# NAKIVO

# NAKIVO Sales Professional Training

NAKIVO®

# Contents

# Introduction

## About the NAKIVO Sales Professional Training

The NAKIVO Sales Professional Training (NSPT) is designed to prepare NAKIVO partners for reselling and distributing NAKIVO Backup & Replication for NAKIVO certification.

This training is designed to help you:

- Understand the needs and challenges of data protection
- Understand the solution architecture and key features
- Be able to identify and find potential customers
- Know how to pitch the solution effectively
- Be able to successfully close deals
- Deliver presentations about the company and solution to potential customers

## About the NAKIVO Sales Professional Certification

The NAKIVO Sales Professional (NSP) certification consists of two parts:

- **Level 1 NSP certificate** is issued upon completion of the multiple-choice test about NAKIVO and NAKIVO Backup & Replication.

- **Level 2 NSP certificate** is issued upon delivery of a presentation about NAKIVO and NAKIVO Backup & Replication (the Level 1 certificate is a prerequisit).

## About NAKIVO

NAKIVO is a US-based corporation dedicated to delivering the ultimate backup, ransomware protection and disaster recovery solution for virtual, physical, cloud and SaaS environments. Over 27,000 customers in 180 countries trust NAKIVO with protecting their data, including major companies like Coca-Cola, Honda, Siemens and Cisco.

## About the Solution

NAKIVO Backup & Replication is a backup, ransomware protection and disaster recovery solution for virtual, physical, cloud, NAS and software-as-a-service (SaaS) environments. The solution can protect VMware vSphere VMs (including vSphere 8.0 U2), Microsoft Hyper-V VMs, Nutanix AHV VMs, Amazon EC2 instances, Windows and Linux physical servers and workstations, NAS and other network shares, Microsoft 365 data, and Oracle Databases.

NAKIVO Backup & Replication stands out from the competition in three key areas:

- **Fast:** The solution delivers high-performance backup and recovery to reduce backup windows, save resources and minimize downtime.

- **Affordable:** NAKIVO Backup & Replication is more affordable than competitor solutions for the same or better feature set with two licensing models: subscription and perpetual.

- **Top-rated:** Recognized by industry analysts and highly ranked by customers.

# MODULE 1: All-in-One Data Protection

This module is designed to help you:

- Understand key data protection needs and challenges

- Be able to explain why traditional backups do not meet the needs of modern IT infrastructures

- Be able to describe the benefits of a modern all-in-one data protection

## Data Protection Needs in Today's IT Environments

Organizations are accelerating their digital transformation and have workloads now spread across clouds, at the edge and on premises. This transformation brings along new challenges, requiring comprehensive data protection across multiple environments that include virtual, physical, cloud, and software-as-a-service (SaaS).

Every business periodically faces data protection challenges, including:

- Important files, emails, and even entire virtual machines (VMs) can become corrupted or accidentally deleted.

- Physical servers' hardware can malfunction or become damaged.

- Applications and operating systems (OS) can become corrupted.

- Virtualization host servers, storage devices, and network equipment can fail.

- Ransomware can encrypt or lock data, and a ransom payment would be required to regain access.

These potential data threats can lead to disruptions to business operations. To avoid downtime, there is a need for two essential capabilities:

- Operational recovery: the ability to recover from a limited failure within an IT infrastructure.

- Disaster recovery: the ability to recover from a major failure that causes business-critical services to be unavailable.

These capabilities ensure that, in case of an outage, IT admins will be able to:

- Recover files and application objects (such as Microsoft Exchange emails) located on VMs or physical machines;

- Recover entire corrupted VMs with OS, applications, and data;

- Restore VMs to new hardware in case of server, storage, or network failure;

- Recover physical machines instantly;

- Recover business-critical workloads at a disaster recovery site in case of a major outage.

# Main Data Protection Approaches

Companies are using two main approaches to ensure data protection:

- **Backups:** To create a point-in-time copy of a workload. Backups are usually incremental, which means that after the initial (full) backup, only the changed data is stored in a repository on subsequent job runs. Incremental backups can run faster and occupy less storage space. Backups are used for long-term data storage and operational recovery.

- **Replication:** To create and maintain an identical copy of a source VM on a target host server. In case of a disaster, the VM can be simply powered on, enabling near-instant recovery. Replication is mostly used for protection from hardware failures (operational recovery) and site failures (disaster recovery).

- **Disaster recovery (DR)** involves a set of policies, tools, and procedures to enable the recovery or continuation of vital technology infrastructure and systems following a natural or human-induced disaster. In case of a disaster, simply power on the replicas and resume operations right away.

# Challenges to Protecting Business Data

As the value of data keeps increasing, the tolerance for infrastructure downtime continues to shrink. Businesses demand that their IT departments protect data in a timely and reliable manner while being able to recover in minutes, rather than hours or days.

Here are the key challenges that IT managers and IT admins face:

- Backups taking too long

- Recoveries taking too long

- Unreliable data protection and recovery

- Too much time spent on managing data protection

- Ability to overcome new threats

- Exceptionally high total cost of the data protection system

- Physical-only backup solutions usually don't take advantage of virtualization technologies (namely VMware's Changed Blocks Tracking or Microsoft's Resilient Change Tracking), which results in backups taking more time to complete.

- Data replication with the physical-only server approach requires the deployment of expensive storage arrays.

- Legacy backup solutions lack flexibility and multifunctionality.

- Legacy backup solutions cannot meet emerging data protection challenges.

- Legacy backup solutions are too expensive to purchase and maintain.

# A Universal Data Protection Solution Is the Answer

Modern all-in-one data protection solutions – such as NAKIVO Backup & Replication – are designed to protect all types of data in today's IT environments.

- Complete data protection across IT environments (virtual, physical, cloud, and SaaS) with a single solution.

- There are no agents to install or manage within VMs.

- Backup data can be stored on-premises, offsite, in a public cloud (Amazon S3, Backblaze B2, Azure Blob, Wasabi), on other S3-compatible storage, or on tape for long-term retention/archival.

- Files, folders, and application objects can be instantly recovered directly from backups.

- Physical machines can be restored from backups with no prerequisites for operating system installation and configuration.

- VMs can be instantly recovered to the same or a different host.

- VMs can be replicated to dissimilar hardware.

- VM replicas can be instantly brought online for fast disaster recovery.

- Recovery times are fast and backup windows are short.

- Management of data protection tasks is simple and intuitive through automation and a host of backup administration tools.

- Maintenance costs are up to four times lower.

- Frequent feature releases to keep up to date with industry trends and new data protection challenges.

# Module 1 Key Takeaways

Modern IT environments have become more complex than ever. Having recognized the benefits of virtualization and the importance of data digitization, the majority of businesses have virtualized their critical production workloads and are moving their operations to the cloud. Despite this trend for virtualization and cloud computing, physical server infrastructures are still widespread. Consequently, businesses express a high demand for comprehensive data protection across platforms that can fit organizations of any size.

Traditional physical backup solutions are slow, difficult to manage, expensive, and not tailored to solve specific data protection challenges and satisfy customers' needs for an agile and resource-efficient solution. NAKIVO Backup & Replication is an all-in-one backup solution that delivers a full range of data protection features, including backup, replication, instant recovery, ransomware protection and disaster recovery orchestration for virtual, cloud, physical, and SaaS environments, all managed from a centralized web interface.

# MODULE 2: Architecture and Deployment

This module is designed to help you:

- Understand NAKIVO Backup & Replications architecture

- Understand the different solution deployment scenarios

## Architecture

The essential components required to start using NAKIVO Backup & Replication are the Director, at least one Transporter and a Backup Repository. NAKIVO Backup & Replication consists of the following components:

- **Director** is the central management instance of NAKIVO Backup & Replication. The Director provides the web interface; maintains the inventory; enables the customer to create and run jobs; and manages Transporters, Backup Repositories, licensing, and configuration settings.
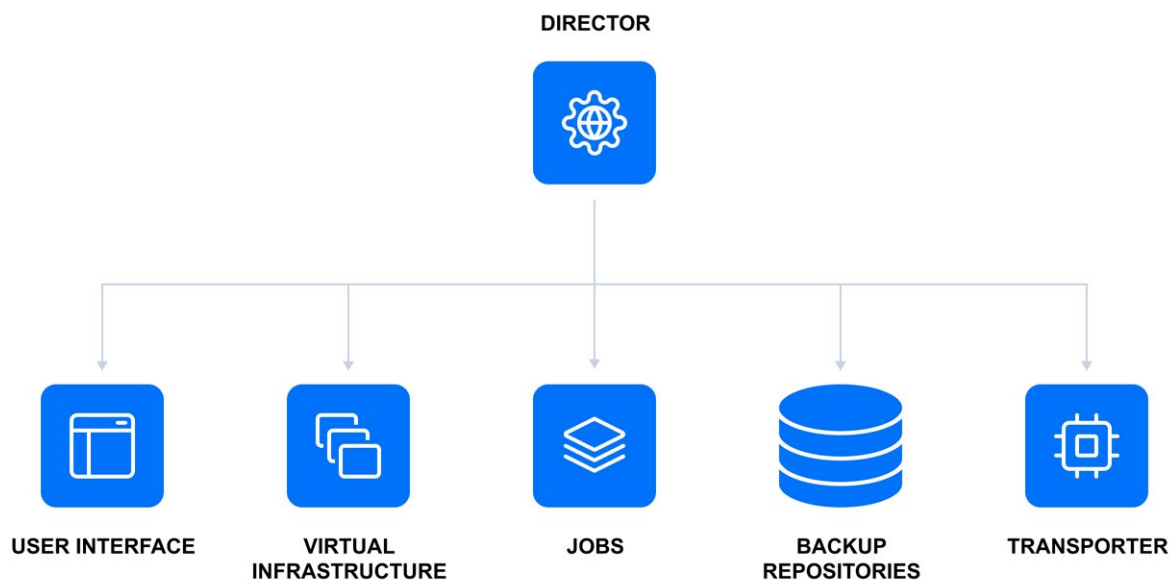


- **Nodes** are solution components that include **Transporters, physical machine agents** and **VM persistent agents.**

  - **Transporter** is a core solution component responsible for data transfers and processing. runs as a service and does all of the heavy lifting. It performs the actual data backup, replication, and recovery, as well as compression, deduplication, and encryption. For example, when a VM is backed up by NAKIVO Backup & Replication, the Transporter reads the VM data, performs deduplication and compression (when enabled), and writes the data to a Backup Repository.

  - **Physical machine agents** are Transporters installed on Windows/Linux physical servers and workstations to allow communication with NAKIVO Backup & Replication.

  - **VM persistent agents** are installed on virtual machines to facilitate file-level recovery and custom OS quiescing.

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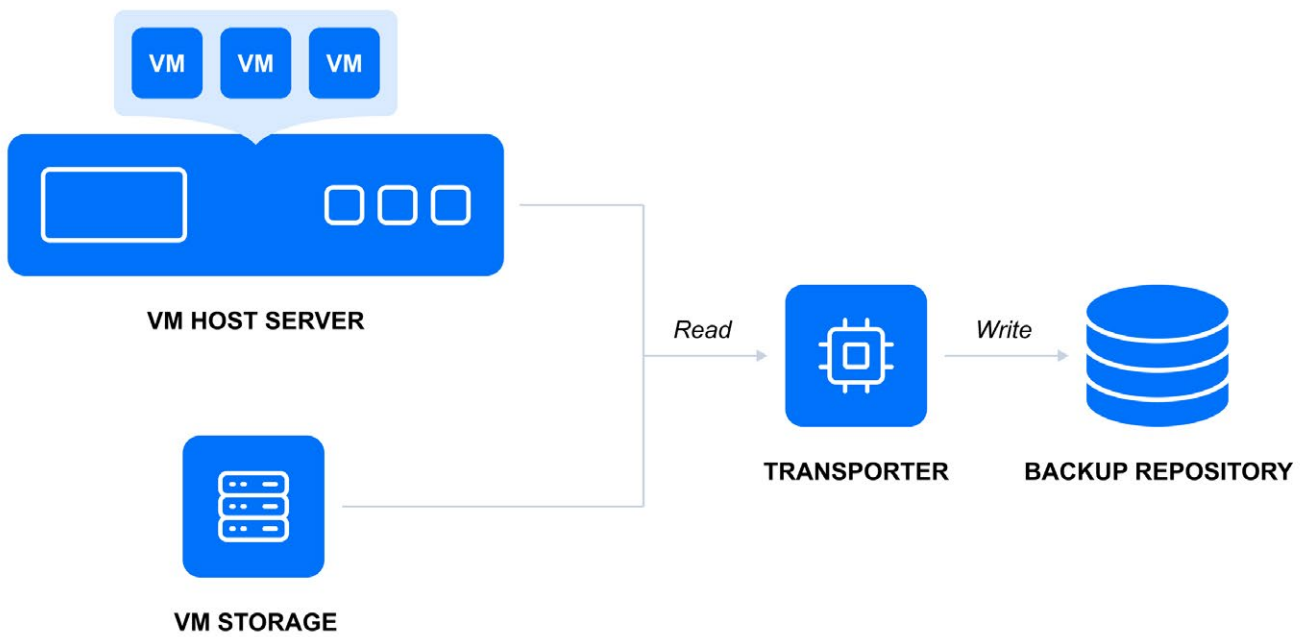
- **The Backup Repository** is a folder used by NAKIVO Backup & Replication for storing backups. When a Backup Repository is created, NAKIVO Backup & Replication creates a folder in the specified location and keeps all the data and metadata in that folder.

  The solution supports creating a repository in virtually any backup destination, such as a local folder, an SMB or NFS share, a public cloud (Amazon S3, Amazon EC2, Backblaze B2, Azure Blob, and Wasabi), an S3-compatible storage platform, and a deduplication appliance. For Microsoft 365 data backups, the solution has a special SaaS repository.
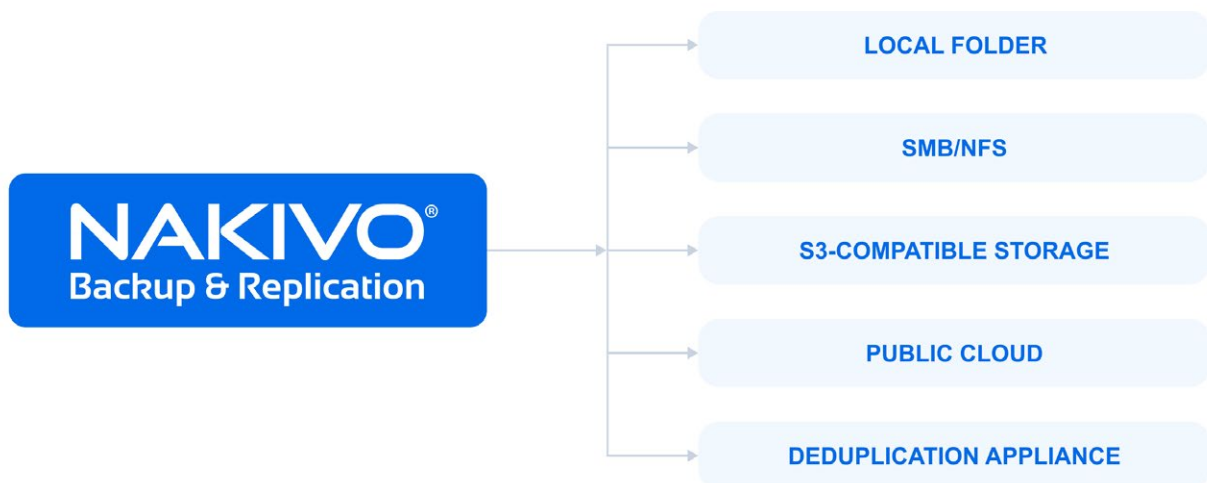
NAKIVO Backup & Replication repositories can support two types of backups:

- **Incremental with full backups:** The initial backup is full, subsequent backup job runs are incremental, and full backups are created periodically based on the pre-configured job settings. Built-in backup data deduplication cannot be enabled with this type of Backup Repository. This is the default Backup Repository.

- **Forever incremental:** The initial backup is full, and all subsequent backups are incremental, meaning that only changed data blocks (increments) are copied to the Backup Repository.

## System Requirements

NAKIVO Backup & Replication is designed for seamless deployment in a virtual, cloud or physical environment. The solution is lightweight, and the full version requires just 2 CPU cores and 4GB RAM.

The solution can be installed on Windows and Linux, deployed as a pre-configured VMware/ Nutanix virtual appliance, installed directly on QNAP, Synology, ASUSTOR, NETGEAR or Western Digital appliances, or deployed from an Amazon Machine Image (AMI) as an Amazon Elastic Compute Cloud (EC2) instance.

| Windows | Linux | Virtual Appliance | NAS | AMI |
|---------|-------|-------------------|-----|-----|

All required components, such as the database, are built-in and work out of the box without any additional configuration. From start to finish, it takes less than two minutes to install and configure the solution and start running the first backup.

## Deployment Scenarios

By default, all solution components (Director, Transporter, and Backup Repository) are installed automatically to enable all features out of the box.

NAKIVO Backup & Replication supports both single-site deployment and multi-site deployment. For a single-site deployment, it is enough to install the solution on a single virtual or physical machine. This deployment scenario is suitable for small and mid-sized organizations.
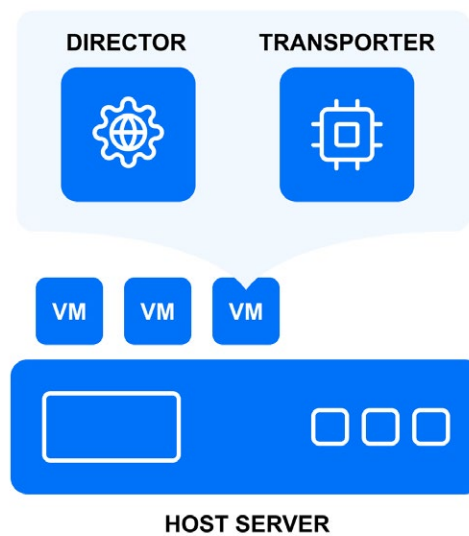
In a multi-site deployment, the full solution should be installed at one site, and at least one additional Transporter at each of the other sites. This deployment scenario is suitable for larger organizations with multiple offices or with a large data center.



## Module 2 Key Takeaways

The essential components required to start using NAKIVO Backup & Replication are the Director, at least one Transporter and a Backup Repository. Nodes and Backup Repositories can be used in a variety of combinations depending on the needs of customers. The modular architecture makes the solution suitable for a variety of deployment scenarios, including single-site deployments for small environments and multi-site configurations for distributed environments.

# MODULE 3: Key features

This module is designed to help you understand and communicate key features and capabilities of the solution:

- Supported Environments

- Data protection

- Data recovery

- Disaster recovery orchestration

- Performance

- Administration

- MSP Console

## Supported Environments

NAKIVO Backup & Replication provides data protection for the following virtual, physical, cloud, and SaaS environments:

- **VMware**

  - VMware vSphere 5.5–8.0 U1

  - VMware Cloud Director 10.2.1–10.3.3.2–10.5

- **Hyper-V**

  - Microsoft Hyper-V Server 2012, 2012(R2), 2016, 2019, 20H1, 20H2, 2022

- **Nutanix**

  - Nutanix AHV v5.15, v5.20, v6.5, 6.5.4 (LTS)

- **Amazon Elastic Compute Cloud (EC2)**

  - All AWS regions

  - All instance types

  - Virtual private cloud (VPC) and Classic

- **Microsoft 365**

  - Exchange Online (including In-Place Archive Mailbox, Litigation Hold and In-Place Hold), OneDrive for Business, SharePoint Online, Microsoft Teams

- **Oracle Database (RMAN)**

  - Oracle Database 19c, 18c, 12c R2, 11g R2

- **Physical Machines**

  - Windows Servers and Workstations

- Windows Server 2012 - 2022 (21H2) (x64)

- Microsoft Windows 10 Home/Pro/Enterprise, Windows 11 (x64)

- Linux Servers and Workstations

  - Ubuntu Server 16.04–22.04 LTS (x64)

  - Ubuntu Desktop 18.04–22.04 LTS (x64)

  - Debian v10.1–12.1

  - RHEL v7.0–9.2 (x64)

  - SLES 12 SP1–15 SP4 (x64)

  - CentOS v7.0–8.5 (x64)

  - CentOS Stream 8–9 (x64)

  - AlmaLinux 8.7–9.1 (x64)

  - Oracle Linux 7.4 - 9.3

# Data Protection

## Backup for Virtual, Physical, Cloud, SaaS and Apps

NAKIVO Backup & Replication provides image-based, application-aware backup for VMware vSphere (including vSphere 8.0 U2), Microsoft Hyper-V, Nutanix AHV, Amazon EC2, Windows, and Linux physical servers and workstations; Microsoft 365 (Exchange Online, OneDrive for Business, SharePoint Online, and Microsoft Teams); and Oracle Databases both Windows- and Linux-based. With NAS Backup, customers can create backups of unstructured data in SMB/NFS shares hosted on NAS devices and Windows and Linux machines. NAKIVO Backup & Replication can capture all the data in a workload while ensuring the transactional consistency of applications and databases (such as Microsoft Exchange, Microsoft Active Directory, or Microsoft SQL Server) that are running on the workload.

## Policy-Based Data Protection

With NAKIVO Backup & Replication, the customer can create data protection policies that regularly scan their infrastructure and automatically protect VMs, Amazon EC2 instances, and physical machines that match policy rules. The rules can be based on machine name, tag, size, location, power state, configuration, or a combination of these parameters.

## Backup Copy Offsite and to the Cloud

Backups can be damaged, accidentally deleted, encrypted by ransomware or become unavailable, leaving a business without any way to restore their data. Backup Copy jobs allow a customer to create copies of backups and send them to a remote site, a public cloud (Amazon S3, Backblaze B2, Azure Blob or Wasabi), other S3-compatible storage platforms, or to tape. The customer can choose to keep a mirrored copy of a backup repository or fine-tune which backups are copied and when.

## Ransomware-Resilient Backups

NAKIVO Backup & Replication offers multiple options for protecting backup data from accidental deletion, modification or ransomware encryption by making backups immutable. Immutability relies on the write-once-read-many (WORM) model.

- Backups sent to local Linux-based repositories can be made immutable for as long as needed. Only a superuser can lift or change immutability.

- Backups sent to Amazon S3, Backblaze B2, Azure Blob, Wasabi, or other S3-compatible storage platforms can be made immutable in NAKIVO Backup & Replication using the native cloud object locking technology. Once set, immutability cannot be lifted by anyone, not even the root user.

- The solution deployed as a hardened Linux-based virtual appliance (VMware or Nutanix AHV VA) or Amazon Machine Image (AMI) has a built-in ransomware-resilient repository. Backups sent to the hardened repository deployed as part of a hardened (more secure) VA or AMI can be made immutable, and immutability cannot be lifted by anyone, not even the superuser.

## Backup to Tape

Tape backup is the process of backing up critical data to tape media. In essence, backing up to tape means creating a backup, storing it in the repository, and then moving it to tape media for safekeeping. NAKIVO Backup & Replication supports backups of the following platforms: VMware vSphere, Microsoft Hyper-V, Nutanix AHV, Windows and Linux physical servers and workstations, Amazon EC2, and Oracle Database. Given that tape is an unlikely ransomware target, backups stored on tape media are protected from deletion and encryption by ransomware and can be used for recovery after an incident. The backups can be sent to physical tape libraries or VTLs for storage. NAKIVO Backup & Replication allows implementing the Disk Staging or Disk-to-Disk-to-Tape (D2D2T) backup strategy, where disks are used as an additional, temporary stage of backup processes before backups are stored to tape.

In NAKIVO Backup & Replication, the process of storing backups to tape consists of two stages:

**Stage 1** — creating backups and storing them in a Backup Repository.

**Stage 2** — copying backups from the Backup Repository to a tape library.

## Backup Size Reduction

NAKIVO Backup & Replication creates incremental backups. The solution can also automatically exclude swap data from VM backups and unused blocks. Data deduplication and compression can be enabled for a Backup Repository to further minimize backup size. All these features can dramatically reduce storage space requirements.

## Instant Verification

NAKIVO Backup & Replication can near-instantly verify VMware vSphere and Microsoft Hyper-V VM backups and replicas with the Instant Verification feature. This way, the customer has proof that VMs can be recovered from their backups. The feature has two functionalities.

- Screenshot Verification: After a job is complete, NAKIVO Backup & Replication instantly recovers the VM, waits until the OS has booted, takes a screenshot of the OS, discards the test-recovered VM, and sends a report with the screenshot via email.
- Boot Verification: NAKIVO Backup & Replication test recovers a VM or turns on a replica, disables networking, and checks whether hypervisor tools (if installed) are running on the guest OS.

## Automated SQL and Exchange Log Truncation

Microsoft SQL Server and Microsoft Exchange record all database changes in transaction log files. These files grow over time and can eventually consume all free space on a disk, which may lead to crashing the server. NAKIVO Backup & Replication can automatically remove transaction log files from the source VMware vSphere VMs, Microsoft Hyper-V VMs, Nutanix AHV VMs, Amazon EC2 instances, and Windows/Linux physical machines after a successful VM backup or replication job. This prevents the log files from growing while keeping a copy in the backup or replica, in case data needs to be restored.

## Encryption in Flight and at Rest

With NAKIVO Backup & Replication, the customer can encrypt data in flight and at rest. NAKIVO Backup & Replication uses AES 256 encryption, which is the industry standard for military and financial institutions.

## Deduplication Appliance Support

NAKIVO Backup & Replication offers a special type of Backup Repository that is optimized for deduplication appliances such as HPE StoreOnce, EMC Data Domain, and NEC HYDRAstor. When tested in a customer environment on an NEC HYDRAstor device, the new repository improved VM backup performance by 53 times as compared to the regular Backup Repository, with backup speeds reaching 3.2 GB/s.

## Storage Appliance Support

NAKIVO Backup & Replication can create backups and replicas of VMware VMs hosted on HPE 3PAR, Nimble, Alletra and Primera storage devices directly from storage snapshots instead of regular VM snapshots, taking the load off the production environment.

## Application and Database Support

NAKIVO Backup & Replication helps you ensure the consistency of applications and databases, such as Microsoft Exchange, Microsoft Active Directory, Microsoft SQL Server, and Oracle

Database. To perform consistent backups and replicas of Windows-based environments, NAKIVO Backup & Replication relies on the Microsoft Volume Shadow Copy Service (VSS) running inside VMs. If a customer's application is not VSS-aware or runs on Linux, the solution allows running custom pre-freeze and post-thaw scripts to enable application awareness.

# Data Recovery

## Instant VM Recovery

With NAKIVO Backup & Replication, VMware vSphere and Microsoft Hyper-V VMs can be instantly booted on target hosts from deduplicated and compressed backups. This feature significantly reduces downtime if a VM fails, resulting in shorter recovery time objectives (RTOs).

## Instant Object and File Recovery

NAKIVO Backup & Replication can instantly restore individual files and application objects (Microsoft Exchange Server, Microsoft Active Directory, and Microsoft SQL Server) stored on virtual and physical machine backups back to original or custom locations. In addition, the Universal Object Recovery feature can be used to instantly recover any application object or file type by mounting disks from a backup directly to production VMs. Customers can streamline file-level recoveries with NAKIVO Backup & Replication by installing a persistent agent on the guest OS with a custom master password instead of using VM guest OS credentials.

## Bare-Metal Recovery

NAKIVO Backup & Replication allows recovering backups of physical machines directly to the same or identical hardware. Eliminating the need to install and configure the operating system streamlines the recovery process and provides a convenient way to set up an environment for testing purposes.

## Cross-Platform Recovery

With NAKIVO Backup & Replication, VM disks can be exported across platforms in order to recover VMware vSphere VMs to a Microsoft Hyper-V environment and vice versa.

## Physical-to-Virtual Recovery

With the Instant Physical-to-Virtual (P2V) feature, physical servers or workstations can be instantly restored to VMware vSphere VMs, allowing workflow to be rapidly resumed after a physical machine failure or safely test patches and updates. The Full P2V Recovery feature simplifies physical to virtual migrations by creating VMware vSphere VM versions of physical machines that are ready for long-term use in a production environment.

## Instant Recovery for Microsoft 365 Data

With NAKIVO Backup & Replication, Microsoft 365 items can be located and recovered with just a few clicks to restore the workflow and fulfill compliance requirements. Instantly recover

Exchange Online, OneDrive for Business, SharePoint Online, and Microsoft Teams items to the original or a different account.

## File Share Recovery

With NAKIVO Backup & Replication, you can recover the contents of an entire share or specific files and folders within the share from backups to the location of your choice. Recover data to a custom location on SMB or NFS shares, send via email or download to a browser.

## Backup Malware Scan

NAKIVO Backup & Replication provides customers with safeguards against dormant malware. The solution can be integrated with supported anti-malware software to detect malicious code in backups, ensuring ransomware-free recovery and strengthening ransomware resilience.

# Disaster Recovery

## VM Replication

NAKIVO Backup & Replication enables creating and maintaining replicas of VMware vSphere VMs, Microsoft Hyper-V VMs and Amazon EC2 instances, which are identical copies of the source VMs. The VM replicas remain in the powered-off state until recovery is started.

## Replication from Backup

The Replication from Backup feature allows for offloading the production environment by replicating VMs directly from backups. Setting up a replication from a backup job for VMware vSphere and Microsoft Hyper-V environments is no more time-consuming than setting up a traditional replication job. Launch a new replication job wizard and select VM backup as the source, then NAKIVO Backup & Replication proceeds to read the data from the repository and injects it into the replica.

## Site Recovery

The Site Recovery feature allows you to create disaster recovery workflows and perform scheduled, non-disruptive disaster recovery testing. You can seamlessly perform planned failover, emergency failover, failback, and datacenter migration. Custom workflows can include steps for graceful source VM shutdown, final VM replication, replica VM re-IP according to predefined rules, network mapping, staged replica VM power on, custom scripting, email notifications, and so on. Once set up, a recovery workflow can be run with a single click.

## Real-Time Replication (Beta) for VMware

The real-time replication (Beta) feature allows you to create replicas of VMware vSphere VMs, including application data and configuration files. These replicas remain continuously updated with the source VM as changes are made in real time with an update rate as low as 1 second. In a failure or unforeseen incident, swiftly initiate failover to replica procedures and resume business operations with minimal downtime and near-zero data loss.

# Performance

### Native Change Tracking

NAKIVO Backup & Replication uses native change tracking technologies (VMware CBT, Hyper-V RCT, Nutanix AHV CRT, Microsoft's delta query) to instantly identify modified data and only transfer the changes to the backup destination.

### LAN-Free Data Transfer

NAKIVO Backup & Replication can use LAN-Free Data Transfer modes (HotAdd or Direct SAN access) for VMware vSphere VM backups to increase data transfer speed while offloading production networks.

### Network Acceleration

NAKIVO Backup & Replication also provides the built-in Network Acceleration feature to further increase performance in busy LAN and WAN. These features can boost VM backup speed by up to two times and reduce network load by as much as 50%.

### Advanced Bandwidth Throttling

NAKIVO Backup & Replication was designed to work quickly and thus transfer data at the maximum available speed. However, if the LAN/WAN is already loaded, the customer may want to limit the speed of data transfers by using the Advanced Bandwidth Throttling feature. Bandwidth rules can be set in order to make sure that jobs do not exceed the bandwidth limit.

# Administration

NAKIVO Backup & Replication provides a simple web interface and comes with several features to help save time and energy:

- **Overview dashboard** provides a view of the status and performance of all the data protection activities, solution components, and issues to address in simple widgets.

- **Calendar dashboard** displays all past, current, and future backup jobs in a simple calendar view.

- **Global Search** allows the customer to find and act on VMs, backups, replicas, jobs, repositories, Transporters, and other objects.

- **File System Indexing** enables customers to create an index for the files and folders in VMware and Hyper-V backups to simplify finding the items needed for recovery.

- **Role-Based Access Control** helps the customer control who can access and perform data protection activities.

- **IT Monitoring** offers real-time monitoring of CPU, RAM, and disk usage of vSphere hosts and VMs. Custom alerts can be created to detect suspicious activity with comprehensive reports about VMware VMs, hosts, and datastores.

- **Two-Factor Authentication (2FA)** prevents unauthorized access to data protection activities.

- **Auto-Update** enables updating the solution with a single click.

- **Job Chaining** can be used to automate routine backup jobs.

- **Built-in Support Chat** allows the customer to get help from tech support without leaving the product interface.

- **Self-Backup** automatically performs a self-backup once a day to have the ability to restore the entire system configuration (including all jobs, inventory, settings, and so on) from a self-backup in case of machine failure.

- **AD Integration** allows integration with Microsoft Active Directory and maps user groups to NAKIVO Backup & Replication user roles.

- **HTTP API** can be used to integrate NAKIVO Backup & Replication with monitoring, automation, and orchestration solutions via HTTP API.

# Data Protection for Managed Service Providers (MSPs)

## Multi-Tenancy

The Multi-Tenant Mode in NAKIVO Backup & Replication allows managed service providers (MSPs) to add and create up to 100 isolated tenants within one solution deployment. This way, an MSP can offer backup as a service (BaaS), disaster recovery as a service (DRaaS) and other data protection services to their customers.

## MSP console

MSPs can create local tenants in their multi-tenant deployment of NAKIVO Backup & Replication and add client environments to offer backup and disaster recovery as a service (BaaS and DRaaS). In addition, MSPs can add clients' standalone instances of the solution as remote tenants to their multi-tenant deployment. MSPs can monitor and manage the data protection activities of all types of tenants from a unified dashboard and easily switch between different tenant infrastructures.

## Direct Connect

To connect to the remote environments of clients, MSPs can use Direct Connect to establish a secure single port connection without setting up a VPN connection.

## Self-Service

The role-based access control can be used to allow local tenants to access the Self-Service Portal and offload backup, replication, and recovery tasks from the service provider to client IT staff.

## VMware Cloud Director Support

When using VMware Cloud Director as a cloud service delivery platform, MSPs can ensure that

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client workloads are protected and recoverable if a data loss incident occurs. With NAKIVO Backup & Replication, VMware Cloud Director objects (such as vApps, individual VMs, and vApp metadata) can be easily backed up to local storage, NAS, the cloud (Amazon S3, Backblaze B2, Azure Blob, Wasabi, etc.). When needed, objects can be restored directly to the Cloud Director hierarchy.

## Module 3 Key Takeaways

NAKIVO Backup & Replication is a unified solution designed to protect and recover VMware vSphere (including vSphere 8.0 U2), Microsoft Hyper-V, Nutanix AHV, Amazon EC2, Windows/ Linux physical machines, Microsoft 365, NAS and Oracle Database environments.

NAKIVO Backup & Replication offers a complete data protection feature set for virtual, physical, cloud, and SaaS environments, including local and offsite backup, VM replication, real-time replication, backup to cloud, support for live applications, instant granular recovery, ransomware protection, performance-enhancing features, and a web-based interface.

# MODULE 4: How to Find Customers

This module is designed to help you:

- Identify target customers

- Understand customer personas

- Effectively search for new opportunities

## Identify a Target Customer

Regardless of industry, company size, or revenue numbers, all businesses need to protect their data. Thus, all businesses that use or plan to use VMware vSphere, Microsoft Hyper-V, or Nutanix AHV VMs; Windows- or Linux-based physical servers or workstations; Amazon EC2 instances; Microsoft 365; and/or Oracle Database are potential NAKIVO customers. This means that whenever you see one of these environments being used, you have a new sales opportunity.

Potential NAKIVO customers can be split into three main segments:

- **SMBs:** Small- and medium-sized businesses (SMBs) want to protect their data and workloads using backup and/or replication. In most cases, SMBs are looking for daily local backups, while some of them will want to use a secondary site or a public cloud as a backup destination.

- **Enterprises:** Larger companies want to protect their data and workloads using backup and/or replication. Enterprises are looking for local backups, offsite backups, replication, and disaster recovery. Enterprises typically have multiple sites or branch offices.

- **Hosting and service providers:** These service providers want to protect customer workloads or their own VMs running customer workloads. Their needs range from local backup and replication to BaaS, replication as a service (RaaS), and DRaaS.

## Know Customer Personas

The key customer personas for NAKIVO Backup & Replication are:

- IT administrators

  - Responsible for setting up and maintaining data protection

  - Responsible for day-to-day data recovery tasks

  - Responsible for technical evaluation of the solution

  - Interested in how a solution can solve their daily challenges

  - Interested in technical benefits that the solution provides

- CTOs, IT managers

    - Responsible for high-level IT management

    - Responsible for technical evaluation of the solution

    - Interested in technical benefits that the solution provides

    - Interested in how the solution helps save resources and time

- Owners, CEOs, CFOs, directors

    - Responsible for purchase approval

    - Interested in how the solution helps save money, resources, and time

# Search for New Opportunities

## Go to Your Existing Customer Base

The simplest way to get new NAKIVO customers is to check your current customer base. According to Gartner, one-third of organizations will change backup vendors within the next 12 months due to frustration over cost, complexity, or capability. So even if your customers already have a data protection solution in place, there is a high chance you can convert some of them into NAKIVO customers.

If you have customers using VMware vSphere, Microsoft Hyper-V, Nutanix AHV, Amazon EC2, Windows- or Linux-based physical machines, Oracle Database, or Microsoft 365, you already have sales opportunities. Contact your customer base and pitch NAKIVO Backup & Replication. You can ask your NAKIVO Business Development Manager or Channel Manager for the email template and web (landing) page.

## Look for Local Hosting and Service Providers

Hosting and MSPs are increasingly likely to use virtualization. They usually have hundreds and sometimes thousands of VMs that they need to protect. Therefore, such opportunities are often large (over $50,000).

Look for local hosting and MSPs in your area and pitch NAKIVO Backup & Replication to them. Since NAKIVO Backup & Replication is a fast, affordable and top-rated solution, your chances are good for converting such prospects into NAKIVO customers.

## Look for Potential Customers in Your Area

Another option is to search for potential customers on LinkedIn. Look for people in your area with these and other similar keywords: VMware, vSphere, Hyper-V, Microsoft, Nutanix, AHV, virtualization, ESXi, VCP, AWS, EC2, Windows Server, Linux Server, Hosting, Cloud, Oracle Database, Microsoft 365. All the people you find are potential customers. Contact them and pitch NAKIVO Backup & Replication. You can ask for an introductory email from your NAKIVO Business Development Manager or Channel Manager.

## Promote NAKIVO Backup & Replication on Your Website

Make sure that NAKIVO Backup & Replication has a separate page on your company's website. The page should list the value and benefits that the customer gets with the solution. You can ask for the solution description, graphics, materials, and free web design assistance from your NAKIVO Business Development Manager.

## Upsell NAKIVO Backup & Replication

Data protection is an integral part of normal business operations. Whenever you create a proposal for VMware vSphere, ESXi, Microsoft Hyper-V, Nutanix AHV, Amazon EC2, Windows/Linux servers or workstations, Oracle Database, Microsoft 365, professional services, hardware, or storage, include NAKIVO Backup & Replication in the proposal. This way you will upsell data protection, increase your bottom line, and deliver a more complete package for your customers.

# Module 4 Key Takeaways

Typical NAKIVO customers are SMBs, enterprises, and hosting and service providers that use virtualization provided by VMware vSphere, Microsoft Hyper-V, Nutanix AHV, or Amazon EC2 or who use Windows/Linux physical machines, Oracle Database, or Microsoft 365.

The key personnel in organizations responsible for testing solutions and making purchase decisions are IT administrators, IT managers, IT directors, CTOs, CFOs, CEOs, and owners.

The main ways to find customers include: checking your existing customer base, looking for local hosting and service providers, searching for customers in social networks, promoting NAKIVO Backup & Replication on your company website, and including NAKIVO Backup & Replication in proposals related to virtualization.

# MODULE 5: How to Pitch NAKIVO Backup & Replication

This module is designed to help you:

- Understand customers' key needs

- Pitch NAKIVO Backup & Replication

- Communicate what differentiates NAKIVO Backup & Replication from competitors' solutions

- Overcome customers' objections

- Recommend the Trial Version

## Put Yourself in the Customer's Shoes

Prior to selling NAKIVO Backup & Replication to a particular customer, you need to understand the customer's needs and challenges. When speaking to a potential customer, you need to:

- Evaluate the customer to ensure that they need data protection for their virtual, physical, cloud, or SaaS environment(s).

- Explore the customer's current situation and identify their key business needs.

- Determine which solution/approach they are currently using, how, and why.

- Identify the key disadvantages and pain points of the current situation.

- Discover the customer's objectives and their desired future result.

Once you have gathered this information, customize your sales pitch and offer the customer the solution that best satisfies their needs. Here are some useful questions that can help you determine the customer's current situation:

- Are you using VMware vSphere, Microsoft Hyper-V, Nutanix AHV, Amazon EC2, Oracle Database, Microsoft 365, and/or Windows/Linux physical machines?

- Which of your business-critical applications and databases are virtualized?

- Do you have a NAS in your environment?

- Would you like to store backups and backup copies in the cloud?

- How do you currently protect your data?

- Do you have any issues with your current solution/approach?

- Would you like to increase the backup and replication speed?

- Would you like to reduce the storage space required to keep backups?

- Would you like to protect your backup data against ransomware and ensure recovery after an incident?

- Would you like to decrease your VM data protection costs?

- What else would you like to improve in data protection?

- What is your desired end result?

## Send the Right Messages to the Right People

Different personas in a company have different levels of involvement in the field of data protection, in addition to different levels of responsibility and visibility. For example, an IT administrator is mainly focused on day-to-day IT tasks, including data protection. At the same time, a CEO or CFO is focused on high-level management tasks, which include having a reliable data protection solution, and optimizing costs and time. The messages sent to people in the customer's organization should take the particular customer persona into account.

# Pitch NAKIVO Backup & Replication

Customers buy results, not solutions or features. They are interested in the objectives that they can achieve by purchasing a particular solution. When presenting NAKIVO Backup & Replication, it is important that you customize your pitch to meet your customers' particular challenges and needs. In other words, your sales pitch should show the customer how NAKIVO Backup & Replication solves their problems, removes their pain, improves their current situation, and delivers the desired result.

Refer to the sections below to learn how to address a particular customer's needs, problems, pains, concerns, and questions.

## General Opening Pitch

**Pitch:** "NAKIVO Backup & Replication is a fast, affordable and top-rated data protection solution for backup, replication, granular restore, and disaster recovery of virtualized and cloud environments from a single pane of glass."

## Virtualization and Cloud Platforms

If the customer says:

- We use VMware vSphere.

- We use VMware ESXi.

- We use Microsoft Hyper-V.

- We use Nutanix AHV.

- We use Amazon EC2.

- We use physical Windows/Linux servers and workstations.

- We use NAS devices with file shares

- We use Oracle Database.

- We use Microsoft 365.

**Pitch:** "NAKIVO Backup & Replication is designed to protect VMware vSphere, Microsoft Hyper-V, Nutanix AHV, Amazon EC2, Oracle Database, Microsoft 365, file shares on NAS devices, and/or Windows/Linux physical machine workloads. Backup and replication are incremental and application-aware. The solution is tailored for virtualization and cloud platforms, as well as traditional, physical environments. It takes advantage of native APIs and features provided by each platform."

## Applications and Databases

If the customer says:

- We have virtualized XYZ applications.

- Can NAKIVO make consistent backups of applications and databases?

**Pitch:** "NAKIVO Backup & Replication supports live applications and databases. The solution uses application-aware mode to ensure that application data in virtual and physical machine backups and replicas is consistent."

## File Recovery

If the customer says:

- We need to be able to recover files from backups.

**Pitch:** "NAKIVO Backup & Replication can instantly recover files and folders directly from compressed and deduplicated backups of virtual or physical machines running Windows or Linux OS. This feature is agentless and works right out of the box."

## Microsoft Exchange Server/SQL Server/Active Directory

If the customer says:

- We have virtualized our Exchange server(s).

**Pitch:** "NAKIVO Backup & Replication provides complete support for protecting and recovering Microsoft Exchange/SQL/AD data: using the application-aware mode, the solution ensures that the data inside Exchange/SQL/AD VMs is consistent and can be recovered. Also, the solution can truncate Exchange/SQL logs after a successful backup to free up space on the server. And after a backup is done, you can instantly recover Exchange/SQL/AD objects directly from the compressed and deduplicated backups."

## Disaster Recovery

If the customer says:

- We want to be able to recover our entire environment in case of a disaster.

- We have a DR site and we want to failover in case of a primary site failure.

**Pitch:** «With NAKIVO Backup & Replication, you can easily replicate live VMs to your disaster recovery site. Replication creates and maintains an identical copy of source VMs, so recovering from a disaster is as simple as powering on the replica VMs. If your VMs or data were damaged and then replicated, you can roll back the VM replicas to a previous good recovery point.

"The Site Recovery feature enables you to create recovery workflows and perform scheduled disaster recovery testing without disrupting your production environment. This allows you to perform planned failover, emergency failover, failback, and datacenter migration. Your custom workflows can include steps for graceful source VM shutdown, final VM replication, replica VM re-IP according to predefined rules, network mapping, staged replica VM power on, custom scripting, email notifications, and so on. Once set up, a recovery workflow can be initiated with a single click."

## Pitch for Real-Time Replication for VMware:

With NAKIVO Backup & Replication, you can create exact replicas of your VMware VMs and keep them updated with the source VM. Changes made on the source VM are instantly replicated to the replica with an RPO as low as 1 second. This means your data loss rate during a disaster or an outage is close to zero.

With the shortest RTOs and RPOs as low as 1 second, your business can quickly resume operations after a disaster, minimizing potential downtime and productivity slowdowns.

## Backup Size Reduction

If the customer says:

- We'd like to reduce the size of our backups.

- How does NAKIVO save space for backups?

- Does NAKIVO deduplicate or compress backups?

**Pitch:** "NAKIVO Backup & Replication was designed to save storage space. The product has built-in deduplication that can automatically deduplicate data across the entire Backup Repository, so only unique data blocks are saved. On top of that, deduplicated blocks are compressed to take up even less space. NAKIVO Backup & Replication can also skip swap files, partitions, and unused blocks while backing up or replicating data, saving gigabytes of space per day and terabytes of space in general."

## Reliability

If the customer says:

- We're spending too much time on backup maintenance.

- Our current backup solution does not report on backup consistency.

- How can we know if the backups are good?

**Pitch:** "NAKIVO Backup & Replication can near-instantly verify VMware and Hyper-V VM backups as well as replicas. After a job is complete, NAKIVO Backup & Replication can instantly recover the VM, wait until the OS has booted, make a screenshot of the OS, discard the test-recovered VM, and send you a report with the screenshot via email. This way, you have proof that your VMs can be recovered from their backups."

## Performance

If the customer says:

- Our backup window is too small.
- We exceed our backup window.
- Our backups take too much time.
- We need to run faster backups.

**Pitch:** "NAKIVO Backup & Replication is very fast. In most cases, the backup and recovery speed is only limited by the available network bandwidth or the performance of datastores. For example, when tested in a customer environment with a high-end NEC deduplication appliance, NAKIVO Backup & Replication achieved a backup speed of 3.2 GB/s. Backups are also made faster by the integration with native technologies like CBT for VMware, RCT for Hyper-V and native change tracking in Microsoft 365."

## Scalability

If the customer says:

- We need to protect multiple sites.
- We have hundreds of hosts.
- We have thousands of VMs.
- We plan to virtualize more of our infrastructure.
- How can NAKIVO Backup & Replication support large environments?
- How scalable is NAKIVO Backup & Replication?

**Pitch:** "NAKIVO Backup & Replication is a modular solution and can scale out with your business. The largest NAKIVO customers protect over 8,000 VMs across more than 300 locations."

## Usability

If the customer says:

- Our current solution is not intuitive.
- Our current product is not easy to use.
- It takes too much time to read the documentation.

**Pitch:** "NAKIVO Backup & Replication was designed to seamlessly integrate into virtual environments of any size. It takes less than 5 minutes to fully install and configure the solution. All required components are installed automatically, and there are no agents. The solution supports virtually any backup destination, such as a local disk, SMB or NFS share, NAS appliance, SAN, public cloud (Amazon S3, Backblaze B2, Azure Blob, Amazon EC2, Wasabi) or other S3-compatible storage platforms. NAKIVO Backup & Replication has a simple and powerful web interface that you can access from anywhere."

## Cost

If the customer says:

• Our current backup solution is expensive.

• We'd like to reduce our backup costs.

• The maintenance cost of our backup solution is too high.

• Our backup vendor has increased the pricing.

**Pitch:** "The price of NAKIVO Backup & Replication can be 2 to 4 times lower than what you'd pay for competitive solutions. And the maintenance and support pricing that you pay for annually is also 2 to 4 times lower than the competition.

"The product is light on resources. You need just 2 CPUs and 4 GB of RAM for a single-site installation, and you can install the solution on Linux, which is free. Also, NAKIVO Backup & Replication comes with a built-in database and all its features are available right out of the box – no need to install, configure, and maintain the solution on each VM."

## Company

If the customer says:

• What is NAKIVO?

• I have not heard of NAKIVO.

• Can you tell me more about NAKIVO?

**Pitch:** NAKIVO is a US-based corporation dedicated to delivering the ultimate backup, ransomware protection and disaster recovery solution for virtual, physical, cloud and SaaS environments. Over 27,000 customers in 180 countries trust NAKIVO with protecting their data, including major companies like Coca-Cola, Honda, Siemens and Cisco.

## Emphasize Differentiators

In most cases, customers evaluate several data protection solutions at once, and often ask how NAKIVO Backup & Replication is better than the competitive solutions. Even if the customer does not ask this question, it is important to outline why NAKIVO Backup &

Replication should be their choice. Depending on the customer type and competitor(s) in the deal, choose the differentiators from the three categories, as outlined below.

## Fast: NAKIVO Backup & Replication Saves Time

- NAKIVO Backup & Replication can be installed and configured in just 2 minutes.
- Installing additional software and databases is not required to run NAKIVO Backup & Replication.
- In most cases, there is no need to read documentation to use the solution.
- NAKIVO Backup & Replication can run as fast as the environment allows.
- With NAKIVO Backup & Replication, you can instantly recover files and objects back to the source without recovering the entire virtual or physical machine.
- The solution can instantly recover entire VMs with Flash VM Boot or replica recovery, as well as entire physical machines with Bare-Metal Recovery.
- P2V recoveries allow you to instantly recover physical machines as VMware VMs, quickly create safe testing environments, and simplify physical to virtual migrations.
- Policy-based jobs allow you to use the «set-it-and-forget-it» approach for data protection.
- Automated Instant Verification ensures that backups are successful and can be recovered.
- Automatic reports and email notifications provide data protection status updates on a regular basis.
- Scaling out NAKIVO Backup & Replication is as easy as deploying an additional virtual appliance.

## Affordable: NAKIVO Backup & Replication Saves Money

NAKIVO Backup & Replication:

- Combines backup, replication, granular restore, and site recovery in one product under one license.
- Allows for switching freely between VMware, Hyper-V, and Nutanix AHV under one license.
- Costs 2 to 4 times less than the competition.
- Can run on Linux, which is free.
- Can turn your NAS into a backup appliance.
- Saves storage space with global data deduplication, compression, and swap data exclusion.
- Is lightweight and does not require expensive hardware to run.
- Does not require purchasing licenses for protecting student accounts in Microsoft 365.

## Top-Rated: NAKIVO Backup & Replication is Highly Rated by Customers and Recognized by Experts

- The solution's outstanding reliability and excellent support service have garnered overwhelmingly positive reviews from customers.

- The positive reviews on Gartner Peer Insights have earned the solution a place in Gartner's Voice of the Customer report with 92% of customers in the report expressing their willingness to recommend the solution.

- Numerous awards from platforms like Capterra, G2, Spiceworks, Trustradius, and many more.

- The solution received an Honorable Mention in the 2022 Gartner® Magic Quadrant™ for Enterprise Backup and Recovery Solutions.

You can request comparison documents outlining NAKIVO Backup & Replication differentiators versus competitive solutions from your NAKIVO Business Development Manager.

# Overcome Objections

The customer may have objections and excuses. Here are suggestions for overcoming sales objections.

## I have never heard about NAKIVO before

**Answer:** "NAKIVO is a US-based corporation dedicated to delivering the ultimate backup, ransomware protection and disaster recovery solution for virtual, physical, cloud and SaaS environments. As one of the fastest-growing backup and ransomware recovery software vendors in the industry, NAKIVO boasts 30 consecutive quarters of double-digit growth, 5-star online community reviews, 98% customer satisfaction with support and a network of over 8,000 partners worldwide. Over 27,000 customers in 180 countries trust NAKIVO with protecting their data, including major companies like Coca-Cola, Honda, Siemens and Cisco."

## We already have a backup solution in place

**Answer:** "NAKIVO Backup & Replication can cut your maintenance costs by 2 to 4 times, while improving backup speed and reliability at the same time. The product is very easy to use. It takes just 2 minutes to install and configure, so it's definitely worth a try."

## NAKIVO doesn't have the *XYZ* feature

**Answer:** "NAKIVO is one of the fastest-growing data protection companies in the industry, and it releases new features nearly every quarter. Let me check with the NAKIVO team how your particular case can be solved and if an appropriate update is already planned."

# Trial Version and Help From NAKIVO

## Have the Customer Install the Trial

If customers don't get to try the software, they aren't going to buy it. Encourage the customer to try NAKIVO Backup & Replication in their environment. Mention that the free 15-day trial includes every feature, does not have capacity restrictions, and does not require a credit card. The free trial is available at www.nakivo.com/resources/download/trial-download/.

## Involve NAKIVO Sales and Support

NAKIVO's Sales and Support teams are here to help! Whenever a prospective customer has questions or concerns, or experiences any issues with the solution, feel free to immediately contact us to help you close the deal.

# Module 5 Key Takeaways

To effectively pitch NAKIVO Backup & Replication, you have to get into the customer's shoes and understand the needs, problems, pains, and concerns each and every one of them may have.

Transmit the right messages to the right people: an IT administrator is likely to be focused on daily administrative tasks, whereas a CEO is more likely to be focused on high-level strategy and value optimization.

Customize your pitch in response to the problems of the customer. Overcome customer's objections and encourage them to personally evaluate NAKIVO Backup & Replication.

# MODULE 6: How to Close Deals

After completing this module, you will be able to:

- Explain the NAKIVO Backup & Replication licensing types.

- Determine the number of licenses required.

- Select the right product edition.

- Register your deal to protect it and receive additional discounts from NAKIVO.

- Communicate pricing to the customer.

- Upgrade existing customers.

## Licensing and Support

NAKIVO Backup & Replication offers two licensing models.

- **Perpetual licenses** provide indefinite use of NAKIVO Backup & Replication and include 1 year of Standard Support (technical support via phone, chat, and email during business hours only). Perpetual licenses are charged per CPU socket for VMs, per physical machine for physical servers and workstations, and per database for Oracle Database (Enterprise Plus edition only). Licenses are required only for the source side of backup and replication, which means that customers do not need to license target servers that are used during recovery. Monitoring for VMware vSphere can be licensed on a per-socket basis; a license is required for each socket on a host where you plan to monitor VMs. NAS Backup can be licensed on a per-terabyte basis and consumed in half-terabyte increments. One licensed terabyte (TB) of file share source object size accounts for 1000 GB of file share source object size. Perpetual licenses for NAS Backup come with one year of free Standard Support.

- **Subscription licenses** are charged per workload with 24/7 Support included (technical support via phone, chat, and email at any time, any day of the year). A workload is either a VMware VM, a Hyper-V VM, a Nutanix AHV VM, an Amazon EC2 instance, an Oracle Database, or a physical machine (1 server or 3 workstations). Subscriptions for Backup for Microsoft 365 are licensed per user/month (billed annually). Monitoring for VMware can be licensed on a per-workload subscription basis; a license is required for each monitored VM. Subscription licenses can be purchased for 1 to 5 years, with greater savings for longer subscriptions. NAS Backup can be licensed on a per-workload subscription basis. In a workload-based license, one workload equals 500 GB of source file share data. Subscription licenses for NAS Backup come with 24/7 Support.

NAKIVO Backup & Replication offers a 15-day Free Trial without any feature or capacity restrictions. Users can protect any supported environment, send backups to any supported storage destination, and perform every recovery type.

# Determine the Licensing Model and the Number of Licenses Required

Do the following:

- Download the latest price lists from the NAKIVO Partner Portal.

- Get the details about the prospect's environment:

  - How many physical sockets are installed in each server where the prospect plans to back up or replicate VMs?

  - How many VMs does the prospect need to back up and/or replicate?

  - How many physical servers\workstations do you want to protect?

  - How much data stored on NAS does the prospect need to back up?

  - How many Orcale databases does the prospect need to protect?

  - How many Microsoft 365 users does the prospect need to protect?

  - How many Cloud instances does the prospect need to protect?

  - How many VMware VMs does the prospect need to monitor?

- Find out whether the prospect prefers perpetual or subscription licensing models.

- Calculate the number of required licenses based on the above.

# Choose the Right Edition

Choose the right edition for your customer:

- **Enterprise Plus edition:** Provides the complete data protection feature set, including Backup for Oracle RMAN, Policy-Based Backup/Replication, Native Backup to Tape, Amazon EC2 Instance Backup/Replication, Backup from HPE 3PAR, Alletra, Primera and Nimble Storage snapshots, Calendar Dashboard, Global Search, File System Indexing, Site Recovery Orchestration, Multi-Tenancy, Self-Service, Branding, HTTP API, and Active Directory Integration.

- **Enterprise edition:** Includes every data protection feature in NAKIVO Backup & Replication except Backup for Oracle RMAN.

- **Pro edition:** Provides the standard data protection feature set, which does NOT include Policy-Based Backup/Replication, Native Backup to Tape, Calendar dashboard, Global Search, File System Indexing, Site Recovery, Multi-Tenancy, Self-Service, Branding, HTTP API, Active Directory Integration, or Backup for Oracle RMAN.

- **Enterprise Essentials edition:** Intended to help small businesses protect virtual infrastructure at an affordable price, Enterprise Essentials edition has the same feature set as the Enterprise edition. The minimum order for the Enterprise Essentials edition is 2 sockets or 5 workloads and the maximum is 6 sockets or 50 workloads.

- **Pro Essentials edition:** Intended to help small businesses protect virtual infrastructures at an affordable price, Pro Essentials has the same feature set as the Pro edition. The minimum order for the Pro Essentials edition is 2 sockets or 5 workloads and the maximum is 6 sockets or 50 workloads.

## Register Your Deal

After you have identified a potential NAKIVO customer, you need to register your potential deal. This way you can get an additional 10% discount.

1. Register your deal by completing the Deal Registration Form.

2. A NAKIVO Business Development Manager will review the deal registration submission and respond to you via email with acceptance or rejection within 2 business days.

3. Within 30 calendar days of acceptance, you can purchase the NAKIVO products for the registered deal with an additional 10% discount.

See the Deal Registration Promotion web page for more details.

## Communicate Pricing

After you have determined the number of sockets (or machines) that the customer needs to license and what product edition suits their needs, communicate the product pricing to the customer. Refer to the pricing page on our website to find the most recent information on pricing and features per edition.

## Upgrade of Existing Customers

Contact existing customers to see if they need more sockets or version upgrades. If you see that they do, it means you have a sales opportunity. Show the customer what advantages they receive if they upgrade from one edition of NAKIVO Backup & Replication to another.

By upgrading from **Pro Essentials** to **Pro** and from **Enterprise Essentials** to **Enterprise** or **Enterprise Plus**, customers can purchase any number of sockets or workloads and, consequently, scale their environments without limits.

Upgrading from **Pro** to **Enterprise Essentials**, clients gain the *BaaS, DRaaS, Integration, and Site Recovery Deluxe Feature Bundle*. The bundle consists of these features: Site Recovery, Calendar dashboard, Global Search, File System Indexing, Policy-Based Data Protection, Native Backup to Tape, HTTP APIs, Active Directory Integration, BaaS and DRaaS, Multi-Tenancy, Self-Service, Branding, License Delegation, and Tenant Resource Allocation.

Upgrading from **Enterprise** to **Enterprise Plus**, clients gain the Backup to Oracle RMAN feature.

## Module 6 Key Takeaways

To close the deal, you should know the required number of licenses and the edition that your customer would like to purchase. It is also useful to know what benefits customers receive when they upgrade to more advanced versions of NAKIVO Backup & Replication.

To protect your deal, you should register it with NAKIVO. Deal registration also increases your discount level for medium and large deals. Communicate NAKIVO Backup & Replication pricing to the customer and upsell maintenance and support to get an even higher discount.

# Summary

After completing this training, you should now:

- Understand the needs and challenges of data protection

- Understand the architecture and key features of NAKIVO Backup & Replication

- Be able to identify and find potential customers

- Know how to pitch the solution effectively

- Be able to successfully close deals

# Next Steps

Once you are ready to take the NAKIVO Sales Professional Certification Test, go on the NAKIVO Partner Portal. After passing the test, you obtain the Level 1 NSP certificate.

After that, you can apply for Level 2 NSP certification by delivering a company and product presentation using the slides available in the NAKIVO Partner Portal. The presentation should provide an overview of the capabilities and key advantages of the solution. Watch an example of a presentation here.

The presentation can be delivered live in a call with the NAKIVO sales manager or as a recording sent to sales@nakivo.com. Feel free to contact your Channel Manager if you need more details on the requirements and instructions on delivering the presentation.