

Microsoft Partner Guidance for Partner-initiated Microsoft Teams Trial

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Using this guide

This document provides Microsoft Partner guidance for the CSP partner-initiated Microsoft Teams Trial.

Overview

The partner-initiated 6-month trial of Microsoft Teams in CSP enables partners to provide customers with the full Teams experience through campaigns that drive customer acquisition, upsell, and customer retention. New customers, Exchange Online Only customers or Office 365 Business customers can experience Teams as a hub for collaboration that brings together chat, meetings, and Microsoft 365, all in one place. Partners Center reporting allows partners to confidently engage with customers throughout the sales and deployment lifecycle. See below for details of this trial offer.

Display name: Microsoft Teams Commercial Cloud (User Initiated) Trial
(note, while the Display Name includes words "User Initiated", this is not a User-Initiated Trial)

Trial offer ID: dd3496ba-a49b-4475-9f40-8c333709ef87

Frequently asked questions

Why create a partner-initiated trial?

Partners manage a large portion of customers who do not have access to Microsoft Teams today. Creating a trial for partners enables them to leverage the value of Teams with customers in their sales and marketing motions. This trial provides partners with the trial lifecycle reporting they need to help customers begin on their Teams journey and enables upsell to paid subscriptions through the CSP channel.

How is this different from other enterprise trials?

This trial is available exclusively in the CSP channel. CSP partners are able to own the customer journey from initial trial through paid conversion and future renewals. Unlike web direct trials or other CSP trials, this trial also has an extended duration of 6 months to enable customers to fully realize the value of Teams through adoption.

How should partners use the Teams Trial

This trial enables two key scenarios:

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- Leading with Teams collaboration to acquire new customers from on-premises positions
- Using Teams to upsell standalone customers to plans that include Teams cloud services
 - Exchange Online Plan 1 or Plan 2
 - Office 365 Business

How does the trial drive customer acquisition?

Partners can include this trial into current customer acquisition motions to entice new customers to sign up for partner services. Throughout the trial, partners have opportunity to showcase the value of Teams and Microsoft 365 to new customers to drive to a purchase decision.

How does the trial drive upsell?

For customers currently on Exchange Online Only or Office 365 Business SKUs, this trial enables customers to experience the full value of Microsoft Teams for 6 months. During this time, partners can engage with customers to explore business cases that drive customers to buy premium SKUs.

What would a partner marketing campaign look like using this trial?

Partners are encouraged to follow the below sequence to gain maximum value from the trial.

Sequence	Timeline	Activity
1	Prior to activation	Identify target customers to approach
2		Engage customers via sales processes (e.g. telesales)
3		Discuss teamwork related business use cases (chat, file collaboration, meetings)
4	Month 0	Activate Microsoft Teams Trial
5	Month 1	Enable business use cases
6	Month 3	Document customer value from using Teams
7	Month 5	Upsell to premium SKU and offer value added services

Do partners have to wait 6 months to convert customers to higher paid SKU?

No, partners can convert customers from Trial to Paid SKU's via CSP at any time.

Will the trial automatically convert to a paid SKU with Teams?

No, the trial licenses will expire after 6 months with no automatic charges. Partners own the relationship with end customers and are responsible for converting trials on behalf of their customers.

Can partners get usage credit for usage during the trial period?

No, trial usage does not count toward Teams usage. To capitalize on the usage incentives, convert the customer to a paid SKU before they cross the usage incentive threshold.

Details of the trial

Which customers are eligible for the 6-month free trial?

- New customers without an Office 365 Tenant
- Exchange Online Plan 1
- Exchange Online Plan 2
- Office 365 ProPlus
- Office 365 Business
- Customers with Dynamics 365 and no Office 365

Which customers are not eligible for the trial?

Organizations are not eligible for the trial if:

- They are a Syndication Partner customer
- They are a GCC, GCC High, DoD or EDU customer

How many licenses are included in the trial?

Trial subscriptions will be provisioned for up to 1000 licenses to ensure teams can be deployed to the entire organization.

What is included in the trial?

For each license assigned to a user in the trial they will be provisioned additional backend services that enable them to experience the full value of Microsoft Teams. This includes:

- Exchange Foundation
- Flow for Office 365 Plan 1
- Forms
- Microsoft Planner
- Microsoft Whiteboard
- Microsoft Teams (Teams1, Teams IW)
- Office Online
- PowerApps for Office 365 Plan 1
- SharePoint Online Kiosk
- Stream
- Sway

- Yammer Enterprise

What is not included in the trial?

Calendar functionality in Teams will not be supported if organizations are not using Exchange Online or a supported version of Exchange On-Prem (Exchange 2016 CU3+ or Exchange 2013 CU17+).

How long does the trial last?

The trial lasts for six (6) months from the date it is initiated in Partner Center. The duration is tracked from the first user, meaning that a user added to a trial that was initiated five months ago will only have one month of free usage remaining. For example, if a partner initiated the trial in Partner Center on January 25, 2020, the trial would expire on July 24, 2020 at midnight GMT for all users assigned subscription licenses.

When does the trial start?

The trial starts on the date that the trial is initiated for the tenant, not when users are assigned licenses.

How do I enable the Partner-initiated Teams trial?

CSP partner can initiate the trial through Partner Center on behalf of the customer. For more information, review the step-by-step guide at the end of this document.

How is the trial managed and users assigned licenses?

Tenant admins or delegated admin partners can assign or unassign licenses provided through the trial for users to take advantage of the Microsoft Teams.

Once the trial subscription has been created what else needs to be done?

Before users can access the trial, users must be enabled in the Microsoft 365 Admin Center.

How do you upgrade from the Trial?

To upgrade users from the trial license, do the following:

1. Help your customer purchase a subscription through CSP that includes Teams. ([See Office 365 Licensing](#))
2. Unassign the Microsoft Teams Commercial Cloud (User Initiated) Trial license from users
3. Assign the newly purchased license to each user

What happens to user data when the trial ends?

When the trial ends and if a user is not immediately upgraded to a paid subscription that includes Teams, the user data is not removed. The user still exists in Azure Active Directory and all data within Teams remains. Once a new license is assigned to the user to enable Teams functionality again, all content will still exist. For more information, see [Office 365 licensing for Microsoft Teams](#)

If the customer has no active paid or trial subscriptions, the tenant will follow normal Office 365 data retention policies. For more information, see [Office 365 Data Retention, Deletion and Destruction Overview](#)

What if my customer needs more than 1000 seats or is not a current or prospective CSP customer?

Partners can get their customer access to the managed Office 365 E1 Trial by working with the customer to get a passcode through their Microsoft account manager or for non-managed customers, by contacting Partner Center Support, and clicking on CSP > Cannot find an offer in the catalog.

Partner-initiated vs. User-Initiated Trials

What is the Microsoft Teams Exploratory experience?

The Microsoft Teams Exploratory experience is a user-initiated trial and offers companies with an AAD Commercial domain or an Office 365 license that does not include Teams the ability to explore Microsoft Teams. Syndication Partner Customers or customers in GCC, GCC High, DoD, or EDU are not eligible for this experience.

How are User-Initiated trials different from Partner-Initiated trials?

Partner-initiated trials are designed to help partners acquire new customer, drive upsell, and retain customers by leveraging the customer value of Microsoft Teams. The partner trial duration is 6-months so that partners can build pipeline and convert customers to premium SKU's within a typical sales campaign.

- Partner-initiated trial is integrated into Partner Center
- Partners can initiate the trial for customers when they are ready
- Partner Center reports allows visibility into customers trial dates enabling additional services and upsell opportunities

Can both trials run at the same time?

From a technical standpoint, a partner can set up a CSP Teams Trial for a customer that has also has Microsoft Teams Exploratory licenses. However, we recommend partners move all customer Microsoft Teams Exploratory licenses to CSP Teams Trial licenses to make the upgrade process to paid licenses easier.

What should partners do if they see Microsoft Teams Exploratory licenses in their customers' tenants?

This means there is end-user demand for Microsoft Teams. While there is no seamless upgrade path from a user-initiated license to a CSP paid subscription, we encourage partners to discuss with their customers' purchase decision makers about expanding their CSP licensing to cover these additional users. If partners wish to block end-users in CSP tenants from claiming Microsoft Teams Exploratory licenses, they can do so. Learn more about the [Teams Exploratory License](#).

Trial Activation Walkthrough

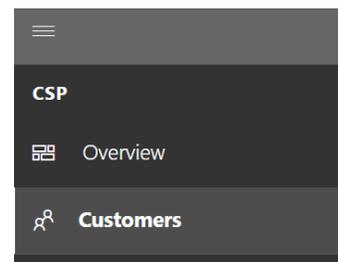
This walk-through is intended for Direct CSP Partners who transact via Partner Center. If you are a reseller who transacts through a CSP Provider, please refer to their guidance on the trial for details on your experience.

Step

- 1 Log into Partner Center and navigate to **Customers** blade.

Select the Customer you wish to enroll in the Teams Trial by clicking on the Customer Name.

Illustration



- 2 Locate the offer called:
Microsoft Teams Commercial Cloud (User Initiated) Trial
Try_CSP_6Mo500K_dd3496ba-a49b-4475-9f40-8c333709ef87

Add products

Azure **Online Services** Software

Segment: Commercial

Publisher: Any Billing type: Any Category: Any

Internal: Any

Your cart

Your cart is empty.
Specify a quantity of any product and click **Add to cart** to continue.

Review

Cancel

SKU	Quantity	Action
Microsoft Teams Commercial Cloud (User Initiated) Trial By Microsoft - Trial, License <small>Microsoft Teams is the hub for teamwork that brings together chat, meetings, calling, and Office 365, all-in-one. And it's built on the trust of Microsoft security and compliance that's crucial for today's businesses. The Microsoft Teams Commercial Cloud Trial offers existing Office 365 users in your organization who are not yet licensed for Microsoft Teams a way to initiate a 1-year trial of the product at no additional cost. ID: 29A2F828-8F39-4837-B8FF-C957E86ABE3C:DD3496BA-A49B-4475-9F40-8C333709EF87</small>	1	Add to cart

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3 Click the **“Add to Cart”** link next to the offer, and complete the checkout process.

4 Review the terms, and click **“Buy”** button to add the offer to the tenant

6 After completing the transaction, you can verify that the Partner-Initiated Microsoft Teams Trial was successfully associated with the customer by returning to the **Customer** blade, and looking in the **Subscriptions** section.

Review your orders

Verify that your orders are correct and then select **Buy**. To make changes, select your browser's **Back** button to return to the previous page.

Product	Currency	Quantity
These items will be grouped into a single order.		
Microsoft Teams Commercial Cloud (User Initiated) Trial By Microsoft - Trial, License	USD	Rem
Billing frequency No billing (Trial)	Term Annual	

+ Add more products

Buy Cancel

CSP

- Overview
- Customers
- Order history
- Subscriptions

Subscriptions

Export subscriptions

Add subscription

There is a delay of up to 4 hours between the time a subscription is activated and when its activation status is updated in a list of customer's subscriptions.

License-based subscriptions

Subscription	Quantity	Status
Microsoft Teams Commercial Cloud (User Initiated) Trial	25 Licenses	Expires 12/5/2019
Subscription ID: 9810619C-4F9F-43E8-88B3-D3D943CDA7C7 Convert trial to paid subscription Billing frequency: Trial offer - no billing		