



Customer Journey-in-a-Box | Playbook

Compliance and Data Protection for M365 E5 Upsell

January 2023



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

\$1 =
USD



\$6.70
Western Europe



\$6.10
Total (Worldwide)



For every \$1 of
Microsoft revenue

Resale-led
partners make
\$2.21
in economic value

Services-led
partners make
\$5.75
in economic value

Software-led
partners make
\$7.86
in economic value

Customer Journey Insights

The opportunity for partners to grow their business with MS is bigger than ever before. A 2022 Forrester study found*: **An opportunity for partners to increase compliance revenue by 16%.* A 27% increase in compliance solution attach rate.**

Mitigate Compliance and Privacy Risks provides a focus on non-CISO pain points, to drive regulatory, legal, and privacy management conversations.. Protect and Govern Sensitive Data adds Insider Risk management and ensures customers know, classify, and protect their data as well as ensure their environment is protected from accidental or unauthorized sharing of sensitive data.

⚡ Priority

- Compliance & Privacy for M365 E5 Upsell

🏠 Segment

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

🗄️ Solution Area

- Security

★ Hero SKU

- M365 E5 Compliance
- Microsoft Priva

🏠 Up/cross sell path

- Microsoft 365 E5

📊 KPIs

- # Workshops & Programs
- # Customer adds

Audience

Customer targeting

- Customer licensed for Microsoft 365 E3 and/or E5 security and Customer licensed for Microsoft 365 E3 stand alone and E5 Teams features.

Build Intent 1:1 Workshops

- 800+ Paid Available Units (PAU) for Azure Active Directory Premium (AADP) PAU, and
- 250+ Monthly Active Users (MAU) for Exchange Online, SharePoint Online or Teams
- Eligible for select customers between 300-999 seats

Buyer Persona

- Compliance Officer Leader
- C-Suite
- Data Protection Officer
- Chief Risk Officer
- Chief Privacy Officer
- Chief Legal Officer

Campaign material

Sales Support Materials

- [Compliance overview](#) (Purview Pitch Deck)
- [Compliance](#) (Portal)
- [Protect and Govern Sensitive Data](#)
- [Mitigate Compliance & Privacy Risks](#)

Product presentations

- [Microsoft Purview Data Lifecycle Management](#)
- [Microsoft Purview Records Management](#)
- [Microsoft Purview Information Protection](#)
- [Microsoft Purview Data Loss Prevention](#)
- [Microsoft Purview Insider Risk Management](#)
- [Microsoft Purview Communication Compliance](#)
- [Microsoft Purview Compliance Manager](#)
- [Microsoft Purview eDiscovery](#)
- [Microsoft Purview Audit](#)

Marketing Guidelines

- [Partner led marketing guidelines](#)
- [Brand Central](#)

Partner

Criteria

- ✔ **Protect and Govern Sensitive Data Partner Characteristics**
 - System Integrators , GSIs
 - Partners that are able to provide consulting and deployment services or compliance
 - Have delivered MCI Workshops
 - MSSP Partners on MSSP Partner program (by invitation only) that have compliance practice
- ✔ **Mitigate Compliance and Privacy Risks**
 - GSIs Advisories And Local Compliance Advisor
 - Partners with Advisories services that engage predominantly with CCO, CLO, DGO, CPO roles to understand
- ✔ **Build Intent 1:1 Workshops: Protect & Govern Sensitive Data and Workshops: Mitigate Compliance & Privacy Risks**
 - FastTrack Ready or Co-Sell Ready
 - And SSPA Compliant

Skilling and enablement

Learning paths

- [Security, Compliance and Identity Partner enablement guide](#)
- [Microsoft 365 and Security Learning Paths | Learning Paths](#)
- [Developing security solutions with Microsoft](#)
- [Compliance Learning Path](#)
- [Certification for Compliance SC-400 Exam: Microsoft Information Protection Administrator](#)

Readiness

- [Manage information protection and governance \(Compliance learning path\)](#)
- [Manage insider risk in Microsoft 365 \(Compliance learning path\)](#)
- [Build your compliance business by managing risk and securing customer information \(Video\)](#)
- [Manage risk and compliance with end-to-end security solutions \(Video\)](#)
- [Build a privacy-resilient workplace \(Video\)](#)

Other resources

- [Privacy management partner FAQ](#)
- [Microsoft Purview Partner FAQ](#)
- [Microsoft Security Technical Content Library](#)

Security Pilot and deployment partner programs

- [Information Protection](#)
- [Risk Management](#)

3 questions you should ask the customer:

- How do you identify and protect your sensitive business-critical data In Microsoft 365?
- What's your strategy to identify and mitigate insider and 3rd party risk?
- How do you keep track of being compliant with industry-related regulations?

Customer Journey

Tactics

Funding & Incentives



Listen & Consult

- Partner led demand gen campaigns (1:many) : Webinars; Events; Roundtables; E-mail campaign; ABM / Digital campaign

- Partner led Small group leadership roundtables

- Through Partner Marketing (1:many) Marketing funds are available for selected partners



Inspire & Design

- Build Intent 1:1 Workshops:
 - Protect and Govern Sensitive Data:
 - Build intent Workshop Mitigate Compliance and Privacy Risks

- Data Protection & Governance Assessment

- MCI Build Intent 1:1 Workshops: \$5K per engagement. Partner nominated
- Solution assessment: no funds available until end of June 2023



Empower & Achieve

- Pre-Sales ECIF (Microsoft Sellers nomination): for key initiatives as E5 Compliance, E3 Core & Zero Trust Foundation, Trials Conversion, Security Customer Transformation, Compete).

Pre-sales - ECIF Value

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



Realize Value

- Partner Incentives: aka.ms/partnerincentives

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Manage & Optimize

- Post-Sales ECIF (Microsoft Sellers nomination): This program is to drive post-sales usage of M365 Security workloads.
- M365 Usage Incentives: Rewards partners for helping customers successfully deploy and adopt Microsoft 365 and security workloads

Build Intent 1:1 Usage Workshops:

- Protect and Govern Sensitive Data: MIP, DLP and IRM
- Mitigate compliance and privacy risks: CM (Compliance Manager) & Priva

- ECIF Post-Sales: \$2 per seat.
- Online Services Usage M365 : > 150 seats, \$1K for Premium Workloads, \$500 for Core Workloads
- Usage 1:1 Workshops \$5K