



SMB cloud practice development

Why Cloud: Conversation guide

Helping small and medium-sized businesses along their cloud-adoption journey

The purpose of this document is to:

- I. Guide partners in leading a discovery conversation
 - a. Learn the customer's current business
 - b. Listen for common pain points customers are experiencing
- II. Help partners craft their pitch
 - a. Understand how the three plays encourage SMBs along their cloud journey
 - b. Aim true but prepare to fall back to the Why Cloud play
- III. Walk through selling a business-class email solution
 - a. Learn how business-class cloud email builds cloud comfort and trust
 - b. Talk about solution benefits without overemphasizing the cloud
- IV. Respond to cloud objections and misperceptions

I. Discovery conversation

It's no secret that business for SMBs is HIGHLY personal. Even if you have a very clear idea about what to pitch your customer, you stand to gain respect and credibility by taking the time to demonstrate your interest in their business.

Learn your customer's current business

Looking around their office tells you a lot about how your customer is using technology today, but there could be more than meets the eye. Start the conversation by getting to know their business better, and then dig into the mechanics behind how it works to understand their technology choices.

The sample questions below offer suggestions for how you might start the conversation. Pick those most relevant to your audience, or add your own favorites.

Questions to help you better understand your customer's business

- Who are your clients? What do they need?
- How many locations do you run?
- Do you have employees that work from home or remotely?
- How do you communicate with your clients? (phone, email, meetings)
- How do you connect with suppliers?
- How do you do your accounting? Banking? Pay bills?
- How do you market your company? (website, business cards, word of mouth)
- What compliance/regulations do you have to juggle? How do you do it?
- How do you store your files, receipts, records, brochures, etc.?
- How do you envision your company growing over the next couple of years?

Questions to help you get a better idea of how your customer uses technology

- How does your company view technology?
- Do you have a dedicated IT person on the team, or another resource you turn to for IT help?
- What online/internet services are you using today, or which ones have you tried in the past? What did you like about them? What didn't work for you?
- Do you use online accounting services, marketing services, email, etc.?
- Do you run email servers in-house? Do you know if you're facing end-of-support for Exchange?
- What about your current technology frustrates you? What do you wish you could do better?
- How much time do you spend on computer and IT maintenance, and administrative tasks? How does that compare with what you budget?
- How would your business be affected if your current technology came to a standstill? For example, what would happen if the electricity went out, or your servers went down?
- What happens today if the internet goes down at your office? How do you stay productive?
- Do you have email and a website? Who manages them? Are they a lot of work for you?
- How do you do file storage? Do you have networked storage or online storage? Who manages it, and is it a lot of work for you?
- How much do you spend on landlines and conferencing systems? How dependent is your business on those?

Listen for common pain points your customer may be experiencing

By circling the statements in the table below that most closely align with your customer, you can map where your customer falls on the cloud-comfort scale, as well as which cloud benefit will resonate best with them when it comes time to propose a solution.

Common pain points: “The solution we’re using today...”

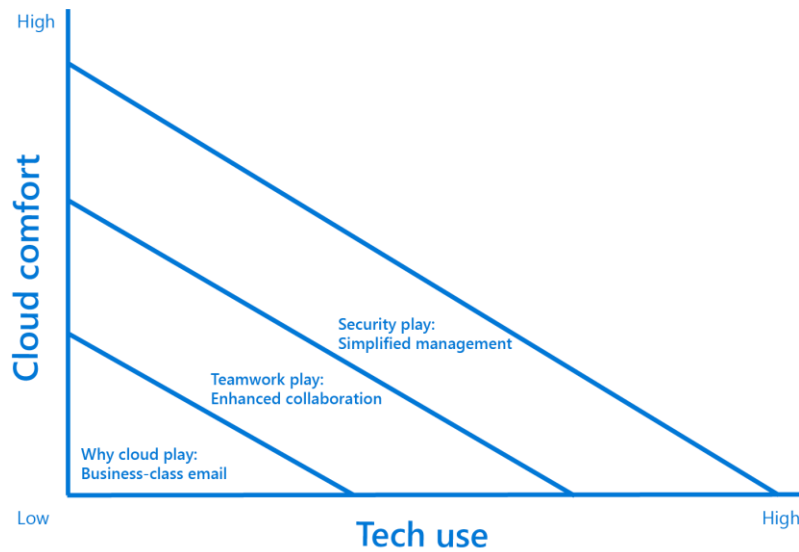
	...eats away at our productivity”	...doesn’t let us work the way we want”	...raises security and compliance issues”	...drains our budget”
	Cloud benefit: Functionality	Cloud benefit: Flexibility	Cloud benefit: Security	Cloud benefit: Savings
Lower cloud comfort >	1. Our admin activities like HR, finance, etc. take too much time.	1. It’s hard to get everyone into a room for a meeting.	1. We don’t know how to keep up with all the security threats.	1. Our carrier keeps raising the cost of our local and long-distance telephone plans.
	2. Internal processes are redundant between functions causing repetitive data entry (ex. CRM and billing).	2. Our teams struggle to keep track of the latest versions of documents.	2. Our assets are all at different phases in their lifecycle and require juggling updates.	2. It’s getting increasingly expensive to keep our older software and hardware running.
Higher cloud comfort	3. Users need unique logins and portals to access all of our different systems.	3. Employees need to be able to do more than email from their phones.	3. I have no idea if the data we move between our desktops and the internet is secure.	3. In order for our tools to work together, we rely on overly complicated and expensive workarounds.
	4. We can’t access data from in-house systems through our online tools.	4. We can’t offer our customers services they would like (ex. accept online payments).	4. We’re blindly trusting that the apps we use are secure and compliant enough.	4. I couldn’t tell you what we spend on LoB apps—we’ve got separate vendors for everything (HR, Accounting, etc.).

II. Crafting the pitch

After learning about your customer’s business and uncovering their priorities, it’s time to map your customer’s needs against the three plays, and assemble your pitch.

Understand how the three plays support your SMBs in their cloud journey

While you have the long-term goal to help your customer take the cloud by storm, for this first step you’ll want to choose a play that takes into account how they run their business today, as well as their cloud-comfort level. The adjacent graph provides a broad view of how the three plays—Why Cloud, Teamwork, and Security—build on one



another to provide you with a comprehensive SMB cloud practice. They span all levels of cloud comfort and technology usage to help you meet your customers where they are today, and bring them along in their cloud journey.

For example, you might consider the Why Cloud play for SMB customers who don’t use much technology today, but may be open to a familiar, low-stakes cloud experience like business-class cloud email. Customers who consume a lot of technology and are very comfortable with the cloud, however, may be looking for a solution that simplifies their security needs across all their different assets and devices. For them, the Security play might make sense.

	Play descriptions	Target workloads	Recommended solution	Partner services
Low cloud comfort > High cloud comfort	Play 1: Why Cloud Replace a high-touch commodity workload to build cloud comfort	Email	Implement a business-class cloud email solution using Exchange Online	Automated email migration Break/fix managed service
	Play 2: Teamwork Use productivity tools to work better together and strengthen collaboration	Client (i.e., Office apps) File share Collaboration tools (i.e., Chat)	Adopt Office 365 Business Premium	Back-up Custom proactive support User education
	Play 3: Security Simplify and secure IT operations for ease of management	Security MDM Identity solutions Line of business apps	Upgrade Office 365 customers to Microsoft 365 Business	Device management Identity management Threat protection Compliance management App modernization

Aim true but prepare to fall back to the Why Cloud play

The graph and table of the three plays make choosing a play appear to be a cut-and-dry process in which customers fall into neat categories. You know from SMB experience it's never that neat.

Some customers may have zero online services but may be open to adopting them, in which case, you may decide the right first step is Microsoft 365. Other customers, who appear to be comfortable online, using electronic bill pay and internet banking, may seem ready for Office 365 but object to the recommendation because they "don't trust the cloud."

You know your customer best and will ultimately choose a smart play for them. However, if they pump the brakes claiming concerns about the cloud, you can fall back on the Why Cloud play—just be sure to acknowledge the shift and address why you're doing it:

1. Explain to your customer that you understand their reluctance. Let them know that it's not unfounded given the history of the cloud, however it could be holding them back unnecessarily.
2. Share stories about how you helped other SMBs that held back from the cloud recognize their misperceptions, so they could make better informed decisions in the future.
3. Ask them to trust you, and go on a cloud journey with you through email.

NOTE: If you decide to pitch plays two or three for Office 365 or Microsoft 365 to your cloud-reluctant customers, refer to the play-specific materials for Teamwork and Security, but keep this document close by for handling cloud objections that may arise. If you decide to pitch play one, continue with this guide.

III. Selling a business-class email solution

Learn how business-class cloud email builds cloud comfort and trust

For cloud-reluctant SMB customers who don't use a lot of technology today, you'll want to start small with a low-stakes offering that instills cloud confidence and can be easily integrated into offers down the road. Business-class email is a perfect first step!

Today, SMBs use email more than any other software/app¹, however cloud-reluctant SMB customers are likely to still be running email on physical servers or free online tools.

Moving them to a business-class cloud email solution that runs on Microsoft servers offers them an inexpensive cloud experience that many perceive to be very low risk. Thanks to the frequency at which we all send and receive emails these days, customers can learn their way around their new solution quickly and easily.

Resources that support SMBs making this leap include the following:

- Bump up your email to business class ([eBook download](#))
- IDC study, "How the Hosted Exchange Server is Redefining SMB Cloud IT Adoption," ([request a free copy of the study](#))

Talk about solution benefits without overemphasizing the cloud

To win over the cloud-reluctant customer, you need to get them to buy into the vision of what the solution can do in their environment before you bring up the cloud.

Here are some tips for how to structure your pitch:

1. Ground the email conversation in the larger story about the challenges their business faces today. Talk about how big their job is, how hard they work, and how ridiculous it is for them to have emails get lost in spam folders (when they send them from a free cloud accounts), size restrictions on attachments, etc.

¹ Bredin, an SMB market research and content marketing agency.

Example: As our reliance on email grows, your business needs a solution that works harder for you. A business-class email solution that runs on Microsoft provides a single solution packed with features that make it easy to be professional, productive, and fiscally prudent.

2. Explain how a business-class cloud email solution solves a specific business problem. Many cloud-reluctant SMB customers get overwhelmed by all the capabilities cloud solutions introduce. Keep your pitch focused on how you can address a problem you know your customer experiences based on your discovery conversation.

Example: I heard you talking about how challenging it is to be productive when you have so many demands for your time. I'd love to help you find a way to stay organized even with your high-volume inbox.

3. Illustrate the new way your email solution will work in their environment. The SMB decision maker you're talking to might be a crucial part of the "IT team." By helping them visualize how the solution works in the existing environment through demos and guided trials, you're more likely to win the deal.

Example: Imagine if your email solution could read through your inbox and update your calendar to help you anticipate schedule changes.

Benefit	Talking points that illustrate how a business-class email solution addresses specific pain points
Functionality: Get more done	<p>Intelligent email and calendaring capabilities keep you focused and on track.</p> <ul style="list-style-type: none"> • Bubble up important messages with an intelligent inbox that prioritizes emails for you • Stay ahead of your moving schedule with a calendar that captures events from emails • Keep records you need at your fingertips with increased inbox size limits and in-place archive • Find what you need fast using enhanced search to read emails and attachments
Flexibility: Choose how you work	<p>Flexible usage options let you work how you want, where you want, on your device of choice.</p> <ul style="list-style-type: none"> • Stay in motion by accessing email, calendar, and contacts from anywhere • Use the tools you prefer through your choice of device and browser • Manage your organization from anywhere with a web-based admin center • Extend what you do with email by integrating it with internal LoB apps
Security: Help protect your business	<p>Built-in email security helps protect against external threats, data leaks, and device misuse.</p> <ul style="list-style-type: none"> • Protect your inbox against spam, viruses, ransomware, and phishing scams with anti-malware and anti-spam filtering • Prevent unauthorized users from opening sensitive documents or viewing private information • Set restrictions on how business information may be copied and saved • Secure devices by creating approved mobile lists, enforcing PIN locks, and enabling remote data
Savings: Keep costs in line	<p>A hosted service removes the burden of upkeep to help you save time and money</p> <ul style="list-style-type: none"> • Avoid the surprise expenses of unplanned hardware and software costs • Get time back with automatic patching and updates managed by Microsoft • Leverage existing resources by enabling secure BYOD (bring your own device) policies • Extend the life of older PCs by using memory on-demand

IV. Respond to cloud objections and misperceptions

After you sell them on the vision and pitch the solution, you'll likely hear push back on the cloud. The key to having a productive cloud conversation at this point is to:

- Be empathetic to their position
- Unpack concerns from buzzwords (i.e. What do they really mean by "I don't trust the cloud?")
- Address their concerns head on

Below are some common objections you're likely to hear, and general guidance on how to frame your response—leading with empathy and closing with facts.

Objection handling around issues of cost

Cloud objection	Cloud value
I don't want to be locked into a subscription for something I don't own and can't touch.	I understand it's comfortable staying with what you have. We're used to owning and controlling important parts of our business. Moving to the cloud doesn't mean you give up ownership or control of your data.
I don't want to give up control of my data.	Instead it means you get Microsoft engineers doing the work to help you stay in control. It can mean: <ul style="list-style-type: none">• More predictable cash flow—even out expenses by avoiding emergency hardware costs.• Flexibility around licensing—you can add and remove users as you need. The power to cancel—if you don't like the services you receive, you can simply cancel your subscription.
I don't want to pay for things I don't need when what I already have is good enough and paid for.	<ul style="list-style-type: none">• You choose what you get, from Exchange to Microsoft 365.• We offer different subscription levels to help you get what you want.• You can replace current services you're paying for with those included as part of M365 (OneDrive, security updates, and integration).
I don't see the value. It's too expensive.	<ul style="list-style-type: none">• You can adjust your subscription based on the number of licenses you need at the time; it's not like perpetual licenses that lock you into a certain number.• Each license allows access on five PCs or Macs, five tablets, and five mobile devices.• You can share and store files online and collaborate in real time from anywhere, your business is no longer tethered to a desktop.• Microsoft 365 includes Office 365 and cloud-based collaboration tools that may have a lower total cost of ownership than their on-premises equivalents.• With Microsoft 365, your devices can live longer through better security and less software-download drain.• Your operational costs may be lower {offer to run the numbers together}.
What if I store a lot? Will the cloud get expensive?	<ul style="list-style-type: none">• Office 365 includes 1TB cloud storage

Objection handling around issues with business disruption

Cloud objection

I don't want to throw a wrench in employee productivity.

I don't want to confuse my business or my people with new technology.

My business can't shut down to deploy new software.

It's a new level of complexity. I'm going to have to hire someone (a partner or an employee) to handle migration and to make my LoB apps work.

Cloud offerings won't work on my Mac or Android operating system.

What if I stop my subscription? Do I lose all my data?

Cloud value

- Our cloud solutions offer experiences that are very similar, if not identical, to many of the trusted productivity tools your employees already use today.
- Cloud solutions tend to improve employee productivity by allowing them to work from any location on any device without missing a beat.
- It's the same great set of tools your employees are using today.
- Microsoft Office [Training Center](#) helps get both IT Pros and end users up to speed.
- Use Office 365 deployment and management [tools](#) to control your Microsoft 365 environment, including staging updates.
- I can help you transfer your data at deployment and manage it down the line. Note to partner: pitch your configuration or migration services
- I understand why this may seem complex now, but it's important to step back and think about how the ad-hoc solutions running today were difficult to integrate at first and are still expensive to maintain and troubleshoot. By moving to the cloud, you can integrate everything together which makes it easier to adapt to your changing needs. The cloud will help you reduce the complexity in the long term without asking you to sacrifice growth.
- The security and management capabilities of Microsoft 365 Business apply to iOS, Android, and Windows across mobile devices and PCs.
- Your files are still accessible even after your subscription lapses.

Objection handling around issues of security

Cloud objection

This won't be as secure as my personal server I can see and touch.

Privacy is really important to my line of business.

Will the cloud meet my industry compliance needs?

Cloud value

- You get enterprise-grade advanced security capabilities to help safeguard your business data. Security features will help protect against new threats or ensure your organization isn't accidentally leaking sensitive information.
- To help prevent loss, Microsoft's data centers are geographically redundant. This means your data is backed-up in more than one location every day.
- On top of that, you get advanced cyberthreat protection and the ability to help protect company data across PCs, phones, and tablets.
- Microsoft 365 offers the flexibility to have all or some data in the cloud, so customers have control over where their data lives.
- Microsoft 365 has built-in controls for data privacy and security. You'll have multiple layers of protection to help safeguard personal data, including privacy settings for Office 365 apps, access control, and encryption options.
- Microsoft 365 and Office 365 is compliant with key third-party standards, such as ISO 27001, the European Union Model Clauses, HIPAA, and FedRamp. Microsoft has data-processing agreements in place that ensure we are in full compliance with the highest industry standards for privacy, security, and handling of customer data in every country that we sell in.
- We'll help you on your journey toward compliance with the European Union's landmark General Data Protection Regulation (GDPR).