datto | FILE BACKUP & SYNC

Datto Workplace
Partner Playbook

Welcome to the Datto Workplace Partner Playbook. The purpose of this document is to assist you in getting started with Workplace, equipping you and your team with the knowledge to market, sell, implement, and support the product successfully.

Getting Started

Welcome Email

To initiate your set-up process, the main contact who signed your Workplace Order Form should have received an email with the subject line "Welcome to Datto Workplace Manager", inviting them to activate their account.

If you can't locate this email, please request we resend the welcome email by sending an email to: orderproc@datto.com. Once you have activated your account by clicking the link in the welcome email and setting a password, you will be logged in to Workplace Manager. You will then be able to create additional Workplace Manager users, if desired.

Note: *The person logging in should be the primary administrator for Workplace. If you are not this person, please identify the correct individual and ask them to request a new login by sending an email to the address above.*

Technical Training

Datto requires that all new Workplace partners have at least one technical resource attend our FREE technical product training on-demand webinars to help get started with Workplace as quickly as possible. These webinars cover implementation, configuration, and management of Workplace, along with how to benefit from integrations with Autotask PSA and Datto RMM.

Access the training webinars here.

If you need additional assistance getting started with Workplace, please review the Help sections (linked to below), contact your Account Manager, or email implementation@datto.com.

Technical Support

As a Datto partner, we understand you will provide direct support to your clients, and Datto will provide next level support to you. Datto offers partners a robust support infrastructure designed to help you address any challenges you encounter with the product on behalf of your clients. All partners are given access to 24x5 standard support and 24x7 emergency support.

Self-Help Options

Partners and users can access support via self-help options. You can easily search on a topic or search via the top navigation menu.

- Workplace Manager Help - intended for you and your team. This can also be accessed via the Support menu in Workplace Manager.
- Workplace End User Help - intended for your clients. This can be accessed via the Help menu in Workplace Online or in the About window in Workplace Desktop. These help menus include the option to raise a support ticket with you, using the Support details you configured in Workplace Manager.

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Getting Support from Datto

If you need to raise a support ticket with Datto, please follow the steps outlined in this article and click through to our dedicated Support Portal. Please ensure to provide the relevant IDs and a clear issue description as these are required for our support team to assist you.

Service Status

To view the current status of the Workplace service click here. The status page is also available from the Support menu within Workplace Manager. We recommend you subscribe via this link to receive automated notifications about Workplace status updates and to track the current status in the event of an outage.

Sales Enablement

This section contains tools and information to help you and your team get up to speed quickly with selling Workplace to your clients and prospects.

Sales Support

Your Account Manager will be your primary point of contact and a great resource for you as you work through this playbook and start providing Workplace to your clients. They will help you access available resources we have to help you including, but not limited to:

1. Coordinating technical or sales resources from Datto to help you win new business.

2. Setting regular meetings, such as monthly and quarterly, to review opportunities in your pipeline, assist with generating new leads, and review past efforts and plan for the future.

3. Answer questions you have about the tools and resources we have available to support your efforts.

4. Escalate open support issues if needed.

Potential Data Loss Risks

As the trusted advisor for your clients, it is up to you to be proactive and help your clients be prepared to recover from potential data loss risks. We recommend discussing the following scenarios when speaking to clients about the value Workplace might bring to their business:

1. **Human error** - accidental deletion/change to data continues to be a key driver for data loss, impacting productivity if workers have to spend time repeating previous work.

2. **Ransomware attacks, malware, data corruption** - data can be lost or damaged due to malicious cyber attacks, or through hardware/software faults.

3. **Hardware failure** - despite improving hardware reliability, laptops still last on average just 3 years, making data loss due to sudden hardware failure a reality.

4. **Hardware theft or loss** - as the workforce becomes more mobile, it is more likely devices such as laptops are lost or stolen.

5. **Environmental events** - we hear more and more about natural disasters and the impact they have on businesses. Whether it is fire, water damage, or a tornado, you need to put safeguards in place to protect clients' business data.

As the trusted advisor for your clients, it is up to you to be proactive and help your clients be prepared to recover from potential data loss risks.

Discussing these risks with your clients, and the impact they can have on their business and employee productivity will help them understand the value of having their business data accessible from any device, any place, any time. Coupled with Datto Workplace's Ransomware Detection and Management, and 6 month retention, Workplace ensures disruptions to business are minimized. Remember, data loss happens every single day - in particular, due to human error such as accidental deletion. Having a simple, secure, automated way for this data to be protected, and restored, can mitigate these data loss risks.

Key Discovery Questions

Your clients may be using a variety of solutions for collaboration today, perhaps including File Sync and Share. Here is a list of useful questions to ask your clients to understand how well they are protecting themselves against the above data loss risks.

1. Collaboration solutions and infrastructure that can be replaced

   a. Do you store data on file servers? How easy is it for users to access and work on this data? Do they need to rely on VPN and FTP? How reliable and easy to use is this?

   b. Do the file servers require an upgrade/replacement? Are you looking to reduce reliance on expensive on-prem infrastructure? Workplace could be their file server in the cloud in many cases.

   c. Do users rely on physical media (eg USB/disks) to share data? Why is this? What is the risk exposure if that physical media is misplaced?

   d. Do users have to manually share their data with other users? (For example, email attachments).

2. Understand needs around collaboration

   a. Are email attachments often used to share data, both internally and externally? Email attachments can be easily forwarded to the wrong recipients, often with no ability to take away access after sending. Email attachments also often have strict limits on file size. Workplace provides easy and secure methods to share files regardless of size, and control or remove access.

   b. Are users picking their own solution to use, such as a consumer-grade File Sync and Share? We recommend using your Remote Monitoring and Management tool to search for common File Sync and Share tools being installed on users' devices.

   c. Are users able to keep track of different file versions, and restore previous versions easily? Do they often delete files by accident or save over their work? With Workplace users can easily restore previous versions of files.

   d. Do users often delete files or folders by accident and need them quickly restored? With Workplace users and admins can effectively manage versions and prevent or restore accidental deletions.

   e. Do users want better visibility and alerting when documents are edited? Communication is key for collaboration, so having visibility of changes is important.

   f. Do users need to be able to easily and securely access and work on their mobile devices? Workplace Mobile is available for iOS and Android devices, providing full access to all your data, wherever you are.

Discussing risks with your clients, and the impact they can have on their business and employee productivity, will help them understand the value of backing up business data and files and folders across their laptops and other devices.

3. Understand needs around accessibility

    a. Do users want to access their work securely, anywhere, from any device? With Workplace users can access data on their laptop, workstation, via the web, and their mobile device.

    b. Do users rely on VPN or FTP to access data remotely? Do they find this reliable and easy to use? How expensive is this? Legacy tools such as VPN and FTP are often unreliable, cumbersome, and an additional expense.

    c. Does remote access present security concerns, as users have access to company data on their mobile devices? Workplace has various policies and features, such as remote wipe, to increase security.

4. Understand needs around security

    a. Do your users use consumer-grade file sharing solutions? These lack many security features, policies, and reporting that businesses need.

    b. Are your users and management concerned about the sharing of sensitive files? Are they able to control or track this? A lack of audit trail or controls increases the risk that data is accidentally or maliciously shared.

    c. Do you have concerns with terminated employees being able to access and share data? Workplace has features such as remote wipe and integration with Active Directory to automate access removal when terminating employees.

    d. Do you require HIPAA compliance, and a signed Business Association Agreement (BAA)? This is possible with Workplace.

Remember, these questions are just the starting point, and cover areas where Workplace's feature set may solve the problems your clients and prospects currently experience. Coupled with a good understanding of Workplace's features on different platforms will assist you in explaining how the product will solve your client's problems and add value.

Datto Partner Portal

As a Datto partner, you will also have unlimited access to the Datto Partner portal, which will be your single pane of glass into everything Datto going forward. Datto has developed a robust set of sales, marketing, and business development tools you can use to generate leads and increase revenue. Partners can access all these tools in the partner portal to help take your business to new heights. Some highlights are as follows:

- Get the latest Datto news and updates
- Access training and sales resources
- Launch marketing campaigns in MarketNow
- Monitor and manage solutions
- Shop in the product store
- Much more!

To help you get started, view the partner portal walkthrough video here.

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Marketing Support

The goal of this section is to help you start building awareness for Workplace with all your clients and prospects by sharing key marketing assets we have made available to you in MarketNow, your personal marketing automation platform from Datto.

MarketNow, Not Later!

You can't afford to wait to start building your lead funnel, so MarketNow, not later! What is MarketNow? Datto and Mindmatrix have joined forces to build our partners a robust marketing and sales enablement platform called MarketNow, comprised of an easy to use marketing automation platform and ready-made marketing and sales assets to help partners go to market with ease. We have done the heavy lifting for you by creating pre-built email and social drip campaigns, co-brandable assets, email templates, landing pages and more. MarketNow is available to all active Datto partners as a key benefit of the partner program.

MarketNow Benefits:

- Setup and launch Endpoint Backup marketing campaigns in minutes
- Use lead scoring to convert hot leads quickly to real sales opportunities
- Enhance your web and social media presence
- Co-brand collateral easily to strengthen your brand to clients and prospects
- Get quick access to dashboards for a snapshot of key metrics
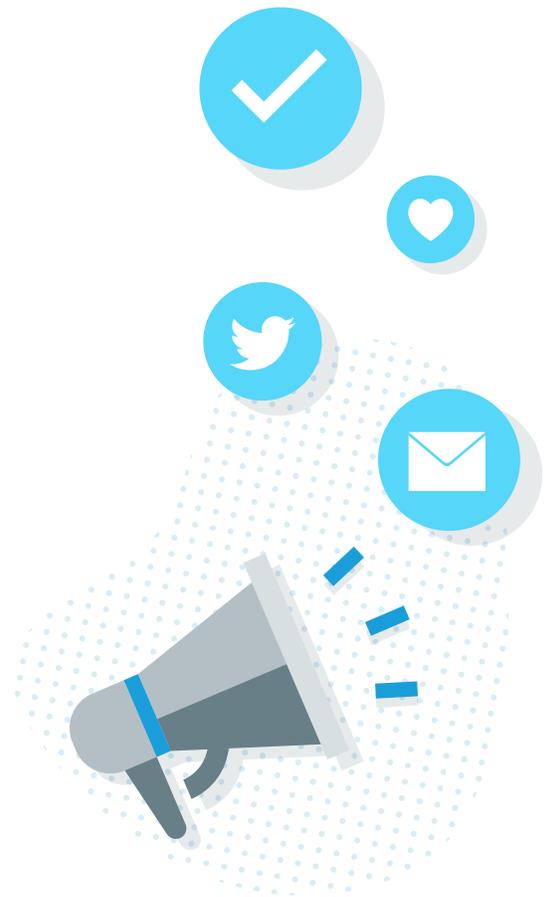- Simplify sales onboarding with easy to use playbooks

How to Access MarketNow:

All new partners access MarketNow via the Datto Partner Portal here.

MarketNow Training

All partners are eligible and encouraged to take the free MarketNow live or recorded onboarding sessions. Click the links below to register:

- Live onboarding
- Onboarding recorded webinar

MarketNow Recommendations

To help you get the most value from MarketNow, we recommend you take the following actions:

1. Dedicate a resource to work with MarketNow.

2. Setup account and profile within 2 weeks of receiving credentials.

3. Activate an email or social drip campaign within 30 days of receiving credentials.

4. Provide feedback to your account manager to help us continue to develop the platform and provide you with the best content and experience possible.

MarketNow Concierge Services

We know that partners sometimes have limited resources and need help with their marketing and sales efforts, this is why we are proud to announce an expanded partnership with Mindmatrix to offer multiple programs exclusively designed for Datto partners. Regardless of your business size and needs, you can select the program that works best for you to help increase sales and get the most out of your MarketNow.
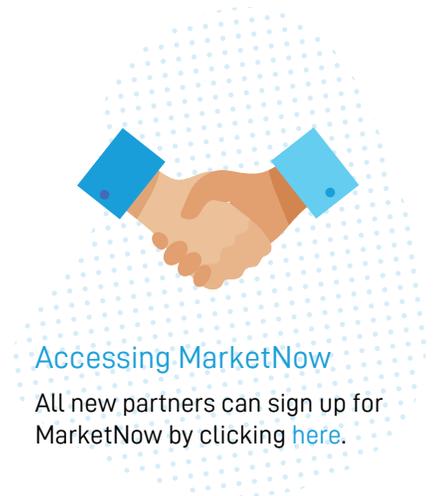
For more details on the various services offered and/or to signup, click here.

MarketNow Training

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- Live onboarding
- Onboarding recorded webinar

Accessing MarketNow

All new partners can sign up for MarketNow by clicking here.

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