

Looking for new revenue opportunities?

Activate your Microsoft Project and Microsoft Visio cloud sales and expand your customer base

1. Understand the Microsoft Cloud Solution Provider (CSP) Program

The CSP program is a sales model that allows partners to resell or bundle their own services in addition to Microsoft Cloud Services as a complete solution and gives customers the payment flexibility with pay-as-you-go billing. Learn more about the CSP incentives at Microsoft Partner Network (MPN) or check with your indirect provider.

2. Choose a relevant Project and Visio sales play

Four Target Project and Visio (P&V) Sales Plays

- Defined based on overlap with Microsoft 365 customer base and licensing models
- Aligned with a unique customer segment

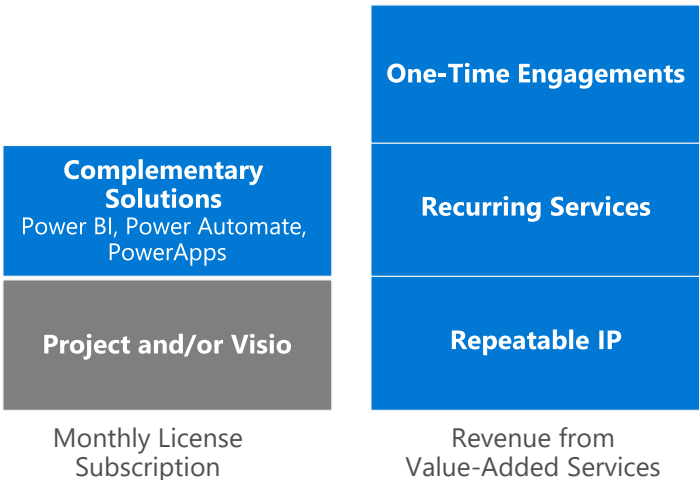
Licensing Model		Existing Office 365 / Microsoft 365 customers	New to Office 365 / Microsoft 365 customers
Cloud	Existing P&V Cloud Customers	1 Seat Expansion	---
	New P&V Cloud Customers	2 Attach	3 Customer Adds
On-Premise	Existing P&V On-Premise Customers	4 Cloud Move	---

- 1 **Seat Expansion:** expand within your existing Project and Visio customer base
- 2 **Attach:** cross-sell to your existing Microsoft 365 or Office 365 customers
- 3 **Customer Adds:** resell to your new Microsoft 365 or Office 365 customers
- 4 **Cloud Move:** build your initial CSP customer base by migrating on-premise Project or Visio seats to cloud

3. Consider adding a new revenue stream

Sources of Partner Revenue

- More cross-sell opportunities
- More revenue come from partner’s value-added services

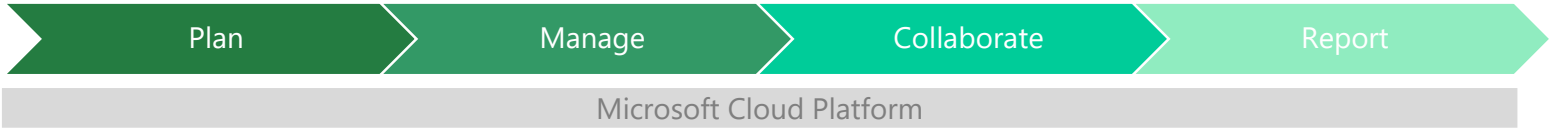


Examples of Value-Added Services

- Consult on how to increase productivity
- Configure process automation scenarios
- Set up customer dashboards
- Train users, IT, and operations
- Outsource staff, e.g., project managers or business analysts
- Package industry specific solutions, e.g., PowerApps, SharePoint, Project, or Power BI customization

Microsoft Project Cloud Solution Overview

Microsoft Project is a simple, yet powerful tool to manage work – from quick projects to complex initiatives. With Project, anyone can get started quickly and execute projects with ease.



Plan Comparison

User Roles	Recommended for SMB customers			
	Project Online Essentials	Project Plan 1	Project Plan 3 (Project Online Professional)	Project Plan 5 (Project Online Premium)
Team Member	●	●	●	●
Informal/Certified Project Manager		●	●	●
Portfolio Manager				●
	Add-on ONLY to Project Online Professional or Premium	Web only, based on the Microsoft Power platform	Includes Project Online with professional functionality and new Project for the web	Includes Project Online with premium functionality and new Project for the web

Examples of Use Cases

Select Industries	Manufacturing Track product development status	Financial Services Managing complex Private Equity	Healthcare Manage healthcare facility inspection	Construction & Real Estate Organize and integrate subcontractor tasks	Professional Services Support complex negotiations
Select Roles	Information Technology Upgrade documentation management system	Human Resources Develop training plan and track execution	Operational Support Manage office maintenance	Finance Track audit schedules	Business Intelligence Manage complex data migration products

Benefits and Sales Plays

Buyer Personas	Key Benefits	Seat Expansion	Attach	Customer Adds	Cloud Move
Business Decision Maker	Easily schedule tasks, assign resources, and manage issues and risks efficiently	✓	✓	✓	
	Work across familiar collaboration tools in Office 365	✓	✓	✓	✓
	Enable real-time access to project information from virtually anywhere	✓	✓	✓	✓
	Leverage native integration with Power BI to get better real-time data insights	✓	✓	✓	✓
IT Decision Maker	Add new seats with ease	✓	✓	✓	
	Consolidate solution portfolio with one solution provider to simplify IT management	✓	✓		
	Support multiple departments with unique needs	✓			
	Minimize IT overhead by leveraging continuous updates				✓

Follow Project and stay connected

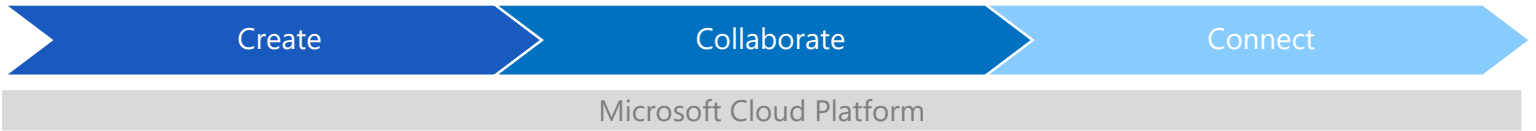


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Microsoft Visio Cloud Solution Overview

Microsoft Visio is a diagramming solution that comes with a robust library of built-in and third-party templates and shapes, data connectivity capabilities, and integrated collaboration tools.



Plan Comparison

Available with a plan	Recommended for SMB customers	
	Visio Plan 1	Visio Plan 2
Visio	•	•
2GB OneDrive storage	•	•
Visio Desktop		•

Examples of Use Cases

Select Industries	Financial Services	Manufacturing	Travel & Transportation	Healthcare	Technology
	Insurance claims and payment status flow	Quality control procedure flow	Freight auditing and billing processes	Medical protocol process flow	Cloud architecture diagrams
Select Roles	Information Technology	Human Resources	Operational Support	Finance	Business Intelligence
	Incident data visualization	Organizational charts	Facility layout design	Compliance process flow	Real-time data charts

Benefits and Sales Plays

Buyer Personas	Key Benefits	Seat Expansion	Attach	Customer Adds	Cloud Move
Business Decision Maker	Create professional diagrams effortlessly	✓	✓	✓	
	Model and automate business processes	✓	✓	✓	✓
	Work across familiar collaboration tools in Office 365 (Teams, Power Point, Word)	✓	✓	✓	✓
	Convert Excel process map data into Visio diagrams with Data Visualizer	✓	✓	✓	✓
	Use Visio Visual to embed Visio diagrams into Power BI dashboards	✓	✓	✓	✓
IT Decision Maker	Add new seats with ease	✓	✓	✓	
	Consolidate solution portfolio with one solution provider to simplify IT management	✓	✓		
	Support multiple departments with unique needs	✓			
	Minimize IT overhead by leveraging continuous updates				✓

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