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| **Office 365 SMB Plans - Cheat Sheet*****Microsoft is evolving Office 365 plans to make them even better for small and midsized businesses.*** |
| **OVERVIEW:****If needed, explain what Office 365 is:** Office 365 is your familiar Office, but in the cloud. It includes:* The **full, installable Office apps** that you know and love – Word, PowerPoint, Excel, Outlook, etc. – **always up to date on up to 5 PCs or Macs.**
* In addition to desktop apps, you also get **Office apps on your tablet and smartphones for viewing and editing on the go**.
* And if you forget your laptop at home, or leave it at the Office and need to access or edit your files, you have **Office Online** which allows you to access, edit, and share your documents by simply logging into your Office Online account from any browser.
* **1TB of OneDrive for Business online storage** so you can safely and securely save your files online and share them with others.
* **Easy to set up and manage**, with a financially-backed SLA and 24/7 technical phone support for critical issues.

**NEWS:** On October 2, 2014, we will release a new set of Office 365 plans tailored to meet the needs of small and midsized businesses (SMBs), ranging from 1 to approximately 250 employees. The new plans are:* **Office 365 Busines**s**:** Full Office applications, plus 1TB of cloud storage for $8.25/user/month.
* **Office 365 Business Essentials:** Core cloud services for running your business, including business-class email and calendaring, Office Online, online meeting tools, IM, video conferencing, cloud storage and file sharing for $5/user/month.
* **Office 365 Business Premium:** The full Office applications, plus core cloud services for running your business for $12.50/user/month.

**What’s new:** The ability to mix and match plans to meet the needs of specific employees, the seat cap is now consistent across all plans (up from 25 on some old plans to 300 seats for all new plans) giving SMBs more flexibility to add additional users as they grow and their needs change, and additional services like Yammer for social networking within your company. **GOALS:** **Perceptions to change:** * Microsoft’s small business solutions are seen by some as inflexible, and are generally not associated with key features such as cloud-based collaboration and cross platform functionality.
* Many small businesses have lingering concerns about cloud technology in general, often associated with issues of recurring costs, security, etc.

**Perceptions to drive:*** Microsoft offers flexible solutions that fit a wide variety of needs; we listen to feedback to ensure this is the case.
* Cloud solutions like Office 365 can help SMBs be more productive, reduce costs and gain a competitive advantage.
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| **Context setting:** There are millions **of cash-strapped small businesses**, many of whom see limiting IT spending and sticking with the legacy software they’ve already purchased as necessary methods of cost reduction. These **constrained IT budgets and a general lack of knowledge have been the biggest challenges in technology adoption among SMBs.**There is still a substantial portion of small businesses that still have not adopted cloud-based technology at all. However, that number is shrinking rapidly, indicating more and more SMBs are learning how cloud solutions can be a boon to their business in many of the same areas which initially concerned them (e.g., cost, security, ease of use, etc.).We have been offering cloud services for a while now, helping SMBs run their businesses more efficiently, spending less time worrying about software and more time focused on what they do best. We’ve learned a lot too throughout the process, and we’re using those lessons to ensure we’re providing the best tools we can to help small businesses grow and thrive.***We listened to feedback and are offering new plans that give SMBs more choice, value and flexibility to best meet their individual needs.**** The industry often talks about SMBs as if they’re a homogenous group, but we know they are very diverse. For example, we heard feedback that:
	+ Some customers only wanted access to email online and core Office products like Word, Excel and PowerPoint. Others need the flexibility to mix and match plans, while others needed to easily add more people based on growth or seasonality.
* With the new plans, we’re accounting for the range of needs that different small businesses have at a price point that makes Office 365 an easy decision.
* **The new plans provide the following benefits for SMBs:**
	+ *Big IT for small prices*: With Office 365, SMBs get it all – email, Web conferencing, instant messaging, cloud storage, file sharing and more – for an affordable price per user, per month.
	+ *Ability to work flexibly and on the go*: Office 365 syncs work across devices, meaning that SMBs can take their work with them wherever they go and work from whichever device is most convenient. Work is also synced across users, allowing co-workers to collaborate on the same document at the same time regardless of location.
	+ *Manageable IT costs:* Office 365’s subscription model makes an SMBs’ IT investment an operating expense instead of a capital expense – and it means SMBs only pay for what they use.
	+ *Are easy to set up and manage:* Office 365 enables SMBs to spend less time managing IT and more time on the tasks that matter. With Office 365, set up is easy, and updates are made automatically through the cloud.
	+ *Familiarity:* Office 365 combines all the productivity tools you know and depend on (Microsoft Word, PowerPoint, etc.) with the above benefits of the cloud.
 | **Supporting evidence** **Data/Statistics:*** [A recent study](http://www.spiceworks.com/marketing/state-of-it/report/) found that roughly 4 out of 10 small businesses still use no cloud services whatsoever, though the fact that the ratio was 7/10 just three years ago illustrates the rapid increase in adoption.
* According to the same study, SMBs with less than 250 employees had notably higher percentages of current and planned cloud adoption than those with 250-1,000 employees.

**Customer feedback:*** “We need anywhere and anytime access to files and business tools to serve our customers and stay competitive.”
* “We need to stop spending on soon-to-be-obsolete technology. We need solutions that evolve with us.”
* “We need to move between plans as our needs and business grow, and we need functionality that is available in the enterprise plans.”

**Customer archetypes:*** *For O365 Business*: Let’s say you are a small wine distributor with 30 people and you are using Office 2007 or Office 2010. Your sales reps are on the road and need to be able to access and edit important files when visiting customers and placing orders. You are using separate solutions for collaboration and storage. For you, we recommend Office 365 Business. For $8.25/u/m, you get all the Office apps, plus mobile apps on tablets and smartphones + 1TB of storage + Office Online. As a result, it’s easy to collaborate with the home office and be productive on the go and from any device.
* For O365 Business Essentials: Let’s say you are a local real estate company with 75 employees, and you are looking to replace an aging email server or for a more professional email solution, possible cloud storage or maybe you are using separate solutions for storage and online meetings. For you, we recommend Office 365 Business Essentials. For $5/u/m, you get core cloud services for running your business, including business-class email and calendaring, Office Online, online meeting tools, IM, video conferencing, cloud storage and file sharing. This plan is great for companies that want simple-to-use, but enterprise-grade cloud services.
* *For O365 Business Premium*: Let’s say you are a pharmaceutical company with 150 employees. You are running an out-of-date productivity infrastructure and looking to go to the cloud to speed up collaboration and time to market. For you, we recommend O365 Business Premium. For $12.50/u/m, you get the Office apps on desktop, tablet and smartphones + Office Online, business-class email (Exchange), 1 TB cloud storage built-in (OneDrive), unlimited online meetings (Lync) and more. This plan is great for companies looking for ways to improve productivity and collaboration and create a flexible work environment.
 | **Soundbites*** “This new line-up reflects discussions we’ve had with small businesses about how they want to get started and grow with Office 365.”
* “The changes we’ve made are about increasing flexibility; allowing small businesses to use specific elements of Office 365 exactly how they want to.”
* “Office 365 gives small businesses a leg up because it offers the same powerful tools that large companies use, while being affordable and easy for small businesses to set up and manage.”
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| ***In today’s new world of work, cloud productivity is key to meeting employee and customer demands. As a result, they give SMBs a competitive advantage**** One of the many significant ways cloud technology has impacted business is that it’s given sole proprietors and smaller businesses tremendous IT benefits without the traditional cost and complexity.
* From enabling employees to collaborate from different locations to providing anytime, anywhere access to business email and documents, cloud services are revolutionary for small businesses because they’re affordable, easy to deploy and easy to manage.
* The Boston Consulting Group recently published the results of a survey that revealed a big shift in the way SMBs work from just 3 years ago and showed that the adoption of the latest technology solutions, like cloud, has a direct impact in SMBs’ bottom line.
 | **Supporting evidence**From the Boston Consulting Group: * Today, 62% of SMB employees are using devices (phone, tablet) to access email, compared to 39% three years ago
* 32% are using devices to access apps developed by and/or for their company (compared to only 12% three years ago)
* An SMB’s IT decisions have a direct impact on employees…
	+ 45% of SMBs said their employees get more done in the same amount of time thanks to technologies like cloud and mobile
	+ 43% said technologies such as cloud and mobile enable employees to work better together
	+ 31% said these technologies enable employees to work and live in more places
* …And on their bottom line:
	+ BCG found that more technologically advanced SMBs increased their annual revenue growth 15% faster than less tech-savvy businesses.
	+ SMBs said technologies such as cloud and mobile have created more satisfied customers (44%) and resulted in better customer relationships (42%)

**U.S. customer examples*** [Sky Zone Indoor Trampoline Park](http://blogs.office.com/2014/05/21/sky-zone-makes-giant-leap-in-productivity-and-savings-with-office-365/), a recreational entertainment company with locations across the United States, uses Office 365 to enable its employees and franchise partners to work with familiar tools from anywhere while promoting a professional image. Through leveraging Office 365, the company expects to save more than US$1 million over the next five years as it takes advantage of cost efficiencies available through Office 365.
* [DeSantis Landscapes](http://blogs.office.com/2014/07/09/desantis-landscapes-office-365/), an Oregon-based business with 92 employees, replaced an aging server with Office 365 and now benefits from better collaboration among employees in the office and in the field. The company uses Lync Online to meet virtually, and employees can also share screens or access documents remotely from SharePoint Online to move business along in minutes – instead of driving back to the office. The company estimates that this has saved them 30-50 hours per week, and on top of that it has reduced its IT costs and is better equipped to grow.
* [Breathe Hot Yoga](http://blogs.office.com/2014/02/21/breathe-expands-with-office-365/) expanded from one to three studios in fewer than three years and now uses Office 365 on mobile devices to keep track of scheduling changes for its 20 teachers that instruct 100 classes per week. Office 365 enables instructors to build strong client relationships by being able to respond quickly to inquiries thanks to the ability to access email from anywhere, on any device. Office 365 is also key to the studio’s teacher training programs – using SharePoint Online, the staff can easily share written class materials and tutorials.
* [Tastea](http://blogs.office.com/2014/06/10/tastea-drinking-in-the-success-with-office-365/), an innovative beverage retailer based in California, chose Office 365 to help it prepare for expansion while maintaining the high level of quality and service its customers had come to expect. The company now relies on Office 365 for everything from inventory management to customer service, and it takes advantage of the Office 365 Marketplace to fill specific needs through integrated third-party apps.
 | **Soundbites*** “With Office 365, SMBs have access to big IT without paying an arm and a leg.”
* “Work is no longer confined to your desk; our goal is to empower small businesses to be more productive from anywhere, on any device.”
* “Competitive advantage now comes from what you do with technology, not how much of it you have.”
* “This is an exciting time for small businesses; technology is allowing them to do things that were never possible before.”
* “In addition to being affordable, cloud services like Office 365 are revolutionary for small businesses because they’re easy to deploy and easy to manage.”
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***As background ONLY - Additional details on Office 365 SMB Business Plans:***

* **New Choice:** The Office 365 Business plan ($8.25/user/month) makes it simple to get just the familiar, full Office apps at a great price – always up to date and available on all your devices including yourPC, Mac, iPad and smartphone. The 1TB of cloud storage that’s included makes it easy to access and edit your important files from anywhere.
* **New Value:** Business Premium includes Midsize Business’ services at the Small Business Premium price of $12.50/user/month. Business Essentials matches Small Business on price ($5/user/month) with improved features and additional services like Yammer and Active Directory support. The higher seat limit of 300 means even more businesses can take advantage of the great value these plans provide.
* **New Flexibility:** As you grow and your technology needs change, you can move your company (or just specific users) to an enterprise plan, a different business plan or even add solutions like Project, Visio, Dynamics CRM Online and more.

