A cheat sheet for selling

Microsoft 365 SKUs

A clear guide on matching the right plan
to the right customer

Introduction

Microsoft 365 has become a product jungle. Plans, bundles, licences, add-ons — it's no wonder MSPs and systems integrators are overwhelmed.

But the good news? You don't need to be an expert in every SKU. You just need to know how to spot the right plan for the right customer — and explain it in plain English.

This quick guide gives MSPs the clarity to sell smarter, position value better, and build long-term customer loyalty through the right-fit Microsoft 365 plan every time.

Pick the right plan for your client

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Business Standard
The essentials toolkit

Includes:

- Word, Excel, PowerPoint, Outlook, Exchange, Teams, 1TB OneDrive, SharePoint

Best for:

- Local retail, small accounting firms, or office-based SMEs needing basic productivity tools without advanced security or remote access support.

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Business Premium
Security and mobility for modern teams

Includes:

- Everything in Business Standard, plus Intune, Defender for Business, Conditional Access (Entra ID P1)

Best for:

- SMEs with mobile teams, bring-your-own-device (BYOD) setups, or growing compliance and remote access needs.

Includes:

- Everything in Business Premium, plus Data Loss Prevention, unlimited OneDrive, Core eDiscovery, Entra ID P1

Best for:

- Mid-sized SMEs or businesses in finance, legal, or healthcare with structured compliance requirements.

Enterprise E3
Compliance and control for complex environments

Enterprise E5
Advanced security and analytics

Includes:

- Everything in E3, plus Defender for Endpoint P2, Microsoft Sentinel, Power BI Pro, Teams Phone, Audio Conferencing, Entra ID P2 (cloud identity and access management licence).

Best for:

- Large, distributed teams or customers focused on advanced threat protection, security analytics, or voice integration.

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Add-ons that actually add value

Upselling doesn't always mean pushing a bigger plan. Sometimes it's about plugging gaps with the right add-on.

Power BI Pro
For advanced data analytics (included in E5)

Teams Phone
Adds voice calling to Teams (included in E5)

Audio Conferencing
Enables dial-in access for Teams meetings (included in E5)

Defender for Endpoint P1 or P2
Enterprise-grade device protection (P1 included in Business Premium; P2 in E5) in E5)

Microsoft Intune
For device and app management (included in Business Premium, E3, and E5)

Microsoft Purview
Compliance and data protection tools including sensitivity labels and encryption (included in E3 and E5)

Microsoft 365 Copilot
AI-powered assistant for Office apps (requires eligible plan and separate Copilot licence)in E5)

Project and Visio
Available separately for project management and diagramming

Quick tip

Use add-ons to address needs like compliance, analytics, voice, or AI — without pushing a full plan upgrade.

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Avoid these common selling pitfalls

Even experienced partners make mistakes that slow deals or reduce upsell potential. Here's what to watch for:

- **Selling features, not outcomes:** Business owners want problems solved. Don't say, "It includes Defender for Endpoint" — say, "It helps stop ransomware before it hits."

- **Pushing the wrong plan too early:** Don't start with E5 unless it's clearly needed. Always try to discover what your client truly needs.

- **Skipping add-ons:** A missed Teams Phone or Defender upsell is lost revenue. Check for gaps before recommending a plan change.

- **Overloading with jargon:** Not every IT lead is a licencing expert. Keep it simple unless they ask for specifics.

- **Forgetting Copilot compatibility:** If they're asking about AI, check if their plan even supports it.

Every conversation is a chance to show up as a ***trusted adviser***, not just a licence provider.

How to use this guide to close more deals

- Train junior sales reps or align your team on messaging
- Refer to it during live customer calls
- Use best-fit examples to guide discovery questions

Bottom line

The right plan, positioned the right way, builds trust and long-term revenue. Use this guide to keep deals clean, conversations clear, and value front and centre.

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