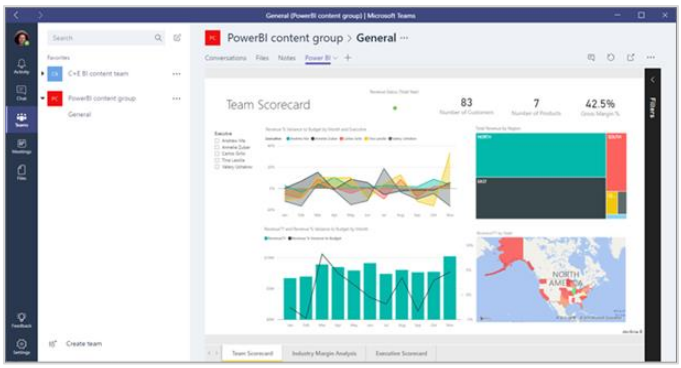
Power BI provides customers with an effective way to share dashboards, reports, and datasets with coworkers. Read more about groups in Power BI.



Teams automatically detects all the reports in the Power BI groups and in My Workspace. The user can choose which ones to show in the Power BI tab in the channel.



Now the Power BI report(s) is graphically displayed in the Teams channel.

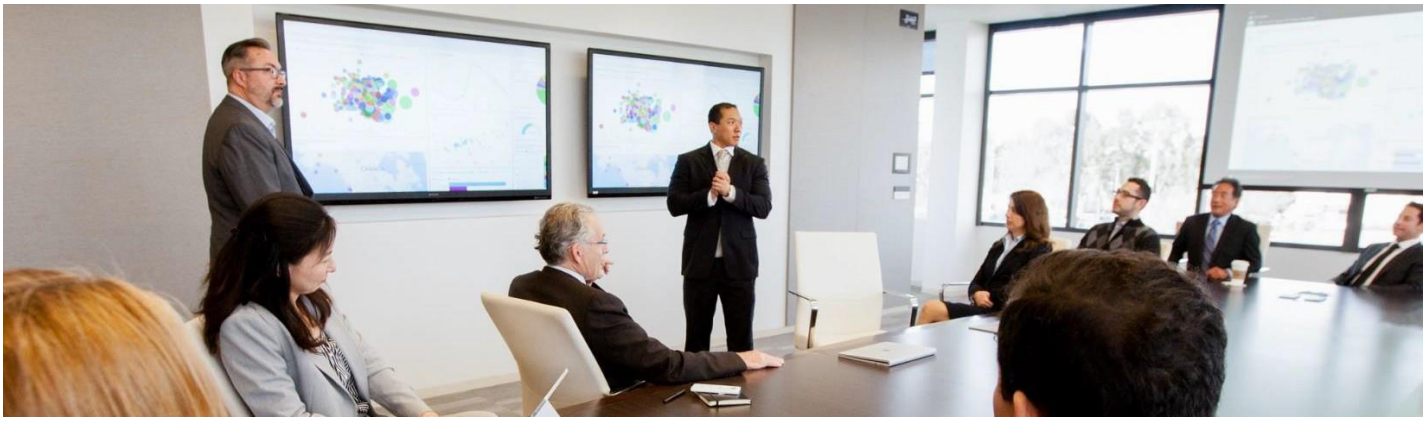


Microsoft
Partner
Network

Hire & Train

Microsoft Teams

aka.ms/practiceplaybooks



Executive Summary

In the previous section, we reviewed the various services offerings their organization can pursue to set up, then build their Teams practice. Now that we've identified some of the recommended avenues of success, they may be wondering how to build and train their team.

First, we'll help them define the optimal members of their team and the skills they should bring to the table. If they need to hire to fill gaps, we'll provide them with guidance, on job descriptions, and factors they should consider when reviewing a candidate's skillset.

It is the critical that all Teams practice resources are trained and then continue to receive ongoing training. We have provided details on the specific Microsoft certifications their technical resources should be working towards, both for their own professional development, and to earn their organization Microsoft Partner Network competencies.

Top 5 things to do

While crafting a game plan to build a team, make sure to nail down these 5 tasks before moving to the next section.

- ☑ Define the members and roles required
- ☑ Identify capability and skills gaps
- ☑ Decide which skills to hire and train
- ☑ Hire to fill gaps in the team
- ☑ Train and certify everyone

Create a Hiring Plan

Human resources are a critical asset to any services-based practice. Starting a new practice requires partners to start with an evaluation of their existing team members (if any) and then make the decision of whether to hire new employees or bring their existing team up to speed.

The following sections describe the recommended resources across sales, technical and support functions that they will likely need. In many practices that are just getting started they may not be able to fill all roles with individual professionals. In this situation one person will likely be required to fulfill the duties of multiple roles.

Partner Skillsets

Referrals and LinkedIn are top sources for identifying skilled labor. Once a candidate is identified, work history, cultural fit, and years of experience become the important considerations.

Roles associated with cloud practices typically have at least 3 years of experience. Furthermore, most companies engage in at least annual ongoing staff learning efforts such as conferences/events and online training. A median of 8.5% of technical resource time is spent on training.

RESOURCES

- Recruit, Hire, Onboard and Retain Talent Playbook
- Microsoft Digital Transformation eBook 3: Empower Employees

Hire, Build, and Train Teams

What roles do partners need to staff?

The typical Teams engagement journey can be divided into Customer Acquisition, Solution Discovery, Solution Delivery, and finally Solution Maintenance and Support. There are various roles aligned with these phases that are critical to their practice. In smaller practices, two or more of the roles can be performed by one person. However, it is important to ensure that all the appropriate skillsets are present in their staff.

MARKETING ROLES

Marketing is a critical part of a successful Teams practice. Partners who invest in marketing resources succeed to a far greater degree than those who don't. The Marketing team is responsible for defining and bringing the solution and services to market, as well as developing lead generation activities to create a sales pipeline. The following key roles should be considered for their Teams practice.

The **Marketing Leader** is responsible for driving marketing strategy, tactics, campaigns and programs to produce top-line results that raise brand awareness, recognition, and loyalty for their company and the Teams offerings. This position is tasked with demand generation and marketing funnel optimization using brand, advertising, creative, digital, field and channel marketing. The Head of Marketing shapes and directs the company's go-to-market vision and works cross functionally to ensure the right mix of offerings, positioning and price. This position is also responsible for planning, organizing, staffing, training, and managing all marketing functions to achieve the sales, growth, profits, and visibility objectives while ensuring a consistent marketing message and positioning consistent with the corporate direction.

The **Digital Marketing Manager** plays a major role in enhancing brand awareness within the digital spaces as well as driving online traffic to their website and acquiring leads/customers. This position plans and executes all digital marketing, including SEO/SEM, marketing database, email, mobile, social media and display advertising campaigns. It is also responsible for improving the usability, design, content, ranking and conversion of the company website. They must remain up to-date with the latest trends and best practices in online marketing, analytics and measurement.

The **Content Marketer** is pivotal to generating inbound leads through writing authoritative, thought-leadership content. This position is responsible for content creation and delivery, tracking metrics that influence content strategy and collaborating with both technical and subject matter specialists to produce relevant content that meets the needs of their audiences. They must be an exemplary writer who can communicate their company's tone and mission with clean, concise, well-polished copy and produce blogs, eBooks, whitepapers, infographics, guides, articles and even audio and video content. This position will also know how to blog and communicate effectively to an online audience.

The **Graphic Designer** is responsible for the creation, maintenance and updating of visual marketing assets in both print and digital media to support their brand and marketing goals. This position manages all phases of the design process including concepting, mock-up production, review and integration, and finished product. The graphic designer is responsible for solving problems when it comes to design aesthetic for presentations, collateral materials, event and trade show graphics, website design, blogs, webinars, demos, emails and digital campaigns, social media assets and more.

SALES ROLES

They have a vision for developing the next great cloud solution or building a great Teams based provider business, but even the best products and ideas need a sales strategy to gain maximum market traction. Consider hiring for the following sales positions for broad reach.

The **Sales Leader** applies their expertise in selling strategies and methodologies, and execution to achieve defined revenue objectives. This role is responsible for creating, leading and directing a high-performance sales team that achieves revenue, profitability and MRR targets while consistently delivering customer value. The Sales Leader manages the hiring, onboarding and compensation plans of new and existing sales team members and develops sales strategies that both accelerate new customer acquisition and deepen existing customers relationships. The Sales Leader also works closely with corporate marketing to ensure a seamless end-to-end customer acquisition business process. A bachelor's degree with a business concentration is required. An MBA is preferred for this role, along with seven to ten years of experience in a sales leadership role.

The **Account Executive** (AE) is responsible for proactively identifying target accounts and acquiring new customers. The role accurately qualifies both self- and marketing-generated leads, defines deal strategy, manages and guides all resources supporting the sales pursuit, manages sales costs and accurately forecasts revenue and close dates. The Account Executive establishes executive relationships and actively works with prospects to develop quantifiable project business cases. This role effectively informs, guides and manages a broader sales pursuit team comprised of pre-sales technical resources, delivery team members and senior leaders.

The **Business Development Representative** (BDR) reports to the Sales Leader and is responsible for the full sales lifecycle, from qualification through closure and renewal. The BDR focuses primarily on acquiring new cloud customers within designated industry verticals, leveraging a repeatable remote sales motion. This role also works closely with corporate marketing resources to execute demand generation programs and continuously improve and refine sales assets and artefacts.

The **Customer Development Representative** (CDR) reports to the Sales Leader and is responsible for upselling and cross-selling new cloud solutions and services to existing customers, as well as all contract renewals. The CDR works closely with marketing to introduce and sell Next-Best- Offer (NBO) "waves" within a designated industry vertical, through an accelerated remote sales motion. This role also works closely with the support organization to assist in resolving outstanding issues with strategic accounts,

The **Customer Success Manager** is responsible for driving consumption of cloud services and identifying new opportunities for customers to leverage their Teams investment and the broader Microsoft 365 platform to derive business value. The CSM orchestrates and drives a proactive selling motion into the existing client base. Primary responsibilities include developing long-term relationships within a portfolio of strategic clients, aligning customer business needs with technology solutions and helping clients bridge the IT/business gap.

SOLUTION DELIVERY

The **Pre-Sales Cloud Solution Engineer** supports the Account Executive, Business Development Representative and Customer Development Representative in driving their active sales pursuits. The PCSE reports to the Sales Leader and is responsible for facilitating both remote and onsite prospect discovery sessions, defining cloud solution fit and working with the delivery team to develop cloud solution recommendations, scope clarity, and accurate project services estimates. This role also works closely with corporate marketing and product management to identify new cloud solution development and packaged services opportunities (IP).

The **Functional Consultant** is at the core of configuring and implementing the system. This person is not necessarily an expert on industry processes but is deeply knowledgeable on the technical aspects of solution implementation. This role is typically trained from graduate or industry hires and experience ranges from 6 months to 10 years. The technical consultant requires deep Teams training and should be skilled at the subsequent lifecycle management required to ensure continued use of the service.

The **Solution Architect** sets the high-level direction and blueprint for implementation and is brought in at critical milestones. Typically, a solution architect is a former functional consultant who has since become more technical and tenured. This is a senior role that usually requires 10-20 years of implementation experience. They should also have an understanding of the entire Microsoft 365 stack of products.

The **Developer** is brought in if there are extensions to third-party systems to be made or coding is necessary. Developer skills are usually aligned to Teams development. This role typically requires at least 5 years of developer experience. An effective Teams developer knows how to modify systems, do code reviews, has a developer pedigree, and can also talk to clients.

The **Project Manager** ensures deadlines are met, manages the day-to-day workflows and roadmap. This role typically requires PMP certification and experience as a project manager.

The **Change Management Consultant** drives the people and process part of the digital transformation. Accelerated value comes from executive sponsorship, stakeholder engagement, alignment of technology with both the business strategy and processes, and readiness. This role typically has a background in business consulting or business process management, along with Change Management certification, from organizations such as Prosci®.

ONGOING SUPPORT

If their practice offers ongoing solution maintenance and support, they will need to invest in resources to support this function to ensure that their organization continues with strong ongoing support for existing customers.

The **User Support Specialist** assists customers who are having technical issues with their product, or who need help realizing the full benefit of their solution. They will likely help customers navigate the operational challenges of cloud computing. Thoroughly training them on both their product, and the infrastructure on which it is built, is paramount to their success, and ultimately, their customers' satisfaction. Qualifications include technical support experience and great communication and interpersonal skills (soft skills). Experience with cloud technologies is a major plus.

SCALING THEIR PROJECT TEAM

The size of their project team can vary widely based on the size of their customer and the complexity of their project. A typical team might comprise a project manager, architect, and between 1 and 3 additional consultants. These roles can scale up for larger projects by adding additional consultants or developers as required. Roles can also scale down for small projects by combining roles for the delivery of the solution. More complex projects will require role specialization – for example, if the scope covers IoT, AI or other integration services the project may call for verticalized technical roles.

Larger projects may also require additional roles than described here. For instance, customers that have a larger user base, or deployment in multiple countries or a heavy customized mobile application might need a Release Manager and different QA/Test professionals on the team.

Customer complexity will drive which skills need prioritization. Consider building their practice following a progressive complexity path. Start with basic projects (single geography, focus on one sales play), evolving to customers that require higher customizations, and then moving onto customers that need to redefine or build complex business processes from the ground up.

Customers add complexity with geographic coverage, and users from different geographies can impact solution performance and different mobile user requirements.

Start with one region/district geography before adding multiple regions/districts or countries. Technical skills requirements to successfully implement a multiple-country customers are higher than single-country implementations.

Another aspect to consider is the focus on functional/industry scope versus the technical scope. There are many partners in the ecosystem that focus only on supporting other partners on the technical configuration/implementation model. Based on that, keeping a strong functional team specialized on vertical industries while outsourcing the technical work is also a practice to be considered.

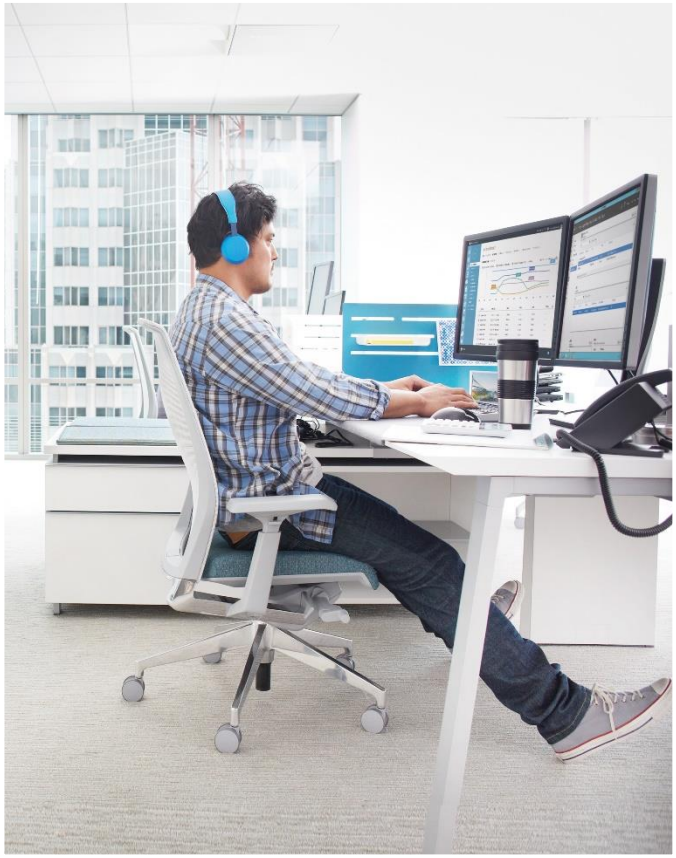
TECHNICAL LEADERSHIP ROLES

Consider the following technical management positions if their solution delivery effort will involve eight or more technical staff. In smaller teams, senior-level employees (e.g., lead consultant, lead architect) sometimes take on management duties along with their other responsibilities, removing the need for dedicated managers.

The **Chief Technical Officer** (CTO) manages technical readiness through identification of needs/requirements.

This role works with HR to understand best-fit career paths for their technical staff, sets standards for skills and certifications, and orchestrates the delivery of training to meet those standards. This role also manages internal tools such as Microsoft 365, Azure DevOps, testing tools, and 3rd party ISV approved applications.

The **Chief Operating Officer** (COO) owns the organizational structure and methodology for solution development and delivery. This role is also responsible for management and leadership training across the organization.



Recruiting Resources

Top 10 Sources to Find Skilled Labor and What to Look For

Sourcing skilled labor can be a challenge. In the Microsoft Hiring and Onboarding Playbook Study, referrals (63%), website (57%) and LinkedIn (56%) were reported as the top approaches for generating leads.

Top Candidate Lead Sources	Total (n=275)
Referrals from employees or partnerships	63%
Posting on website	57%
LinkedIn	56%
Social media	42%
Former employees	36%
University recruiting	36%
Local technical communities	35%
Recruit from competitors	23%
Meetups	16%
Recruitment agency	4%
Other	4%

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

Job Descriptions

The following tables provides detailed job descriptions they can utilize to hire the key technical resources. All technical skills, non-technical skills, certifications, and technologies listed are potential items a candidate should have, but no candidate will have all the items listed.

Sales Leader The Sales Leader applies their expertise in selling strategies and methodologies, strategic planning and execution to achieve defined revenue objectives. This role is responsible for creating, leading and directing a high-performance sales team that achieves revenue, profitability and MRR targets while consistently delivering customer value. The Sales Leader manages the hiring, onboarding and compensation plans of new and existing sales team members and develops sales strategies that both accelerate new customer acquisition and deepen existing customers relationships. The Sales Leader also works closely with corporate marketing to ensure a seamless end-to-end customer acquisition business process.	
• **Top Qualities:** Demonstrates strong motivational and leadership skills. Ability to think creatively. Deep understanding of sales best practices. • **Previous Roles:** VP Sales, Sales Manager. • **Certifications:** Defined / corporate sales methodology.	
Strategic Capabilities	• Define optimized selling motions that align with the Microsoft Teams and Microsoft 365 solution set and target market. • Understand the key business drivers within the focus vertical/industry. • Accurately forecast revenue and close dates. • Effectively motivate sales team members. • Collaborate with marketing and delivery leaders to execute comprehensive customer acquisition, retention and extension strategies. • Strong objection handling and closing skills. • Excellent negotiating skills
Execution Skills	• Develop plans and strategies to meet or exceed the company's revenue target. • Develop a scalable sales process and drive sales team compliance. • Determine and assign sales quotas, targets, and goals. • Support complex sales negotiations, attend sales presentations and help close strategic deals. • Directly manage large, high-profile customer accounts, (when appropriate). • Work collaboratively with marketing to develop lead and revenue generation programs and create high impact sales collateral. • Set targets, performance plans and objective for all sales team members. • Review sales team members performance, progress, and targets. • Coach sales professionals to drive continuous improvement. • Recruit, select, onboard, and train new sales professionals. • Create motivating compensation plans and incentives. • Monitor competitive and market activity. Provide feedback and recommendations to the executive team. • Ensure CRM system accurately reflects all customer and new business opportunities.

Technologies	• Working knowledge of the Microsoft cloud platform and Microsoft 365 (or Microsoft Teams) capabilities. • Feature / Function knowledge of relevant Microsoft 365 solution set. • Working understanding of competitive sales strategies.
Certifications	• Sales cycle methodology or equivalent training.
Experience Types/Qualities	• A bachelor's degree with a business concentration is required. An MBA is preferred. • Seven to 10 years of experience in a sales leadership role. • A minimum of four years of experience in a selling role and at least two years of experience working with sales technology, CRM systems and social media tools. • Verifiable track record of quota attainment. • Exceptional leadership, communication and interpersonal skills. • Strong leadership and decision-making capabilities.

Account Executive (AE)

The Account Executive is responsible for proactively identifying target accounts and acquiring new customers. The role accurately qualifies both self and marketing generated leads, defines deal strategy, manages and guides all resources supporting the sales pursuit, responsibly manages sales costs and accurately forecasts revenue and close dates. The Account Executive establishes executive relationships and actively works with prospects to develop quantifiable project business cases. This role effectively informs, guides and manages a broader sales pursuit team comprised of pre- sales technical resources, delivery team members and senior leaders.

- **Top Qualities:** Business acumen / understanding of key prospect business drivers and processes. Consistent quota achievement. Strong networking and lead generation.
- **Previous Roles:** Account Executive, Account Manager, Business Development, Pre-Sales Support, relevant role within the target vertical(s).
- **Certifications:** Defined / corporate sales methodology.

Strategic Capabilities	• Understand and execute a defined selling methodology: sales cycle planning and execution through closing to project team hand-off. • Understand the key business drivers within the focus vertical/industry. • Understand the internal and external pressures that affect customer priorities: • Understand enterprise fiscal and budgeting cycles, organization structures and capital prioritization processes. • Clearly communicate partner differentiation and potential business impact to all stakeholders influencing the decision process. • Develop and defend a business case. • Strong verbal (telephone), written and presentation communication skills. • Develop and execute sales strategies and defined sales plays. • Accurately forecast opportunity scope, revenue and close date. • Strong collaboration skills: work with internal pre-sales and delivery colleagues to execute a comprehensive win strategy. • Strong objection handling and sales closing skills. • Ability to determine win probability (knowing when to disengage). • Excellent negotiating skills

Execution Skills	• Develop a networking and prospecting plan across the defined industry or vertical, relevant groups and associations, industry influencers, and potential technology partners. • Plan and execute field-level marketing campaigns. • Understand and align with the internal corporate marketing message and marketing plan. • Conduct accurate due diligence (discovery) with technical, operational and strategic project stakeholders. • Align Microsoft Teams solution capabilities and partner IP features / functions with customer business challenges and desired business outcomes. • Create and facilitate effective business value discussions, presentations and proposals to prospect business leaders. • Clear understanding of common RFI/RFP selection processes (and disruptive techniques). • Co-develop customer business cases to support project approval and funding.
Technologies	• Working knowledge of the Microsoft cloud platform and Microsoft 365 (or Microsoft Teams) capabilities. • Feature / Function knowledge of relevant Microsoft Teams solution set.
Certifications	• Business degree or equivalent (MBA is desirable). • Sales cycle methodology or equivalent training. • Executive engagement/communications training. • Presentation delivery training.
Experience Types/Qualities	• 5+ years B2B sales experience (Account Executive, Business Development, Pre-Sales Support). • Verifiable track record of quota attainment and project success. • Previous focus industry/vertical expertise. • Strong leadership and decision-making capabilities.

Business Development Representative (BDR)

The Business Development Representative (BDR) reports to the Sales Leader and is responsible for the full sales lifecycle, from qualification through to closure, and renewal. The BDR focuses primarily on acquiring new cloud customers within designated industry verticals, leveraging a repeatable remote sales motion. This role also works closely with corporate marketing resources to execute demand generation programs and continuously improve and refine sales assets and artifacts.

- **Top Qualities:** Tenacious. Strong networking and lead generation. Consistent sales process compliance. Consistent quota achievement. Excellent communicator.
- **Previous Roles:** Business Development, Pre-Sales Support, Customer Support, relevant role within the focus industry/vertical.
- **Certifications:** Defined / corporate sales methodology, desktop productivity (with focus on CRM).

Strategic Capabilities	• Facilitate an accelerated remote selling motion: from lead qualification through to project team hand- off. • Understand the key business drivers and business processes within the focus vertical/industry. • Clearly communicate partner differentiation and project business impact to all stakeholders influencing the decision process. • Exceptional communication skills (written, verbal, and presentation). • Accurately forecast opportunity scope, revenue and close date. • Strong objection handling and closing skills. • Demonstrate a high level of business acumen and literacy. • Solution demonstration skills (light). • Highly organized and able to stay on target while performing a variety of critical short, medium- and long-term tasks daily.
Execution Skills	• Create differentiation through memorable first impressions. • Develop and maintain a high level of industry competence and knowledge. • Accurately triage, profile and qualify new prospects. • Develop/manage active pipeline of qualified SMB (small and medium business) opportunities • Engage with all prospect stakeholder levels (tactical, operational and leadership). • Facilitate business case discovery and ROI/payback discussions with prospect stakeholders. • Leverage intelligent discovery to identify business pains and business process challenges. • Clearly articulate the business and Total Cost of Ownership (TCO) benefits of cloud, SaaS and subscription-based solutions. • Remotely deliver brief solution demonstrations, presentations and close transactions without physically meeting customers. • Excellent ability to interface remotely with clients & handle multiple priorities concurrently.
Technologies	• Working knowledge of full Office 365 suite & related productivity applications (Teams, Skype, etc.). • Strong working knowledge of CRM and lead generation social selling tools (Hub Spot, LinkedIn, Adobe Marketo, etc.).
Certifications	• Bachelor's degree or equivalent expertise and 3+ years sales experience in a business-to-business environment. • B2B sales methodology.

Experience Types/Qualities	• Industry or vertical experience. • Self-motivated, ability to work independently. • High degree of emotional intelligence. • Ability to learn and adapt in a rapidly evolving environment. • Desire to make a difference.

Customer Development Representative (CDR)

The Customer Development Representative (CDR) reports to the Sales Leader and is responsible for upselling and cross-selling new cloud solutions to existing customers, as well as all contract renewals. The CDR works closely with marketing to introduce and sell Next-Best-Offer (NBO) "waves" within a designated industry vertical, through an accelerated remote sales motion. This role also works closely with the support organization to assist in resolving outstanding issues with strategic accounts.

- **Top Qualities:** Tenacious. Strong networking and lead generation. Sales process compliance. Consistent quota achievement. Excellent communicator.
- **Previous Roles:** Business Development, Pre-Sales Support, Customer Support, relevant role within the focus industry/vertical.
- **Certifications:** Defined / corporate B2B sales methodology.

Strategic Capabilities	• Establish and extend LOB and executive relationships within the customers' business community. • Understand the key business drivers and business processes within the focus vertical/industry. • Map business challenges to cloud services and solutions. • Exceptional communication skills (written, verbal, and presentation). • Accurately forecast opportunity scope, revenue and close date. • Strong objection handling and closing skills. • Demonstrate a high level of business acumen and literacy. • Solution demonstration skills (light). • Highly organized and able to stay on target while performing a variety of critical short, medium- and long-term tasks daily.
Execution Skills	• Engage existing customers to secure renewals and sell additional cloud services. • Develop and maintain a high level of industry competence and knowledge. • Proactively propose incremental cloud and managed service offers that build on customers' existing technology and cloud services footprint. • Develop and manage an active pipeline of qualified SMB (small and medium business) customer opportunities. • Engage with all prospect stakeholder levels (tactical, operational and leadership). • Facilitate business case discovery and ROI/payback discussions with prospect stakeholders. • Leverage intelligent discovery to identify business pains and business process challenges. • Clearly articulate the business and Total Cost of Ownership (TCO) benefits of cloud, SaaS and subscription- based offers. • Remotely deliver brief solution demonstrations, presentations and close transactions without physically meeting customers.
Technologies	• Working knowledge of full Office 365 suite and related productivity applications (Teams, Skype, etc.). • Strong working knowledge of CRM and lead generation social selling tools (Hub Spot, LinkedIn, Adobe Marketo, etc.).

Certifications	• Bachelor's degree or equivalent expertise and 3+ years sales experience in a business-to-business environment. • B2B sales methodology.
Experience Types/Qualities	• Industry or vertical experience. • Self-motivated, ability to work independently. • High degree of emotional intelligence. • Ability to learn and adapt in a rapidly evolving environment. • Desire to make a difference.

Pre-Sales Cloud Solution Engineer

The Pre-Sales Cloud Solution Engineer supports the Account Executive, Business Development Representative and Customer Development Representative in driving their active sales pursuits. The PCSE reports to the Sales Leader and is responsible for facilitating prospect both remote and onsite prospect discovery sessions, defining cloud solution fit and working with the delivery team to develop accurate cloud solution recommendations, scope clarity and accurate project services estimates. This role also works closely with corporate marketing and product management to identify new cloud solution development and packaged services opportunities (IP).

- **Top Qualities:** Understand customer requirements and business challenges. Effectively communicate solution value. Detail oriented. Analytical, problem-solving orientation.
- **Previous Roles:** Pre-sales support, business analyst, project delivery, customer support and/or relevant role within the focus industry/vertical.
- **Certifications:** Demo2Win or equivalent training. B2B sales methodology.

Strategic Capabilities	• Translate technology jargon and technical requirements into business language. • Ability to explain complex cloud solutions (and architectures) in simple terms. • Establish relationships with both LOB IT stakeholders during active sales cycles. Demonstrate a high level of business acumen and literacy. • Develop and maintain a high level of industry competence and knowledge. Understand the key business drivers and business processes within the focus vertical/industry. • Map business challenges to cloud services and solutions. • Exceptional discovery skills. • Strong solution design capabilities • Strong solution demonstration skills. • Exceptional communication skills (written, verbal, and presentation). • Highly organized. Able to prioritize a variety of critical short, medium- and long-term tasks for multiple sales pursuits. • Identify and determine impact of both functional gaps, as well as technical gaps and project risks

Execution Skills	• Actively support the opportunity profiling and qualification process. • Prioritize and manage support activities for an active pipeline of prospect and customer opportunities. • Engage with all prospect stakeholder levels (tactical, operational and leadership). • Accurately identify business case and ROI elements. • Leverage intelligent discovery to identify business pains and business process challenges. • Collaborate with project delivery to define customer solutions. • Prepare and deliver cloud solution demonstrations, both onsite and remotely. • Continually refresh and update Microsoft Teams and Microsoft cloud service solution knowledge. • Support the development of RFI/RFP submissions. • Actively support prospect cloud solution trials, pilots and POCs.
Technologies	• Working knowledge of full Office 365 suite and related productivity applications (Teams, Skype, etc.). • Strong working knowledge of CRM and lead generation social selling tools (Hub Spot, LinkedIn, Adobe Marketo). • Microsoft 365 or equivalent certifications.
Certifications	• Bachelor's degree in computer science, engineer or computer security or equivalent expertise and 3+ years of sales or customer support experience in a business-to-business environment. • Demo2Win or equivalent solution demonstration training.
Experience Types/Qualities	• 5+ years industry or vertical experience. • Self-motivated, ability to work independently. • High degree of emotional intelligence. • Ability to facilitate/whiteboard solution discovery and design sessions.

Customer Success Manager (CSM)

The Customer Success Manager is responsible for driving successful adoption and expansion of Microsoft Teams workloads within their accounts. Primary responsibilities include developing long-term relationships within a portfolio of strategic clients, aligning customer business needs with Microsoft technology solutions and helping customers bridge the IT/business gap.

This role is also responsible for managing the day-to-day client relationships, and facilitating the development of the appropriate technical, operational and strategic relationships necessary to develop a deep and broad business partnership.

The CSM will collaboratively drive change management and adoption activities with key Business Decision Makers, help reduce implementation risk, drive usage of existing workloads, and identify opportunities in her/his accounts. The CSM is also a key part of our customer facing sales teams and will be called on frequently to leverage their deep knowledge of CRM or ERP to support sales growth.

- **Top Qualities:** Business acumen; compelling people skills; project management skills
- **Previous Roles:** Account Management, Change Management Consulting, Business Consulting
- **Certifications:** Business Degree (BA or MBA), Change Management

Strategic Capabilities	• Deep understanding of SaaS customer engagement • Understand core business drivers within each customer industry or vertical. • Proven ability to map the customer's business process to product capability • Experience in driving CRM or ERP transformation in enterprises through effective change management and adoption highly preferred • Accurately segments and prioritizes the customer portfolio by opportunity and need. • Understand internal and external pressures that affect customer priorities • Proactively identifies and surfaces new technology or business solutions that support strategic customer objectives and/or address customer challenges. • Collaborates and engages with internal project and delivery colleagues to identify and position ongoing next wave sales opportunities.

Execution Skills	• Build, maintain and leverage strong relationships with Business Decision Makers (BDMs) and IT Decision Makers (ITDMs) within each customer to influence solution adoption, create strong support for new opportunities, secure willingness to advocate on behalf of the solution/project
	• Ability to drive change throughout a customer's organization including managing communications and training for varieties of stakeholder groups
	• Create value for customers by ensuring they clearly define business outcomes and then build a "success plan" with the appropriately identified objectives, stakeholders, milestones, risks and metrics needed to achieve them
	• Facilitate strategic planning workshops with customers
	• Proactively identify new workloads and expansion opportunities in each account to drive value both for the customer and partner
	• Connect features / functions to customers' desired business outcomes.
	• Co-develop customer business cases to support project approval and funding.
	• Build/maintain rapid channel of communication to customer in case of online service-related issues and events
	• Create, maintain and execute strategic account plans for each customer account:
	  ○ plans contemplate customers' value chain, eco-system, internal/external business drivers, key customers and suppliers.
	  ○ plans contemplate a staged or wave approach to identifying and recommending the "next-best project."

	○ plans reflect account-based marketing approach across prioritized customer accounts.
Technologies	• Working knowledge of the Microsoft cloud platform and Microsoft 365 (or Microsoft Teams) capabilities. • Feature / Function knowledge of relevant Microsoft Teams solution set.
Certifications	• Business degree or equivalent (MBA desirable). • Certification in Organizational Change Management. • Executive engagement/communications training. • Presentation delivery training.
Experience Types/Qualities	• 3+ years B2B sales experience (Account Executive, Business Development, Pre-Sales Support, Project Delivery). • Previous industry/vertical expertise. • Strong orchestration and relationship development skills.

Change Management Consultant

As a Change Management Consultant, they will be a key leader in working with our customers to drive the people and process side of digital transformations. Accelerating value realization for customers requires a deep understanding of not only business strategy and process, but also how organizations respond to and adapt to change.

The Change Consultant will work with executives and business leaders at large organizations in a variety of industries to drive effective change programs aligned with our business solutions. They will secure executive sponsorship, engage with key stakeholders and ensure that the solution is developed in ways that effectively meet business strategy and stakeholders needs, while overcoming inertia and delivering sustainable results.

Theirr contributions will include strategic engagement with executives, business process management, and stakeholder alignment, communications and readiness.

- **Top Qualities:** Business acumen; compelling people skills; project management skills
- **Previous Roles:** Change Management Consulting, Business Consulting, Business Process Management
- **Certifications:** Change Management, Business Degree (BA or MBA)

Strategic Capabilities	• Understand core business drivers within each customer industry or vertical. • Understand internal and external pressures that affect customer priorities • Strong verbal (telephone), written and presentation communication skills.

Execution Skills	• Experience in leading change management frameworks and methods • Ability to network within and across customer accounts to broaden the contact base, specifically within LOB and senior leadership. • Facilitates strategic planning workshops with customers • Conducts accurate due diligence (discovery) with technical, operational and strategic project stakeholders. • Connects features / functions to customers' desired business outcomes. • Experience driving change throughout a customer's organization including managing communications and training for varieties of stakeholder groups • Project management • Excellent written and verbal presentation skills
Technologies	• Working knowledge of the Microsoft cloud platform and Microsoft Teams (or Microsoft 365) capabilities. • Feature / Function knowledge of relevant Microsoft Teams solution set.
Certifications	• Business degree or equivalent (MBA desirable). • Certification in Organizational Change Management. • Executive engagement/communications training. • Presentation delivery training.
Experience Types/Qualities	• 3+ years of experience in change management and business consulting • Experience with c-level, stakeholder management, communications, and training programs • Previous industry/vertical expertise. • Strong orchestration and relationship development skills.

Marketing Leader

The Marketing Leader is responsible for driving marketing strategy, tactics, campaigns and programs to produce top-line results that raise brand awareness, recognition, and loyalty for the company and the broader Microsoft 365 offerings. This position is tasked with demand generation and marketing funnel optimization using brand, advertising, creative, digital, field and channel marketing. The Marketing Leader shapes and directs the company's go-to-market vision and works cross functionally to ensure the right mix of offerings, positioning and price. This position is also responsible for planning, organizing, staffing, training, and managing all marketing functions to achieve the company's sales, growth and profitability objectives, while ensuring consistent global marketing messaging and positioning that is consistent with the corporate direction.

- **Top Qualities:** Excellent strategic, analytical and leadership skills. Creative and entrepreneurial spirit.
- **Previous Roles:** Vice President of Marketing, Director of Marketing, Head of Marketing
- **Certifications:** Bachelor's degree in Business, Arts, Engineering and/or Sciences. An advanced degree in marketing or business (MBA) is preferred.

Strategic Capabilities	• Spearhead the planning, development and execution of the organization's marketing strategy and go-to- market vision. • Oversee the implementation of all marketing strategies over the full marketing lifecycle: inclusive of campaign and program design, execution, monitoring, optimization and analysis. • Deep demand generation focus to strategically grow a customer base and maximizing online revenue generation opportunities across multiple channels. • Increase sales revenue through traditional and digital marketing activities including creative design, content creation and management, marketing automation, customer and campaign analytics, e-commerce, and web, search, email, social and mobile marketing. • Manage the "voice of the customer" • Ability to monitor and interpret competitive research to inform product and services adjustments, as well as opportunity identification. • Ensure marketing KPIs align with and support both organizational and operational objectives. • Prioritize and manage marketing budgets to ensure maximum ROI. • Lead and mentor a high-performing, highly collaborative marketing team across multiple functions: brand, digital, social media and creative, channel and field marketing, advertising and PR.
Execution Skills	• Successful track record building and managing multi-functional marketing teams. Ability to motivate and inspire marketing team members. • Possesses exceptional verbal and written communication skills as well as strong and persuasive presentation abilities. • Ability to network and effectively leverage professional contacts. • Drives the daily execution and enhancement of the company's overall marketing strategy. Delivers measurable results within a defined budget.
Technologies	• Exceptional knowledge of marketing principles, techniques, technologies and platforms. • Working knowledge of marketing automation, SEO, social and content management tools. • Deep understanding of CRM and lead management tools (HubSpot, Pardot, Adobe Marketo, etc.).
Certifications	• 8+ plus years B2B marketing experience; previous senior management or executive positions in technology and/or related industries. • Highly collaborative leader with 5+ years people management experience. • International marketing experience is preferred.
Experience Types/Qualities	• Industry/vertical marketing expertise. • Action-orientation, with the desire and ability to get things done. Strong sense of urgency. • Effective collaboration and influencing capabilities.

Digital Marketing Manager

The Digital Marketing Manager plans and executes all digital marketing activities, including SEO/SEM, marketing technology, email, mobile, social media and display advertising campaigns. This position plays a major role in enhancing brand awareness within the digital arenas and drives online traffic to their website that lead to best-in-class customer acquisition. The Digital Marketing Manager is also responsible for improving the usability, design, content, ranking and conversion of the company website. Additionally, they oversee and influence the social media strategy by creating and managing the social profile and presence, monitoring online conversations and sentiment and creating content for social channels. This role must relentlessly stay current with the latest trends and best practices in online marketing, analytics and measurement.

- **Top Qualities:** Strategic and analytical thinker. Innovative and adaptable.
- **Previous Roles:** Digital Marketer, Digital Marketing Manager, Social Media Manager/Specialist, SEO Manager/Specialist
- **Certifications:** Bachelor's degree in Business, Arts, Engineering and/or Sciences; Certifications: Google Analytics and AdWords, HubSpot and Hootsuite.

Strategic Capabilities	• Proven track record managing an organization's digital presence, creating content for digital, social and mobile channels, engaging in social listening and monitoring online conversation and brand mention that drive an enhanced customer experience. • Deep experience generating new leads, specifically marketing qualified leads (MQL), by converting site traffic through calls-to-action, landing pages, and lead generation content (including offers). • Excellent verbal and digital communication skills. Proficiency in all social channels, as well as experience with public relations or public brand management. • Optimization of marketing automation and lead nurturing processes through email, content, and social channels. • Establish closed-loop analytics with sales to understand how inbound marketing activities convert into customers. Continuously refine the customer engagement and conversion process. • Experience with improving organic and paid search rankings and results (SERP and SEM), conducting keyword research, making technical SEO recommendations, designing site architecture, and analyzing and applying metrics on website and keyword performance. • Deep experience driving reach, engagement, and advocacy in social media via organic content, paid ads, and influencers to acquire more followers on social channels. • Collaborate with inbound marketing and blog contributors to maximize joint content development efforts
Execution Skills	• Strategic results orientation with a proven track record of strong tactical execution. • Meaningful experience with data-driven SEO analysis and optimization; as well as hands on knowledge of SEO tools, email marketing, lead nurturing, marketing automation, and/or web analytics. • Possesses an active and well-rounded personal presence on social media, with a command of each network and their best practices. • Highly analytical with an ability to use both data and intuition to inform decisions; can derive meaning from data through A/B testing and email optimization. • Strong written, oral and visual communication skills. • Proven ability to manage projects involving both internal staff and external agencies.
Technologies	• Thorough knowledge of search ranking, optimization factors and key algorithm updates. • Deep proficiency in SEO optimization tools, Google and other web analytics, and keyword tools • Experience with content and email management tools, and marketing automation technology

	• Working knowledge of Office 365 and related productivity apps, with deep knowledge of CRM and Lead Management tools (HubSpot, Pardot, Adobe Marketo, etc.).
Certifications	• BA/BS degree or equivalent work experience. • 3-5 years' digital marketing experience at an agency or B2B technology brand with proven examples of digital / social strategies and execution.
Experience Types/Qualities	• Industry/vertical experience • Analytical ability and can use data to inform all decisions • Innovative and adaptable

Content Marketer

The Content Marketer is pivotal to generating inbound leads through writing authoritative, thought-leadership content. This position is responsible for strategizing and executing content creation and delivery, tracking metrics that influence content strategy, and collaborating with both technical and subject matter specialists to produce relevant content that engages the emotions of their target audiences. They must be an exemplary writer who can clearly communicate their company's tone and mission with clean, concise copy. The Content Marketer is responsible for producing blogs, eBooks, whitepapers, infographics, guides and articles, as well as audio and video content. This position must also know how to blog and effectively communicate to an online audience.

- **Top Qualities:** Excellent communicator and storyteller. Experimental and curious. Analytical and precise. Results driven.
- **Previous Roles:** Content Marketer, Copywriter, Editor, Corporate Communications, Inbound Marketing.
- **Certifications:** Bachelor's degree in Business, Arts, Engineering and/or Sciences.

Strategic Capabilities	• Deep understanding of, and ability to, strategize and execute content creation and delivery. • Channel management of digital content hubs and all supporting social channels, including email / newsletter distribution. • Knowledge of inbound content best practices and all business relevant social media channels and/or platforms. • Experience driving inbound traffic, prospect/customer engagement and qualified lead generation • Ability to work with, and produce compelling content for, sales to improve lead quality and with support to improve customer retention. • Ability to drive collaboration, planning and measurement of inbound campaigns and programs across internal stakeholder groups. • Ability to build and manage a rich content/editorial calendar that attracts a qualified audience to defined digital properties (inclusive of blog posts, whitepapers, eBooks, reports, webinars, infographics, etc.). • Ability to optimize marketing automation and lead nurture processes across digital and social channels. • Clear understanding of, and experience tracking, metrics that influence content strategy to ensure optimal ROI. • Excellent writing and editing skills. Experience with editorial governance over brand voice, style and tone.

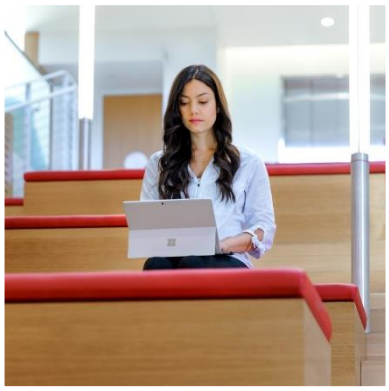
Execution Skills	• Collaborate across functions and silos to deliver an effective content marketing strategy and editorial plan that addresses primary business objectives at the lowest possible cost. • Strong project management skills. Ability to lead all stages of content development from ideation through execution and implementation. • Ability to deliver measurable results across multiple channels relating to increased engagement, lead generation and sales execution. • Strong understanding of SEO and Google Analytics to optimize content creation. • Ability to engage and maintain connections with social audiences. • Editorial mindset with an ability to predict audience preferences and buyer behaviors.
Technologies	• Expertise in marketing and social media automation platforms and content management tools such as WordPress, as well as email marketing tools such as Constant Contact, MailChimp etc. • Understanding of SEO, keywords and Google analytics. • Working knowledge of Microsoft Office365 and related productivity apps, with deep knowledge of CRM and Lead Management tools (HubSpot, Pardot, Adobe Marketo, etc.).
Certifications	• BA/BS or equivalent working experience. • 3+ plus years B2B marketing experience preferably in technology and/or related industries. • Best practices around digital, social, inbound and supporting mar-tech, as well as content creation and consumption patterns.
Experience Types/Qualities	• Industry/vertical experience. • Excellent communicator, storyteller extraordinaire and creative thinker. • Digital expertise.

Graphic Designer

The Graphic Designer is responsible for the creation, maintenance and updating of visual print and digital media marketing assets to support their brand and marketing goals. This position manages all phases of the design process including concept definition, mock-up production, content review and integration, as well as finished product. The graphic designer is responsible for the design aesthetic for all marketing and sales collateral materials, inclusive of presentations, event and trade show graphics, website design, blog templates, webinars, demos, emails and digital campaigns as well as all video and social media assets.

- **Top Qualities:** Creative. Clear communicator. Strong time/project management skills.
- **Previous Roles:** Graphic Designer, Art Director, Multimedia Content Creator
- **Certifications:** BA/BS or recognized design certification and/or equivalent working experience.

Strategic Capabilities	• Ability to create and champion the visual brand identity across all marketing channels. • Ability to develop a clear understanding of the product/services brand positioning and messaging. • Experience in articulating designs with a business-driven and brand experience mindset. • Excellent verbal and visual communications skills. • Understanding of the design and production of graphics for digital, website, social media, display ads, and email, as well as traditional print media – including page and microsite layout, animation, infographics, illustrations, graphics, banners and email templates, for both internal and external use. • Manage all design requirements including presentations, signage, and trade show collateral. • Ability to review web applications and visuals, including user interfaces created by both internal stakeholders and external vendors, to ensure alignment to brand standards. • Ability to bring new design and content creation ideas to the broader marketing. • Proficient with new media. Possesses a strong understanding of the integration and use of animation and video to drive prospect and client engagement.
Execution Skills	• Ability to generate high-level concepts, from strategic brief through to final execution. • Experience managing all phases of the design process, including concepting, mock-up production, copy creation, review and integration, and finished product review. • Ability to work collaboratively within multiple stakeholder groups that include sales and product development, to identify and address visual requirements for projects and campaigns. • Maintain quality control and responsibility for the integrity of the final deliverables. • Manage the creative process across multiple project priorities and timelines. • Ability to present concepts, communicate ideas, defend ideas to cross-functional project stakeholders.
Technologies	• Proficiency in graphic design programs such as Photoshop, Illustrator, and InDesign. • Working knowledge of full O365 suite with an emphasis on PowerPoin.t • Video editing (Adobe Premiere Pro) a plus. • Knowledge of HTML, CSS, and JavaScript a major plus.
Certifications	• BA/BS or recognized design certification and/ or 2+ years equivalent working experience. • Previous experience working as an in-house designer or at a marketing agency. • End user proficiency in Adobe Creative Suite or similar technologies.
Experience Types/Qualities	• Expert grasp of design fundamentals and trends. • Strong organizational and communication skills. • Digital expertise. • Acute attention to detail.



RESOURCES:

- Training Event in a Box
- Office 365 Training Center
- Microsoft Learn
- Partner Technical Services
- Microsoft Partner Network Training Center

Training Resources

For technical staff to function as change agents supporting current and emerging cloud technologies, their buy-in for the use and integration of these technologies is needed.

Partners will need the following:

- An understanding of their roles and any changes to their current position
- Time and resources to explore the technologies
- An understanding of the business case for the technologies

Use the following resources as part of their Teams onboarding for new and existing staff:

- Training Event in a Box – a downloadable set of Power Points and Demo Scripts that they can use to train their technical team or their customers.
- Office 365 Training Center provides free, self- paced learning to help them stay current with Office 365.
- Microsoft Learn offers a wide variety of official curriculum on-demand, Microsoft 365 certification preparation courses and helps them learn through hands-on experiences with a broad reach of Microsoft technologies.
- Partner Technical Services provides 1:1 pre-deployment guidance and developer assistance from Microsoft technical consultants to help ensure a successful implementation for their team.
- The Microsoft Partner Network Training Center provides a centralized interface with in-person, virtual and online training opportunities and certification options organized by products, competencies, certifications, and job role

DEVELOPER FOCUSED TRAINING RESOURCES

Topic	Samples & Tutorials
Microsoft Teams Platform Academy	https://aka.ms/teamsplatformacademy
Microsoft Teams Developer Platform	https://aka.ms/teamsdev
SharePoint Framework	http://aka.ms/spfx-training
Graph API	https://github.com/microsoftgraph/contoso-airlines-teams-sample
SharePoint Framework – Tutorial	https://docs.microsoft.com/en-us/sharepoint/dev/training/training
SharePoint Framework – Samples	Dev Setup http://bit.ly/SPFx-DevSetup Build your first Web Part http://bit.ly/SPFx-FirstWP SPFx Labs http://bit.ly/SPFx-Labs SP dev solutions: https://github.com/SharePoint/sp-dev-solutions/tree/master/solutions
SharePoint Framework – First Visit Demo Sample	http://bit.ly/FieldVisitDemo
Office Developer – Hands-on Labs End to end HR solution with Teams, Power Platform, Bots, and Graph	https://developer.microsoft.com/office/docs#officetraining
Microsoft Teams – Samples	Line of Business Samples – Airlines, Manufacturing, and Professional Services Contoso HR Talent Application – Hiring process workflow Teams App Templates – Icebreaker, custom stickers app template Contoso HR Talent Application Demo

Competencies and Certifications

Cloud Productivity Competency

Microsoft competencies demonstrate proven expertise in delivering quality solutions in a specialized area of business. Microsoft competencies are designed to be recognizable by prospective customers that partners are qualified to meet their needs.

Achieving a Cloud Productivity competency provides a brand for customers that says that they have been validated by Microsoft as being skilled in delivering solutions and services for Office 365. It's a customer-facing brand. With it, comes many benefits, including access to Partner Technical Services, dev and test licenses and go-to-market services.

There are several different competencies available, for example there are separate competency options for Managed Services Providers, Distributors, and Learning Partners. In each case, there are minimum requirements that the partner must meet to qualify for the Silver or Gold competency tiers. These requirements can include active the number of active users, certified staff members, and volume of business.

A full list of requirements for the MPN Cloud Productivity competency can be found on the Cloud Productivity site. Other Modern workplace competencies (include Cloud Productivity) related to Office 365 can be found on the Modern Workplace competency site.

Certifications

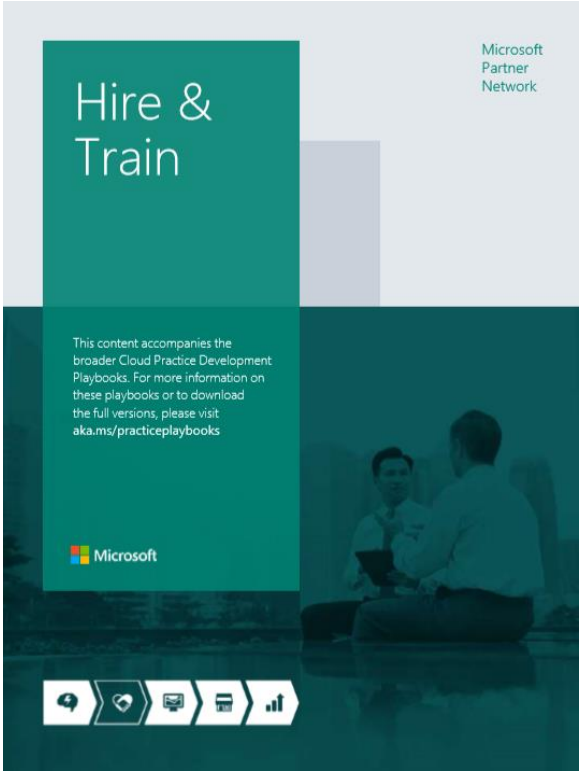
Increase readiness and marketability with Microsoft certifications.

There are numerous assessments and certifications their team should consider as motivation for advancing their skills, creating proof points for their practice and enabling them to achieve Microsoft Partner Network Competencies.

	Description	Prerequisites and Exams
Microsoft 365 Certified: Teams Administrator Associate	Microsoft Teams Administrators configure, deploy, and manage Office 365 workloads for Microsoft Teams that focus on efficient and effective collaboration and communication.	Exam: • MS-700: Managing Microsoft Teams
Microsoft 365 Certified: Teamwork Administrator Associate	Microsoft 365 Teamwork Administrators configure, deploy, and manage Office 365 workloads that focus on efficient and effective collaboration, such as SharePoint, OneDrive, and Teams.	Exams (both required): • MS-300: Deploying Microsoft 365 Teamwork • MS-301: Deploying SharePoint Server Hybrid
Microsoft 365 Certified Enterprise Administrator Expert	Microsoft 365 Enterprise Administrators evaluate, plan, migrate, deploy, and manage Microsoft 365 services.	Prerequisite qualifications (choose one): • Microsoft 365 Certified: Modern Desktop Administrator Associate • Microsoft 365 Certified: Teamwork Administrator • Microsoft 365 Certified: Security Administrator Associate • Microsoft 365 Certified: Messaging Administrator Associate • MCSE: Productivity Solutions Expert • Microsoft 365 Certified: Teams Administrator Associate Exams (both required): • MS-100: Microsoft 365 Identity and Services • MS-101: Microsoft 365 Mobility and Security
Microsoft 365 Certified: Developer Associate	Microsoft 365 Developers design, build, test, and maintain applications and solutions that are optimized for the productivity and collaboration needs of organizations using Microsoft 365.	Exam: • MS-600: Building Applications and Solutions with Microsoft 365 Core Services

Guide: Hire and Train

Leverage the Microsoft resources available in the Hire and Train guide, for details on building a technical team, comprehensive role and job descriptions, and training and readiness resources.



Microsoft
Partner
Network

Operationalize

Microsoft Teams

aka.ms/practiceplaybooks

Executive Summary

In the previous section, we reviewed how they should hire, train, and equip their staff. In this section, we will guide them through the steps to operationalize their practice.

We'll walk them through the options for leveraging their internal use benefits that provide them complimentary software licenses and subscriptions for use within their organization. We'll show them how to deepen relationships with their customer by re-selling Teams as an overall package along with their customer offering, creating a new revenue stream for their business.

This section also provides guidance on how to operate their business, from the infrastructure considerations of sales and marketing operations to the key contracts they will want to put in place.

Whether they're building products, providing managed services, or performing project work for customers, their success may be impacted by their ability to manage their customer records, their projects, and their support trouble tickets. We provide guidance on what tools and systems they should consider implementing

Top 5 things to do

Put a plan into action. These are the top 5 things partners should do to get the momentum going.

- ☑ Implement standardized processes
- ☑ Decide on technology infrastructure
- ☑ Claim their internal use benefits
- ☑ Set up key contracts and tools
- ☑ Establish the customer support process

Teamwork Assessment

Teamwork Assessment enables partners to engage with business and IT leaders to identify customer use cases, create strategic alignment, and define actionable roadmaps that deliver transformational business value.

Microsoft 365 Partner Accelerators are a set of activities that they can use to accelerate the customer journey. Leveraging these accelerators enables them to facilitate more productive customer conversations, help their customers envision the possibilities with Microsoft 365, and more efficiently realize customer opportunities.

There are several Partner Accelerators available, covering a range of Microsoft services. One such accelerator is the Teamwork Assessment.

WORKSHOP FORMAT

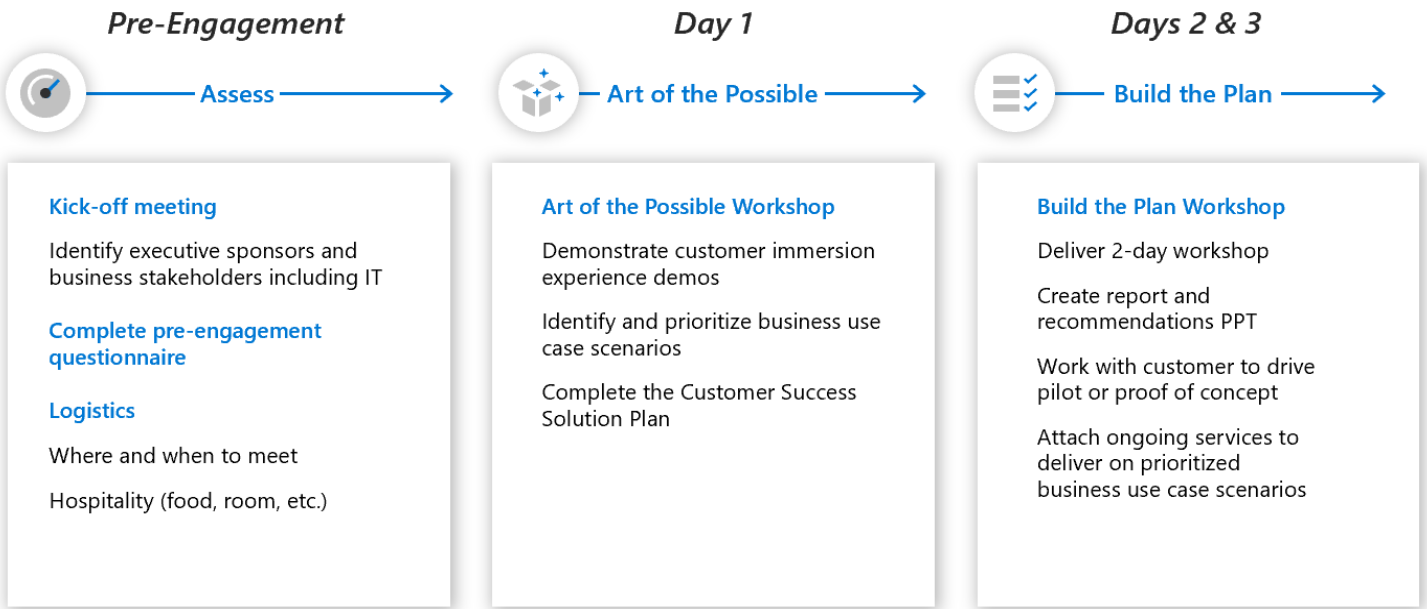
Each Teamwork assessment comprises a 3-day workshop, typically delivered at the client premises. The format of the workshop is as follows:

- **Before the workshop**, the partner and client should hold a kick-off meeting to identify the executive sponsors and business stakeholders, including IT. The client should also complete a pre-engagement questionnaire, and practical logistics (venue, dates, times, catering, etc.) should be agreed.
- The first day of the workshop is called **'The Art of the Possible'**. This provides the client with the opportunity to experience Teams through immersive demos, and to discuss the business use cases, drive the customer intent, and agree the focus areas.
- The second and third days of the workshop are called **'Build the Plan'**. This may occur immediately after the 'Art of the Possible' day or a little later. The goal is to collaborate with the customer to agree the scope and use cases to be addressed, success metrics, communication, training, and other key aspects for a successful delivery plan.

There are several different 'Build the Plan' workshops available, and as the Partner they should choose which is best suited for their client. These are:

- **Teams Adoption Workshop** This workshop is designed to assist them in effectively engaging with either the BDM's responsible for project or change success and or the customer adoption leads. The aim is to build a proactive adoption strategy.
- **Solutions Workshop** The scope of this engagement is to perform a detailed analysis of the customer's current environment, including user personas, device and calling + meeting workloads. The objective is to jointly create a customized, prioritized and actionable upgrade plan to move users to Teams for all workloads.
- **Calling Workshop,** The scope of this engagement is to perform a detailed analysis of the customer's current environment, including user personas, device and calling + meeting workloads. The objective is to jointly create a customized, prioritized and actionable upgrade plan to move users to Teams for all workloads.
- **Meeting Workshop** The scope of the Meetings Workshop is to perform a detailed analysis of the customer's current environment, including Site and Environmental analysis, use case scenario discovery, device strategy, networking, and workloads. The objective is to jointly create a customized, prioritized and actionable deployment plan.

Teamwork Assessment timeline



FUNDING

They may be eligible for funding support to complete Teamwork Assessments with qualifying customers. Funding of up to US$5,000 is available per approved engagement.

The funding process is as follows: They start by nominating customers, then Microsoft validates customer and partner eligibility. They provide a statement to Microsoft from their customer confirming engagement, and funding in approved. After delivery, they up upload their proof of execution (POE) documentation to Microsoft, and once this is approved payment is made within 30 days.

RESOURCES

- Teamwork Assessment Materials
- Teamwork Assessment Introductory Webinar
- Teamwork Assessment Deep Dive Webinar
- Teamwork Assessment Accelerator Program
- Funding Qualification Requirements

Implement a Solution Delivery Process

The process partners follow in delivering their solution to customers is just as important as the technologies they use to deliver it.

When a Teams project fails, it is most often due to basics like a lack of cloud technical skills, inadequate fit/gap analysis, poor project governance, or team churn. These issues are associated with not having the right people on the team and an underdeveloped methodology for delivery.

Many project failures are also driven by poor alignment of strategy, executive sponsors, stakeholders, or business processes. Solution delivery processes that include modern change management best practices reduce these risks and accelerate value to customers.

Investing in proper time estimation methods and delivery processes is critical for success, partner profitability, and customer satisfaction. Independent of the methodology choices, partners must always drive a short time to value, which translates to fewer customizations, better use of standardized business processes, and fast delivery of solution modules to users.

When it comes to delivering solutions for their Teams practice, incorporate the processes that best fit their needs and their team.

SCRUM PROCESS

The Scrum process works well if they want to track product backlog items (PBIs) and bugs on the Kanban board, or break PBIs and bugs down into tasks on a task board. This process supports the Scrum methodology as defined by the Scrum organization. Tasks in this process support tracking remaining work only.

AGILE PROCESS

Choose Agile when their team uses Agile planning methods, including Scrum, and tracks development and test activities separately. This process works well if they want to track user stories and bugs on the Kanban board, or track bugs and tasks on the task board. They can learn more about Agile methodologies at the Agile Alliance.

These two processes both work for developing modern Teams applications as well as for deployment of Teams. Both processes are also supported in Azure DevOps (formally Visual Studio Team Services) for tracking the project.

CREATE REPEATABLE PROCESSES

Repeatable processes make for profitable practices. Use the following example checklist to build their own checklist to use when executing a new engagement.

- Hold initial requirements meeting
- Identify product owner/manager(s)
- Identify executive sponsors of the project
- Ensure the project has clear strategic goals and success metrics
- Identify key business process owners and stakeholders
- Ensure that business processes are aligned with business strategy and stakeholder needs
- Bind customer 's organization and their business processes owners into the QA process
- Reduce the volume of customizations, as they have a high impact on mobile extensibility
- Follow-up meeting to clarify and establish next steps
- Discuss MVP (minimal viable product) criteria
- Establish development process (Agile, Scrum, etc.)
- Identify milestones and tasks; share with customer
- Identify Mobile usage scenarios and mobile devices requirements as early as possible
- Provide cost estimates for development, cloud services, and ongoing maintenance/support
- Address customer objections to proposed technology and services
- Acquire data (or sample of data) for initial data assessment and proof of concept development
- Host project artifacts (issues, code, etc.) to share with internal team and customer (e.g. Visual Studio Team Services)
- Follow up with customer and provide status/demos on a regular basis (e.g. 2-week sprint)
- Ensure customer has communications and readiness plan to address the needs of each stakeholder team
- Coordinate a final handoff to customer
- Conduct project debrief with customer
- Organize internal project post-mortem
- Customer conducts acceptance test
- Execute a progressive deployment strategy, i.e. one region, several regions, one country, two countries, several countries
- Ensure customer has a plan to track progress against success metrics and adoption targets

Implement Intellectual Property Offerings

Consider these tips to if investing in developing IP and begin to monetize domain expertise.

DEFINE THEIR SOLUTION

When we asked partners how they determined what IP they were going to build, we often got the same answer: they realized most of their customers were asking for the same thing or something very similar. Rather than continuing to do high-cost, custom work for every customer, they decided to productize what their customers were asking for. Bring their sales, marketing, technical, and delivery teams together to brainstorm and define what patterns of challenges they are seeing across their customer base.

DETERMINE WHAT WILL DIFFERENTIATE THEIR SOLUTION FROM OTHERS IN THE MARKET

It is important to think about their differentiation strategy. What is going to make their Teams practice better than other similar practices in the industry?

MAINTAIN RIGHTS TO THE IP

As they make the transition from project-based or custom services to packaged IP, it is critical to revise their customer agreements, so they can maintain the IP rights to the solutions they build.

They should engage legal counsel to help them protect and maintain ownership of the IP they create. Key to success with IP is effectively defining licenses, contracts and terms of use, and acquiring patents if applicable.

CONSIDER THEIR CHANNEL STRATEGY

One of the advantages of productizing their IP is it opens the possibility of selling their solution on AppSource or through the Microsoft channel of partners.

Microsoft Licensing Options

There are several ways partner can purchase the Microsoft cloud services needed to support customers and their practice.

MICROSOFT CLOUD AGREEMENT VIA THE CLOUD SERVICE PROVIDER PROGRAM

Microsoft Cloud Agreement (MCA) is a transactional licensing agreement for commercial and government organizations seeking to fully outsource management of their cloud services through the Cloud Solution Provider (CSP) program.

In combination with the value-added services offered by a systems integrator, hosting partner, or born-in-the-cloud reseller partner, the CSP program offers an easy way to license the cloud services their customers need. On-premises software and Software Assurance are not available through CSP partners.

The CSP model keeps partners at the center of the customer relationship by providing them with direct management of billing, provisioning, and support.

MICROSOFT ISV ROYALTY LICENSING PROGRAM

Microsoft ISV Royalty Licensing Program is for ISVs who want a convenient way to license Microsoft products and integrate them into a unified solution. ISVs can then replicate the business solution and distribute a fully-licensed solution to their end users. ISV Royalty (ISVR) agreements are for a three-year term and payment is made monthly through an authorized ISV Royalty Licensing Program distributor.

MICROSOFT SERVICES PROVIDER LICENSE AGREEMENT

Microsoft Services Provider License Agreement (SPLA) is for service providers and ISVs who want to license eligible Microsoft products to host software services and applications to end customers. SPLA provides the license rights to host specific Microsoft products monthly for a three-year term, as outlined in the Microsoft Service Provider Use Rights (SPUR) with pricing based on use rights.

MICROSOFT ONLINE SUBSCRIPTION AGREEMENT

Microsoft Online Subscription Agreement (MOSA) is a transactional licensing agreement for commercial, government, and academic organizations with one or more users/devices. MOSA works best for organizations that want to subscribe to, activate, provision, and maintain cloud services seamlessly and directly via the web through the Microsoft Online Subscription Program (MOSP). On-premises software and Software Assurance are not available through MOSA.

For more details on these licensing programs please visit https://partner.microsoft.com/licensing/licensing-agreements.

Create a Presales Environment

Defining their presales environment strategy is necessary to drive repeatability, increase win-rates, and accelerate decision making.

There are several options for hosting the presales environment. We recommend that they make an early investment in localized demo data and industry-oriented data to help them reduce cost of sales and accelerate the purchase cycle.

TEAMS DEMONSTRATION VS. TRIAL ENVIRONMENTS

Demonstrations and trials can both be leveraged during their sales cycle, but they each serve very different purposes. Trials are better suited to pre-configured solutions that are consumed with very little (if any) configuration. The trial must already contain the industry or vertical best practices, and these best or optimized business processes must be obvious to the prospect. Trials are ideally suited for marketing or self-serve driven buying cycles.

Solution demonstrations are best suited for sales scenarios in which the recommended solution set is significantly different from what the prospect is currently uses, and/or there are multiple ways to configure the solution with Teams.

Trials can be an effective sales asset if they are driving a highly prescriptive sales cycle and have a solution that has been developed for a very specific industry or vertical. Solution demonstrations are more effective for sales scenarios where they need to limit or control what they want their prospect to see.

Microsoft's Live Drive Application Launcher simplifies the creation of complex demonstrations, and can be found here: https://cdx.transform.microsoft.com/

Keep in mind, some product features are add-ons not available in trial mode. If they are going to market with solutions that leverages add-on features, they might need to invest in their own pre-sale's environment.

There are three licensing options for supporting the pre-sale process.

TRIAL ENVIRONMENTS

If they wish to leverage a trial environment for Teams, they can find information about signing up for and managing a trial at https://docs.microsoft.com/microsoftteams/iw-trial-teams. Just be aware of how Office 365 is associated with Teams at the tenant and other services that are provisioned as a part of the Teams environment as documented in the website above.

IUR (INTERNAL USER RIGHTS)

Internal User Rights (IURs) are Office 365 licenses (including Teams) their partner organization has access to as part of the benefits of different competency levels in the Microsoft Partner Network. To be eligible, their organization needs to be at the Silver or Gold competency level. Each competency level has different IURs.

Some partners use their IURs for internal operations, but other partners use the IURs for presales. The IURs environments have full feature and functionality coverage, and they don't expire if they keep their competency requirements updated.

PROS	CONS
No direct cost associated to the environments Environments don't expire if they keep their competency level updated Integrated to their organization's tenant, so they can use business emails and credentials for access Interface can be localized.	No demo data or demo guidance embedded. They need to invest initially to build the data and demo scenarios Add-ons no included in most IURs Limited number of user licenses For global partners, the IURs can be already in use by other subsidiaries Other Microsoft technologies are not part of the environment

COMMERCIAL SOFTWARE LICENSED ENVIRONMENT

In this modality, their organization will license the environment, just like a customer would, to support presales. The environment access can be controlled in a granular way and all the labor involved in building demo data and customer scenarios can be reused from one customer to the next. Most industry-oriented partners prefer to license their own presales environments as a productive way to drive repeatability and manage their vertical IP.

PROS	CONS
Full features and functionality, the license what they need in alignment with their go-to-market strategy Environments don't expire if they keep subscription Integrated to their organization's tenant, so they can use business emails and credentials for access Interface and data can be localized They can apply a different security model and restrict access to the environments They can host their IP and use the environment as part of their OP release process	Subscription costs Separated administrative process to manage instance, features, updates, security

Key Contracts and Practice Tools

Partners will require a complete set of legal documents to drive compliance, protect their IP, and produce consistent engagement deliverables. They also need a documented process to monitor project progress, in terms of both the project plan and budget.

KEY CONTRACTS

Leverage the Key Contracts for Practice guide to learn more about developing service level agreements, master services agreements, a statement of work, and a mutual non-disclosure agreement.

MICROSOFT TEAMS

Microsoft Teams should be used for every project for collaboration. Create a team for each project and invite the customer in as a guest user to collaborate and track the project. Build as much as possible into that team to demonstrate the value and expandability of Teams. The lifecycle of a project or duration of a managed services agreement is critical, especially when leveraging the technology and services they are selling them.

MICROSOFT PROJECT ONLINE

Microsoft Project Online is a flexible online solution for project portfolio management (PPM) and everyday work. Project Online provides powerful project management capabilities for planning, prioritizing, and managing projects and project portfolio investments — from almost anywhere on almost any device. Project Online can be used by administrators, portfolio managers and viewers, project and resource managers, and team leads and members.

AZURE DEVOPS

Azure DevOps provides various tools for tasks like running agile teams, providing support for Kanban boards, handling work item backlogs, scrum boards, source control, continuous integration, and release management. Source control functionality provides Git support, which enables integration with GitHub if such integration is desired. While Azure DevOps helps to manage the technical aspects of a project, cost-containment requires a different set of tools.

GITHUB

GitHub provides the hosted environment for the business application implementation team to version control and share their source code, notebooks and other artifacts both privately (e.g., internally to a team) and publicly (e.g., an open source project), and collaborate on development projects.

OTHER COLLABORATION TOOLS AND FILE SHARING

Yammer is an enterprise social network collaboration offering to help teams collaborate and share files with each other.

OneDrive for Business is an enterprise file sharing service that is designed for automatic synchronization of files between their computer and the cloud. OneDrive makes it easy to share files with their customers or partners.

Microsoft Dynamics 365 for Project Service Automation provides users with the capabilities required for setting up a project organization, engaging with customers, project scheduling and costing, managing and approving time and expenses, and closing projects. It is specially targeted to address the needs of a project services-based practice, as it is designed for professionals who manage projects and the associated customer engagement process end-to-end.

Microsoft Surface Hub is a Teams-integrated collaborations device, or "meeting room in a box." In addition to the built-in team experiences like Teams, Microsoft Office, and Whiteboard, Microsoft Surface Hub is customizable with a wide array of applications. Universal apps built for Windows 10 shine on Microsoft Surface Hub, and scale to the large screen. They can also connect apps from their personal device and drive them from Microsoft Surface Hub.

Use CRM to Grow Your Business

CRM solutions streamline processes and increase profitability in their sales, marketing, and service divisions.

A strong CRM solution is a multifaceted platform where everything crucial to developing, improving, and retaining their customer relationships is stored. Without the support of an integrated CRM solution, they may miss growth opportunities and lose revenue because they're not maximizing their business relationships. Imagine misplacing customer contact information, only to learn their delay pushed their client into the arms of a competitor. Or, picture their top two salespeople pursuing the same prospect, resulting in an annoyed potential customer and some unfriendly, in-house competition.

Without a centralized program where their people can log and track customer interactions, they will lose out on valuable sales opportunities.

THE FUNDAMENTALS OF CUSTOMER RELATIONSHIP MANAGEMENT

CRM tools make the customer-facing functions of business easier. They help them:

- Centralize customer information
- Automate marketing interactions
- Provide business intelligence
- Facilitate communications
- Track sales opportunities
- Analyze data
- Enable responsive customer service

Running a successful business is no simple task. When marketing campaigns, data analysis, meetings, customer care, and more, all happen simultaneously, they need a powerful CRM solution to bring all these functions together in one place. Using Microsoft Dynamics 365 for Sales and Marketing they can keep with the "365 suite" and can seamless integrate all their outlook communications with prospects and clients and their LinkedIn contacts all in one place. Dynamics 365 can also be integrated into Teams, once again practicing what they preach by tying in Teams to everything they do as a company.

Their sales team will be working with the following types of records:

*ACCOUNTS***:** Account records contain information about the companies they do business with.

CONTACTS: Contact records contain information about the people they know and work with. Usually, multiple contacts are associated with one account. Contacts could include people responsible for making purchasing decisions or paying invoices, support technicians, or anyone they work with at the company.

LEADS: Leads are potential sales, and they or their company can get leads from many different sources. For example, they can generate sales leads from marketing campaigns, inquiries from their website, mailing lists, social media posts, or in person at a conference or trades convention.

OPPORTUNITIES: When they qualify a lead, it becomes an opportunity, or a deal that they're getting ready to close.

Microsoft Dynamics 365 can be customized, so they can also work with records relevant to their team and the way their organization does business, including sales, customer service, field service, project service, automation, and marketing.

Define Customer Support Program & Process

Support Overview

It has been said an unhappy customer represents an opportunity to make a customer for life. Studies have found when a customer gets to the point of complaining, they are very emotionally engaged. If they can switch that negative to a positive, they may just have a customer for life.

When it comes to support, there are two perspectives they should consider. First, how will they support their customers when they have engaged them for project services, are using their software, or are utilizing their intellectual property? Second, where do they go for support for a solution they are building or because they need assistance on behalf of their customer?

They will need to:

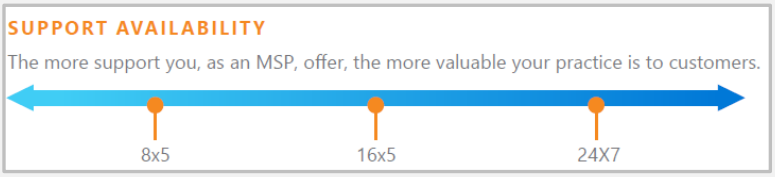
- Define their support model
- Provision their support infrastructure
- Define and implement their escalation process
- Select and enable their support options

Supporting Customers

Let's begin with the first scenario in which partners support their customers directly. It should go without saying that one of the most important functions for their MSP practice will be supporting their customer once their applications and data are firmly in the cloud or sitting in a hybrid deployment. No matter how well a cloud or hybrid environment is planned, provisioned, operated, or monitored, problems will arise — and those problems will need to be remediated. It's their job as an MSP to offer support to their customers to deal with outages, breaches, inefficiencies, and disaster scenarios. MSPs need to consider the level of support that makes sense for their practice — in terms of resources and revenue — as well as what makes sense to the customers they serve.

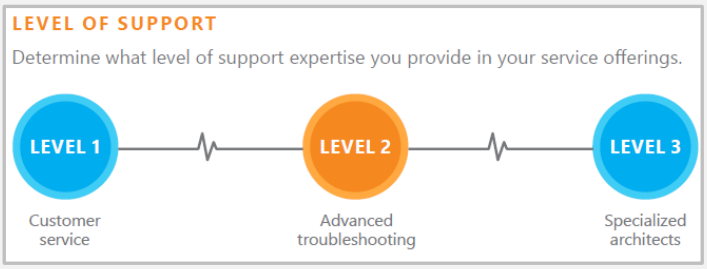
SUPPORT MODEL

How do they package and sell their support? The typical options are to provide support either on a retainer basis (where the customer pays a monthly fee for up to a certain number of "use it or lose it" support hours) or per incident (where the customer pays a fee every time they utilize their support). They must also define their support availability so their customers have a realistic expectation of when they can access their service.



ESCALATION PROCESS

How does a customer get help at the right technical level? For their support process to make economic sense, avoid having their most skilled and most expensive resources (e.g., architects, senior developers, data scientists, etc.) answer every support call. For their solution offering, consider implementing a tiered support offering of junior-level resources that are equipped to handle common issues. These resources should be equipped to escalate a customer support case to a more senior-level resource once the common issues have been ruled out. They will need to decide how many levels of tiered support to offer, but two to three tiers are most common. When defining their escalation process, do not forget about the basics. For example, how do customers get in touch with them for support in the first place? This could be a dedicated support telephone number, forum or chat room, Twitter handle, email address, etc.



Support infrastructure: How will they manage customer support requests and track them to closure? Many MSPs offer premium support offerings such as a Technical Account Manager who is responsible for tracking, reporting, and escalating an issue.

Get Co-Sell Ready

The Microsoft co-sell program provides Microsoft partners with an opportunity to reach more customers and leverage the Microsoft global brand, sales teams, and distribution networks to sell their apps and services.

Microsoft's Co-Sell program is the path for partners to jointly sell with Microsoft. The Co-Sell program incorporates both lead-sharing and direct incentives for the Microsoft sales teams for including qualifying partner solutions in their solutions.

Co-selling is a significant opportunity. Since the program was launched in FY17, through to the end of FY19, it has generated over $9.5bn in contracted partner revenue from over 36,000 co-sell wins.

CO-SELL FOR TEAMS

Having started with Azure, for FY20 the Co-Sell program now includes IP Co-Sell for Teams. This introduces an ISV Co-Sell opportunity for Teams-based applications. This offers a great go-to-market channel for ISV partners building Teams solutions.

In addition, Services -Co-Sell is supported across Azure, Business Applications and Microsoft 365, using joint lead-sharing as the basis for co-selling for services partners.

GET CO-SELL READY

To co-sell with Microsoft, partners need a commercial-ready solution that's published in the Microsoft commercial marketplace, an engaged sales team, a strong go-to-market strategy, and to meet other published requirements. For further information, see Learn more about getting co-sell ready

Support Options from Microsoft

How do partners receive support for their implementation efforts or on behalf of their customer?

For full details of the benefits available at each Partner level, see Partner Network – Compare Offers. They should also review the Microsoft Partner Benefits Usage Guide.

PARTNER ADVISORY HOURS

Partner advisory hours are used as currency for technical presales and advisory services offered by the Microsoft Partner Services team.

As part of Microsoft Partner Network membership, organizations receive partner advisory hours for attaining a Microsoft competency and subscribing to Microsoft Action Pack.

Partner Level	Advisory Hours Included
Network Member	0 hours
Action Pack	5 hours (after first cloud sale)
Silver	20 hours
Gold	50 hours

These hours can be used for:

- 1:1 pre-deployment best practice consultation, based on their implementation scenario
- 1:1 developer consultation for ISVs

SIGNATURE CLOUD SUPPORT

Microsoft Signature Cloud Support provides partners with cloud support to help their customers' services operating smoothly. SCS handles technical support scenarios for Microsoft Office 365, Microsoft Dynamics CRM Online, and Microsoft Azure.

MICROSOFT SUPPORT

Microsoft Advanced Support for Partners is the ideal solution for partners who are growing their cloud business. Not quite ready for Premier Support, but need a higher level of service than the Microsoft Partner Network core benefits provide? The Advanced Support program delivers the right level of support to meet them in the middle while their business grows. With Advanced Support for Partners, they get cloud support at an accessible price point, which helps they be a great ally to their customers and grow their business faster. The program includes valuable proactive and reactive services delivered by experienced Services Account Managers and Partner Technical Consultants. Advanced Support for Partners enables them to provide support on behalf of their end customers, in addition to providing support on subscriptions they own directly.

Microsoft Premier Support for Partners delivers a managed support offering for them and their customers — proactive support services for developing, deploying, and supporting Microsoft technology, whether on-premises, hybrid, or in the cloud. As the only partner program with complete, end-to-end managed support across the full Microsoft platform, Premier Support for Partners also provides a powerful marketing tool to gain competitive advantage in the marketplace.

Microsoft offers a range of paid Azure support plan options for customers — from developers starting their journey in the cloud to enterprises deploying business-critical, strategic applications on Microsoft Azure. These options are available in tiers – Premier, Professional Direct, Standard and Developer Support Plans — that are available for purchase directly by those who are not Microsoft Partners. In addition to these paid plans, Azure offers core support, which is free. It provides support via forums and help with account billing or management questions.

SUBMITTING OFFICE 365/TEAMS SUPPORT REQUESTS

Support requests need to be submitted using the Admin Portal or Partner Portal (if they're listed as a partner for their customer). First, they must log in to the customer for which they want to receive support. Next, submit a support request. Once submitted, they can manage the incident from the Office Portal or Partner Portal.

SUPPORT OPTIONS

	OPTIONS	RESPONSE TIME
PARTNER FACING	Signature Cloud Support	Less than 2 hours
	Microsoft Advanced Support for Partners	Less than 1 hour
	Microsoft Premier Support for Partners	Less than 1 hour
	Partner Advisory Hours	N/A
CUSTOMER FACING	Premier	Less than 1 hour
	Professional-Direct	Less than 1 hour
	Standard	Less than 2 hours
	Developer	Less than 8 hours
	Core	N/A

Support Tracking

Setting up tickets, tracking issue resolution, and managing customer success are fundamentals of their practice.

Providing support to their customers from their practice is a non-trivial, omni-channel effort. Consider using the Microsoft Dynamics 365 for Customer Service solution or a similar customer support software package in their own business to help them quickly set up and start managing their overall customer support efforts.

Microsoft recommends staying within the "365 Suite" of products and leveraging Microsoft Dynamics 365 for Customer Service to manage customer support activities. It provides licensed users with access to core customer service capabilities for a significantly lower price than comparable offerings from other vendors. These capabilities include enterprise case management, Interactive Service Hub, Unified Service Desk, SLAs and entitlements, and other service group management functionality.

CREATE CONSISTENCY AND LOYALTY

Provide the seamless service their customers expect by meeting them where they are with the information they need, every time.

- Give customers great service on their channel of choice.
- Make help easy by providing relevant, personalized service.
- Proactively address issues by detecting customers' intent and social sentiment.

MAKE THEIR AGENTS' JOBS EASIER

Give their agents complete information — in a single customer service software app — to make smart decisions and provide great service.

- Reveal customers' case histories, preferences, and feedback.
- Provide guidance on entitlements and service-level agreements.
- Display it all in a single interface tailored to their job and skillset.

GET AN ADAPTIVE ENGINE

Respond quickly to customer and market changes within an agile, cloud-based environment that has digital intelligence built in.

- Adapt and customize easily using configuration, not code.
- Extend their functionality through a single interface.
- Rely on advanced analytics and a trusted cloud platform.

Microsoft
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Go to Market and Close Deals

Microsoft Teams

aka.ms/practiceplaybooks

Executive Summary

In previous sections in the playbook, we covered topics from how to build their practice by selecting products or services to specialize in, to building and training their team help turn their ideas into reality, to bringing their special offering to market and finding and keeping great customers. So, what's left to do? In this section, we'll discover strategies to compel potential customers that may be sitting on the fence to take action, from creating a good value proposition to building marketing and sales materials that tell their story.

It has been said that their current customers are their best customers. Do they know who their best customers are? What do they have in common? And how do they find more like them? We'll start by helping them build foundational marketing materials such as marketing personas, points of differentiation, value propositions, and customer business needs.

Once they've built the foundation, we'll look at how they can put these materials to work. We'll go through the different ways they can attract new customers and look at best practices. How do they put it all together? We'll discuss why integrated marketing campaigns work the best, and the tools they need to run them, such as a CRM system and marketing automation.

But marketing is only half of the story. Their sales team is the other half. Don't forget how the two work together and what marketing can do to support sales. The job of the marketing team is to build out not only customer facing materials, but also compelling materials that can be used to train and arm their sales team.

The sales end of the bargain is to close the sale. One way to do this is by writing a winning proposal. Another way is to build a proof of concept or prototype of their product or service offering, which could help a prospect understand what it is they're offering or solidify their vision of what they can help make possible. Microsoft is committed to helping their business grow and provides both co-selling and co-marketing opportunities.

Finally, don't miss the Microsoft resources available in the Go-to-Market and Close Deals guide, which they can leverage to help build their marketing materials and campaigns, as well as resources to help their team close the deal.

Top 5 things to do

Add value turing prospective customers into lasting ones. These are the top 5 things partners should do to go to market and get deals done.

- ☑ Identify their customer's business needs
- ☑ Write a compelling value propostion
- ☑ Leverage marketing to find customers
- ☑ Build marketing and sales materials
- ☑ Collaborate with partners

Marketing Infrastructure

After developing an overarching corporate strategy for a Teams practice, marketing must develop an annual marketing plan to support the goals defined by the leadership team. Marketing will then turn strategy into action by operationalizing people and processes.

MARKETING TECHNOLOGY

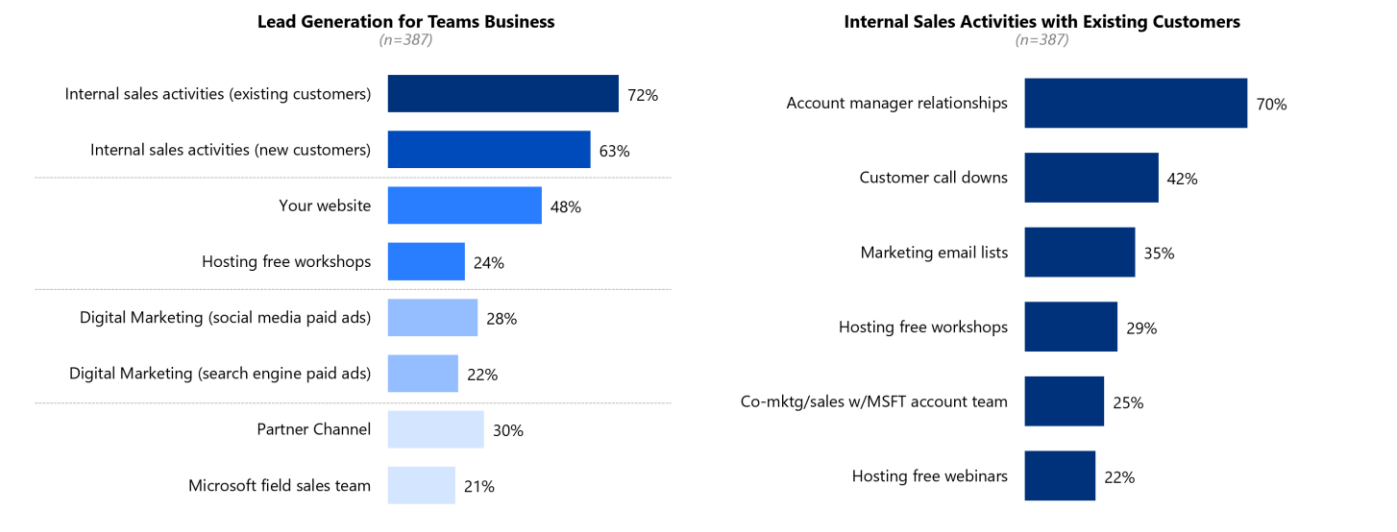
Their marketing team will need supporting technology to execute, analyze and improve their activities across the customer lifecycle. This includes brand awareness, lead generation and management, prospect engagement and nurture, customer acquisition and customer expansion. Marketing must also report outcome metrics and measure tactical efforts such as campaign performance and lead sourcing. These responsibilities require the right technologies to be in place, and the right people and processes to be deployed to optimize these investments. No matter what their practice size, they should consider building a well configured marketing technology stack that can scale to their forecasted growth objectives.

The key tools to consider should include:

- **CRM:** As the foundation of their marketing stack, their CRM will house the data and business processes required to develop, improve, and extend their prospect and customer relationships. It must be configured to track their marketing attribution to sales and provide insights on how campaigns influence sales pipeline and customer growth.
- **Marketing Automation:** A single integrated solution that automates key marketing processes such as email marketing, drip and nurture campaigns, lead management and lead scoring.
- **Content Management System:** Information powers their website, blog and other web properties they can leverage to market their business online. It allows them to create, publish, store, edit and collaborate on

SURVEY DATA

At least 6 in 10 partners generate leads for Teams business via internal sales activities: only half as many use digital marketing or Microsoft channel/field resources.



website content. If they have a website, they have a CMS.

- **Social Media:** Includes technology to accelerate audience growth, monitor activity, make social engagement easier, automate content distribution and measure channel performance.
- **SEO:** Helps them drive organic (unpaid) traffic to their website. This category includes many tools that help with keyword research, content analysis, link and citation building, keyword tracking and other SEO initiatives.
- **Web Analytics** Tools: designed to measure digital marketing activity, as well as analyze their website and web properties to identify both traffic sources and their actions and behaviors in terms of engagement and conversion.

INSOURCE OR OUTSOURCE THE MARKETING FUNCTION

A key operational decision they will need to make regards whether to insource or outsource part or all their marketing functions. It is important to emphasize that there is no right, or wrong model as much depends upon their organization's objectives, existing competencies, GTM timelines and budget.

The advantages of in-house resources include:

- **Business, Industry and Brand Expertise:** With daily immersion into their Teams practice, culture and values of their organization, this approach helps to ensure accurate and consistent brand messaging across all marketing messaging and deliverables.
- **On-Demand Production:** As most Teams practices are fast paced, with changes in target market drivers and customer demands, and frequent changes in internal business operations, it can be challenging to efficiently and effectively communicate changes in positioning and strategy to an outsourced team. Internal marketers can quickly respond to time-sensitive projects, internal priorities and market changes. They can also liaison easily with cross functional resources within the business and key customers activities that require constant monitoring and fluency (email marketing and nurture campaigns) it is almost always more cost effective to assign these tasks to dedicated inhouse resources.

Common in-house marketing responsibilities include strategy, workflow process development, inbound lead generation and nurturing, including campaign planning, and data integrations, analytics and tracking.

Given the focus of most successful Teams practices, which requires specialized knowledge of their customer's industry or niche and its intersection with their technology solution, strategy ownership is always an inhouse function.

The advantages of outsourced resources include:

- **Flexibility**: If they are testing a new approach, experimenting with a "one-off" project or need to scale quickly to meet a market opportunity, outsourcing enables them to execute quickly and effectively.
- **Cost Efficiency**: It can be extremely costly to recruit and retain talent for marketing positions that are in demand. Retaining an inhouse resource may not be affordable, especially for smaller partner organizations.
- **Specialized skills**: Often there is a lack of expertise or experience around key marketing activities that require special skills, such as search engine optimization or video production. Typically, external agencies or specialists can provide resources with expertise across multiple clients, industries and domains. Consequently, they often bring many best practices to their team that would not otherwise have been possible.

Commonly outsourced Teams practice marketing activities include website development, graphic design, video production, content development (specifically copywriting), as well as marketing automation setup and consultation. SEO is a key capability that may require external assistance as SEO mistakes are often very costly. If they outsource this function, secure a resource that is aware of algorithm changes and knows the evolving best practices and most current techniques

A hybrid approach may possibly be the most effective and impactful in the early days of their Teams practice. They benefit from internal marketing professionals who are focused on their marketing outcomes daily, while simultaneously leveraging outsourced resources to fill in the gaps by bringing specialized skills to activities that are periodically required, but without the need for a full-time investment.

Sales Infrastructure

After developing an overarching corporate strategy for a Teams practice, sales must develop a strategic sales plan to support the goals defined by the leadership team. The strategic sales plan describes the target market business environment, opportunities, strategic priorities, revenue goals, sales team structure, budget and action plan.

SALES TECHNOLOGY

Customer Relationship Management (CRM): Configuring and implementing a CRM system that reflects the core elements of their target prospect profile is critical to understanding buyer behavior, effectively facilitating deal reviews, coaching sales team members and delivering an accurate forecast. At minimum the CRM system must support the collection of information regarding prospect and opportunity requirements, key stakeholders, project drivers, the selection process, key milestones, decision criteria, competitors and close dates. The CRM must also support the execution of their defined Accelerated, Depth, Disruptive and Existing Customer sales motions.

Social Selling: Equipping their sales team with a social selling "stack" is critical to driving impact, efficiency and prospect engagement. The minimum stack should include LinkedIn Navigator https://www.linkedin.com a social scheduling tool like Hootsuite https://hootsuite.com/, social listening tools and personality profiling tools like Crystal Knows www.crystalknows.com.

Industry Content Services: Providing their sales team with access to industry content, insights, trends, and news events ensures they can facilitate domain specific conversations with prospects and customers.

Subscriptions to industry tools like First Research www.firstresearch.com, D&B Hoovers http://www.hoovers.com, and Industry Intelligence www.industryintel.com help their sales professionals remain relevant and informed.

NEW HIRE ONBOARDING

A well-designed onboarding process harnesses the excitement, enthusiasm and desire to make an immediate impact that all sales professionals bring to a new job. They are motivated to 'hit the ground running', open to learning new sales strategies, and eager to engage with their prospects. Unfortunately, this initial burst of energy is often undermined by a disorganized onboarding process. It is critical that they put as much structure and energy into onboarding new sales employees as they do into sourcing and interviewing them.

STRUCTURE AN EFFECTIVE ONBOARDING PROCESS

Sales professionals will be exposed to a substantial amount of new content during their onboarding cycle. To ensure this information is absorbed, hiring managers must consistently evaluate new sales hires to determine if they fully understand and can demonstrate the skills they need to succeed in role.

To reduce the risk of losing a new employee during the onboarding process (or not identifying a hiring mistake early), managers should:

1. Clearly communicate the company vision
2. Align organizational and employee objectives
3. Set clear expectation and objectives
4. Ensure pre-onboard housekeeping is complete
5. Design a comprehensive onboarding roadmap with defined activities for key timeline milestones:
    - first day
    - first week
    - first month
    - 90-day confirmation
6. Structure an experiential learning process
7. Continuously evaluate, coach & confirm
8. Make a clear retain or replace decision at the end of the 90-day probation period

SALES METHODOLOGY

Create Repeatable Processes

Cloud technology buying processes are increasingly leaving sales professionals with fewer and fewer prospect engagement opportunities. Every interaction counts. Every prospect communication must have a purpose and sales processes must be optimized to drive consistent outcomes. The Teams-centric solution they bring to market will effectively dictate whether the sales team drives a three phase **Accelerated** process, a four phase **Depth** approach or a five phase **Disruptive** strategy. If they pursue multiple buying profiles within their focus industry or vertical (SMB repeatable and ISV mid-market) their sales team will have to define and drive two separate opportunity pursuit streams. They also will have to define a wave-based **Customer** sales motion to drive activation and consumption of both existing and new cloud, project and managed services (up/cross-sell).

Repeatable Sales Assets: Preconfiguring industry or vertical specific sales assets drives sales process compliance, improved message consistency, increased deal velocity and accelerated prospect engagement. It also forces their organization to clearly define and validate critical project drivers, business case elements and key milestones. Core repeatable sales assets include:

- Engagement communication (e/v-mails)
- Alignment plan
- Engagement plan
- Credentialing meeting agenda
- Demonstration Plan
- Selection service proposal
- Optimization workshop summary report
- Proposal presentation
- Solution proposal

These repeatable sales assets, which underpin all three cloud sales motions, need to be updated and enhanced in an ongoing basis to ensure they accurately reflect the business environment and realities of their target market.

It's also important to ensure that sellers and customers clearly understand their differentiated services, such as change management or managed services, that accelerate value realization and reduce project risk.

SALES OPERATIONS

Management Rhythm: Sales leadership must schedule and facilitate consistent opportunity/deal, pipeline and forecast reviews. This disciplined rhythm drives sales process compliance, active coaching and forecast accuracy.

Proposal Management: All estimates, proposals, NDAs, and contracts need to be vetted by the appropriate leadership team members prior to release to prospects or customers.

Compensation and Incentives: The cloud, SaaS and a focus on monthly recurring revenue have effectively rendered most traditional compensation models obsolete. Licensing revenue, which was historically collected upon contract execution and used to fund sales and marketing costs, is now recognized over a much longer period. Time and materials project services are increasingly being replaced with 3rd-party and partner-developed IP or being converted into recurring monthly fees.

Simultaneously, customer demand is shifting towards solution sets that include multiple Microsoft and partner developed components (ERP, CRM, ISV, Office365, Power BI, SharePoint, Azure, managed services, IP, etc.). Combined, these changes are driving the need for new compensation models. Sales operations is responsible for designing balanced sales compensation plans that attract skilled talent, incent the right behaviors and mitigate overall business risk.

Go-to-Market and Close Deals Guide

Leverage the Microsoft resources available in the Go-to-Market and Close Deals guide, for details on marketing to the cloud buyer, aligning marketing goals with business goals, developing value propositions, and marketing and sales assets, resources, and best practices.

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Optimize and Grow

Microsoft Teams

aka.ms/practiceplaybooks

Executive Summary

Partners are now familiar with strategies for building Teams practices, finding and keeping customers, and providing them with ongoing support.

In this section, we'll focus on how to optimize their practice, strengthen their relationship with customers, and evaluate their performance to help them continue to delight prospects and customers.

Are their customers delighted by their services and products? Delighted and not just satisfied? In this section, they'll learn why customer lifetime value is so important, and how to create more customers for life. We'll share how to get to know their customers better by following their journey with secret shopping and analysis. We'll also explore the use of a "land and expand" strategy and see how getting to know their customers better can lead to incremental opportunities to provide additional services.

They will also discover ways they can keep their solutions top of mind for prospects and customers through nurture marketing, and how to grow and improve their lead generation practice through a well-planned referral marketing program. We'll show them how to make the most of their renewal process, and how to get ahead of deadlines.

We will help them learn how to grow their business by identifying the best customer personas and creating "look-alike" prospects, deepening their expertise in key verticals and marketing that expertise, and collaborating with other partners to offer their customers a more comprehensive level of service and support.

We will end by discussing how important it is to create advocates for their company. This includes turning a customer into a fan and collecting testimonials to create case studies that can be used in future marketing campaigns. Map their customer's experience and ask for feedback to ensure they are turning satisfied customers into delighted customers who can wait to tell their story!

Use the strategies we provide in the Optimize and Grow guide to optimize and grow their practice.

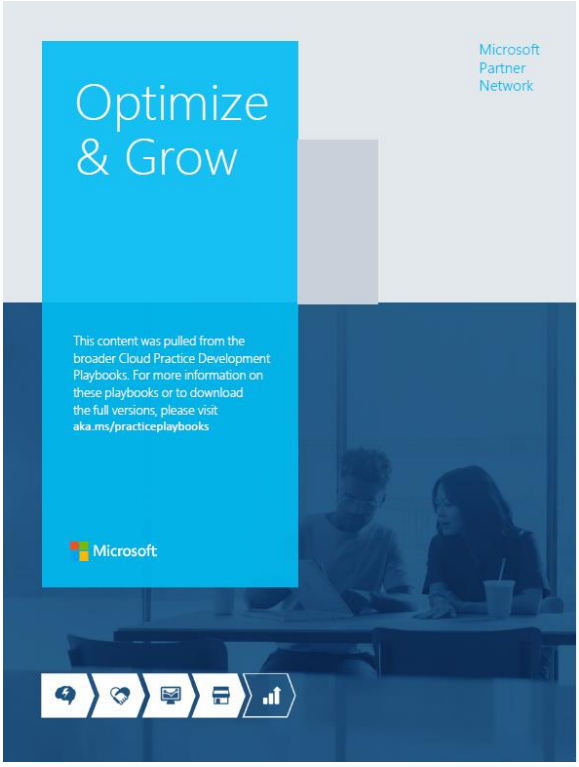
Top 5 things to do

Learn from customers and experience to optimize and expand to new markets through strategic partnerships. These are the top 5 things partners should do to optimize and grow a Teams practice.

- ☑ Gather feedback from their customers
- ☑ Nurture existing customers
- ☑ Turn customers into advocates
- ☑ Generate referrals with marketing
- ☑ Nurture strategic partnerships

Guide: Optimize and Grow

Leverage the Microsoft resources available in the Optimize and Grow guide, for details on building customer lifetime value, executing nurture marketing efforts, optimizing and growing from feedback, refining customer value proposition, growing partnerships, and measuring results.



Playbook Summary

This playbook was created to help partners gain valuable knowledge on how to build a successful Teams practice.

In the first chapter, **Define Your Strategy**, partners learned about the unique business opportunity in front of them. The four main practice focus areas were defined: deployment, security and governance; adoption and change management; calling, meetings and devices; and developing custom and ISV solutions. And, the main monetization models for Teams services were explained: project-based services, on-going managed services, and licensing re-usable IP.

The **Hire & Train** section, explains skill requirements that a partner organization would need to deliver Teams projects and services. , Guidance was given on how to evaluate new hires or up-skill existing staff to meet those needs, and several training resources are available, both online and instructor-led.

The **Operationalize** section shows partners can roll out Teams offerings. This included their approach to marketing and sales and using Teamwork Assessments as a first stage of a customer engagement. This section included discussion of a range of tools they can use to help them generate more leads and manage their Teams practice more efficiently.

The **Go-to-Market and Close Deals** section offers guidance on developing a marketing plan, best practices for operationalizing marketing staff and processes, as well as access to the Go-To-Market and Close Deals Guide.

Finally, in **Optimize and Grow**, we referenced the Optimize and Grow guide, which includes a wide range of proven approaches to build and scale a successful Microsoft Partner practice.

FEEDBACK

Partners are encouraged to share feedback on how toa improve this and other playbooks by emailing playbookfeedback@microsoft.com.