

Cherry Pick the best Opportunities

Upsell Guide



FORTINET®



20 YEARS+
POWERED BY STRONG PARTNERSHIP

Selling the Right FortiGate

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For Operational Technology	
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Starting The Conversation

A-Z Upsell Tips

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?**



FortiGate Sizing Guide

Users	FortiGate	Models	Interface	Threat Protection Throughput	Other Comments
1 – 10	FortiGate 30G (SoC4)	FG-30G FWF-30G-E	3xGE, 1xGE FortiLink	500Mbps	WiFi units Dual Radio 802.11 a/b/g/n/ac/ax
1 – 30	FortiGate 40F	FG-40F FG-40F-3G4G FWF-40F-E FWF-40F-3G4G	4xGE, 1xGE FortiLink Port	600Mbps	Designed for SD-WAN New integrated wireless WiFi units Single Radio NO SSL VPN Support
Up to 50	FortiGate 50G (SP5)	FG-50G FG-50G-SFP FG-50G-SFP-POE FG-50G-DSL FG-50G-5G	4xGE, 1xGE FortiLink Port SFP Option SFP+POE Option DSL Modem Option	1.1Gbps	WiFi units Dual Radio 802.11 a/b/g/n/ac/ax NO SSL VPN Support Please see the product brochure for a complete list of variants.
Up to 60	FortiGate 60F	FG-60F FG-61F FWF-60F-E FWF-61F-E	8xGE, 2xGE WAN Ports	700Mbps	Designed for SD-WAN WiFi unit Single Radio NO SSL VPN Support
Up to 70	FortiGate 70F	FG-70F FG-71F	8xGE, 2xGE WAN Ports	700Mbps	Designed for SD-WAN Alternative to 60F
	FortiGate 70G (SP5)	FG-70G FG-70G-POE FWF-70G	8xGE, 2xGE WAN Ports	1.3Gbps	Designed for SD-WAN WiFi units Dual Radio 802.11 a/b/g/n/ac/ax

FortiGate Sizing Guide

Users	FortiGate	Models	Interface	Threat Protection Throughput	Other Comments
60-100	FortiGate 80F (SOC4)	FG-80F FG-80F-BYPASS FG-80F-DSL FG-80F-POE FWF-80F-2R-E	8 x GE, 2 x shared RJ45/SFP WAN FWF-80F-2R Dual Radio	900Mbps	Optional Redundant Power Supply Please see the product brochure for a complete list of variants.
100-120	FortiGate 90G (SP5)	FG-90G FG-91G	8 x GE RJ45 ports, 2 x 10GE RJ45/SFP+ shared media WAN ports. Desktop format	2.2Gbps	Optional Redundant Power Supply Inc 128Gb SSD
	FortiGate 100F	FG-100F FG-101F	18xGE, 8xGE SFP, 2x10GE FortiLink (1U)	800Mbps-1Gbps	Dual AC Power supply Includes 480Gb SSD
150-300	FortiGate 120G (SP5)	FG-120G FG-121G	18xGE, 8xGE SFP, 4x10GE SFP	2.8Gbps	Dual AC Power Supply Includes 480Gb SSD
150-250	FortiGate 200F (CP6X, CP9)	FG-200F FG-201F	16xGE, 4x10Gb SFP, 8xGE SFP 16xGE, 4x10Gb SFP, 8xGE SFP	3Gbps	Dual AC power supply Includes 480Gb SSD
Up to 400	FortiGate 200G (SP5, CP10)	FG-200G FG-201G	8 x GE, 8x 2.5/5 GE RJ45, 4 x GE SFP, 8x10GB SFP+	6Gpbs	Dual AC Power supply 480Gb SSD
Up to 600	FortiGate 400F	FG-400F FG-401F	18xGE, 8xGE SFP, 8x10GE SFP+ 18xGE, 8xGE SFP, 8x10GE SFP+	9Gbps	Dual AC power supply Includes 960Gb SSD

FortiGate VM Sizing Guide

	FG-VM01/01S	FG-VM02/02S	FG-VM04/04S	FG-VM08/08S	FG-VM16/16S	FG-VM32/32S	VMUL/ULS
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	12Gbps	13.7Gbps	20Gbps	30Gbps	36Gbps	50Gbps	
SSL VPN Throughput	0.8Gbps	0.8Gbps	2Gbps	4.5Gbps	8.5Gbps	8.6Gbps	
SSL VPN Users	1000	2000	4500	10000	20000	20000	
Threat Protection	0.7Gbps	1.2Gbps	2.2Gbps	4.5Gbps	7Gbps	13Gbps	
FortiGate Equivalent	FG-60F FG-50G	FG-100F - FG-200F FG-90G	FG-200F FG-120G	FG-400F FG-200G	FG-600F	FG-600F - 1100E FG-700G	

NOTES

- FG-VM01 etc is equivalent to subscription licensing with 1CPU
- 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.
- VMxxS series do not come with multi-VDOMs by default, you can add VDOMs using perpetual licenses

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

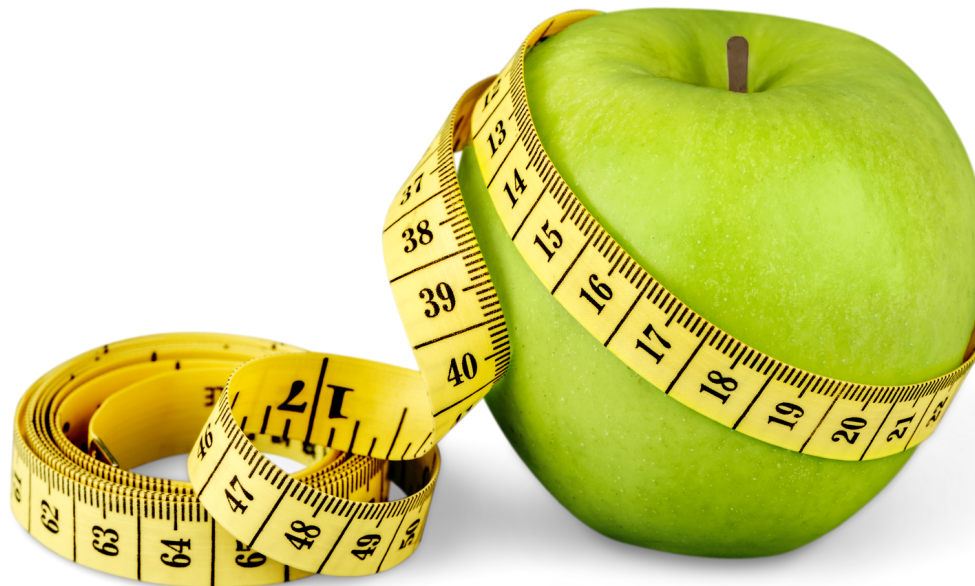
FortiGate VM **Sizing** Guide

QUESTIONS TO ASK TO HELP WITH SIZING

- Number of users connected to the network, internal and remote. 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

ADDITIONAL OPTIONS

- WiFi requirements – how many access points are required to provide secure WiFi access
- FortiClient – provides remote VPN access, AV, Application firewall for end points
- Unmanaged FortiClient is free for VPN access, Manager requires FortiClient EMS
- 2 Factor Authentication – Adds 2FA to user authentication via Hardware or Software token



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.
	SASE	Help simplify the management and operation of your Hybrid workforce and ease the challenges of secure remote users. Secure users accessing network resources and applications both on and off site
	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.
Remote Management and Reporting	FortiGate Cloud	Fortigate Cloud Management, Analysis and 1 year log retention. Enables you to securely manage your Fortigate remotely while providing standard reporting on users activities and threats without the need to install any infrastructure.
	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 private and public cloud like Azure, AWS, GCP and more
Secure WiFi	FortiAPs	How many Access Points are required? FortiAPs offer a unified, scalable, secured connectivity with seamless wireless coverage all managed from a FortiGate or FortiManager
Extend Network	FortiSwitch	What additional ports are required to support the infrastructure i.e POE switches for APs, Telephones, CCTV and other devices. FortiSwitch offers the ability to add devices and manage the entire infrastructure from a Fortigate or FortiManager.
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
Operational Technology	OT/IOT	with the growth and overlap of operational technology add in OT/IOT services. Secure everything from building management systems, CCTV, monitoring OT devices, IPS for OT and Virtual Patching.
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 prestaging
	Migration Services	Let us help with migrating your customers to the latest Fortinet platforms supporting the latest threat technologies from the world leader in security technology.
	Training	ensure your customers' IT teams are equipped for the day to day management of their solution, leaving you to focus on expanding the account footprint. Training can often show customers other Fortinet solutions to invest in to improve their security posture

Starting the Upsell Conversation

ONLY LOOKING AT 24X7 SUPPORT?

Have you considered that to truly provide a secure solution, you might need **Unified Threat Protection** or **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/ATP Bundle

WHAT ABOUT YOUR REMOTE WORKERS?

In the hybrid world with workers on/off site consider **FortiClient** as a starting point to secure remote workers. Providing VPN and EndPoint Protection capabilities you can then expand this out to ZTNA at no cost and over time grow out to a complete SASE offering as the customer connectivity requirements grow

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. Combining FortiGate with FortiSwitch and FortiAPs allows you to reduce the burden on your IT teams while providing complete secure connectivity across branch locations all managed from a single pane of glass. 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. With simple management of Firewall, Switches and Access Points all through a single console.

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, 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.

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.

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?"

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

If a customer requests a generic product quote e.g., a FortiGate, confirm their request with the largest unit. If they have a particular unit in mind, they'll correct you.

Assuming a larger size is an easy upselling tip. Alternatively, suggest a larger model for future proofing or to at least open the conversation about a solution that meets future needs. E.g., "Would you like to upgrade to the 100F to accommodate growth?"

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.

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.

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 use 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.

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