



Secure Productivity

Small and medium-sized businesses

Move to Microsoft 365 Campaign-in-a-Box Execution Guide

Partner marketing resources to
generate interest and qualify intent



What's included in this guide

01 Campaign overview

02 Target | Messaging and audience

03 Build | Recommended campaign
journey and asset library

04 Activate | Customize and launch

Secure productivity

Move to Microsoft 365 Campaign-in-a-Box

With the End of Support (EOS) for Office 2016 and Office 2019 coming October 14, 2025, Microsoft partners have a unique **opportunity to migrate small and medium-sized businesses to the cloud with Microsoft 365.**

Organizations that migrate to Microsoft 365 can support the dynamic, anytime-anywhere nature of modern work more easily—and help keep their data, devices, and people secure.

- Streamline IT to control costs
- Deliver exceptional user experiences
- Secure the workforce and the work

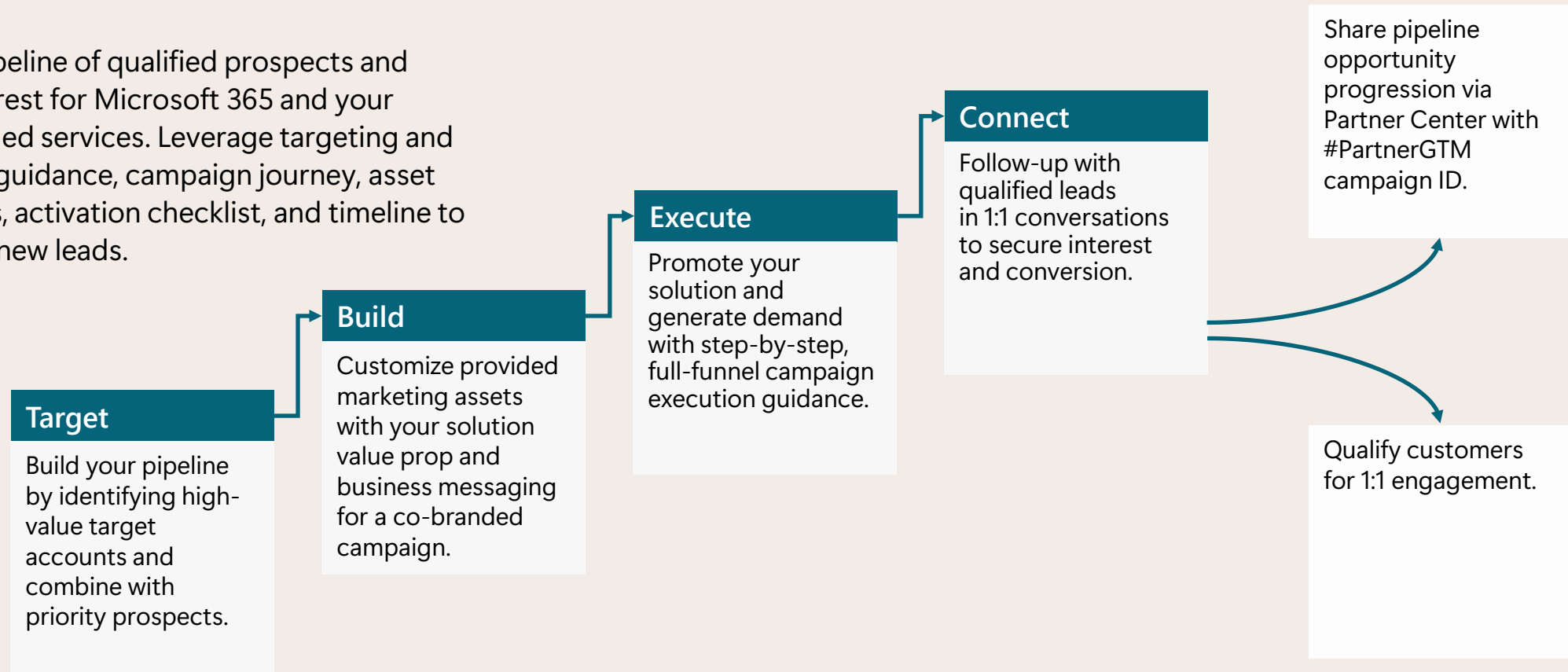
Launch this campaign to drive awareness, generate leads, and initiate sales engagement opportunities.

Specifically tailored for Cloud Service Provider partners with modern work capabilities: Grow, nurture, and close deals in your pipeline as you help your customers take advantage of Microsoft 365 Business Standard/Premium to retire their legacy on-premises solutions.

Use this guide and associated materials to create your own sales and marketing campaign that highlights the benefits of Microsoft 365 and your services.

Demand generation campaign overview

Build a pipeline of qualified prospects and drive interest for Microsoft 365 and your value-added services. Leverage targeting and message guidance, campaign journey, asset templates, activation checklist, and timeline to generate new leads.



Move to the Cloud with Microsoft 365

To-Customer Messaging

Streamline IT to manage costs



- Eliminate on-premises servers and reduce IT costs with email, file storage, and productivity apps in one solution.
- Gain access on up to 5 PCs, 5 tablets, and 5 mobile devices with a single user license.
- Keep your business files stored securely, up to date, and accessible across devices with 1TB of OneDrive cloud storage.
- Meet, chat, and collaborate with people inside and outside your organization with Microsoft Teams.

Deliver exceptional user experiences



- Enable work online or offline with productivity apps that live in the cloud and on your devices.
- Collaborate in real-time with document sharing and coauthoring across applications.
- Simplify change management with the apps your team already uses, consistently updated and continuously improving.
- Boost productivity and work smarter with Microsoft 365 Copilot—your AI companion for work¹.

Secure the workforce and the work



- Help keep emails secure from phishing, spam, and malware with customizable, always-on email policies.
- Enhance security and streamline access with multi-factor authentication and single sign-on.
- Safeguard your company's sensitive information with the ability to remotely wipe data from a lost or stolen device.
- Control access to business information, setting the stage for AI-driven productivity with Copilot¹.

Target | Who is this campaign for?

This campaign targets small and medium-sized business (**SMB**) leaders with a typical workforce of 10-300 employees that are currently using on-premises Office 2019 or older.

Business decision makers

Business owners



Cares about:

- Addressing the long-term challenges of remote and hybrid work, temporary labor, and new business continuity goals.
- Keeping their business up to date with technology, without spending too much.
- Finding the right solution that allows them to do more.

Pain points:

- Identity, threat, and information protection with increased cyberthreats.
- Shifting workplace. Workers have adopted new habits but still demand exceptional experiences.
- Reducing complexity and platforms.
- Emerging technologies like AI.

Influencers

IT administrators Security and compliance professionals



Cares about:

- Keeping all endpoints secure—especially with employees using their own devices.
- Helping their business on a digital transformation.
- Finding and using the best technology, at the best price.

Pain points:

- Security. Growing risks continue to challenge IT admin teams.
- Constantly having to learn about new tools and services is time consuming.
- How will AI affect security—positive and negative.

Accessing your renewal data in CloudAscent

Partner center

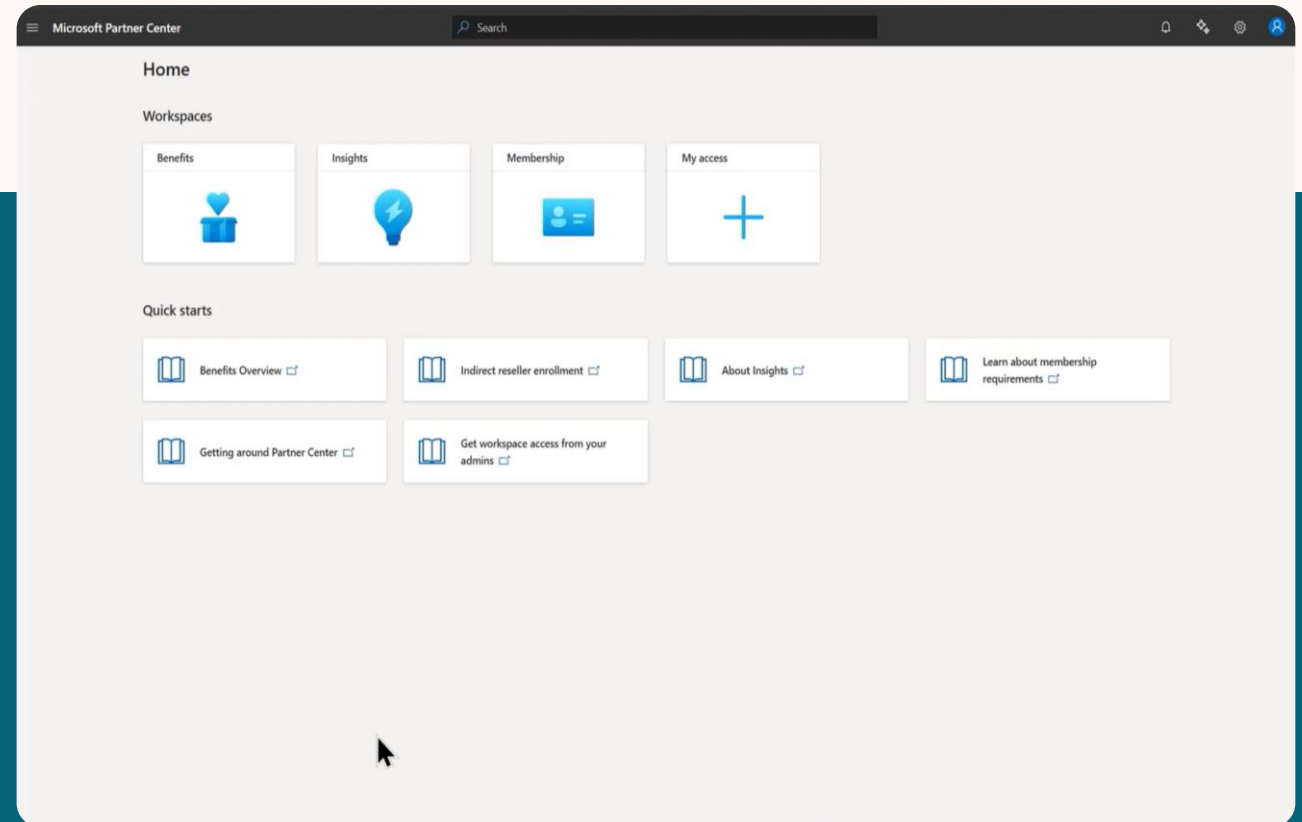
Who can access this data?

Any partner that has existing transacting customers with Microsoft

What customers are included in the dataset?

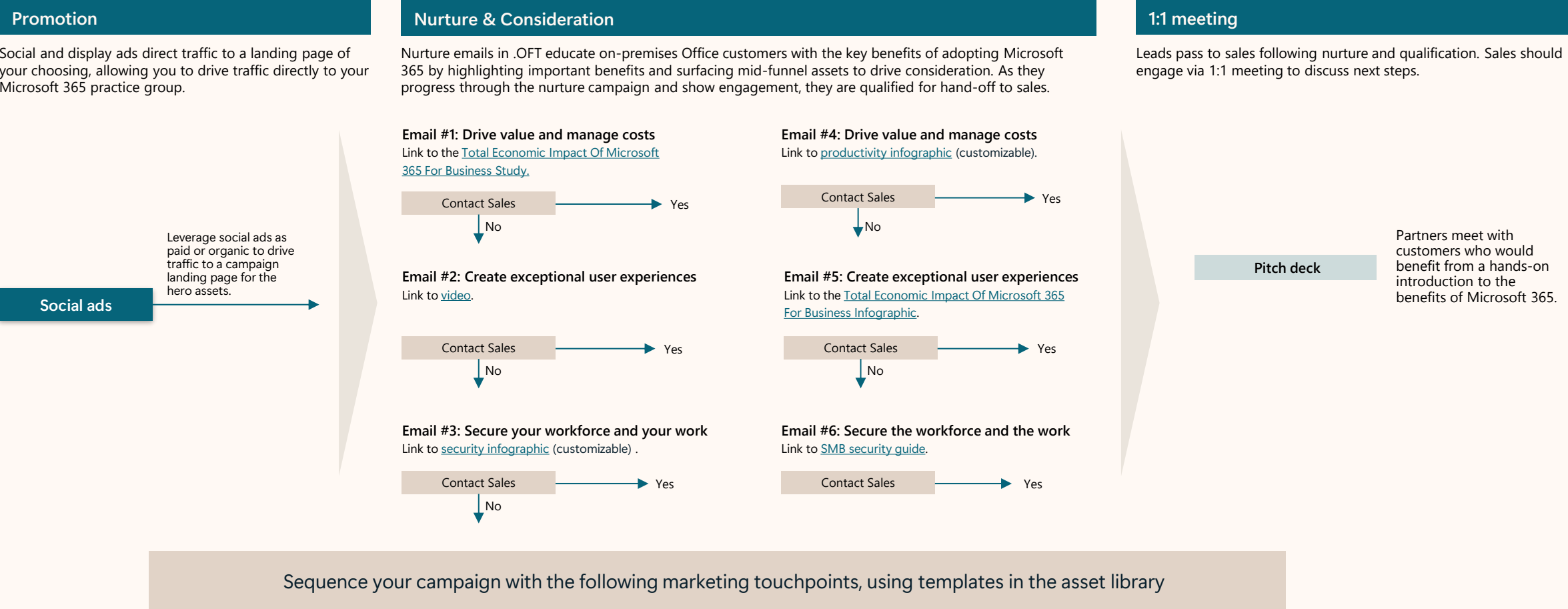
Only Microsoft unmanaged customers
(no account team assigned)

1. Navigate to <https://partner.microsoft.com/> and select **Partner Center**
2. Sign in using your company email
3. To download the report insights into Excel, select the **Downloads Hub** in the left-hand navigation
4. Within the **Downloads Hub**, **Create a new report**, ensure you have **Cloud product performance** selected, have chosen the **Basic** download option and download **"Cloud Ascent–M365 Propensity"**
5. Once open, navigate to **Column "AG"** to view and filter to **"any Office product 2019 or before"**



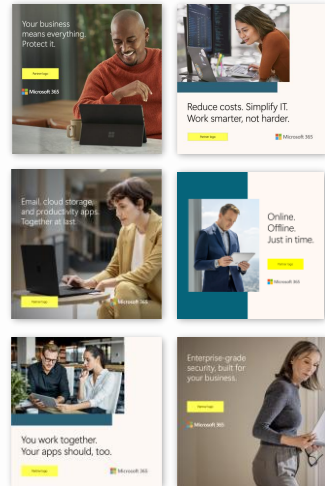
Hover mouse over image to play in normal view; or video auto plays in presentation mode

Demand generation campaign journey



Campaign asset library

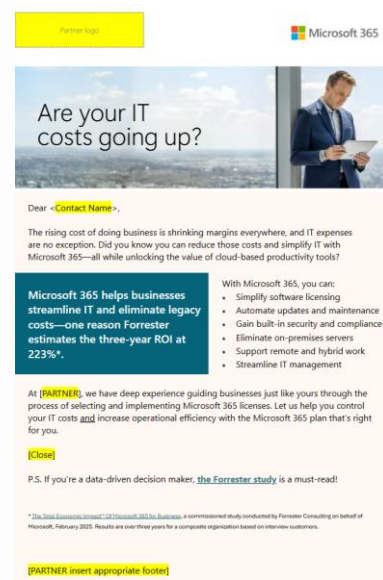
Promotion



Social ads

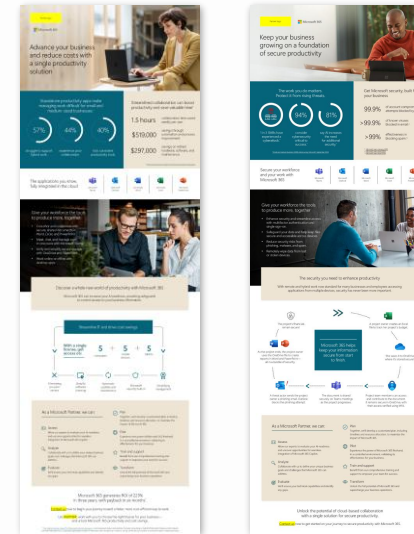
6 ads in 3 different dimensions,
dark and light versions

Nurture



6 nurture emails

Consideration



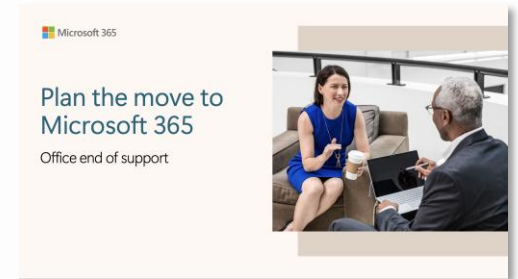
Productivity

Security

6 assets

including 2 customizable infographics

Decision and enablement



Pitch Deck

Customizing your assets

The campaign assets in this collection are templates that require partner customization. Each asset includes specific instructions for you to make it your own, by modifying:

- Brand font, logo, and colors
- Solution value proposition
- Call to action and company contact information

Ready to start building your pipeline?

- Check out the full range of [campaign assets](#).
- Get support in our [partner portal](#).
- Review [Microsoft Partner-Led Marketing Guidelines](#).

Lead generation strategy and timeline

Paid media

Month 1

Build the campaign to spend between \$5k - \$10k+/month promoting your hero asset (through gated landing page) to priority audiences. Maintain a consistent daily spend to deliver continuous campaign coverage.

Months 2 and 3

Optimize the campaign to maximize efficiency (high click-thru rate, low cost per click). Consider copy updates to accelerate click-thru and audience refinements to maximize lead acquisition.

Organic media

Month 1

Support campaign launch with organic social post from Partner brand handle using social copy/images provided.

Months 2 and 3

Schedule additional organic posts bi-weekly throughout the campaign flight, adjusting post copy and using other creative, if available, to drive new interest.

Promo emails

Month 1

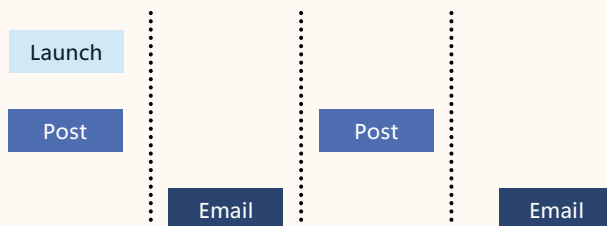
Segment known contacts based on campaign personas and priority accounts. Send first email one week after the hero asset is live.

Send second email to contacts who did not open first email two weeks following first send.

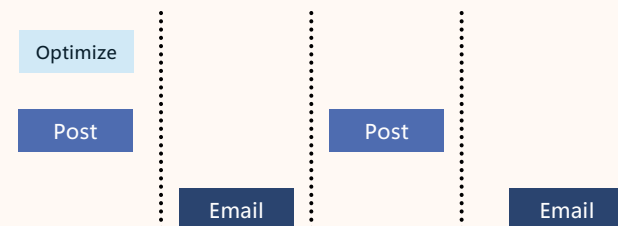
Months 2 and 3

Alter subject lines and copy blocks to optimize. A/B testing variations, if desired, such as adding recipient first name in subject line. Resend to contacts who have not yet opened emails.

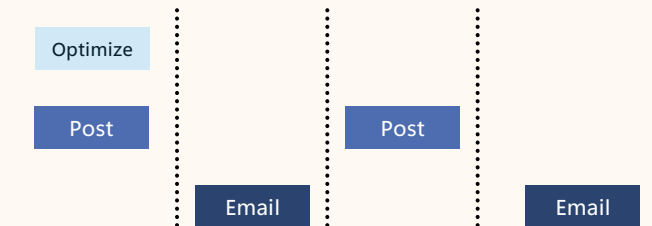
Month 1



Month 2

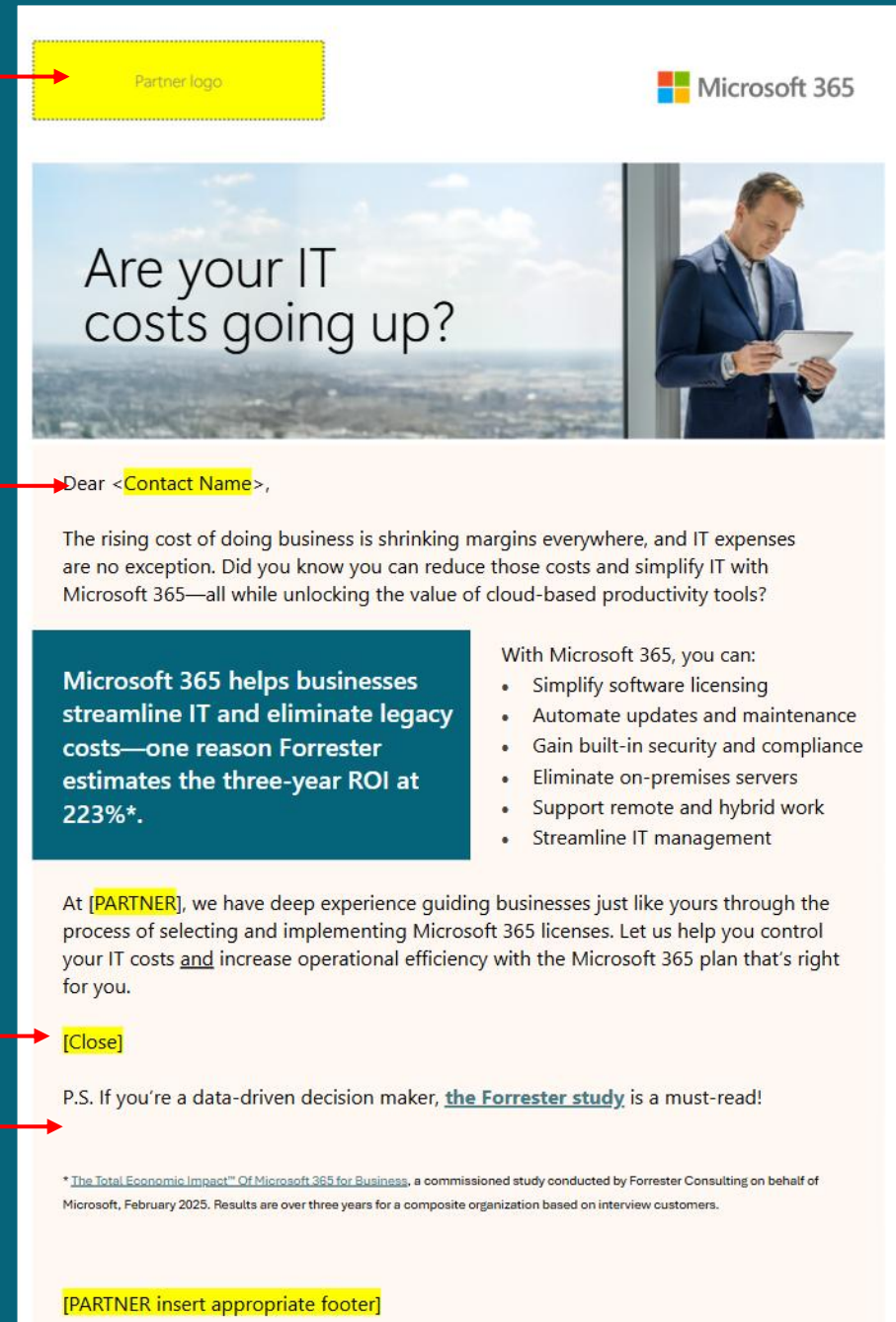


Month 3



Customizing your emails

- 1** Replace **logo placeholders** with your own corporate logo. Ensure your logo is 125% the size of the Microsoft 365 logo, per Microsoft Partner Brand Guidelines.
- 2** Replace the **template font** with your **brand font**, matching weights. (Note that font type sizes vary and you may need to adjust your size to fit). Banner and footer overlays can also be adjusted to fit your brand imagery/colors. Images included in this template *must remain for use exclusively in this template* and may not be altered or used elsewhere.
- 3** Add recipient name.
- 4** Replace all **yellow-highlighted areas** with the appropriate content.
- 5** Add your **contact details, CTA, and applicable links**. (Please note: links and CTA will vary based on the email content. If you are directing to customized infographics, be sure to update the links.)
- 6** Insert sender's signature.
- 7** Insert your own copyright information, company info, links to privacy policy, and unsubscribe options below the body of the email.

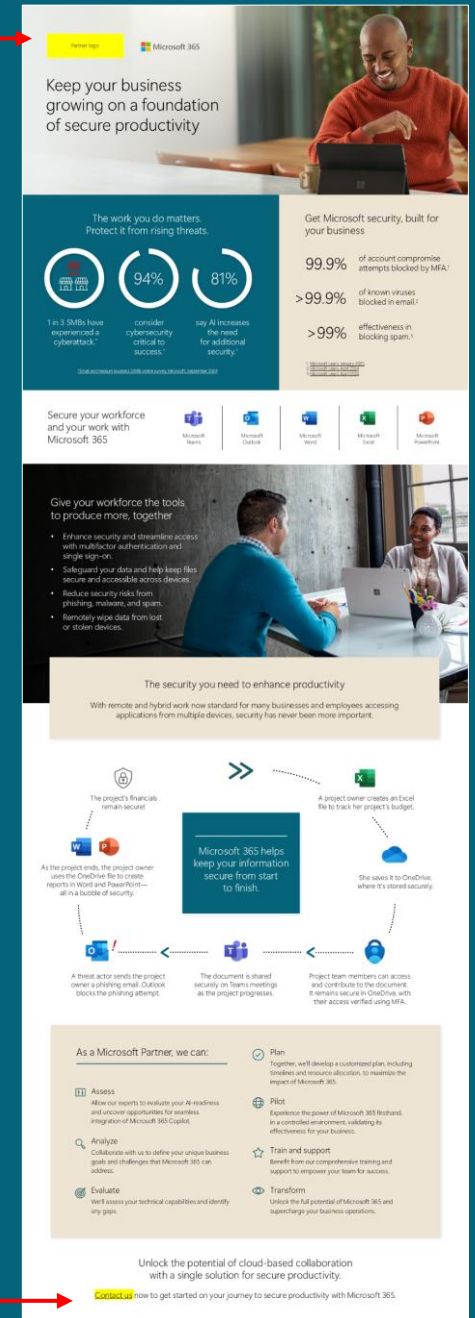


Customizing your infographics

There are two customizable infographics in this campaign.

Note: The Total Economic Impact™ Of Microsoft 365 For Business study and infographic and the SMB Security Guide are not customizable.

- 1 Replace logo placeholders** with your own corporate logo. Ensure your logo is 125% the size of the Microsoft 365 logo, per Microsoft Partner Brand Guidelines.
- 2 Replace the template font with your brand font**, matching weights. (Note that font type sizes vary and you may need to adjust your size to fit). Color blocks can also be adjusted to fit your brand imagery/colors and can be adjusted in the master template settings. Images included in this template *must remain for use exclusively in this template* and may not be altered or used elsewhere.
- 3 Replace all yellow-highlighted areas** with your company name and details where noted.
- 4 Add your contact details, CTA, and applicable links.** (Please note: links and CTA will vary based on the infographic content.)



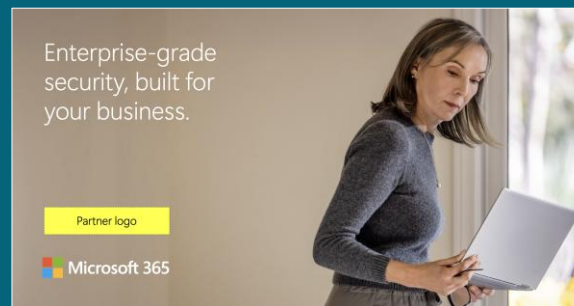
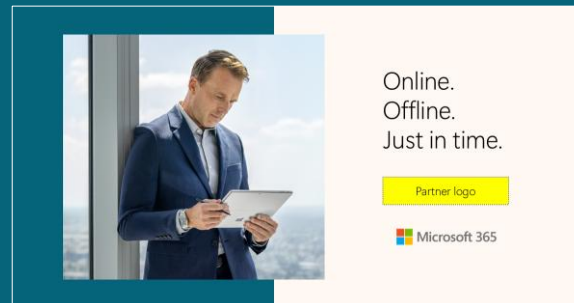
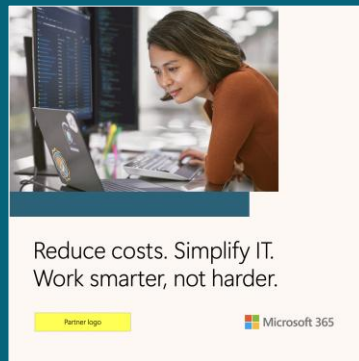
Customizing your social ads

- 1 **Replace logo placeholders** with your own corporate logo. Ensure your logo is 125% the size of the Microsoft 365 logo, per Microsoft Partner Brand Guidelines.

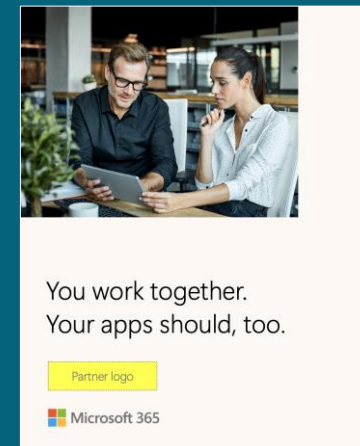
- 2 **Replace the template font with your brand font**, matching weights. (Note that font type sizes vary and you may need to adjust your size to fit). Color blocks can also be adjusted to fit your brand imagery/colors. Images included in this template *must remain for use exclusively in this template* and may not be altered or used elsewhere.



1200 x 1200



1200 x 627



727 x 900



Social assets are available in dark and light versions, in three different dimensions.



Thank you

