Maximise The
Opportunity

Upsell Guide

EXCLUSIVE NETWORKS

FORTINET

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Selling the Right FortiGate

WHAT ARE THE ORGANISATION'S GROWTH PLANS?

With expansion plans throughput from the Internet could escalate rapidly.

To handle the change, you need to select a firewall solution that can scale up as the throughput increases, either by adding more components to the firewall, or by installing another firewall in parallel.

CONSIDER THE REQUIREMENTS

A common mistake made by businesses when sizing a firewall is to use employee count. User count should refer to the number of devices (including BYOD) that will need to access the firewall at any given point in time both now and in the future.

A firewall, intended for a dozen users but bombarded by hundreds of devices will result in patchy performance and complete overload.

QUESTIONS TO ASK

• **How many users are connected to the network, internal and remote?**

• **What is the estimated number of devices/BYOD?**

• **Are there any servers that users are connecting to via the FortiGate? (Regard each server as +10 users)**

• **Are there any servers remotely accessed i.e., used to upload files, web servers?**

• **Number of interfaces required? Is there a requirement for additional switches to extend the interfaces, manage APs etc.**

• **Bandwidth of connection, both uplink and downlink. Is this an SD-WAN implementation?**

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FortiGate Sizing Guide

Users	Fortigate	Models	Interface	Threat Protection Throughput	Other Comments
1-60	FortiGate 40F	FG-40F FG-40F-3G4G FWF-40F-E FWF-40F-343G	4XGE, 1XGE, FortiLink Port	600 Mbps	Ideal for high SSL, VPN Connection, SD-WAN, 310 Mbps, SSL New integrated wireless
10 – 40	FortiGate 60E	FG-60E-DSL	9GE + 1 inbuild x DSL modem	150-180 Mbps	Inbuilt DSL Modem
40 – 100	FortiGate 60F	FG-60G FG-61F FWF-60F-E FWF-61F-E	8xGE, 2xGE FortiLink Ports	700 Mbps	Ideal for high SSL, VPN Connections and designed for SD-WAN
	FortiGate 70F	FG-70F FG-71F	8xGE, 2xGE FortiLink Ports	700 Mbps	Designed for SD-WAN, Alternative to 60F
60 – 120	FortiGate 80F	FG-80F GH-80F-BYPASS FG-80F-DSL FG-80F-POE FG-81F FWF-80F-2R-E	8 x GE, 2 x shared RJ45/SFP WAN Includes Embedded DSL Module 8 x GE, 2 x shared RJ45/SFP WAN Includes 128Gb SSD Includes Dual WiFi Radio	900 Mbps	Please see the product brochure for a complete list of variants. Includes 128Gb SSD
100 – 180	FortiGate 100F	FG-100F FG-101F	18xGE, 8xGE SFP, 2x10GE FortiLink	800 Mb1 / ps – 1 Gbps	Dual AC Power supplied Includes 480Gb SSD
150 – 400	FortiGate 200F	FG-200F FG-201F	18 x GE RJ45, 4x10Gb SFP, 8xGE SFP	3 Gpbs	Dual AC Power supplied Includes 480Gb SSD
Up to 1000	FortiGate 400F	FG-400F FG-401F	16GE + 16GE SFP	Up to 5 Gpbs	Dual AC power supply Includes 480Gb SSD

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FortiGate VM Sizing Guide

vCPU (min/max)	1/1	1/2	1/4	1/8	1/16	1/32	Unlimited
Storage	32Gb / 2TB	32Gb / 2TB	32Gb / 2TB	32Gb / 2TB	32Gb / 2TB	32Gb / 2TB	32Gb / 2TB
Firewall Throughput	12 Gbps	13.7 Gbps	20 Gbps	30 Gbps	36 Gbps	50 Gbps	
SSL VPN Throughput	0.8 Gbps	0.8 Gbps	2 Gbps	4.5 Gbps	8.5 Gbps	8.6Gbps	
SSL VPN Users	1000	2000	4500	10000	20000	20000	
Threat Protection	0.7 Gbps	1.2 Gbps	2.2 Gbps	4.5 Gbps	7 Gbps	13 Gbps	
FortiGate Equivalent	FG-60F	FG-100F to 200F	FG-200F	FG-400F	FG-600F	FG-600F to 1100E	

NOTES

• Minimum recommended memory requirements 8Gb

• Actual performance may vary depending on the network and system configuration/platform. Performance metrics were observed using a DELL R740

• (CPU Intel Xeon Platinum 8168 @ 2.7 GHz, 96 cores, Intel X710 network adapters)

• Threat Protection performance is measured with IPS and Application Control and Malware protection enabled, based on Enterprise Traffic Mix.

VDOM SUPPORT

• FortiGate VMxx units include 10 VDoMs as standard

• FortiGate VMxxV units have NO included VDoMs

NETWORK INTERFACE SUPPORT

The maximum number of network interfaces consumable by a FortiGate instance is 24 starting with FortiGate version 6.4.0. Prior versions allow 18. The minimum number is 1. The actual number of network interfaces attachable to instances will vary depending on cloud platforms and instance types, and they may not allow you to attach the greater number of interfaces to an instance than their maximum limits even while FortiGate allows up to 24.

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Additional Upsell Options

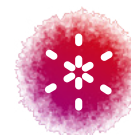|		
Remote Workers	FortiClient/ZTNA	Fortinet's ZTNA is a feature that requires a FortiGate (appliance, VM, or SASE) and FortiClient. Leveraging the FortiClient EMS system, admins can provide universal ZTNA for both remote and on-campus access, with policies being enforced at the FortiGate. Applications can be in the data centre, a public cloud (e.g., AWS, Azure), a private cloud, or a SaaS (e.g. Microsoft 365, Salesforce.com). ZTNA is a non-licensed feature, so if you have a FortiGate and FortiClient, you have ZTNA available.
	FortiClient	Provides remote VPN access, AV, Application firewall for endpoints. Strengthens endpoint security with the ability to discover, monitor, and assess endpoint risks, ensuring endpoint compliance, mitigating risks and reducing exposure. Unmanaged FortiClient is free for VPN access, Manager requires FortiClient EMS.
	FortiTokens	For Multi-factor or two factor authentication for increased security, reduces the risk of compromise, helps meet compliance requirements. Offers consolidation with passcodes being generated by the FortiGate with no need to upgrade the unit's license.
Better reporting	SMB Bundle	For lower end units 80F and below, the SMB bundle includes cloud management. Adds FortiCloud logging and reporting to the UTP Bundle.
	FortiAnalyzer Cloud FortiAnalyzer VM	For multiple units (less than 5/8 units) FortiAnalyzer provides a comprehensive suite of customisable reports which allow you to analyse and visualise network threats, inefficiencies and usage as well as meet compliance/auditing requirements.
	FortiManager VM	For multiple units, FortiManager offers a single pane of glass for managing distributed FortiGates, reducing management burden and operational costs, ensures policy consistency across a distributed estate and provides unified security with ease of use.
Cloud Services	FortiGate VMs	For securing cloud services including Azure / AWS / GCP
Secure WiFi	FortiAPs	How many access points are required? FortiAPs/FortiWifi offers a unified, scalable solution providing additional security + network + access, seamless coverage, cost savings and compliance.
Management	FortiSwitch	What additional ports are required to support the infrastructure i.e.. POE switches for APs, Telephones and other devices on the network. This will help simplify the management.
SD-WAN	FortiManager FortiAnalyzer FortiGate	FortiManager and FortiAnalyzer = Fabric Management Centre for centralised policy orchestration, visibility and analytics FortiGate = one WAN edge powered by One OS: SD-WAN, NGFW, advanced routing, ZTNA
Services	Professional Services	Whether it's your own professional services, Exclusive Networks professional services or even Fortinet Services, offer the customer, installation, configuration, auditing, health check and training services.

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Starting the Upsell Conversation

ONLY LOOKING AT 24/7 SUPPORT?

Have you considered that to truly provide a secure solution, you might need **Unified Threat Protection** for Advanced Threat Detection … offering the additional security of Web Filtering, Anti-Malware including advanced threat detection, Application Control and Intrusion Prevention, it's more than just a firewall? Suggest UTP Bundle.

WHAT ABOUT YOUR REMOTE WORKERS

You need VPN/ZTNA to secure the connection to your Infrastructure. Consider **FortiClient** which not only provides all the VPN connectivity, it also provides complete endpoint protection.

HAVE YOU GOT YOUR ENDPOINTS COVERED?

As well as VPN capabilities and Zero Trust Fabric Telemetry, **FortiClient** also includes Advanced Threat Protection, AV/anti-malware, Web filtering, Application control and vulnerability scan all from a single management console. FortiClient fully integrates into the Fortinet Security Fabric creating a seamless, cooperative threat detection and protected infrastructure. Security without compromise.

DO YOU HAVE MULTIPLE BRANCH LOCATIONS?

Have you considered implementing Fortinet **Secure SD-Branch?** Protecting the LAN and the WAN by converging branch technology into a single platform all managed from a single pane of glass. Helping reduce the burden on your IT teams while improving overall branch security. FortiGates offer SD-WAN capability out of the box.
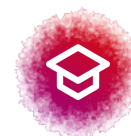
WHO WILL MANAGE THE SOLUTION DAY TO DAY?

Do you have the right level of knowledge in-house to do this competently?

We can organise **Fortinet Training** for your IT teams, so they feel empowered to use the solution confidently, and understand how to use all the features and benefits, ensuring you get the best ROI from your investment.

DO YOU NEED EXPERTISE TO INSTALL AND CONFIGURE THE SOLUTION?

Do you have the right level of knowledge in-house to do this competently? Our team of **Fortinet Accredited Engineers** offer implementation services from new installations and upgrades to health checks, audits and optimisation and configuration services, we provide all the skills and experience you need to ensure you get the best return on investment from your solution.

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Starting the Upsell Conversation

DO YOU HAVE PLANS TO UPGRADE YOUR ENDPOINT PROTECTION TO ADD DETECTION AND RESPONSE CAPABILITIES?

Does your current endpoint security solution include EDR?

FortiEDR is the only Endpoint Protection Platform (EPP) + EDR solution that provides both pre- and post-infection protection. It proactively reduces the attack surface, provides next-generation Anti virus and malware prevention, detects and defuses potential threats and can automate response and remediation procedures.

HOW DO YOU CURRENTLY MANAGE MULTIPLE VENDOR PRODUCTS WITHIN YOUR NETWORK INFRASTRUCTURE?

Do you have to manage multiple devices via unique interfaces across your infrastructure? What problems do you come across?

With the ability to extend security across the complete network including policy control of users and devices, **FortiSwitch** secure access switches consolidate management of all areas of the network via a familiar and common GUI. Ideal for converged network environments, enabling voice, data and wireless traffic to be delivered across a single pane of glass.

HAVE YOU OR DO YOU PLAN TO MOVE DX AND APPLICATIONS TO THE CLOUD?

DO YOU HAVE MULTIPLE SITES ON YOUR WAN THAT REQUIRE INDIVIDUAL GATEWAY SECURITY?

HOW DO YOU CONFIGURE, MAKE CHANGES AND MANAGE THE DISTRIBUTED DEVICES?

Would you benefit from a single pane management view in terms of time and cost saving?

Are you experiencing challenges in connectivity, performance or security? Are you dealing with complex operations and high WAN / MPLS costs?

Are you looking at replacing VPN with ZTNA to secure your remote workers?

If you have a FortiGate installed in your environment, you can take advantage of SD-WAN features for free to transform and secure your WAN.

Fortinet's **Secure SD-WAN** solution improves your overall security posture effectiveness while delivering superior user experience at any edge. Fortinet offers an integrated, automated solution with broad visibility and fabric management centre – a single pane of glass. At the centre of this is FortiOS – a single operating system enabling the security driven networking that includes SD-WAN, next-generation firewall, advanced routing and ZTNA.

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A-Z Upsell Tips

A IS FOR ASK

One of the most important upselling tips: ALWAYS ASK

Some salespeople are wary of upselling as seeming too pushy. But when done right, it can enhance the customer experience, build loyalty, and increase sales. It doesn't have to sound like a sell, you can try asking if their solution is still providing all they need. E.g., "You've grown substantially over the last 3 years, is the solution still coping with the number of additional users? We have some great trade up offers if you'd like to review it?"

Try to include an upselling question in every sales conversation.

B IS FOR BECAUSE

A study showed when the word 'because' was used in upselling, 93% of customers say yes. Without the word 'because' this response drops to 60%.

E.g., "A trade up is a great option because it will save you money, boost performance with updated security and advanced feature sets plus it will future proof your network for company growth."

Try using the word because with a genuine reason or benefit.

C IS FOR COMMAND

Hiding a command in a question is one of the top selling tips. It's hard to say no when you make a personal request by using the word 'I'. Another tactic is to disguise the command by offering options so the customer focuses on the choice not a Yes/No answer.

E.g., "I'll add FortiGate Security and Infrastructure training to the quote"

D IS FOR DESCRIBE

Using a detailed description of which extra benefits are included in the upsell can increase sales of specific items by 27%.

E.g., "We can help with the installation and configuration for faster set up and to help with any teething issues."

E IS FOR EDUCATION

Upselling isn't always about direct selling. Value add content can boost spending and customer satisfaction. A reference from a similar customer, e-guides, quick tips or whitepapers help educate customers and enable them to make a decision.

E.g., "Let me send you a link to a case study showing how you can save money."

Make sure you have a couple of success stories, customer references or case studies up your sleeve. It helps if they're from a customer with a similar problem to solve.

F IS FOR FOMO

Fear of missing out is another upsell method. Fast selling SKUs, impending price increase, warehouse sales, renewals and finance or budget deadlines are all good examples. Become the customer's hero ensuring they don't miss out on a hot seller, limited availability items or time-sensitive bargains.

E.g., "We've got just 2 of those discounted units in stock. I can put your order in now to secure them?"

G IS FOR GO-TO LIST

Upselling is easier with a 'go-to list' of top suggestions.

Memorise add-on or complementary items that offer a solution – particularly useful if the customer asks, "What do you recommend?" Have elevator pitches to hand on Fabric solutions like FortiClient, FortiTokens, FortiManager, Switches and APs, training, or your own managed services.

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A–Z Upsell Tips

H IS FOR HIGH OPTION

Don't avoid recommending higher priced items for fear of turning the customer off on price. You're offering the best option for future growth, which can help build more trust.

E.g., "Rather than 24x7 Support, what about a Licensing and Support Bundle?" or "A truly secure solution is a UTP bundle, which offers the additional security of Web Filtering, Anti-Malware including Advanced Threat Detection, Application Control, Intrusion Prevention … it's more than just a firewall."

I IS FOR INFLUENCE

Popular. Best Selling. In-demand. Always highlight top sellers. This is one of the best upselling techniques for indecisive customers.

E.g., "Would you like the FortiGate 60F? It's the most popular firewall for your market."

Or better still, build loyalty with a seriously indecisive customer by suggesting presales consultancy to understand their company needs and help them pinpoint a tailor-made solution that fits their requirements perfectly.

K IS FOR KNOWLEDGE

Knowledge is power when it comes to upselling. Familiarise yourself with some of the key product upsells. Offer recommendations to add FortiManager and FortiAnalyser to manage distributed FortiGates.

E.g., "How are you managing your estate? Would you like to be able to manage it via a single pane of glass solution?"

L IS FOR LARGEST

Knowledge is power when it comes to upselling. Familiarise yourself with some of the key product upsells. Offer recommendations to add FortiManager and FortiAnalyser to manage distributed FortiGates.

E.g., "How are you managing your estate? Would you like to be able to manage it via a single pane of glass solution?"

M IS FOR MASTERY

Of all upselling tips, this is a must. KNOW HOW TO UPSELL. Don't leave it to chance.

Train yourself on the options and best suggestions. Test which works best for you or with types of customers.

Have your elevator pitches on services and key Fortinet upsells to hand. Keep at them until it feels natural and becomes a habit.

N IS FOR NINES

People love the number nine.

In a study of retail choices by MIT and University of Chicago researchers, customers bought more of an item when it was priced at £39 – even when compared to £34!

See if the magic number nine works. If the price comes to any figure ending 1 – 8, try making the price end in 9.
E.g., Change £247 to £249.

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A-Z Upsell Tips

O IS FOR OPTIONS

Wherever possible, TALK options on the phone. Don't rely on email follow up or adding upsell options to the quote.

Be careful not to overwhelm with choice. A supermarket study offered 24 types of jam one day, and 6 the next. Only 3% of shoppers bought jam when there were 24 types to choose from. Yet over 30% shoppers made a purchase with just 6 options.

E.g., recommend APs and switches, or FortiClient, FortiManager or FortiAnalyser with FortiGates. Training and Professional Services are options to discuss too.

P IS FOR PATIENCE

Embracing questions makes for a happier customer. Take time to guide your customer to their perfect solution. Ask questions and encourage them to ask questions to show genuine care for helping them solve the problem and find the best solution.

E.g., "Do you have any other questions?"

Earn trust early on and the customer will be more open to your upselling suggestions.

Q IS FOR QUIET

Background noise can be very distracting, so make sure the environment you're in is quiet.

This will allow you to concentrate on the customer, listening to their requirements and ultimately have a more productive conversation.

If the environment around you is too noisy, the customer may try to end the call quicker feeling you're distracted.

R IS FOR RECOMMEND

Sharing recommendations and discussing case studies or success stories isn't just something to do in collateral. Sharing customer success stories or offering customer references during conversation can help increase sales by 27%.

E.g., "Another customer used this solution and got X results."

If you don't have any case studies, look on the Fortinet website. An example of any success story will help strengthen the conversation when upselling.

S IS FOR SAMPLE

Proof of concepts have higher conversion rates and can reduce the sales cycle by as much as 50%.

CTAPs are a free service that generate in depth reports highlighting gaps in security, productivity and speed and can help open up conversations about other parts of the Security Fabric.

"Have you considered a CTAP?" ... a great tool not only for conversion and displacement but as a renewal tool to check the current FortiGate is sufficient or if there is an opportunity to trade up to a bigger unit or upsell a bigger solution.

T IS FOR TRADE UP

If your customer is coming up for renewal, or their product is going end of life (EOL) then it's the perfect time to suggest a newer, fast model with the Trade Up Program.

Take advantage of the evolution of the FortiGate platform, and the extended Security Fabric to offer future proofing to your customers and expand your account footprint.

Fortinet's trade up program offers up to 55% discount on eligible products so if you're not using it, you need to take a look today.

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A–Z Upsell Tips

U IS FOR USE NAMES

Remember to use the customer's name whenever possible. Studies show that hearing one's name activates the reward centre of the brain, making it easier to ask for the upsell.

E.g., "Matt, would you like me to include the options we discussed on the quote?"

V IS FOR VALUE

Do you offer any services such as presales consultancy, professional services, technical support or finance & leasing services? Demonstrating expertise, imparting helpful knowledge and offering value add is a great way to build loyalty.

If you don't offer these services, consider making using of Exclusive's portfolio of value add services to act as an extension of your business and just add your margin on top.

W IS FOR WIIFM

This acronym stands for WHAT'S IN IT FOR ME? Also referred to as the WIIFM rule.

Speak in benefits, not features. The best upselling tips revolve around this golden rule. Tell customers how your solution/service/products benefits THEM.

E.g., "We can use the Trade Up program to upgrade your units, it will save you money, offer the latest advanced security features and future proof your network to accommodate growth."

X IS FOR X-RAY VISION

We're not suggesting you need to acquire superhero abilities but all upselling tactics require you to read the customer so make sure to listen more than talk so you understand the customer and their requirements, and try to spot the pains/issues and rescue them with your recommendations.

E.g., "It sounds like you're having trouble with X, I suggest .... "

Y IS FOR YES

Being positive and using the word Yes (even when you're saying No) is a good technique to maintain loyalty and good customer relationships. If you appear to be flexible when it comes to customer requests – no matter how crazy they seem, customers feel heard and considered

E.g., Need to investigate whether a request can be compromised on? "Yes, we can look into that for you" is better than a flat No.
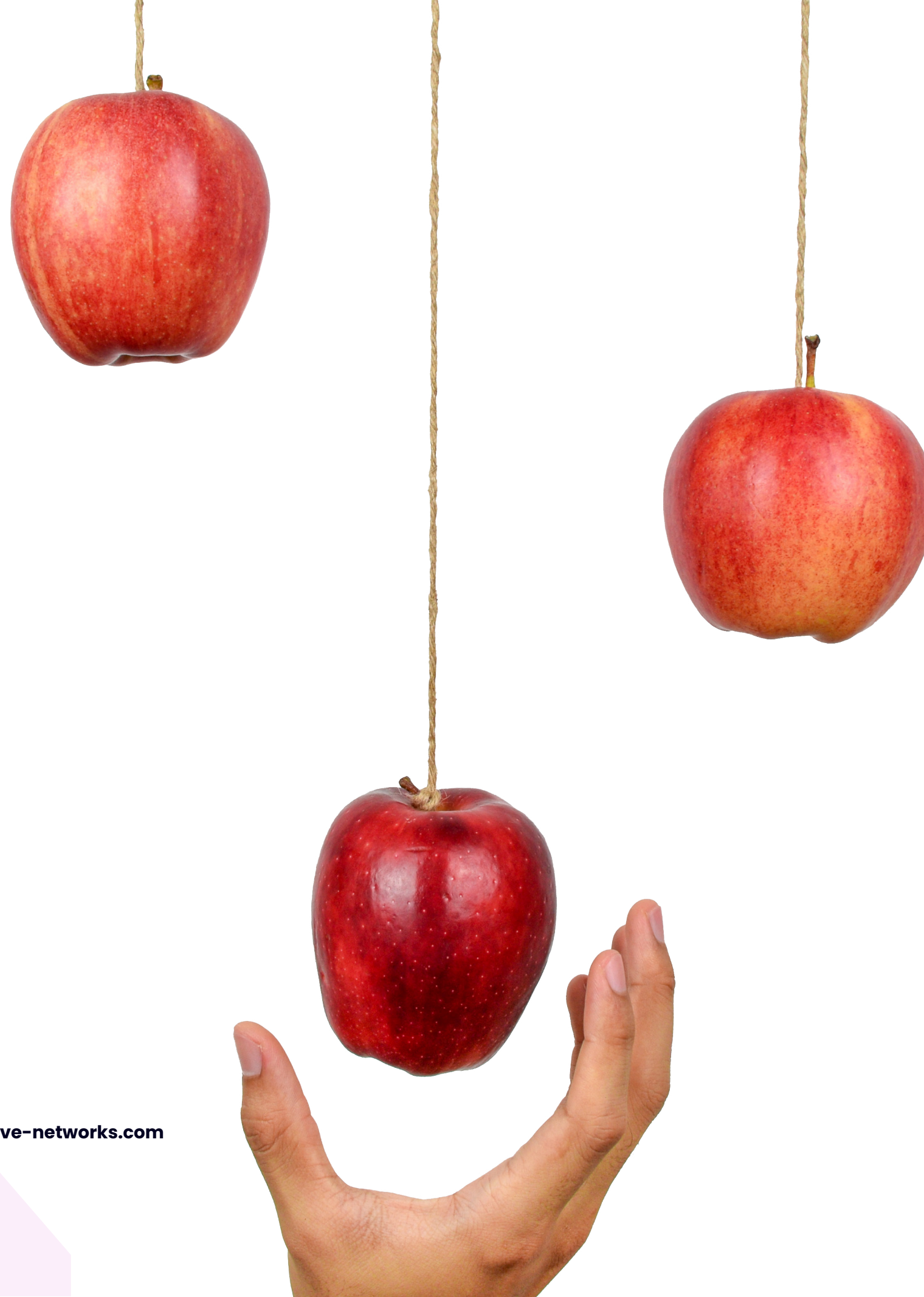
Z IS FOR ZEROS

You already know about the power of the number nine … Did you know that keeping zeros off the end of your pricing can also help upsell?

Customers perceive pricing with zeros e.g., £151.00, as more expensive, and items without zeros e.g., £151, as better value!

Leave the extra zeros off your pricing.

Contact Us

Exclusive Networks Ltd
Alresford House
Mill Lane
ALTON
GU34 2QJ

Tel: +44 (0)1420 548248

For more advice on upselling Fortinet solutions, please reach out to us at Fortinetteam_UK@exclusive-networks.com