HOW TO INITIATE AND CONDUCT THE TCO ANALYSIS

User Guide

STEP 1: Set for a meeting with your client to present the benefits of conducting a TCO analysis, discuss the process that you follow and get their confirmation to start

a. Once the contact at the client's side has been identified, send the invitation email explaining briefly the process and requesting for a face-2-face meeting to go into more details.
b. If the client does not reply to the email sent, call the contact and request for the meeting or ask for the right person to talk to.
c. Keep repeating step b until the first face-2-face meeting is set.
d. During the 1st meeting, go through the customer facing presentation to explain the benefits and the process. The objective of the 1st meeting is to get the client's approval to start the analysis and identify the contacts who will provide you with the data required to run the TCO tool.

STEP 2: Set for a meeting with the contacts to collect the data required

a. Once the rights contacts are identified, set for face-2-face meetings with them to collect the data required for the TCO analysis.

b. Use the data template (.xlsx) to collect the information required for the TCO analysis.

STEP 3: Compute the Microsoft 365 plans and any add-on required

a. Along with the sales account manager, compute the annual Microsoft 365 subscriptions required by the customer along with the add-ons (SharePoint additional storage required, 3rd party migration tools…)

STEP 4: Get a price estimation for the professional services required to deploy Microsoft 365 and migrate the data.

a. Request from your services department an estimation on how much will it the customer to deploy Microsoft 365 and migrate the data as per the requirements.

Step 5: Enter all data in the TCO Excel sheet and validate the results back with your contact

a. All data collected must be entered in the Excel sheet and the results validated with your contact at the client's side.

Step 6: Once the data is validated, generate the report and send it the client

a. Once the data is validated with the client, generate the report and send it attached with the email summarizing the results.
b. Using the same email, request for a face-2-face meeting to present the results and discuss next steps (Microsoft 365 proposal).

Step 7: Generate a proposal and share it with the client

a. Generate a proposal including Microsoft 365 subscriptions and the professional services required to setup, deploy and migrate data.
b. Present it to the client during the follow-up face-2-face meeting.
c. Send it to the client by email as a follow-up to your meeting.

Step 8: Negotiate and close the deal

a. Initiate a commercial discussion with the client and close the deal.