Security

Microsoft Practice Development Playbook

aka.ms/practiceplaybooks

Microsoft

About this Playbook

This playbook is intended for the business and technical leadership for new and existing Microsoft partners that are adding a security-focused practice to their business.

Objectives

The goal of this playbook is to help you accelerate or optimize your security focused practice and understand why you should perform the recommendations. Our goal is to not to re-write the existing body of detailed guidance on how to perform any given recommendation; instead, we point you to resources that will help you.

For the business side, this playbook provides valuable resources for driving new revenue opportunities, developing strategies for marketing, selling, and lead capture, as well as building deeper and longer team engagements with your customers through potential new service offerings like managed services.

For the technical side, the playbook offers guidance on a number of topics that range from the technical skills your team will need, to resources that you can use to accelerate learning, as well as an explaination of some of the key opportunities for technical delivery to focus on as you get started and grow your practice.

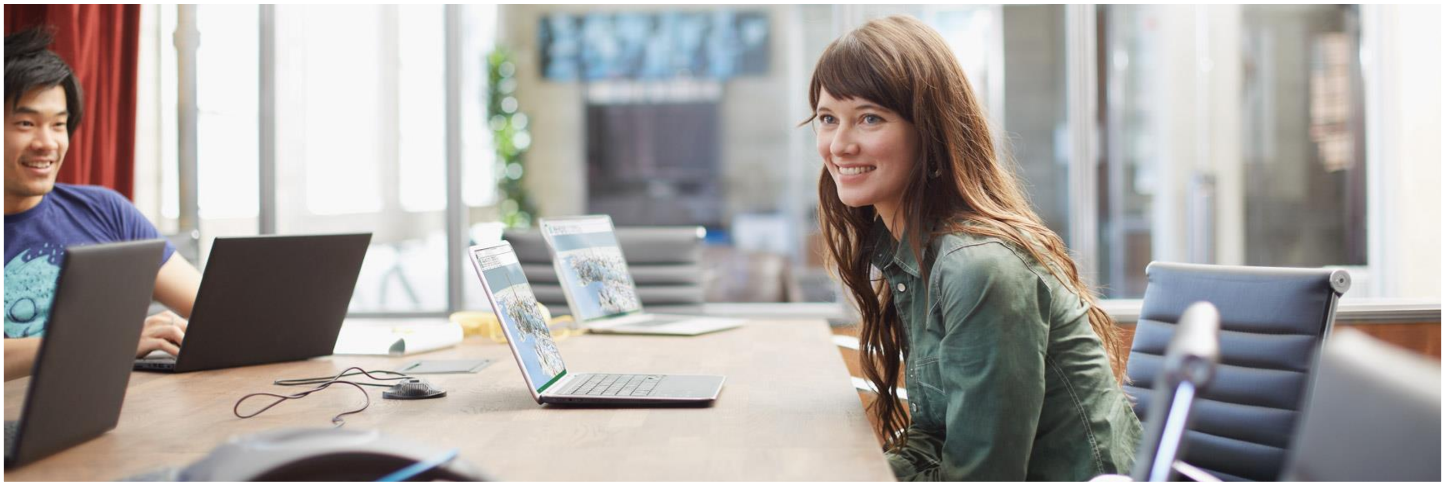
How this playbook was made

This playbook is part of a series of guidance that was written by one Microsoft Partner (Solliance) while working in conjunction with Microsoft One Commercial Partner and 21 other successful partners that have volunteered time and information to provide input and best practices to share with the rest of the partner community.

To validate the guidance provided in these playbooks, we conducted a survey of 484 partners from around the world with MDC. In this survey, we gathered insights on a range of topics, including how partners hire, compensate and train resources; their business model, revenue and profitability; what practices and services they offer; and what skillsets they have in place to support their offers. The results of this survey are provided in-line with the guidance found within this playbook.

This playbook is focused on security with elements of compliance included, but it is not intended to be a comprehensive compliance guide.

CONTRIBUTING PARTNERS	
Accenture	KPMG
Atea	Performanta
BT	ResourceiT
Dimension Data	Slalom
Extra Mile Marketing	SoftwareOne
Ernst & Young	VBC
Hanu Software	Wortell



Using the playbook effectively

Quickly read through the playbook to familiarize yourself with the layout and content. Each section includes an executive summary and key actions for that specific topic. Review these summaries first to decide which areas to focus on. Go over content several times, if needed, then share with your team.

TO GET THE MOST VALUE OUT OF THIS PLAYBOOK:

- ☑ Get your team together and discuss which pieces of the strategy each person is responsible for.
- ☑ Share the playbook with your sales, marketing, support, technical, and managed services teams.
- ☑ Leverage the resources available from Microsoft to help maximize your profitability.
- ☑ Share feedback on how we can improve this and other playbooks by emailing playbookfeedback@microsoft.com.

Table of Contents

The Security Opportunity

As companies embrace the opportunities presented by cloud and mobile computing to connect with customers and optimize operations, they take on new risks. One of the biggest challenges in digital transformation is ensuring security, privacy, and compliance.

PROTECTING AGAINST EVOLVING CYBERSECURITY THREATS

In today's world, it's clear that increasing trust and managing security is a struggle for many organizations. But as these statistics point out, the importance of improving security comprehensively has become even more evident:

2 Billion

Over 2 billion customer records compromised from a variety of breaches such as Yahoo, Sony, Anthem, Premera, and Target.

99 Days

Approximately 99 days between infiltration and detection, on average.

$17 Million

The average cost/business impact per security breach in the U.S. is $17 million.

Traditional IT boundaries are disappearing and organizations now need to protect data on employee-owned mobile devices and SaaS applications not operated by the IT team. If they do not adapt their approach to security, companies face the risk of significant financial loss, damage to customer satisfaction, and market reputation. This presents an opportunity to help companies manage security concerns in an ever-evolving technology world that's constantly under threat.

NEW PRIVACY REGULATION (GDPR) PRESENTS NEW OPPORTUNITIES

Additionally, the General Data Protection Regulation (GDPR)requires significant changes by organizations all over the world regarding how they manage and protect personal data. Specifically, GDPR imposes new rules on organizations that offer goods and services to people who reside in the European Union (EU), or that collect and analyze data tied to EU residents, no matter where they are located. In fact, IDC predicts GDPR will create a $3.5B market opportunity for security and storage vendors.

As a partner, you have multiple opportunities to monetize on GDPR. First, customers will need consultants to support them on their journey to GDPR compliance, which may start with assisting customers in identifying the personal data they store, where it is stored, how it is stored and how it needs to be protected. Second, partners can conduct gap assessments and make recommendations on technology, people and processes that customers need to comply with GDPR. And third, partners can play a major role in helping customers build and maintain detection and notification systems for data breaches.

SOURCES:

- https://info.microsoft.com/rs/157-GQE-382/images/EN-MSFT-SCRTY-CNTNT-eBook-cybersecurity.pdf
- https://microsoft.sharepoint.com/sites/Infopedia_G03KC/_layouts/15/WopiFrame.aspx?sourcedoc={55ed23be-92f3-4251-9f5c-9239c1455363}&action=default&DefaultItemOpen=1
- https://microsoft.sharepoint.com/teams/SecurityAirliftProgram/Shared%20Documents/Forms/AllItems.aspx?id=%2Fteams%2FSecurityAirliftProgram%2FShared%20Documents%2FSecurity%20Airlift%20March%202017%2FPowerPoint%2FO365
- 2016 Cost of Data Breach Study: Global Analysis
- Cyber crime--a risk you can manage: Information management and governance to protect business innovation business white paper
- Risk Based Security

The Security Opportunity

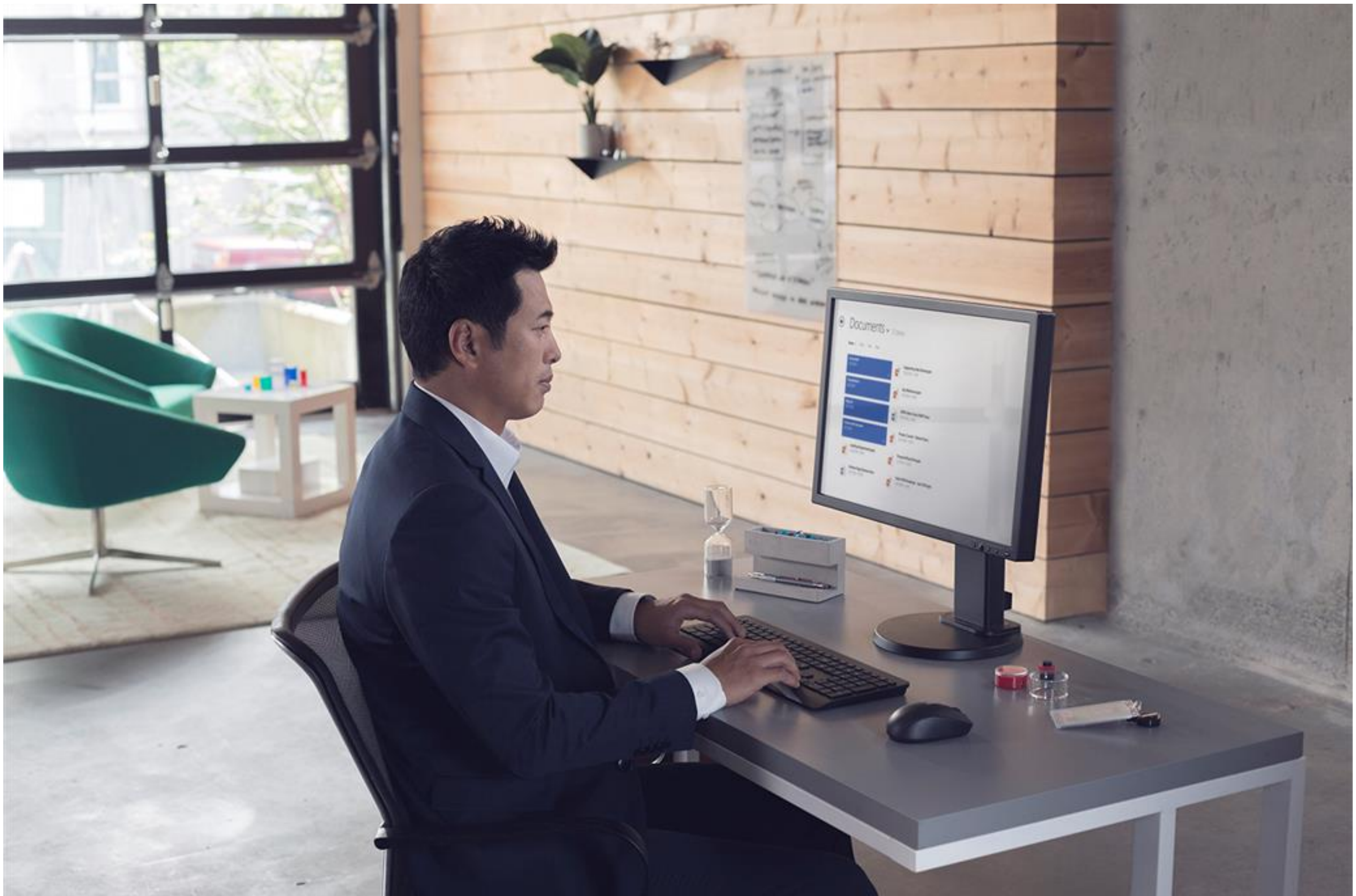
Help your customers protect against breaches, detect breaches and respond to breaches with a comprehensive security solution. The overarching security environment of the enterprise includes a mix of solutions provided by many different vendors. This playbook focuses coverage on Microsoft products and services that play a critical role in securing this environment.

	PROTECT USERS	Safeguard AND manage identity	• Azure Key Vault • Microsoft Azure Active Directory
		Detect and respond to identity-based threats	• Microsoft Azure Active Directory • Advanced Security Management • Microsoft Advanced Threat Analytics
		Protect against password attacks	• Windows Hello for Business • Credential Guard • Multi-Factor Authentication for Office 365
+	PROTECT EMAIL & DOCUMENTS	Manage cloud application usage	• Microsoft Cloud App Security
		Protect against data leakage	• Microsoft Azure Information Protection • Office 365 Data Loss Prevention • Office 365 Customer Lockbox • Windows Information Protection • SQL Server/Azure SQL DB Transparent Data Encryption • Azure Storage Service Encryption
		Protect against malware & phishing attacks	• Office 365 Advanced Threat Protection
		Respond to security incidents	• Advanced eDiscovery • Office 365 Advanced Data Governance
+	PROTECT DEVICES	Protect against malware attacks	• Windows Defender • Device Guard • UEFI Secure Boot • Trusted Boot Process
		Manage mobile devices and applications	• Enterprise Mobility + Security • Mobile Device Management for Office 365 • Intune
		Respond to malware attacks	• Windows Defender Advanced Threat Protection • Office 365 Threat Intelligence • Microsoft Intelligent Security Graph
+	MANAGE ENTERPRISE SECURITY	Detect and respond to threats	• Microsoft Azure Security Center • Azure Advisor
		Protect against threats	• Microsoft Azure • Windows Server • SQL Server Database Threat Protection
		Gain visibility into your security health	• Microsoft Azure Security Center • Azure Network Watcher • Operations Management Suite • Office 365 Secure Score • Office 365 Threat Intelligence • Microsoft Cloud App Security
=	COMPREHENSIVE SECURITY SOLUTION		

Partner Practice Development Framework

The partner practice development framework defines how to take a practice from concept to growth in five stages. It is the foundation of this playbook, and each phase of the framework is covered in a dedicated chapter.

Define Strategy	Define your offer, benchmark your practice, and identify required resources.
Hire & Train	Hire talent, train resources, and complete certifications.
Operationalize	Prepare for launch with systems, tools, and process in place.
Go to Market & Close Deals	Execute your sales and marketing strategy to find your first customers, and close deals with winning proposals.
Optimize & Grow	Collect feedback, identify expansion opportunities, optimize your practice, grow partnerships, and refine your offer.



Define Your Strategy

Security

aka.ms/practiceplaybooks

Microsoft

Executive Summary

Now that you understand the opportunity before you in building a security practice, the first step is to define the strategy you will use to build your practice. Like the foundation of the house, thinking though your strategy is critical to the long-term success of your practice — and it is worth it to take the time to think this strategy through.

We begin by providing an overview of the areas of expertise within the Security practice: identity and access management, threat protection, information protection, and security management. Your practice may have expertise in just one of these areas, across multiple or all areas. For each area, we provide details about the nature of the business opportunity and the key Microsoft products and services leveraged in delivering solutions that capitalize on the opportunity.

Then we will guide you through the process of defining your offer and its value proposition. This is a critical piece of your strategy — specifically, the definition of what you will sell and why customers will want to buy it. Along the way we will review the four cloud business models (reselling, project services, managed services, and intellectual property), their respective profitability, and how you can assess the profitability of your own practice. For project services, managed services and intellectual property, we provide you guidance on what other successful partners are selling, as well as recommendations on what to include in your own project services (e.g. delivering Secure Score workshops and providing planning and deployment services), managed services (e.g. providing managed security monitoring and remediation services) and intellectual property (e.g., packaging your practice and offering integrated security dashboards) offerings.

We will help you drill into how to price your offer base, including what pricing strategy to use to drive adoption of your offer, and how to minimize your risk by establishing up-front fees and payment terms. The ultimate goal is to help you build a solid business plan that addresses your team, marketing, sales, and financial aspects.

Then we dive deeper into sales to help you define your pre-sales and post-sales engagement process, and how to compensate sales executives.

If you are not yet a Microsoft Partner, we will give you a walking tour of the Microsoft Partner Network, the programs you can leverage to grow your practice, how to earn competencies that yield additional benefits, and how to maximize the benefits you get from the program.

After that, we'll give you a head start in how to identify potential customers when starting your practice, as well as potential service offerings.

We'll conclude this section by helping you understand support — how to support your customers, Microsoft's support offerings, and the support-related benefits you get from establishing competencies in the Microsoft Partner Network.

Let's get on to defining your practice strategy.

Top 5 things to do

Measure twice and cut once. Here are the top 5 things you should absolutely do when defining the strategy for your practice.

- ☑ Define your focus & value proposition
- ☑ Understand the Security Opportunity
- ☑ Develop a Business Plan
- ☑ Define and design the Solution Offer
- ☑ Define your pricing strategy

Define Your Practice Focus

Through your security practice, you can help keep your customers productive and secure — and their company data protected — on their favorite apps and devices with Microsoft solutions.

IDENTITY AND ACCESS MANAGEMENT

Help your customers protect their identities and data. Use behavioral analysis to provide actionable insights and ensure that customers have a sound approach to manage users and groups, as well as secure access to on-premise and cloud apps.

THREAT PROTECTION

Build a practice that helps your customers proactively guard against threats, identify breaches and threats using advanced analytics, and automate the response to threats enterprise wide.

INFORMATION PROTECTION

Manage and protect corporate apps and data. Provide your customers with mobile device management, mobile app management, and PC management capabilities. Enable employees with access from virtually anywhere on almost any device, while helping to keep corporate information secure and compliant.

SECURITY MANAGEMENT

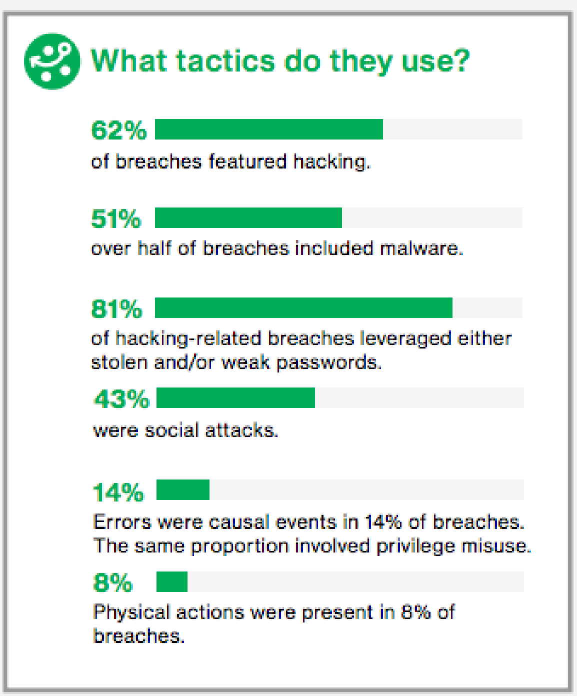
Help your customers manage the security of their enterprise-wide assests with centralized tooling and help them establish a security operations center from which to monitor and manage.

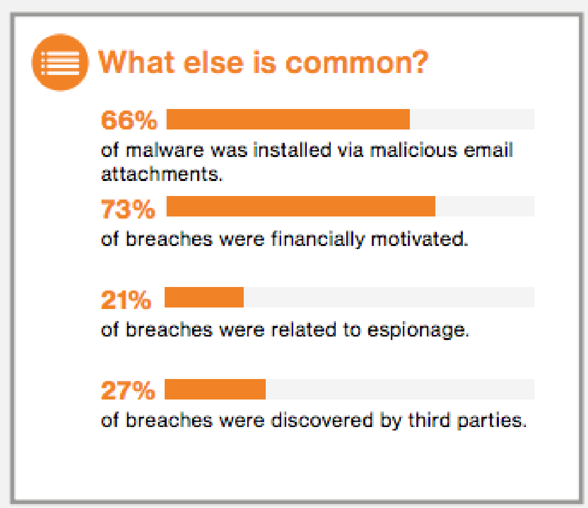
Understanding the Security Practice

By developing a security practice, you can help turn the potentially dizzying array of services, licensing options, and overlapping featuresets into a cohesive, comprehensive, and understandable security solution that enables customers to manage their security, protect their assets, and respond to security incidents.

The Identity & Access Management Opportunity

According to the Verizon 2017 Data Breach Investigations Report, compromised credentials are used in 81% of all hacking related breaches. Phishing attacks, the practice of sending fraudulent emails to get individuals to reveal personal information, are continuing to prove successful. In the same report, in the typical company of 30 or more employees, about 15% of all unique users who fell victim to phishing once also fell victim a second time. The impact of phishing should not be lost as it represents the start of a negative chain of events: phishing is used to gain a foothold using malwarze, in which the stolen credentials are leveraged to increase the scope of the breach. In the study, 95% of phishing attacks that led to a breach were followed by some form of software installation. The opportunity to help customers here should be plain — equip cusomters to better manage their identity and access controls, and stop breaches before they escalate in severity.



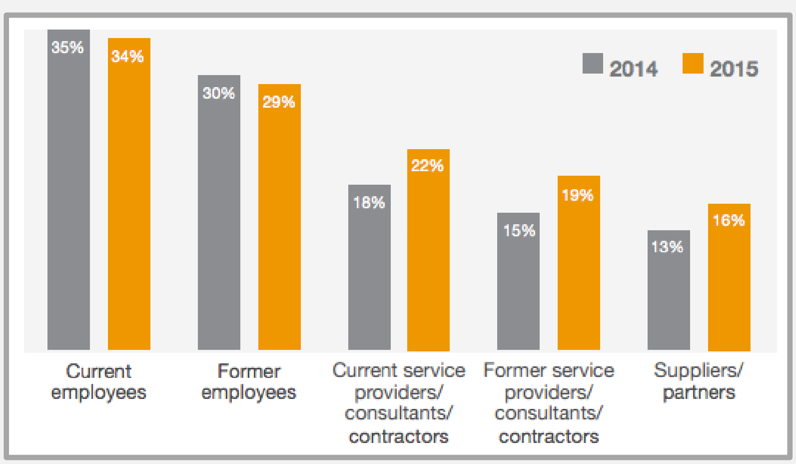


Consider using the following Microsoft products and services to develop solutions for a security practice focused on identity & access management:

SAFEGUARD AND MANAGE IDENTITY	Azure Key Vault Microsoft Azure Active Directory
DETECT AND RESPOND TO IDENTITY-BASED THREATS	Microsoft Azure Active Directory Advanced Security Management Microsoft Advanced Threat Analytics
PROTECT AGAINST PASSWORD ATTACKS	Windows Hello for Business Credential Guard Multi-Factor Authentication for Office 365

The Information Protection Opportunity

According to the 2016 Ponemon Institute Cost of a Data Breach study, the cost incurred for each lost or stolen record of sensitive data is now at $158, with the total consolidated cost of a data breach at $4 million. Meanwhile, according to the PWC Global State of Information Security Survey, the sources of security incidents perpetrated by current employees remains high, and that from business partners continues to rise. Additionally, 88% of organizations surveyed feel they are losing control over their data, according to the 2016 EY Global Information Security Survey. All of this combines to create the demand for partners to improve their customers defense with information protection.



Source: PWC Global State of Information Security Survey 2016

Consider using the following Microsoft products and services to develop solutions for a security practice focused on information protection:

MANAGE CLOUD APPLICATION USAGE	Microsoft Cloud App Security
PROTECT AGAINST DATA LEAKAGE	Microsoft Azure Information Protection Office 365 Data Loss Prevention Office 365 Customer Lockbox Windows Information Protection SQL Server SQL Server/Azure SQL DB Transparent Data Encryption Azure Storage Service Encryption
PROTECT AGAINST MALWARE AND PHISHING ATTACKS	Office 365 Advanced Threat Protection
RESPOND TO SECURITY INCIDENTS	Advanced eDiscovery Office 365 Advanced Data Governance

The Threat Protection Opportunity

According to EY's 2015 Global Information Security Survey, 44% of the organizations surveyed saw phishing as the top threat and 43% identified malware as their top threat. Additionally, these organizations identified zero-day attacks and targeted cyber attacks to steal financial information, disrupt or deface the organization, or steal intellectual property or data. Yet, in the same survey, 36% of respondents said they do not have a threat intelligence program. In the Verizon 2017 Data Breach Investigation Report, the data confirms that the threats are real:

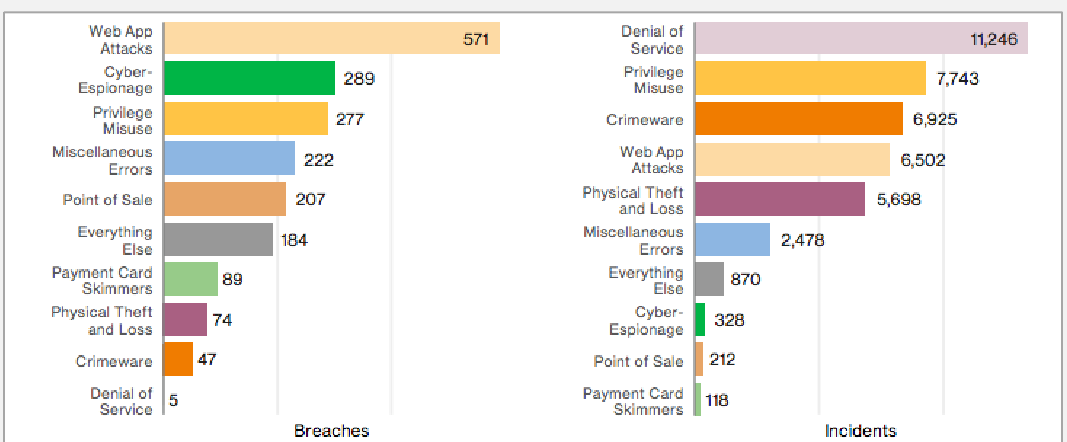


Figure 33: Percentage and count of breaches per pattern (n=1,935)

Figure 34: Percentage and count of incidents per pattern (n=42,068)

Source: Verizon 2017 Data Breach Investigations Report

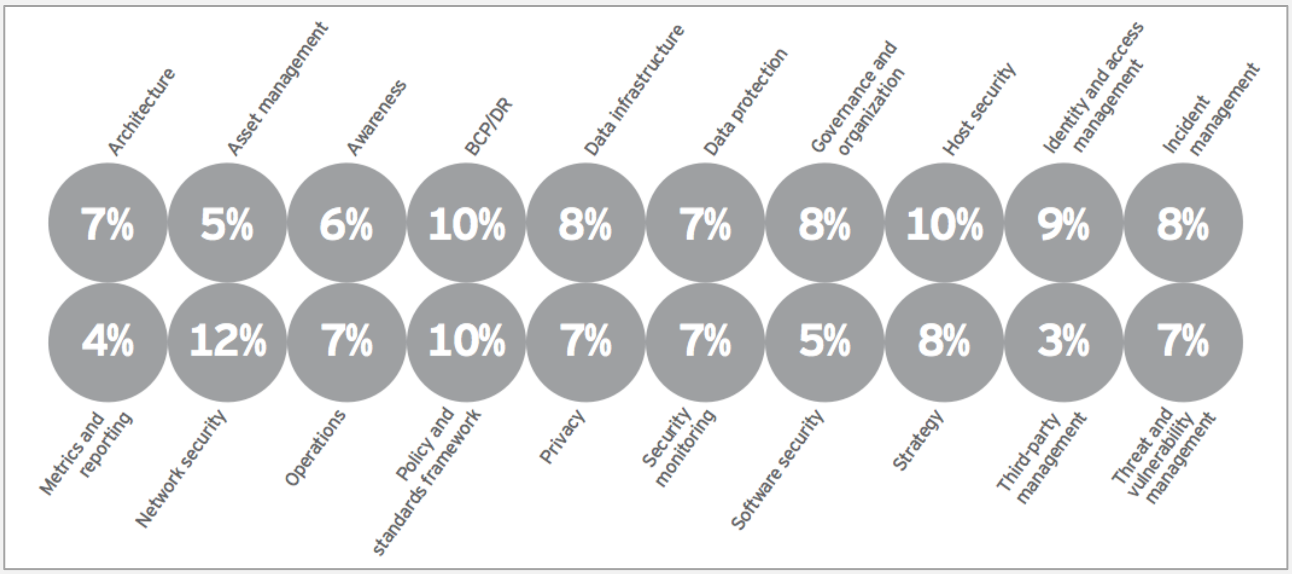
The threat protection opportunity is about enabling your customers to remain constantly aware of the current threat landscape and identifying attackers — and the attacks they are using — before they cause damage.

Consider using the following Microsoft products and services to develop solutions for a security practice focused on threat protection:

PROTECT AGAINST MALWARE ATTACKS	Windows Defender Device Guard UEFI Secure Boot and the Trusted Boot Process
MANAGE MOBILE DEVICES AND APPLICATIONS	Enterprise Mobility + Security Mobile Device Management for Office 365 Intune
RESPOND TO MALWARE ATTACKS	Windows Defender Advanced Threat Protection Office 365 Threat Intelligence Microsoft Intelligent Security Graph

The Security Management Opportunity

To become proactive about managing security, organizations should consider implementing a security operations center (SOC), which is a centralized unit addressing security on both organizational and technical levels where the staff is supervising the site with advanced data processing technology. The cornerstone capability underpinning any such effort is a set of centralized tools for monitoring and management. Very few organizations today claim they have a level of maturity of "very mature," according to EY's 2015 Global Information Security Survey.



Source: EY's 2015 Global Information Security Survey

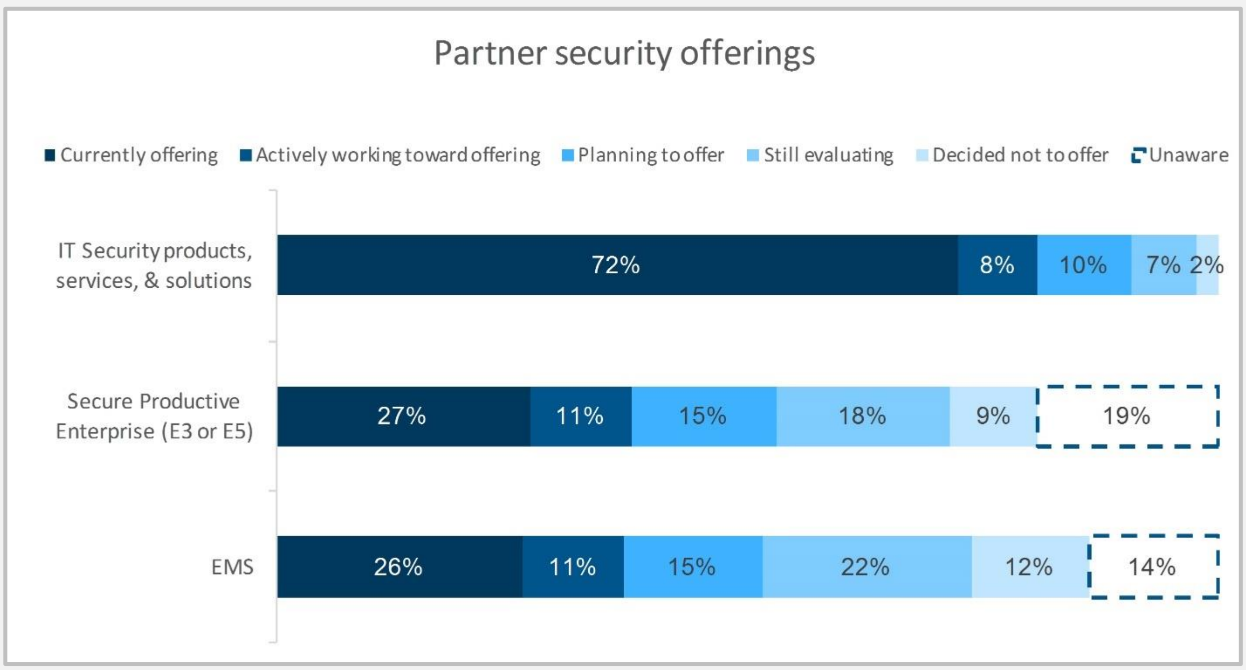
Consider using the following Microsoft products and services to develop solutions for a security practice focused on security management:

DETECT AND RESPOND TO THREATS	Microsoft Azure Security Center Azure Advisor
PROTECT AGAINST THREATS	Microsoft Azure Windows Server SQL Server Database Threat Protection
GAIN VISIBILITY INTO YOUR SECURITY HEALTH	Microsoft Azure Security Center Azure Network Watcher Operations Management Suite Office 365 Secure Score Office 365 Threat Intelligence Microsoft Cloud App Security

Security Suites

One way to help your customers make sense of the options and simplify their licensing is to guide them to an appropriate suite.

According to a 2016 study of 130 security partners conducted for Microsoft by MDC, a significant portion of security partners are in the early phases of selling security services. This represents an opportunity in the market for new entrants, and a growth opportunity for established participants.



If EM+S and Secure Productive Enterprise are new to you, read on.

Enterprise Mobility + Security (EM+S)

EM+S provides an identity-driven security solution that offers a holistic approach to the security challenges in this mobile-first, cloud-first era. It bundles five products to deliver a device-management and virtual identity management suite. The suite is offered in two tiers, EM+S E3 and EM+S E5 that offer the suite of services for a single per user price.

AZURE ACTIVE DIRECTORY PREMIUM

Azure Active Directory Premium provides the single sign-on capability for the entire enterprise targeting resources both in the cloud and on-premises. At the E3 level, EM+S includes AAD Premium P1 which provides the secure single sign-on to cloud and on-premises apps, along with multi-factor authentication support (requiring further authentication via phone call, text message or mobile app verification), conditional access (based on group membership, geographic location and device state), and advanced security reporting. At the EM+S E5 level, AAD Premium P2 is included that builds on AAD Premium P1 by adding more advanced protection for users (such as conditional access based on sign-in or user risk) and support for privileged identities (which enables on-demand, "just in time" privilege escalation for administrative access).

MICROSOFT INTUNE

Microsoft Intune is included for both EM+S E3 and E5 to provide mobile device and app management capabilities to protect corporate apps and data on any device- even when users bring their own personal devices.

AZURE INFORMATION PROTECTION PREMIUM

Azure Information Protection enables control over the access to files and emails across cloud and on-premises. Azure Information Protection Premium is provided at two levels in EM+S. Within EM+S E3, Azure Information Protection Premium P1 is provided that includes support for file and email encryption and cloud based tracking of files. EM+S E5 provides Azure Information Protection Premium P2, which layers on automated, intelligent classification and encryption for files and emails.

MICROSOFT CLOUD APP SECURITY

Microsoft Cloud App Security brings the security capabilities traditionally available to on-premises systems to SaaS cloud applications like DropBox, Office 365, G Suite and Salesforce, and enables deeper visibility, comprehensive controls, and enhanced protection against cloud security issues. Cloud App Security is included only with EM+S E5.

ADVANCED THREAT ANALYTICS

Advanced Threat Analytics is an on-premises platform that helps protect the enterprise from advanced targeted attacks by automatically analyzing, learning, and identifying normal and abnormal entity (user, devices, and resources) behavior. It is available in both EM+S E3 and E5.

BENEFIT / EM+S SKU	Identity & access management	Managed mobile productivity	Information protection	Identity-driven security
EM+S E5	Azure Active Directory Premium P2	Microsoft Intune	Azure Information Protection Premium P2	Microsoft Cloud App Security
EM+S E3	Azure Active Directory Premium P1	Microsoft Intune	Azure Information Protection Premium P1	Microsoft Advanced Threat Analytics

Secure Productive Enterprise (SPE)

At a high level, Secure Productive Enterprise brings Office 365, Windows 10 Enterprise, and Enterprise Mobility + Security suite together into a single licensing offering.

It is important to notice the standardized packaging is available across Office 365, Windows 10 Enterprise, and the Enterprise Mobility + Security suite. Each of these products now has its own E3 and E5 offerings.

Secure Productive Enterprise E3 Formerly Enterprise Cloud Suite(ECS)	Secure Productive Enterprise E5 NEW
Office 365 E3	Office 365 E5
Enterprise Mobility + Security E3	Enterprise Mobility + Security E5
Windows 10 Enterprise E3	Windows 10 Enterprise E5

To understand the benefit of Secure Productive Enterprise, consider the capabilities it provides, the specific services and features it includes, and note that the suite price is almost 30% less than the cost of buying the complete set of capabilities individually. The following table summarizes this for SPE E5:

	Capabilities	Microsoft Secure Productive Enterprise
Windows Enterprise E5	Unified OS across devices and platforms	Windows 10 Enterprise + MDOP
	Advanced attacks protection	Windows Defender ATP
EMS E5	Mobile device and app management	Microsoft Intune
	Identity and access management	Azure Active Directory premium
	Information protection	Azure information protection
	User and entity behavioral analytics	Microsoft Advanced Threat Analytics
	Cloud and SaaS app security	Cloud app security
Office Enterprise E5	Threat and malware protection	Advanced threat protection
	Office apps security	Advanced security management
	Data identification	Advanced eDiscovery
	Enhanced sensitive data access controls	Customer lockbox
	Productivity apps and services	Office 365 E3
	Live business analytics and visualization	Power BI Pro
	Individual and team effectiveness	Delve analytics
	Business phone system in the cloud	Cloud PBX
	Worldwide dial-in for online meetings	PSTN conferencing

Develop a Business Plan

Resources

- → Microsoft Cloud Profitability Scenarios Overview
- → Financial Models
- → Customer Lifetime Value Model
- → Microsoft Modern Partner

Cloud Profitability Benchmark Assessment

Partners have requested help in identifying how they can build a profitable business driving Microsoft cloud services, devices, and other products. Through IDC research and discussions with thousands of partners around the world, we've identified four pillars of the modern partner that contribute to building a profitable, sustainable cloud business:

- Pillar #1: Differentiate to Stand Out
- Pillar #2: Modernize Sales & Marketing
- Pillar #3: Optimize your Operations
- Pillar #4: Deliver Customer Lifetime Value

You can find the key findings of this research in the Microsoft Modern Partner eBook series.

BENCHMARK YOUR CLOUD BUSINESS ACROSS THE FOUR PILLARS OF THE MODERN PARTNER

Start by answering a series of questions about your business, including questions that cover firmographics, customer/market orientation, cloud business metrics, customer adoption and usage, and revenue generating activities. This step should only take about five minutes and will be the basis of your results, so take your time in entering the correct information.

Once complete, you will receive an overall maturity score of Start, Grow, or Optimize, along with an individual maturity score for each of the four pillars of the Modern Partner. In addition to your maturity score, you will also receive recommended next steps to increase your cloud maturity for each of those pillars. Be sure to follow those recommended steps and read the Microsoft Modern Partner eBook series.

Now that you understand your strengths and weaknesses across the Modern Partner pillars, share the results of the assessment with your team. We've made it easy to share — simply download and email the results, or click the "Share Results" button on the site.

Pull your team together to discuss the results, build an action plan, and assign ownership of the tasks you determine are most important. If you have a Microsoft Partner account executive, share the results with them to guide you to the best resources and support provided by Microsoft.

Resources

- [Cloud Business Plan Template]
- [Video: How to Create a Marketing Plan]
- [Marketing Plan Contents]
- [Competitive Overview Video]
- [Offerings Video]
- [Cloud Financial Models]

Starting Your Business Plan

A business plan is critical asset that can help you envision and think through the details of your practice, identify gaps you will need to address, and explain the fundamentals of your practice to others.

In the pages that follow, we provide a section-by-section walkthrough of a Cloud Business Plan — a template provided by Microsoft that you can use to help create your business plan.

CLOUD OPPORTUNITY

In this opening section, describe the overall demand for cloud solutions, why it is a significant business opportunity, and the possible financial gains of aggressively developing a cloud practice. If you have data available for your specific market, use it; however, the sample text in the plan can be used almost verbatim in many cases.

COMPANY OVERVIEW

Describe how long your company has been in business, how large your company is in terms of employees and revenue, and what your company does.

TARGET MARKET

Describe the specific market you will target, and the rough number of firms in the target market. If possible, use databases to more precisely define how big your target market is; however, the real key is to give the reader confidence that your target market is large enough to support financial projections laid out in a later section.

COMPETITIVE OVERVIEW

List who your main competitors are in the specific market(s) you will target.

OFFERINGS

Describe your specific offerings. In many cases, this can be taken directly from your website; although, care should be taken to present a concise description of what your company does, and the business benefits for the customer.

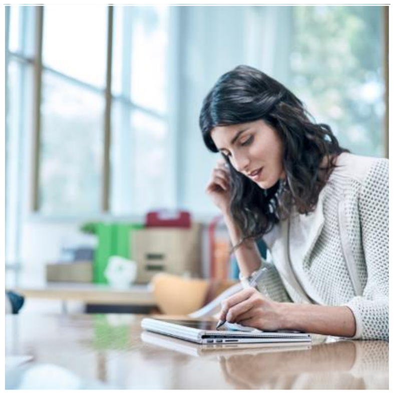
DIFFERENTIATION

Describe your core strengths relative to the competitors earlier described, and why they are inherently sustainable and cannot be easily replicated by competitors.

EXECUTIVE TEAM

In this section provide brief bios of your senior management team.

Resources



- [Marketing Infrastructure]
- [Video: How to Create a Marketing Plan]
- [Marketing Plan Contents]
- [Cloud Financial Models]
- [Sales Infrastructure Video]
- [Smart Partner Marketing]
- [IP Development]
- [Support Infrastructure]
- [Cloud Financial Models]
- [Financial Tutorial]
- [Capital]

Creating the Marketing and Sales Plan

A section-by-section walkthrough for starting your marketing and sales plan using the Cloud Business Plan template.

MARKETING

Summarize the overall demand for cloud solutions from your business plan. Describe the marketing strategy you intend to pursue in the cloud, and the investments you should make to execute this strategy.

SALES

Describe the cloud sales strategy you intend to pursue and the investments you must make to execute this strategy.

DELIVERY

Describe the cloud delivery strategy you intend to pursue and the investments you will make to execute this strategy.

FINANCIAL PROJECTIONS

Using the cloud financial models available, outline your core anticipated financial impact from executing on your plans.

CAPITAL REQUIREMENTS

Using the cloud financial models, indicate the capital you need and how you will spend it. Review the Financial Leverage video for guidance on sourcing options for the capital.

DIFFERENTIATION

Describe your core strengths relative to the competitors described earlier, and why they are inherently sustainable and cannot be easily replicated by competitors.

Develop a Financial Plan

A section-by-section walkthrough for starting your financial plan using the Cloud Business Plan template.

A business plan is conceptual and doesn't become real for the reader until the numbers get plugged in. Investors, customers, partners, and others will ask to view this model during normal business transactions. It will benefit your cloud practice to develop this financial plan early in your business life. You will want to update them periodically so they are available as needed.

Microsoft provides you with support in building out these financial plans. View this walkthrough video to not only learn more about the significance of your financial planning, but also pick up practical tips on building the model. Taking the time to think through these important numbers will prove to be beneficial per the most successful cloud partners. Some of the areas you will want to include in your financial plans include:

FINANCIAL PROJECTIONS

Using the cloud financial models available, outline your core anticipated financial impact from executing on your plans.

ANTICIPATED VALUATION IMPACT

Using the cloud financial models, indicate the anticipated shareholder value creation.

RISKS AND MITIGATION

List the key business risks that could affect the realization of the preceding financial projections, and how you plan to reduce these risks. In your financial plan it is important to understand that most cloud businesses will not be profitable for 12–18 months. Based on a recent survey of 484 partners with a security practice, survey respondents report it taking from 6 months to 2 years to achieve profitability. It is critical to plan for this timeframe and ensure you have enough cash to carry you through until your business is profitable. (Source: Microsoft Cloud Practice Development Study, MDC Research, June 2017).

RESOURCES:

- Cloud Financial Models
- Financial Tutorial
- Capital
- Risks and Mitigation

Define and Design the Solution Offer

Understand the Cloud Business Models

It’s key to understand that not all revenue streams are equal.

THERE ARE FOUR WAYS TO MAKE MONEY SELLING CLOUD:

- ☑ Resale
- ☑ Project Services
- ☑ Managed Services
- ☑ Packaged IP

Partners that focus almost entirely on product revenue have the biggest barrier, and typically see margins in the range of 5–20%. This is because the margins for this revenue line are tied to vendor incentives. These partners are subject to changes in strategy and the desire to fund programs, and have the least control over their own destiny.

Project services typically drive a range of approximately 35% gross margin, but this has been under pressure for some time. This is a result of little differentiation in the channel, which has caused billable price points to hold steady over the past five or more years, while increasing salary and benefit costs of consultants and inflation have eroded profitability.

As a result, aggressive and entrepreneurial members of the channel have adapted and gone after the higher margin opportunities of managed services, which generate on average 45% gross margin and packaged IP, which often exceeds 70%.

It’s these partners who are setting themselves up to be rewarded. The mergers and acquisition space is quite active. The partners who have gravitated toward the recurring revenue lines and realizing healthy growth are being presented with much higher valuations. This can have a dramatic increase in the cash event of the company and overall shareholder value — far higher than what a traditional partner focused on product and billable services can realize.

Not all revenue streams are created equal

AVERAGE GROSS MARGINS

Source: IDC eBook, sponsored by Microsoft, The Modern Microsoft Partner Series, Part 2: Differentiate to Stand Out, 2016

Define and Design the Solution Offer

Defining Your Value Proposition

Your value proposition is what gets customers excited to do business with you. It enables them to match their needs with your services — ideally, in a way that differentiates you from the competition.

Microsoft has created a streamlined process for defining your value proposition as a part of the Microsoft Partner Crossover program. In short, defining your value proposition amounts to building a single phrase from these components:

FOR...	Customers, companies, decisions makers
WHO...	Needs or problems to solve
OUR SOLUTION...	Short phrase that describes the solution
DOES/INCLUDES...	What is the solution (seen by the customer)
AND ENABLES TO...	Benefits for the customers
UNLIKE...	Direct and indirect competition
THANKS TO...	Killer feature / Company top strength

FOR: Define the target audience of your value proposition. Who would see the value? These are the profiles of your target customers and companies, and the decision makers within those companies. Try to make these definitions succinct and precise, but avoid making them too generic. For example, you might say, “Companies between 50 to 100 employees,” instead of just “SMB”. Also, note that the customer may have as many as three different roles. The customer can be the one who uses your service, the one who decides on selecting your services, and the one who pays for your service. Sometimes all three roles are owned by one person, but sometimes the roles are spread across two or three people.

WHO: Describe the specific business process you want to help. This is the customer’s need. Examples of this include, “improve sales conversation rate,” or “spend less time getting to sales insights.”

OUR SOLUTION: Describe the solution you are offering to your customer. It is critical that this is simple to understand and succinct. The easier it is for prospects to understand your solution, the faster you will sell it, and the lower your cost of sales will be. For example, “A full dashboard service to provide your topmost business indicators in real-time.” In defining your solution, avoid being too generic (e.g., “a service to increase your productivity”) or too feature-centric (e.g., “an HTML5 dashboard powered by AJAX”).

RESOURCES:

➔ [Value Proposition Video]

DOES/INCLUDES: Describe the features as the customer sees them, not as you have designed them. For example, "a globally accessible solution with advanced collaboration features" as opposed to "a digital workplace that powers the experience with external compute in datacenters hosted in 23 regions." Focus on the most important features and use terms that your customers are familiar with from their particular industry.

AND ENABLES: Highlight the benefits of your solution. For an emerging market, the benefit should highlight the process improvement. For a mature market, consider highlighting the competitive advantage it provides the customer. For example, "no upfront investment", "free up your IT resources to focus on your core business," and "flexible and scalable solution that grows with your business."

UNLIKE: Describe what the competition is doing and why your solution is the best one. For example, "undisputed leader in TPC-H performance," or "a fraction of the cost of most standard analytic solutions with the fastest learning curve."

THANKS TO: Describe the "killer feature," or that one tangible argument a customer can use to justify the purchase of your product that does not apply to any of your competitors. Examples of such differentiators include: "delivered via a Microsoft Gold Certified Partner in cloud," or "the only solution to operate 100-percent in-country."

HERE IS AN EXAMPLE OF A COMPLETED VALUE PROPOSITION PHRASE:

FOR…	Companies between 50–100 employees, Business services/Fast growing, CEO/MD/CFO
WHO…	Make sure their team is equipped with the right IT equipment, Focus on their core business
OUR SOLUTION…	All-in Digital Workplace service for employee
DOES/INCLUDES…	IT device, O365, integration, training, support for 79$/m/user
AND ENABLES TO…	No upfront charge, one-stop-shopping, evolution
UNLIKE…	Buying fragmented solutions with a big upfront fee to buy the equipment and fund integration services
THANKS TO…	Exclusive 24/7 services / Microsoft Gold Certification

Take the time to create your one-phrase value proposition; it sits at the core for your solution offer.

Define Your Solution Offer

A solution offer is how you package your value proposition.

You determine what it is you think customers will buy and balance that with how selling that offer is good for your business. The key here is to think through this offer in advance of a customer need.

Most service providers sell using a demand-based approach. That means they are like the clothes tailor who makes every clothing article on-demand and custom to each individual customer need. What you want to do is evolve this into an offer-based approach. In contrast to the tailor, in the offer-based approach, you have an inventory of jackets you can offer to customers that meets their needs directly or with minimal adjustment. To switch from a demand-based approach to an offer based approach, it is critical to think of your services as a product. This solution offer includes the unique value you have defined in your value proposition, the services included, and the way you price the benefits available to your customer. The key is that this solution offer is a stock offering — it is the same offer you can make to every customer.

Why is the way you package a solution offer important? First, because most customers are now shopping for their solutions and making significant decisions before they even talk to a salesperson. A well-defined solution offer can turn a lead into a qualified prospect, or even a customer, without any active intervention on your part. A lack of a solution offer, wherein the lead needs to talk to a salesperson first, may mean the customer keeps searching and gravitates towards vendors that do provide a solution offer that meets the customer needs. Second, this packaging is important because the potential market for tailor-made offers is significantly smaller (e.g., 10% of the market) than those for ready-made offers (which may represent 90% of the market). Third, by packaging your solution offer in advance, it means your pre-sale effort is done exactly once — you don't need to repeat it for every prospect. Fourth, because statistics show that the average gross margins for packaged IP (like those that capture in a well-defined solution offer) can take project services margins from 15% to over 45%.

Read on to understand how to define the pricing for your offer as this turns out to be an integral piece as you define your offer. Be sure to review the content on [Project Services](), [Managed Services]() and [Intellectual property]() within this playbook to help you define what goes into your offer.

Services Offered

Project services lead IT revenue and are the most commonly offered solutions to customers across all four cloud-based practices.

IP Services are the least commonly offered to customers; nearly half do not offer IP services across all 4 practices.

Microsoft

Understanding Project Based Services

Building a new practice is a daunting challenge. It is not that different from starting a business from scratch. Just like any business venture, it's important to start with a vison of what your business will do, what problems it will solve, and how it will make money.

Let's start off with the premise that there are four categories of offerings that we'll work from: project based services, managed services, intellectual property, and vertical solutions.

In the Microsoft Cloud Practice Development Study, 484 partners that identified as having a Security practice were asked what project services they offer within their practice. The results are below. Consider this data when designing your project based offerings.

PROJECT BASED OFFERINGS

Cloud Migration Planning	**64%**	Auding, Security & Compliance Assessments	**37%**
Configuration	**63%**	Activity and Log Audit Management	**37%**
Help-Desk Support	**52%**	Cloud Solution Costing & Spend Optimization	**35%**
Data Loss Prevention & Systems Integration	**51%**	Solution Configuration & Customization	**35%**
Patch Management	**50%**	Policy Reccomendation & Improvement	**33%**
Advanced Threat Protection	**48%**	Password Complexity Management	**32%**
Office Client Deployment	**48%**	User Monitoring	**31%**
Deployment Services	**46%**	Threat Detection & Migration Enablement	**30%**
Data Migration Management	**43%**	Cyber Secutiry Risk Assessment	**29%**
Enable Multi-Factor Authentication	**43%**	Information Protection Configuration	**29%**
Identity & Access Control Enablement	**42%**	Solution Analysis Scope & Design	**28%**
Cloud Readiness Assessment	**42%**	User Enablement	**28%**
Solution Support & Training	**42%**	Security & Compliance Enablement	**27%**
Health Checks	**41%**	User Training & Customer Self Portal & Mentoring	**24%**
Mobile Device Management	**40%**	Data Leakage Prevention	**23%**
Proof of Concept	**38%**	Device Procurement & Deployment	**23%**
Auding, Security & Compliance Assessments	**37%**	Penetration Testing	**23%**
Activity and Log Audit Management	**37%**	Custom Application Development	**22%**
Cloud Solution Costing & Spend Optimization	**35%**	Incidence Response Management	**21%**
Solution Configuration & Customization	**35%**	Data Classification & Data Governance	**19%**
Policy Reccomendation & Improvement	**33%**	Training on Azure or Microsoft Security Products	**19%**
Proof of Concept	**38%**	Security-Penetration Testing	**18%**

REVENUE

Total Median (n=464)	$48,946
SMB (n=401)	$45,569
Enterprise (n=63)	$541,965

When targeting your project services, our research with partners emphasized the importance of targeting the enterprise customer to attain significantly higher per-project revenue.

Source: Microsoft Cloud Practice Development Study, MDC Research, June 2017.

PROJECT SERVICES BY REGION

PROJECT SERVICES BY REGION	Total n=484	APAC n=24*	Canada n=18*	CEE n=27*	Germany n=36	LATAM n=41	MEA n=32	UK n=43	US n=119	WE n=103
Cloud Migration Planning	64%	63%	72%	41%	81%	49%	69%	72%	72%	57%
Configuration	63%	58%	67%	56%	78%	59%	63%	53%	70%	66%
Help-desk support	52%	58%	61%	37%	50%	22%	66%	58%	65%	51%
Data loss prevention	51%	54%	44%	59%	47%	56%	63%	47%	55%	51%
Systems Integration	51%	58%	61%	48%	64%	34%	44%	47%	58%	49%
Patch management	50%	54%	56%	41%	61%	27%	53%	56%	63%	45%
Advanced Threat protection	48%	58%	39%	41%	56%	41%	59%	42%	46%	51%
Office Client Deployment	48%	46%	44%	33%	47%	46%	63%	51%	53%	45%
Deployment services	46%	54%	61%	26%	58%	39%	44%	56%	52%	34%
Data migration management	43%	50%	50%	26%	47%	32%	47%	49%	54%	36%
Enable multi-factor authentication	43%	42%	61%	19%	58%	27%	34%	53%	57%	34%
Identity & access control enablement	42%	42%	56%	19%	50%	27%	38%	44%	48%	47%
Cloud Readiness Assessment	42%	50%	56%	15%	58%	22%	38%	60%	55%	29%
Solution Support & Training	42%	42%	50%	33%	22%	29%	50%	33%	52%	41%
Health Checks	41%	50%	39%	37%	44%	24%	31%	67%	52%	32%
Mobile device management	40%	42%	39%	11%	58%	12%	31%	53%	55%	38%
Proof of Concept	38%	42%	33%	19%	61%	37%	38%	26%	40%	40%
Auditing, Security & Compliance assessments	37%	38%	33%	33%	28%	37%	38%	51%	39%	39%
Activity and log audit management	37%	29%	33%	37%	28%	37%	44%	35%	44%	32%

Cloud Solution Costing & Spend Optimization	35%	42%	39%	26%	28%	24%	38%	37%	53%	21%
Solution Configuration/Customization	35%	42%	44%	26%	31%	27%	31%	33%	45%	26%
Policy recommendation and improvement	33%	38%	61%	26%	33%	12%	41%	26%	41%	32%
Password complexity management	32%	33%	28%	22%	19%	20%	31%	49%	46%	27%
Security & Compliance Assessment	31%	29%	11%	19%	28%	24%	31%	42%	43%	27%
User monitoring	31%	29%	39%	26%	19%	22%	22%	30%	46%	25%
Threat detection & mitigation enablement	30%	33%	17%	15%	31%	7%	31%	44%	43%	26%
Cyber security risk assessment	29%	38%	22%	19%	22%	22%	19%	42%	42%	23%
Information protection configuration	29%	21%	33%	19%	25%	22%	41%	26%	37%	23%
Solution Analysis, Scope, & Design	28%	46%	22%	15%	17%	20%	28%	19%	45%	24%
User Enablement	28%	46%	39%	22%	22%	17%	16%	35%	34%	22%
Security & Compliance Enablement	27%	21%	6%	11%	33%	22%	22%	40%	35%	23%
User training and customer self-serve portal	24%	21%	39%	19%	14%	7%	25%	16%	42%	17%
Mentoring	24%	25%	28%	19%	22%	20%	22%	26%	32%	19%
Data leakage prevention	23%	17%	6%	30%	25%	17%	31%	16%	31%	20%
Device Procurement and Deployment	23%	33%	56%	11%	31%	5%	22%	23%	35%	9%
Penetration testing	23%	21%	17%	22%	19%	15%	19%	33%	32%	18%
Custom Application Development	22%	29%	33%	30%	22%	10%	13%	12%	29%	22%
Incidence response management	21%	33%	33%	11%	11%	12%	16%	19%	31%	19%
Data classification and data governance	19%	21%	28%	7%	14%	15%	22%	19%	28%	14%
Training on Azure or Microsoft security services	19%	8%	17%	7%	17%	15%	19%	14%	29%	16%
Security-Penetration Testing	18%	8%	0%	15%	19%	15%	16%	16%	29%	14%
Productivity cloud app usage management	17%	17%	11%	15%	14%	12%	22%	12%	28%	9%
Security operations center management	13%	8%	6%	11%	11%	7%	16%	12%	18%	12%

Source: Microsoft Cloud Practice Development Study, MDC Research, June 2017

Deliver A Workshop

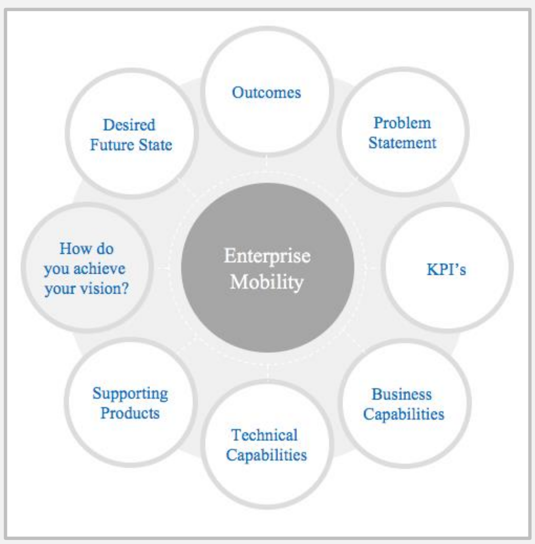
Delivering a workshop that provides assessments, training, or planning services is a great project services approach to launching a new customer engagement.

ENTERPRISE MOBILITY STRATEGY & PLANNING WORKSHOP

2016 marks the inflection point for cloud adoption for both SMB and enterprise customers. Most customers today have already started taking the cloud seriously. However, not every customer is savvy enough to build a robust cloud strategy. From the enterprise mobility perspective, many don't have granular visibility into what data employees are storing on their devices, if corporate data is being used on unknown and unmanaged SaaS applications, or how to protect their files and data from being accidently or deliberately distributed. Others, while aware of these challenges, don't know where to start and are unsure of how ready their staff, systems, tools, and processes are for true enterprise mobility.

This is why most managed services engagements and significant enterprise mobility projects begin with an enterprise mobility assessment. Microsoft has created the Enterprise Mobility Strategy and Planning Workshop for partners to deliver this assessment in a workshop form. This one-day workshop is designed to help enterprise customers envision and plan Microsoft's solutions for mobilizing, managing, and securing enterprise mobility.

Your solution architects can use the workshop during a pre-sales effort to scope and size an engagement to help the customer achieve their mobility goals.



AT THE END OF THE WORKSHOP:

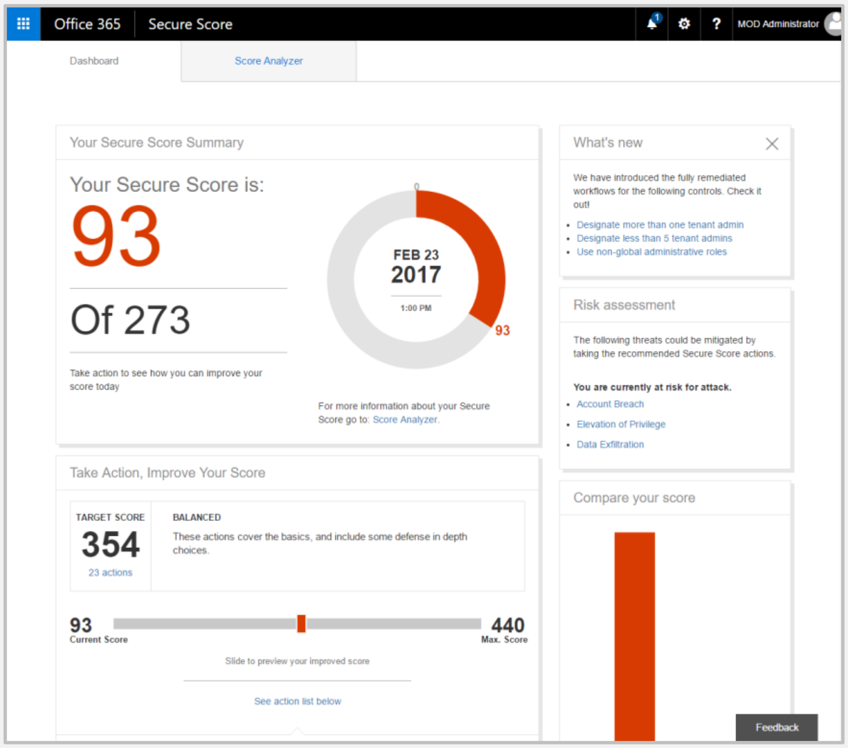
- The customer will have a vision of how Enterprise Mobility can help their organization realize their mobility goals and drive business impact.
- You will have sufficient knowledge to write a proposal for a mobility engagement (e.g., Enterprise Mobility Suite Pilot, Dynamic Identity Framework, Universal Application Development).

TARGET CUSTOMERS FOR THIS OFFERING INCLUDE:

- Customers not yet convinced that EMS is right (e.g., BDMs are not engaged).
- Customers who own licenses but have no deployment plan.

SECURITY ASSESSMENT WORKSHOP UTILIZING SECURE SCORE

The Office 365 Security Assessment is a structured engagement that uses the Office 365 Secure Score tool to evaluate and prioritize the Office 365 tenant security settings of an organization.



Secure Score provides a numerical summary of your customer's security posture within Office 365 based on system configurations, user behavior, and other security-related measurements. It is not an absolute measurement of how likely your system or data will be breached; rather, it represents the extent to which you have adopted security controls available in Office 365 that can help offset the risk of being breached.

The Office 365 Security Assessment can help you create and present to you're a customers a customized, prioritized, and actionable roadmap based on the recommendations from the Office 365 Secure Score tool. The agenda typically consists of an up to two-hour, remote kick-off meeting followed by a two-day, on-site assessment workshop.

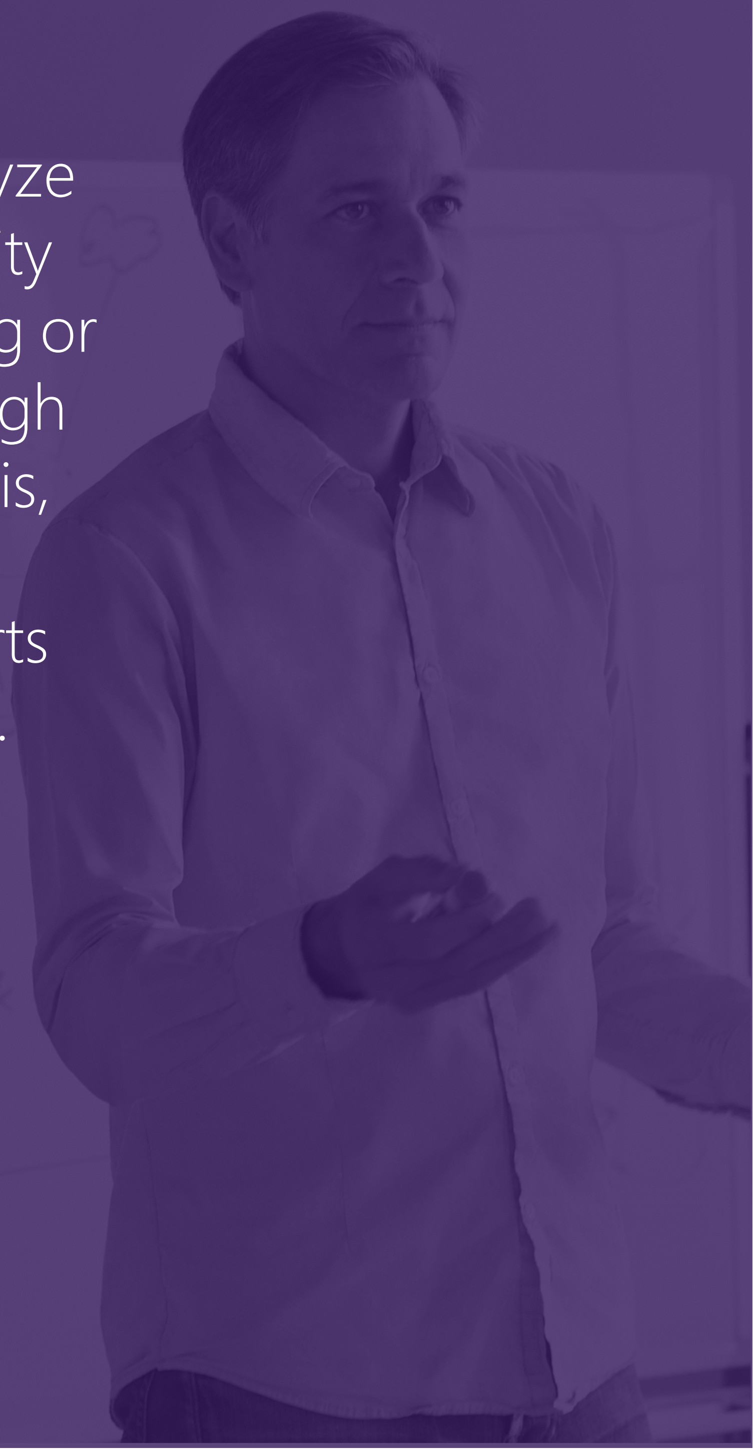
The artifacts within the Office 365 Security Assessment are intended to be customized so that the engagement is aligned to your organization's own value proposition, workflows, delivery methodologies, related work streams, and offerings. The outcome of the Office 365 Security Assessment is to assist with the development of a roadmap of actionable customer recommendations used to drive additional project-based work. Alternately, it can be used to inform a repeatable lifecycle of security management tasks within a managed service offering.

Leverage the Office 365 Secure Score Assessment IP Kit, available at http://aka.ms/office365securityfiles.

“

Our biggest success basically is that we introduce or we analyze our customers’ security level by implementing or by taking them through a secure score analysis, and based on that, doing all different sorts of recommendations.

DANNY BURLAGE,
Founder & CTO Wortell



Enable and Support Deployment

Offer a set of project services that revolves around enabling customer use of security products and cloud services, and deployment support.

ENABLE HYBRID IDENTITY

Managing identity is just as important in the public cloud as it is on premises. To help with this, Azure supports several different cloud identity technologies:

- You can run Windows Server Active Directory (commonly called AD) in the cloud using virtual machines created with Azure Virtual Machine. This approach makes sense when you're using Azure to extend your on-premises datacenter into the cloud.
- You can use Azure Active Directory to give your users single sign-on to Software as a Service (SaaS) applications. Microsoft's Office 365 uses this technology, for example. Applications running on Azure or other cloud platforms can also use it.
- Applications running in the cloud or on-premises can use Azure Active Directory Access Control to let users log in using identities from Facebook, Google, Microsoft, and other identity providers.

SOME OF THE KEY CUSTOMER CHALLENGES AND QUESTIONS YOU MAY FACE ARE:

- Is Azure Active Directory secure?
- Is it safe to deploy Active Directory in an Azure Virtual Machine?
- How can I enable single-sign-on with my existing Windows Server Active Directory domains and my resources in Azure?
- Can I enable single-sign-on with other cloud-based SaaS services?
- Do I need to deploy Active Directory Federation Services?

HOW AZURE ACTIVE DIRECTORY CAN HELP

USER ACCESS MANAGEMENT	USER TAGGING & CHANGE MANAGEMENT	SINGLE-SIGN-ON	MULTI-FACTOR AUTHENTICATION
This is a simple but important aspect of ID management that gives admins the power to identify and control the state of users logged in to the network. MSPs, on their customers' behalf, can add or delete users, query or filter users, set access policies, and enforce strong authentication when users access resources. This can be done using CSP Partner Center and Azure Portal.	This allows you to use Azure tags and manage the logging of all user activity on Azure. Maintain multiple Azure subscriptions, as well as role-based access, for individual users for specific subscriptions and specific Azure resources.	This enables your customer to have access to their resources by using a single set of user credentials and a unified authentication method across Azure, hosted infrastructure, on-prem infrastructure and other SaaS apps. Free your customers from multiple authentication processes for accessing different apps.	A method of ID authentication that requires more than one verification process (e.g., phone verification), adding a valuable second layer of security to signing in and completing any transactions. MSPs can provide improved application security with Microsoft Azure Active Directory Multi-Factor Authentication (MFA).

Enabling hybrid identity is a foundational step in for many organizations' digital transformation.

RESOURCES:

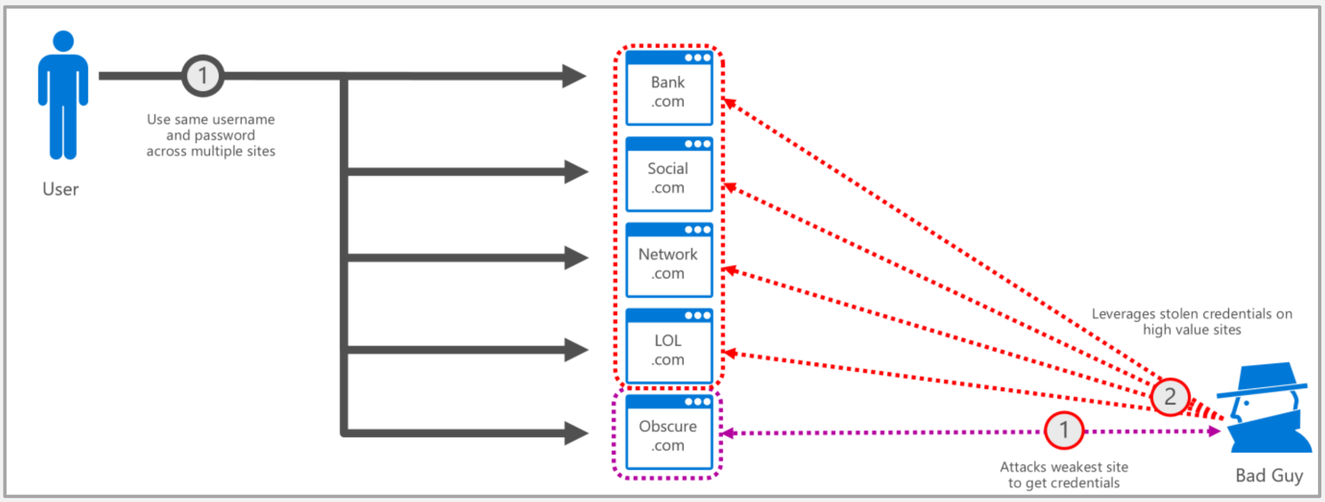
- [What is Azure AD?]
- [Deploying a Hybrid Identity Solution]
- [How to Deploy ADFS in Azure]
- [Azure AD Domain Services]
- [Azure Active Directory Proof of Concept Playbook]

Microsoft

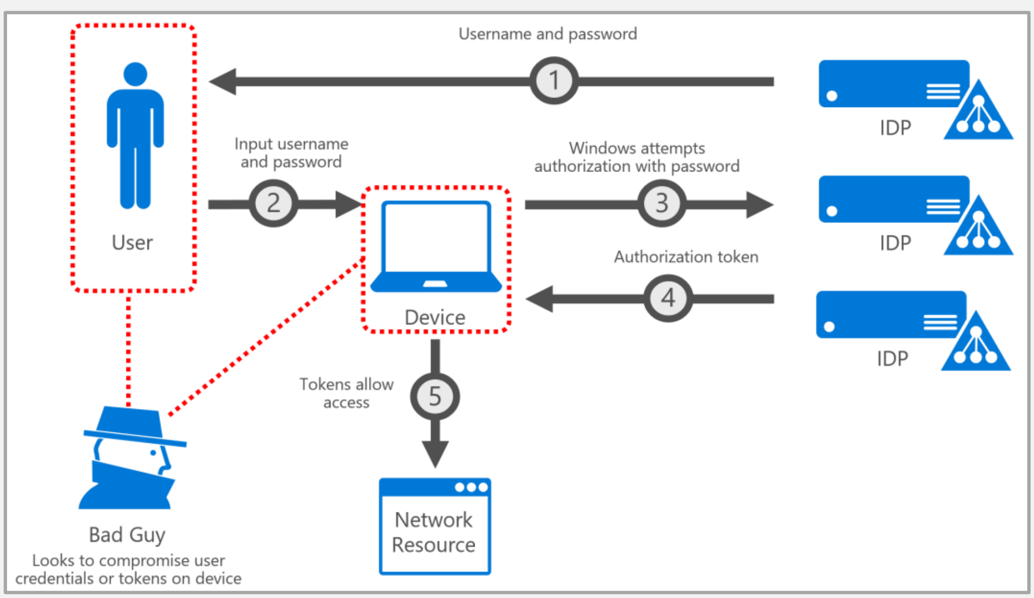
PROVIDE PLANNING & DEPLOYMENT SERVICES FOR PROTECTING IDENTITITES WITH WINDOWS HELLO FOR BUSINESS & CREDENTIAL GUARD

Passwords are a burden on users and a liability to the enterprise. Enable your enterprise customers to modernize authentication by helping them plan and deploy Windows Hello for Business.

Users forget their passwords. Moreover, a Security Week survey found that 75% of individuals use only three or four passwords across all of their accounts. This means users will tend to use the same password for authentication against both personal and corporate assets, making corporate assets as easy to comprise as the personal asset having the weakest security.

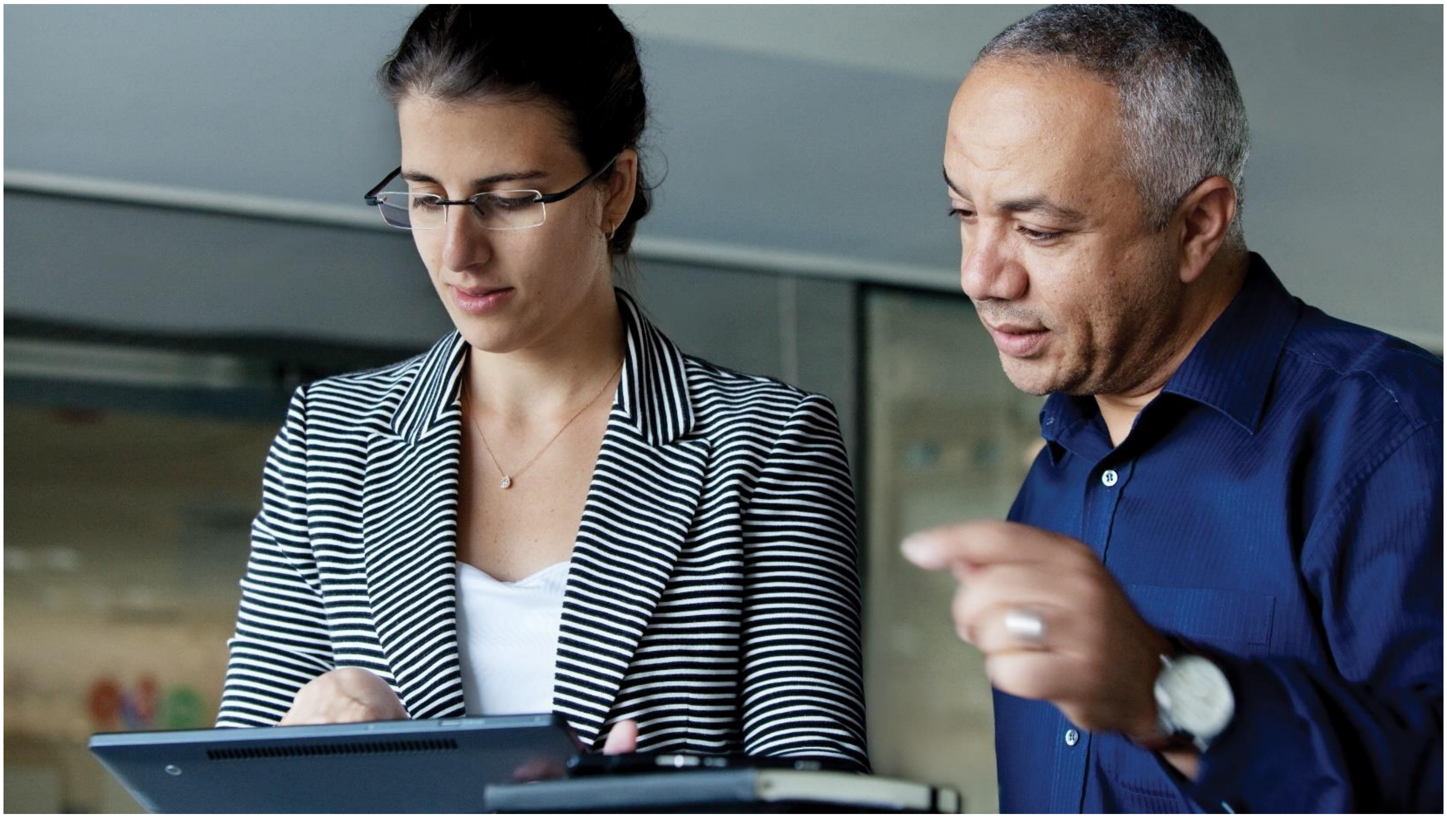


Once authenticated on a device, without any additional measures, the tokens that device uses to authenticate with other enterprise assets can be compromised and reused, effectively giving an attacker the privileges of the user without knowing the password.



Multifactor authentication is the right approach, but as it is deployed today presents an additional burden on users, so its use is only applied to specific assets that require more stringent security instead of being applied universally.

Windows Hello for Business provides users a natural approach to multi-factor authentication and in a way in which they will never forget their password because the user's own biometrics (via facial recognition or fingerprints) and device (via a certificate issued to the device during setup) combined constitute the password.The user simply sits within view of the device camera or presses the fingerprint reader on the device. The way Windows Hello is deployed yields breach-, theft- and phishing-proof identities that can be used to provide single sign-on to resources on-premises, on the web, and to devices by authorizing against user identities stored in Azure Active Directory.



AUGMENT CREDENTIAL PROTECTION WITH CREDENTIAL GUARD

Credential Guard prevents attackers from being able to retrieve credentials from operating system memory by maintaining them in a virualized environment that is only accessible by privileged system software, and is not directly accessible by privileged users. Credential Guard works to protect derived credentials used at logon time including NTLM hashes (one way functions) and Kerberos credentials (usernames and passwords, long-lived keys and ticket-granting ticket session keys). Unauthorized access to these secrets can lead to credential theft attacks, such as Pass-the-Hash or Pass-The-Ticket. Credential Guard protects against these types of attacks.

Partners should guide their customers to combine Credential Guard with Windows Hello for Business and Windows Server 2016 for comprehensive credential protection. Use of Windows Hello ensures that there are no usernames or passwords to phish and protects private keys from extraction, and Credential Guard protects derived credentials after logon. On Windows Server 2016 domains, Credential Guard also protects the private key of domain joined devices and authentication policies can require users to sign on from specific domain joined devices which are protected with Credential Guard. Should Credential Guard be disabled, the result is a denial of service instead of a security breach as priveledged users cannot logon and sensitive users remain protected.

Deploy Microsoft Intune

Intune is a cloud-based enterprise mobility management (EMM) service that helps enable a mobile workforce to be productive when using their personal devices — all while keeping corporate data protected.

Intune provides mobile device management, mobile application management, and PC management capabilities from the cloud.

MOBILE DEVICE MANAGEMENT

Intune helps provide secure management of personal and corporate-owned devices across the most popular platforms, including Windows, Windows Phone, iOS, and Android. You can provide users with the ability to enroll their own devices for management, as well as install corporate applications from the self-service company portal. In the case of large-scale device deployments, you can simplify enrollment using Apple Configurator or an Intune service account. With Intune's resource access policies, you can restrict users from accessing corporate resources on an unenrolled or noncompliant device. You can also apply device settings that can enable remote actions such as passcode reset, device lock, data encryption, or full wipe of a lost or stolen device.

MOBILE APPLICATION MANAGEMENT

With Microsoft Intune you gain control of your corporate data at the app level without having to lock down the entire device. This is commonly an issue with employees using their own personal devices who feel IT is intruding on their device when locking it down. With Intune, manageability and data protection is built directly into the Office mobile apps your employees are most familiar with, helping prevent leakage of company data by restricting actions such as copy, cut, paste, and save between Intune-managed apps and personal apps. Intune provides the flexibility to extend these capabilities to your existing line-of-business apps with the Intune App Wrapping Tool and offers secure content viewing using the Intune Managed Browser, PDF Viewer, AV Player, and Image Viewer apps. You also have the ability to deny specific applications or URL addresses from being accessed on a mobile device, and can push required apps automatically during enrollment. To further protect corporate information, you can selectively wipe managed apps and related data on devices that are unenrolled, no longer compliant, lost, stolen, or retired from use.

DEPLOY ADVANCED THREAT ANALYTICS

From detecting known malicious attacks to uncovering abnormal activity with machine learning and behavioral analytics, identify advanced persistent threats to your enterprise quickly — and take action swiftly — with Microsoft Advanced Threat Analytics.

WHAT IS ADVANCED THREAT ANALYTICS?

Advanced Threat Analytics (ATA) is an on-premises platform that can help you protect your enterprise from advanced targeted attacks by automatically analyzing, learning, and identifying normal and abnormal entity (user, devices, and resources) behavior. It addresses the following:

MALICIOUS ATTACKS	ABNORMAL BEHAVIOR	SECURITY ISSUES & RISKS
ATA detects known malicious attacks almost as instantly as they occur. • Pass-the-Ticket (PtT) • Pass-the-Hash (PtH) • Overpass-the-Hash • Forged PAC (MS14-068) • Golden Ticket • Malicious replications • Reconnaissance • Brute Force • Remote execution • Malicious DPAPI	Behavioral analytics leverage machine learning to uncover questionable activities and abnormal behavior. • Anomalous logins • Unknown threats • Password sharing • Lateral movement	ATA identifies known security issues using world-class security research. • Broken trust • Weak protocols • Known protocol vulnerabilities

HOW IS ATA UNIQUE?

The constant reporting of traditional security tools and sifting through them to locate the important and relevant alerts can get overwhelming. ATA provides a timeline view of events. The attack timeline is a clear, efficient, and convenient feed that surfaces the right things on a timeline, giving you the power of perspective on the who, what, when, and how. ATA also provides recommendations for investigation and remediation for each suspicious activity.

For a complete list of the detections and their descriptions, please see What Suspicious Activities can ATA Detect?

HOW IS ATA DEPLOYED?

ATA can be deployed either as an out-of-band solution by utilizing port mirroring without affecting the existing environment. ATA can also be deployed directly on the domain controllers without the added overhead of additional servers. Once deployed, ATA automatically starts analyzing and detecting suspicious activities.

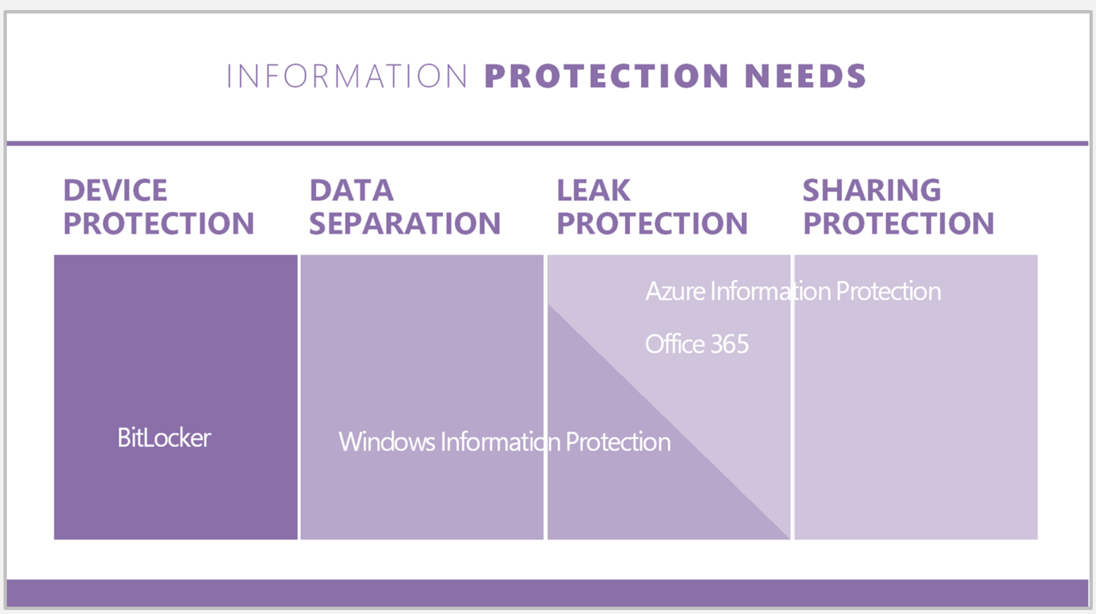
DEPLOY INFORMATION PROTECTION WITH BITLOCKER AND WINDOWS INFORMATION PROTECTION

Information security starts with device protection, meaning you need a solution that can protect your data while it is at rest, even if the device is lost or stolen. Windows includes BitLocker for this scenario. BitLocker is a data protection feature that integrates with the operating system and addresses the threats of data theft or exposure from lost, stolen, or inappropriately decommissioned computers. BitLocker achieves this by encrypting all user files and system files on the operating system drive, including the swap files and hibernation files, and checking the integrity of early boot components and boot configuration data.

WHEN IT COMES TO INFORMATION PROTECTION, THE FOLLOWING REQUIREMENTS ARE FUNDAMENTAL:

- Provide the means to identify personal versus corporate data, such that corporate data can be contained and securely wiped on demand.
- Provide the ability to prevent business data from leaking in an unauthorized way. For instance, with a solution that can prevent data from being copied from corporate documents into non-corporate locations.
- Ensure that business data can be securely shared with others within and outside of their organization.

With Windows Information Protection (WIP), Windows now includes the functionality necessary to identify personal and business information, determine which apps have access to it, and provide the basic controls necessary to determine what users are able to do with business data, for example by imposing copy and paste restrictions. WIP is designed to work with the Office 365 and Azure Rights Management, which can help protect business data when it leaves the device or when it is shared with others, such as via printing restrictions or limiting email forwarding. WIP is enabled enterprise-wide by turning on policies in Microsoft Intune or System Center Configuration Manager. WIP is fully integrated within the experience your users are already familiar with, and they can continue to use the apps that they, or IT, choose to access protected content. WIP does not require users to use special folders, change modes, use alternate apps or move into secure zones or partitions. Instead, the solution works completely behind the scenes and helps protect data wherever it lives on the device. It can continue the protection when data is copied to removable storage devices such as a thumb drives.The deployment and configuration of BitLocker and Windows Information Protections represent important project services opportunities for partners.



“

Clients need the ability to share data in the borderless enterprise. Information protection provides both proactive control and awareness of the risk associated the documents being distributed, shared.

WARREN SMALL
Vice President of Security,
Dimension Data

Deploy Azure Information Protection

Resources

- [Overview of Azure Information Protection]
- [Data Classification for Azure]
- [Azure Information Protection Data Sheet]
- [See how Azure Information Protection Protects Company Data]

Deploy Azure Information Protection

Azure Information Protection is a cloud-based solution that helps an organization classify, label, and protect its documents and emails. This can be done automatically by administrators who define rules and conditions, manually by users, or a combination in which users are given recommendations.

CLASSIFICATION AND LABELING

Classify data based on source, context, and content at the time of creation or modification, either automatically or manually. Once classified, a persistent label is embedded in the data and actions such as visual marking and encryption can be taken based on the classification and label.

PROTECTION AND USE RIGHTS

Protect sensitive data by encrypting it and allowing only authorized users access to the data. The protection is persistent to ensure data is protected at all times, regardless of where it's stored or with whom it's shared.

TRACKING AND REPORTING

Users can track activities on shared files and revoke access if they encounter unexpected activities. The solution provides rich logs and reporting that can be leveraged for compliance and regulatory purposes.

SOME OF THE KEY CUSTOMER CHALLENGES AND QUESTIONS YOU MAY FACE ARE:

- How should I classify data?
- How does Azure Information Protection help protect sensitive data?
- How can we securely collaborate inside and outside of our organization?

DEPLOY MICROSOFT CLOUD APP SECURITY

Bring the security capabilities traditionally available to on-premises systems to SaaS cloud applications like DropBox, Office 365, G Suite and Salesforce, and get deeper visibility, comprehensive controls, and enhanced protection against cloud security issues.

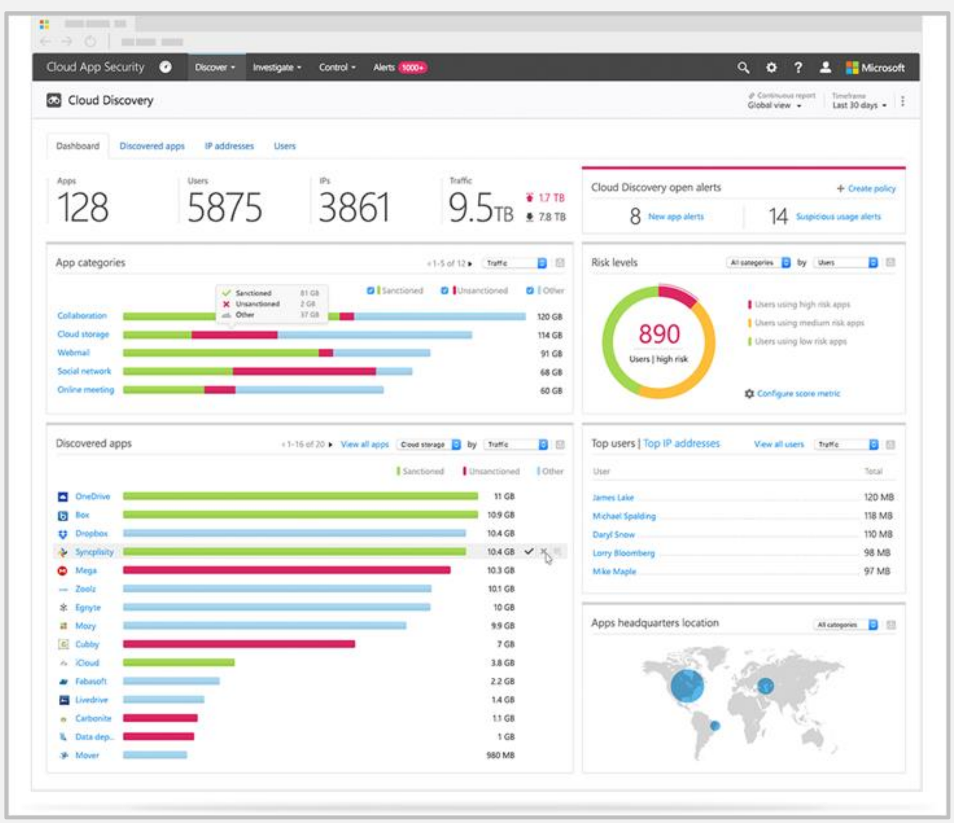
SOME OF THE KEY CUSTOMER CHALLENGES AND QUESTIONS YOU MAY FACE ARE:

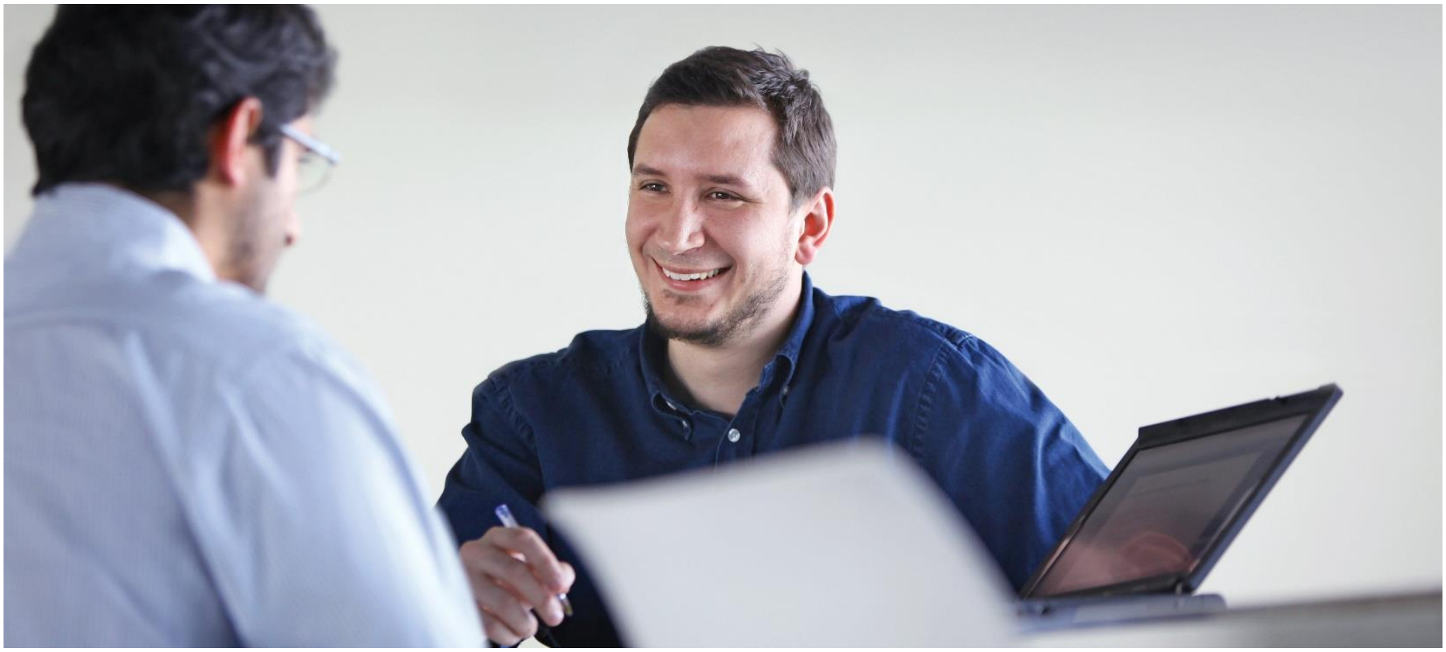
- How do I identify applications in use by employees?
- How do I ensure that sensitive data is protected?
- How do I track access to shared files and compliance issues?

How Cloud App Security Helps

APP DISCOVERY

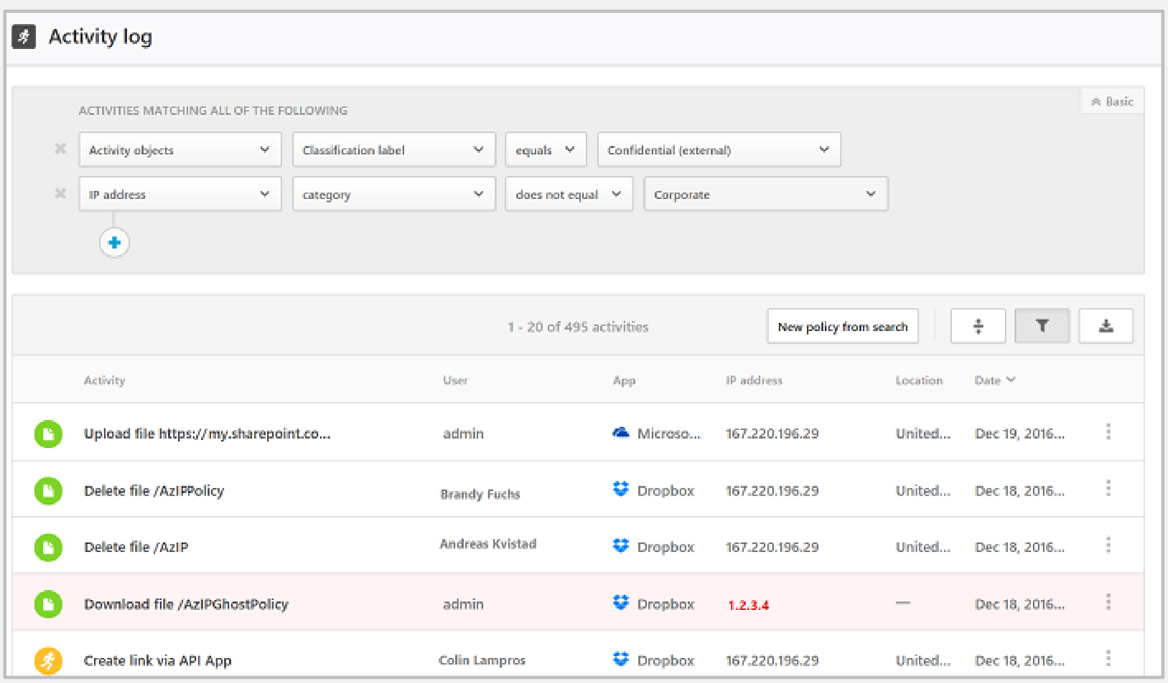
Discover all the cloud apps in your network, gain visibility into Shadow IT, and assess risk without installing agents. All information is gathered directly from your network firewalls and proxies by a log collector that runs on your network and receives logs over Syslog or FTP, and uploads them to Cloud App Security.





THREAT PROTECTION

Users can track activities on shared files and revoke access if they encounter unexpected activities. The solution provides rich logs and reporting that can be leveraged for compliance and regulatory purposes.



DATA CONTROL

Protect sensitive data by encrypting it and allowing only authorized users access to the data. The protection is persistent to ensure data is protected at all times, regardless of where it's stored or with whom it's shared. This is performed via the integrated app connectors to SaaS cloud application APIs. The following table illustrates the security capabilities available with each supported cloud application.

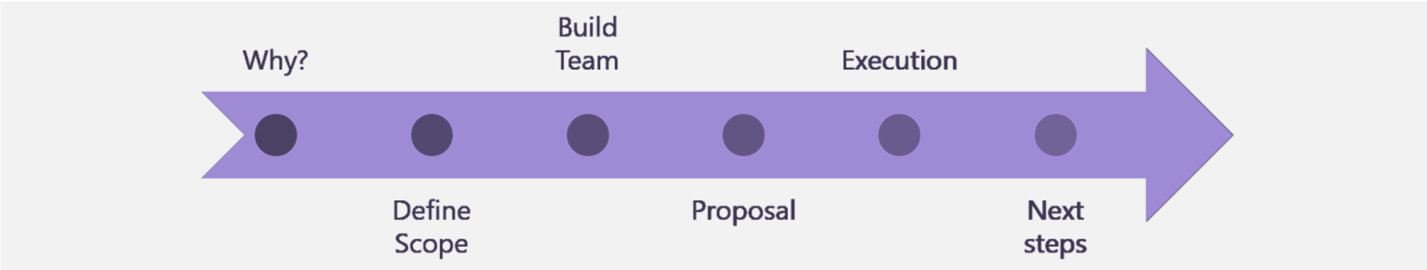
	Office 365	Box	Okta	G Suite	Service Now	Salesforce	Dropbox	AWS
List accounts	✔	✔	✔	✔	✔	✔	✔	✔
Group	✔	✔	✔	✔	✔	✔	✔	✔
Privileges	✔	✔	Not supported by provider	✔	✔	✔	✔	
User governance	✔	✔		✔	Coming soon	Coming soon	Coming soon	
Log on activity	✔	✔	✔	✔	✔	✔	✔	✔
User activity	✔*	✔	✔	✔ - requires Google Unlimited	Partial	Supported with Salesforce Shield	✔	Not applicable
Administrative activity	✔	✔	✔	✔	Partial	✔	✔	✔
Periodic file scan	✔	✔	Not applicable	✔	✔	✔	✔	Coming soon
Near-realtime file scan	✔	✔	Not applicable	✔ - requires Google Unlimited			Coming soon	
Sharing control	✔	✔	Not applicable	✔	Not applicable		✔	
Quarantine	✔	✔	Not applicable	Coming soon			Coming soon	
View app permissions	✔	Not supported by provider	Not applicable	✔		✔	Not supported by provider	
Revoke app permissions	✔		Not applicable	✔		✔	Not applicable	

Cloud App Sercurity is available standalone or as a part of EM+S E5. Learn more at https://www.microsoft.com/en-us/cloud-platform/cloud-app-security.

Plan a Proof of Concept

One of the key services in your project services arsenal is the Proof of Concept (PoC).

PROOF OF CONCEPT HIGH LEVEL FLOW



Why Perform a Proof of Concept?

Proof of concepts (PoC) serve several purposes. One of the primary aims is to overcome customer objections by demonstrating that the solution will solve the problem it's being designed for. The PoC also can serve as evidence that your practice can use for future engagements with the same customer or with new customers. Many times, the output of a PoC can be added to your practice's intellectual property list for demonstrations, or used to accelerate future solutions. Proof of concepts are one of the key tools when trying to displace the competition by rapidly showing value and hopefully a quick return on investment.

POC Execution

First, identify the technical resources needed for the PoC. This will include the technical implementation team, as well as project management for tracking the progress of the engagement. Beyond identification of resources, ensure all members of your team and your customer's technical team (if they are participating) are clear on responsibilities. During the PoC it is important that the initial design follows best practices and is designed for production (just scaled down) from the beginning. Communication is critical, so ensure that the progress of the PoC is communicated to all stakeholders on a regular basis.

Define Scope

A proper PoC is defined with a clear and concrete scope. Conduct an application design session (ADS) to align business and technical requirements and set clear goals. This should include:

- Identify workloads and features to demonstrate.
- Determine what you want to prove and which objections need to be overcome.
- Clearly demarcate responsibilities and set up organization.
- Set up subscriptions, define payment, and perform cost estimates of the PoC.
- Agree on the next step if success criteria are met.

Next Step

At the end of the PoC, create a report that explains the overall status of the PoC and any issues identified during the PoC. The report should elaborate on the pros and cons of the delivery and clearly explain the value prop of moving forward with a real implementation to the stakeholders along with expected production costs over time. Assuming the stakeholders agree to move forward, put a plan into place to deploy the PoC into production while ensuring that the PoC is designed for production usage

Implement a Secure Solution in Azure

If your project services offering calls for implementation on or deployment into Microsoft Azure, delivering a secure solution should be a critical piece of the value the project delivers. So, what are the security-related services and features that you should consider?

The table below provides a summary of select, important security-related services (with features of a service explicitly called out when that is more relevant) grouped into these major security categories: storage, networking, compute, database, identity and access management, and security management and monitoring. Within each category is a selection of services or resources to use, the security objective you want to accomplish, and what Azure services or features you should leverage to meet that security objective. This list is constantly evolving and is more comprehensive than what can be covered in this playbook. For the most up-to-date and comprehensive treatement, see https://docs.microsoft.com/en-us/azure/security/azure-security-services-technologies.

STORAGE

If you are using…	And you want to…	Then consider…
Azure Storage	Encrypt data at rest	• Service Encryption • Client Side Encryption
	Protect data in transit	• File Shares with SMB 3.0 Encryption • TLS protocol
	Control data access	• Account Keys • Shared Access Signatures • Stored Access Policy • Cross Origin Resource Sharing (CORS)
	Audit usage	• Storage Analytics
Azure Data Lake Store	Encrypt data at rest	• Block encryption
	Protect data in transit	• TLS protocol
	Control data access	• Access control lists • Firewall
	Audit usage	• Audit logs • Diagnostic logs

NETWORKING

If you are using...	And you want to...	Then consider...
Virtual Networks	Secure the virtual network perimeter	• Network Security Groups • Azure Application Gateway
	Secure hybrid connectivity	• Azure VPN Gateway • Azure ExpressRoute • Azure Application Proxy
	Audit usage	• Azure Network Watcher • Log analytics for Network Security Groups

COMPUTE

If you are using...	And you want to...	Then consider...
Virtual Machines	Secure Vvrtual machines	• Azure Disk Encryption • Microsoft Antimalware • Diagnostic logs
Cloud Services	Secure cloud services	• Microsoft Antimalware • Diagnostic logs
App Services	Secure app services	• Enforce HTTPS • TLS mutual authentication • Diagnostic logs

DATABASE

If you are using...	And you want to...	Then consider...
Azure SQL Database	Encrypt data at rest	• Transparent data encryption • Column level encryption • Always encrypted
	Protect data in transit	• TDS over TLS protocol
	Control data access	• SQL Authentication • Azure Active Directory Authentication • Dynamic Data Masking • Row Level Security • Role Membership & Object Level Permissions • Firewall
	Audit usage	• SQL Database Usage
	Detect threats	• SQL Database Threat Detection

IDENTITY & ACCESS MANAGEMENT

If you are using...	And you want to...	Then consider...
Azure Services	Control management plane access to Azure Services	• Azure Resource Manager • Role Based Access Control
	Manage identity	• Azure Active Directory • Azure Active Directory B2C • Azure Active Directory Domain Services
	Store secrets & encryption keys	• Azure Key Vault
	Audit usage	• SQL Database Usage
	Protect identities	• Azure Multi-Factor Authentication

SECURITY MANAGEMENT & MONITORING

If you are using...	And you want to...	Then consider...
Azure Services	Manage and monitor security of Azure resources	• Azure Security Center • Operations Management Suite (OMS)
	Manage & audit logs	• Log Analytics • Azure Log Integration

THE MICROSOFT AZURE IP ADVANTAGE

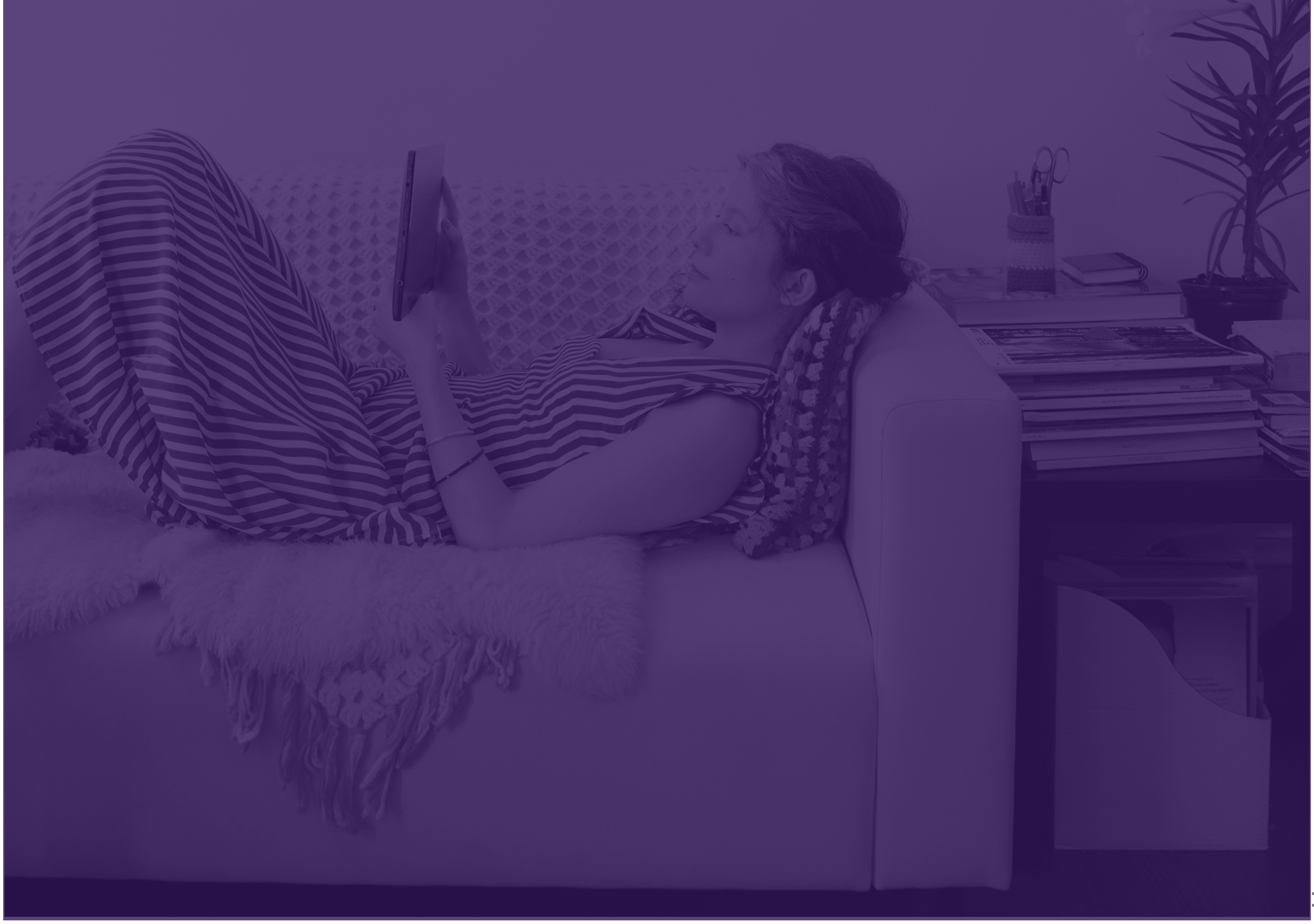
Microsoft Azure IP Advantage program represents the industry's most comprehensive protection against intellectual property (IP) risks. The Microsoft Azure IP Advantage program includes the following benefits:

- Best-in-industry intellectual property protection with uncapped indemnification coverage will now also cover any open source technology that powers Microsoft Azure services, such as Hadoop used for Azure HD Insight.
- Makes 10,000 Microsoft patents available to customers that use Azure services for the sole purpose of enabling them to better defend themselves against patent lawsuits against their services that run on top of Azure. These patents are broadly representative of Microsoft's overall patent portfolio and are the result of years of cutting-edge innovation by our best engineers around the world.
- Microsoft is pledging to Azure customers that if Microsoft transfers patents in the future to non-practicing entities, they can never be asserted against them.

With these changes, Microsoft now offers our customers industry-leading protection against intellectual property risk in the cloud. Learn more at aka.ms/AzureIPAdvantage

> Nothing produces more 'aha!' moments than when a customer first sees advanced threat protection block malicious emails that normally would have gone into their inbox.

BRUCE WARD
Vice President of Business Strategy,
Peters & Associates



Understanding Managed Services

With managed services, you can help your customers on a regular basis by offering white-glove services. As a managed service provider, your offerings can span from planning and enablement to day-to-day operations and support.

Managed services is not a new business model. For more than 20 years, large enterprises have relied on service providers to manage their IT assets. Whether you call them an outsourcer, an RMM provider, or a managed IT provider, service providers have been managing their customers' workloads — either in their own data centers or those operated by their customers. Cloud, however, requires a new method of management because of its focus on scale, elasticity, and automation. For CIOs, cloud represents a paradigm shift in the way they think about embracing IT. Dev-ops has completely changed the way applications are developed and maintained. The hyper-scale nature of cloud provides a completely new meaning to scalability, elasticity and resiliency — and has redefined how applications are architected and delivered. The pay-as-you-go model provides a fail-fast, agile method of app development. Device and data proliferation means customers want to — and can — do so much more with their IT assets, with cloud providing the computing resources to do so. Because of cloud, CIOs are demanding a new way to think about data governance and security. A cloud MSP is someone who helps their customer transition to (and embrace) this paradigm shift in technology — by guiding them in all aspects of their cloud journey. From consulting to migrations, to operations management, cloud MSPs show customers all the benefits that come with cloud adoption.

PLANNING

- Assess your customer's IT environment and determine risks and policies that are viable security opportunities.
- Deliver ongoing Security Assessments utilizing Secure Score.
- Offer customers a roadmap based on their Secure Score mitigation or recommendations.
- Provide TCO and ROI analysis for moving their security to the cloud.

ENABLEMENT

- Migrate workloads to Azure and Office 365.
- Remediate security gaps found in the Security Assessment Workshop.
- Address security needs across enterprise, including on-premises.
- Optimize security workloads for apps running across on-premises and in Azure and Office 365 cloud environments.
- Optimize advanced security workloads.

SUPPORT OPERATIONS

- Offer further support while delivering on SLAs and uptime guarantees.
- Operate and monitor your customer's Azure, Office 365, and hybrid cloud environments.
- Provide your customers with governance over their cloud strategy by managing their policies.

Read the MSP Playbook →

Managed Services Offerings

The project services discussed earlier are all potential offerings in your managed services offering. Beyond those, as an MSP you can offer a much broader set of long-term support and consulting offerings.

In the Microsoft Cloud Practice Development Study, 484 partners that identified as having a Security practice were asked which managed services they offered within their practices. The results are below. Consider this data when designing your managed services-based offerings.

MANAGED SERVICES

MANAGED SERVICES BY REGION	Total n=484	APAC n=24*	Canada n=18*	CEE n=27*	Germany n=36	LATAM n=41	MEA n=32	UK n=43	US n=119	WE n=103
Configuration	54%	42%	44%	52%	39%	54%	59%	56%	58%	58%
Help-desk support	52%	50%	50%	33%	53%	37%	47%	65%	63%	50%
Desktop & Device Management & Support	47%	50%	44%	41%	36%	29%	72%	56%	55%	41%
Patch management	45%	58%	39%	30%	47%	29%	41%	63%	56%	41%
Active Directory Federation & Management	45%	33%	50%	37%	53%	49%	53%	35%	43%	48%
Domain Management	44%	50%	39%	44%	33%	37%	47%	53%	57%	36%
Data loss prevention	44%	38%	28%	59%	22%	59%	47%	42%	47%	45%
Troubleshooting	43%	38%	33%	33%	47%	37%	31%	49%	55%	44%
Enable multi-factor authentication	39%	38%	50%	26%	42%	29%	34%	51%	49%	34%
Advanced Threat protection	38%	42%	33%	33%	42%	29%	53%	30%	34%	43%
New Accounts Added & Removed	37%	50%	39%	30%	28%	12%	44%	58%	51%	25%
User Rights & Account Management	36%	33%	39%	30%	25%	24%	34%	47%	50%	27%
Hybrid environment support	34%	33%	56%	22%	33%	22%	34%	33%	45%	32%
Microsoft support	34%	38%	44%	26%	25%	17%	34%	47%	51%	23%
Identity & access control management	33%	38%	56%	15%	36%	27%	28%	35%	41%	30%
Data migration management	33%	33%	50%	30%	25%	34%	31%	33%	43%	27%
Password complexity management	33%	33%	28%	26%	14%	20%	38%	49%	47%	31%
Reactive Help Desk Support	33%	38%	33%	11%	22%	17%	31%	51%	50%	26%
Activity and log audit management	32%	25%	33%	30%	28%	29%	31%	28%	35%	31%
Mobile device management	30%	33%	39%	11%	31%	10%	31%	44%	41%	28%
Performance Monitoring and Reporting	30%	25%	28%	26%	36%	22%	31%	35%	42%	22%
Single Sign-On Management	30%	21%	39%	19%	31%	20%	22%	26%	40%	30%
Threat detection, monitoring & mitigation	28%	29%	28%	19%	25%	15%	38%	26%	42%	21%

User monitoring	28%	21%	39%	30%	11%	27%	19%	35%	44%	19%
Policy recommendation and improvement	26%	33%	22%	11%	28%	10%	25%	37%	37%	23%
Auditing, Security & Compliance assessments	26%	25%	22%	19%	8%	29%	22%	23%	37%	24%
Security Management & Identity Protection	25%	42%	28%	19%	14%	20%	19%	30%	34%	20%
Managed Access to Email Groups	24%	25%	22%	15%	14%	20%	41%	35%	34%	15%
Reporting and Analytics	23%	29%	50%	26%	25%	15%	19%	23%	33%	13%
Cyber security risk assessment	23%	25%	17%	11%	8%	17%	9%	26%	39%	17%
Information protection management	21%	13%	22%	19%	17%	12%	25%	28%	33%	14%
Application Lifecycle Management & Support	19%	17%	11%	15%	14%	20%	16%	14%	27%	16%
Data leakage prevention	19%	13%	6%	22%	6%	20%	31%	21%	24%	16%
Auditing, Security & Compliance enablement	18%	13%	11%	7%	6%	17%	16%	21%	31%	17%
Incidence response management	18%	17%	17%	7%	8%	12%	16%	23%	32%	13%
Penetration testing	18%	13%	6%	15%	17%	17%	16%	28%	24%	15%
Reports and dashboard Maintenance	18%	21%	39%	11%	11%	10%	25%	14%	29%	8%
Identity as a Service	14%	0%	17%	15%	11%	22%	9%	16%	18%	12%
Data classification and data governance	13%	4%	17%	7%	11%	12%	16%	12%	21%	7%
Productivity cloud app usage management	11%	13%	22%	11%	0%	2%	13%	9%	20%	6%
Security operations center management	10%	13%	0%	11%	0%	10%	16%	7%	18%	6%
CISO or security analyst as a service	9%	17%	6%	7%	6%	7%	9%	5%	15%	7%
We do not offer any of these managed services	8%	8%	6%	15%	17%	5%	6%	2%	8%	8%

REVENUE

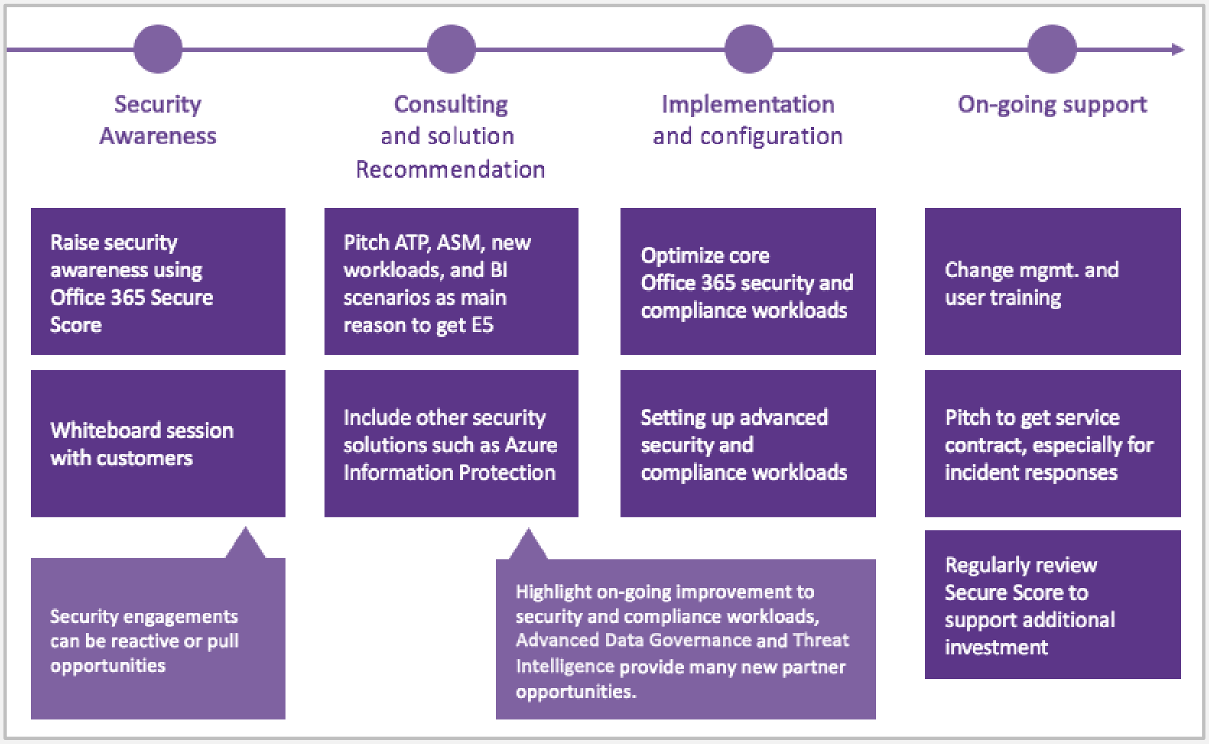
Total Median (n=445)	$46,355
SMB (n=386)	$43,274
Enterprise (n=59)	$489,815

When targeting your managed services, our research with partners emphasized the importance of targeting the enterprise customer to attain significantly higher managed revenues.

Source: Microsoft Cloud Practice Development Study, MDC Research, June 2017.

Going from Project Services to Managed Services

Build your practice to from providing project services such as assessments and deployments to ongoing managed security services and operational support. This will help create annuity income streams with higher preofessional services margins.



SEPARATE SECURITY MANAGED SERVICES TEAMS FROM TRADITIONAL IT MANAGED SERVICES TEAMS TO LAND NEW CLIENTS

Separate security services teams can help build a new solution message for your organization. Most partners have a single or integrated team offering their managed services and security services.

A small share of partners are beginning to recognize opportunities to land clients that traditionally would not engage them for traditional managed IT services using security service offerings. Spinning off a separate security services team has allowed them to generate a differentiated offering that positions them as experts in the security service space.

Few have separated managed services and security services teams; challenges integrating security into managed services teams center around education.

Because most partners are using the same staff to market and sell their security services business as their traditional IT and managed services business, the greatest challenge is ensuring their staff has the right marketing/sales resources and solution knowledge to support a security services conversation.

Compared to many IT offerings today, security services require more intensive education of clients about the risks and solutions available.

Keep in mind that client conversations and education about security and security services are increasing with C-level or non-technical BDMs, so a different level of information is required to support that interaction.

Ensure you are solving a problem. Attach managed services wherever possible and make sure you have a very robust offering around it. This allows for a scalable high margin business.

NICK SONE
CEO of Ensyst

Accelerate your Managed Service Model

Resources

Take your managed service provider model to the next level by becoming a Microsoft Azure Cloud Solution Provider

- ➔ Getting Started
- ➔ Cloud Reseller FAQ
- ➔ Azure Managed Services Playbook for CSP Partners
- ➔ Empowering digital transformation with Microsoft cloud solutions for hosting, cloud and managed service providers
- ➔ View the CSP Infographic
- ➔ Learn about Incentives for CSPs

Accelerate your Managed Service Model

The Microsoft Cloud Solution Provider (CSP) program enables partners to directly manage their entire Microsoft cloud customer lifecycle.

Partners in the CSP program utilize in-product tools to directly provision, manage, and support their customer subscriptions. Partners can easily package their own tools, products, and services, and combine them into one monthly or annual customer bill.

CSP DIRECT

The CSP Direct model is great for partners who have the infrastructure in place to do it all. If your business meets these requirements and you are ready to go, enroll today.

CSP DIRECT REQUIREMENT CHECKLIST

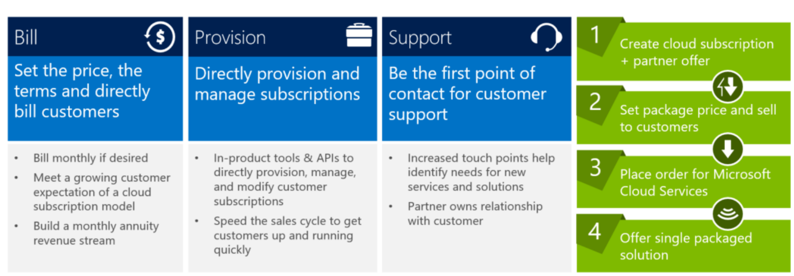
- Services business model
- Customer support infrastructure
- Customer billing and invoicing capabilities
- Ability to scale

KEY SERVICES FOR THIS OFFERING

- You are the first point of contact for your customers' needs.
- You own and control the billing cycle.
- You sell integrated offers and services — one sales motion to drive services, attach, and upsell.
- You receive in-product tools to directly provision, manage, and support your customers.

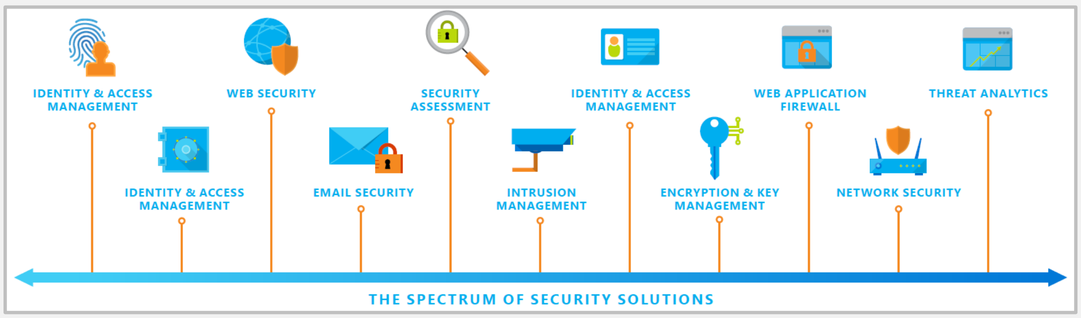
CSP INDIRECT

Spend more time with your customers and provide specialized service offerings. If you're not interested in building an infrastructure to provide customer support and billing, get connected with an Indirect Provider.



Security as a Managed Service

The current digital security landscape for businesses can accurately be described in one word: complicated. More numerous and advanced threats, more nebulous and complex compliance requirements, more difficult and intricate infrastructure to secure. Simply put, keeping data, workloads, and users secure is more than a full-time job — and organizations are having trouble keeping up. The graphic below illustrates the myriad offerings and postures taken by security companies, highlighting the fragmented nature of the market. However, this harsh environment represents a significant **opportunity for partners looking to offer security as a managed service.**



For even the most adept IT and incident response teams, effectively handling patching, malware threats, and intrusion detection can be too difficult to manage without help. MSPs can offer their services to ensure enterprise clients are secured. But in this age where we hear about security breaches almost daily, how can you help your customers stay ahead of the game, and avoid becoming a statistic?

KEY CUSTOMER CHALLENGES AND QUESTIONS

1. They lack the tools and expertise to effectively get ahead of security threats and compliance risks.
2. They are unable to identify, assess, and mitigate security risks.
3. They are able to detect threats, but are unable to correctly respond in a timely fashion.
4. They are unfamiliar with security best practices and the overall threat landscape.
5. They are confused with the myriad offerings out there.

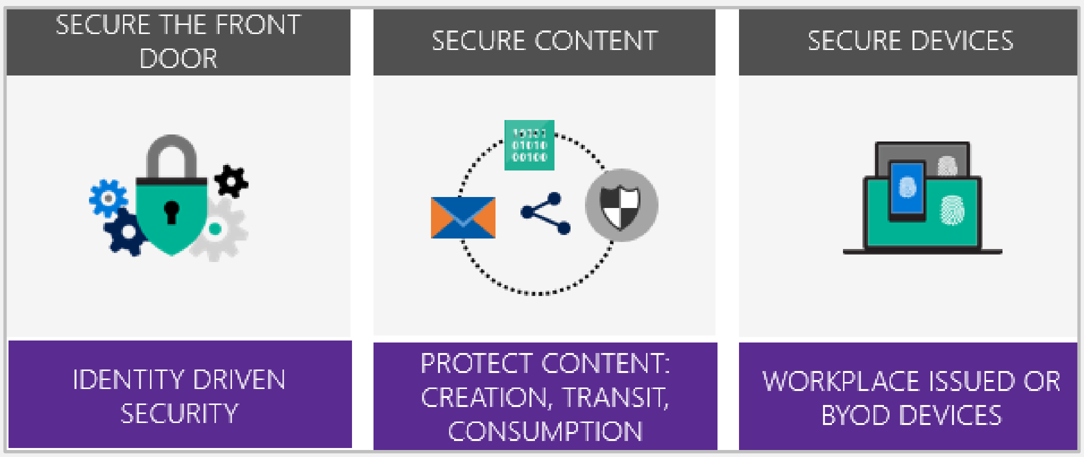
EXAMPLE OF A SECURITY MANAGED SERVICES OFFERING

Basic	Pro	Premium
$ per user per month with Office 365	$$ per user per month with Office 365 and EM+S	$$$ per user per month with Office 365 Advanced Security & Compliance and EM+S

• Plan and deploy Office 365 capabilities
• Provide end-user training
• Email and data migration to cloud
• Deliver end user support and incident management
	• Plan and deploy Enterprise Mobility Suite
	• Increase incident and user support roles
	• Create monthly services health reports and
	manage critical IT services dashboards
	• Enable Advanced Threat Analytics, device management and Identity Management services
	• + Basic benefits
		• Monitor the following services:
		  • SaaS app usage
		  • Top targeted users
		  • Unusual signs-ins
		  • Potential threats
		  • Sensitive information sharing to external users
		• Manage customers security policies including secure score reports
		• Support data classification policies
		• +Pro and Basic benefits

IDENTITY IS FUNDAMENTAL

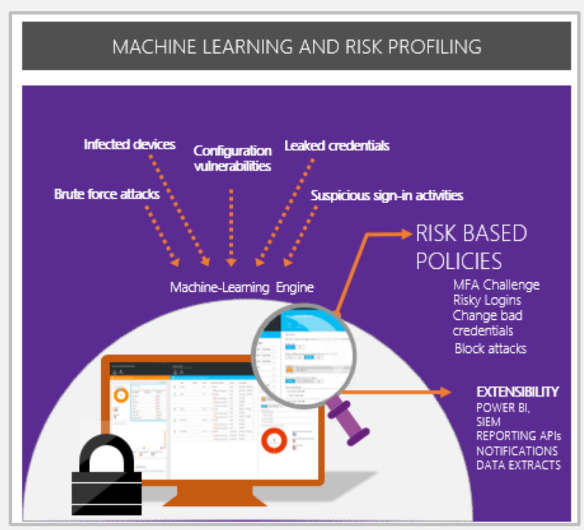
As you consider building your managed services offering for your security practice, notice how it helps build a deepr relationship supporting your customer. You start, metaphorically, by securing their front door by providing identity-driven security. With identity in place, you can evolve to securing content (protecting content, managing content creation, transit, and consumption) and securing devices (both workplace-issued devices and staff personal devices).



SECURE THE FRONT DOOR

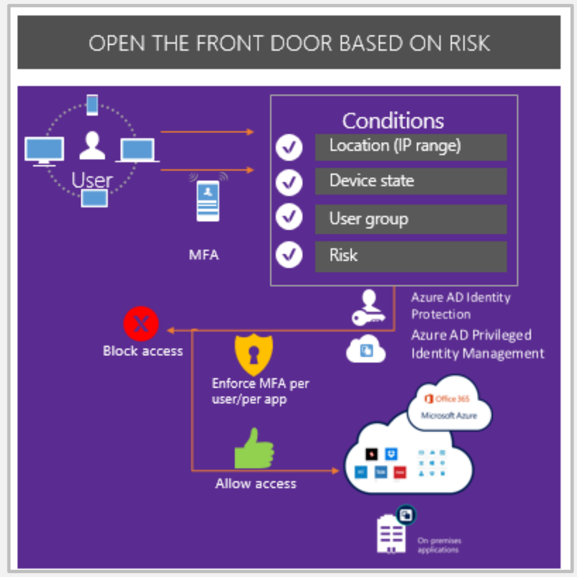
Just like for a house, the front door lets you establish identity and decide who to let in, and enables you to limit access. Now, apply that to your customers' data and digital assets. You want to be able to answer YES to the following:

- Do you know who is accessing your data?
- Can you grant access to your data based on risk in real time?
- Can you quickly find and react to a breach?



To get to YES, you need a solution that adapts in a changing environment and learns what is normal credential use from what looks questionable. This is what you get when by implementing risk-based policies that are driven by machine learning. The addition of machine learning adds intelligence that lets the system monitor and identify brute force attacks, infected devices, configuration vulnerabilities, leaked credentials, suspicious sign-in activities, sign-ins from atypical locations, or multiple sign-ins from geographically distant locations in less time than the travel would take. The system detects those types of risk events and assigns a risk level that indicates how strongly an event indicates a compromised identity. With risk level assigned to the risk event detected, you can react by executing your risk-based policies for the detected threat in question. You might issue a Multi-Factor Authentication (MFA) challenge, block risky logins, or change credentials known to have been compromised.

If this sounds like science fiction, consider this example, which uses machine learning to assign a risk score to a user (e.g., base on intelligence like XYZ), which in turn, is evaluated by a condition that when the risk is determined to be high, the system will mitigate the risk by issuing an MFA challenge. Within Azure Active Directory, you can use the Identity Protection feature to detect the potential vulnerability affecting an organization identity by assigning it a risk level. And you can configure automated responses to detected suspicious actions by their level of risk of compromise using Conditional Access. You can, for example, choose to block access, or to allow access but require Multi-Factor Authentication or a password change. You can later review a report of the users flagged for risk, the number of risk events triggered, and the status of any remediation actions taken. You can also take action to close any listed risk events manually, which can help the machine learning algorithm to improve the classifaction of similar events in the future.



As an added layer of security, you could utilize Privileged Identity Management to ensure privileged users (e.g., those with administrator level credentials) must first escalate their user their role to admin (refered to as activating the role). Role activation may require approval by other users in the organization and the admin role only applies for a limited window of time.

EXAMPLE COMPONENTS OF AN IDENTITY OFFER

Consider the following table which provides an example approach to selling identity-driven security.

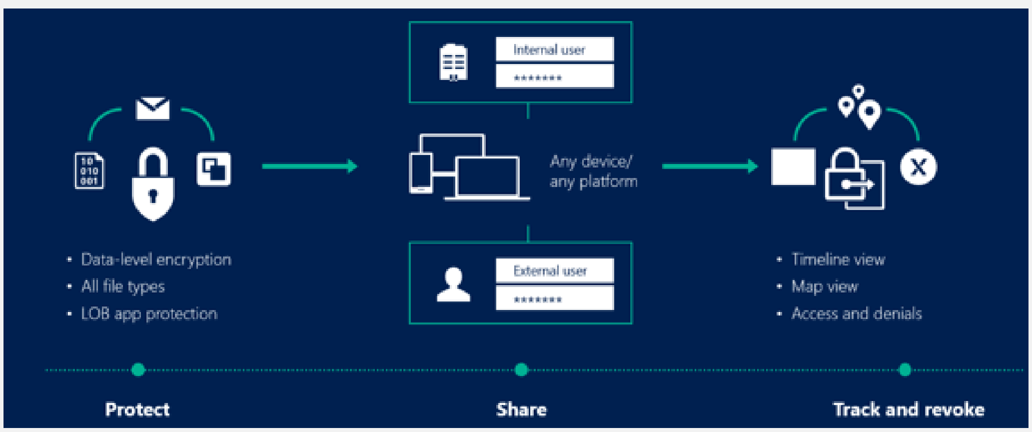
Secure the Front Door	Capabilities	Enabling Technologies	UP-SELL/ CROSS-SELL
 Identity Driven Security	1. Risk-based Conditional Access and Multi-Factor Authentication 2. Advanced security reporting 3. Identify threats on-premises 4. Identify high-risk usage of cloud apps, user behavior, detect abnormal downloads, prevent threat	Azure Active Directory Premium P2 Azure Active Directory Premium P1 (*included in P2*) Cloud App Security	No Prerequisites. Every Organization needs to secure their front door. Best Position with: 1. Business Premium 2. E3 3. E5 4. Azure Deals

SECURE CONTENT

Now that you have secured the front door, it is time to turn your attention to securing the inside of the house — its content. In the context of your customer and their digital assests, you want to be able to answer YES to this question: "Can you protect your data in devices, in the cloud, and in transit?"

Securing content means being able to take a series of steps against the content:

- Define policies, templates and rules for content
- Define exceptions
- Define content classification labels
- Detect the SaaS apps that are in use and assigning them a security risk rating
- Define data copy and usage rules for apps on devices
- Control sharing of data based on identity
- Detect data and users violating content policies
- Enable yourself to take action to maintain the security of content



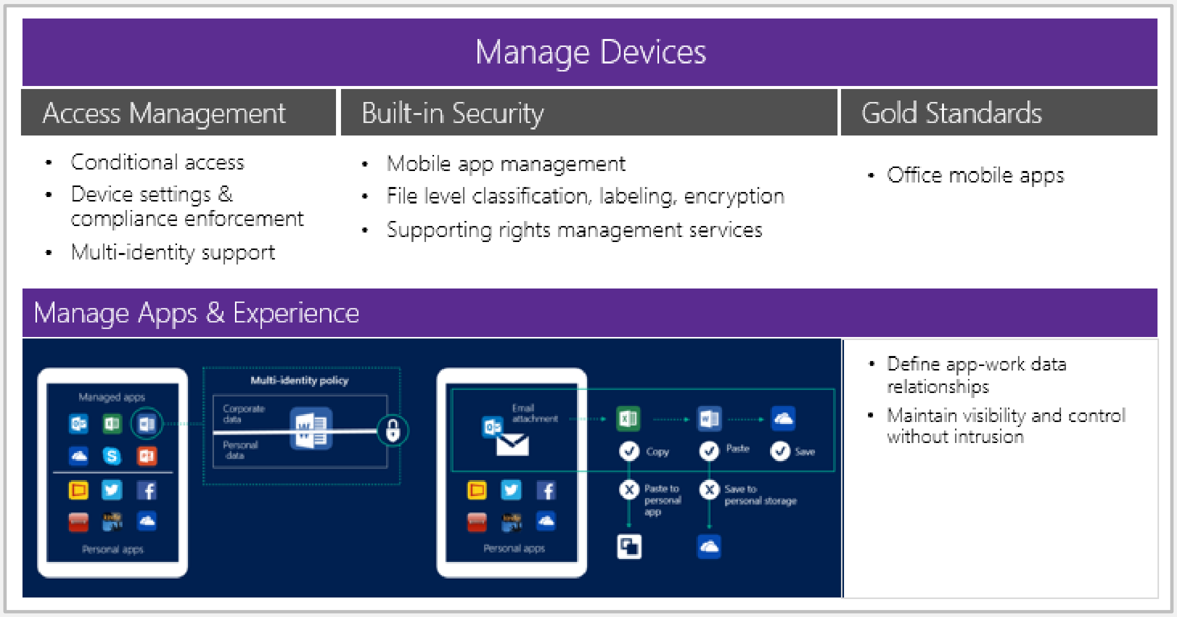
EXAMPLE COMPONENTS WITHIN A CONTENT PROTECTION OFFER

The following table provides an example approach to selling content protection.

Secure Content	Capabilities	Enabling Technologies	Up-sell/Cross-sell
 PROTECT CONTENT: CREATION, TRANSIT, CONSUMPTION	1.Shadow IT Detection: Discovering Apps and Risk Scoring 2.Intelligent Classification and Tagging of content 3.Document encryption, tracking, revocation 4.Monitoring shared files and responding to potential leaks 5.Data segregation at a device/app level	Azure Active Directory Premium P1 Cloud App Security Azure Information Protection P2 Microsoft Intune	Access to Office Mobile Apps is a prerequisite. Best Position with: 1. Business Premium 2. E3 3. E5

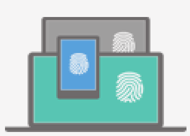
SECURE DEVICES

Devices represent other doors into your data and digital assets, and need to be secured accordingly. Similar to the example used in "Secure the Front Door," the process for securing devices also includes intelligent access management. You can use Conditional Access to restrict access based on the the device platform (e.g., iOS, Android) and wether or not it is enrolled into the mobile device management solution provided by Microsoft Intune. You can also apply constraints on a per-mobile app basis using the mobile application management capabilities of Microsoft Intune.



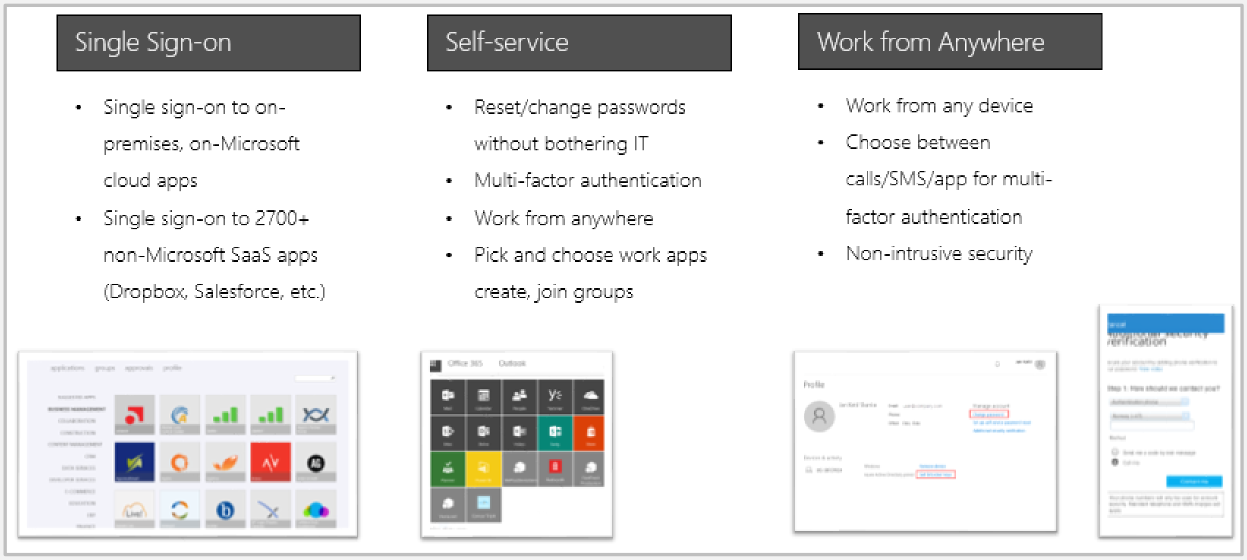
EXAMPLE COMPONENTS WITH A DEVICE PROTECTION OFFER

The following table provides an example approach to selling device protection.

Secure Devices	Capabilities	Enabling Technologies	Up-sell/Cross-sell
 Workplace Issued or BYOD Devices	1.Conditional Access 2.Device and App access level controls: PIN 3.Device and App encryption at rest 4.Save-As, Copy, Paste restrictions 5.Device and App level data wipe	Azure Active Directory Premium P1 Microsoft Intune	No Prerequisites Best Positioned with: 1. Business Premium 2. E3 3. E5

DELIVER A GREAT EMPLOYEE EXPERIENCE

It's no secret that ease-of-use and security are often at odds. In helping secure your customers, it is important to also deliver a great experience for the users who will be affected by the security solution deployed. Turn security into an improved experience for your customer's users by enabling capabilities like single sign-on, self-service password reset, and the ability to securely use their own personal devices without IT intrusion.



EXAMPLE COMPONENTS OF A GREAT EMPLOYEE EXPERIENCE OFFER

The following table provides an example approach to a great experience while delivering tight security.

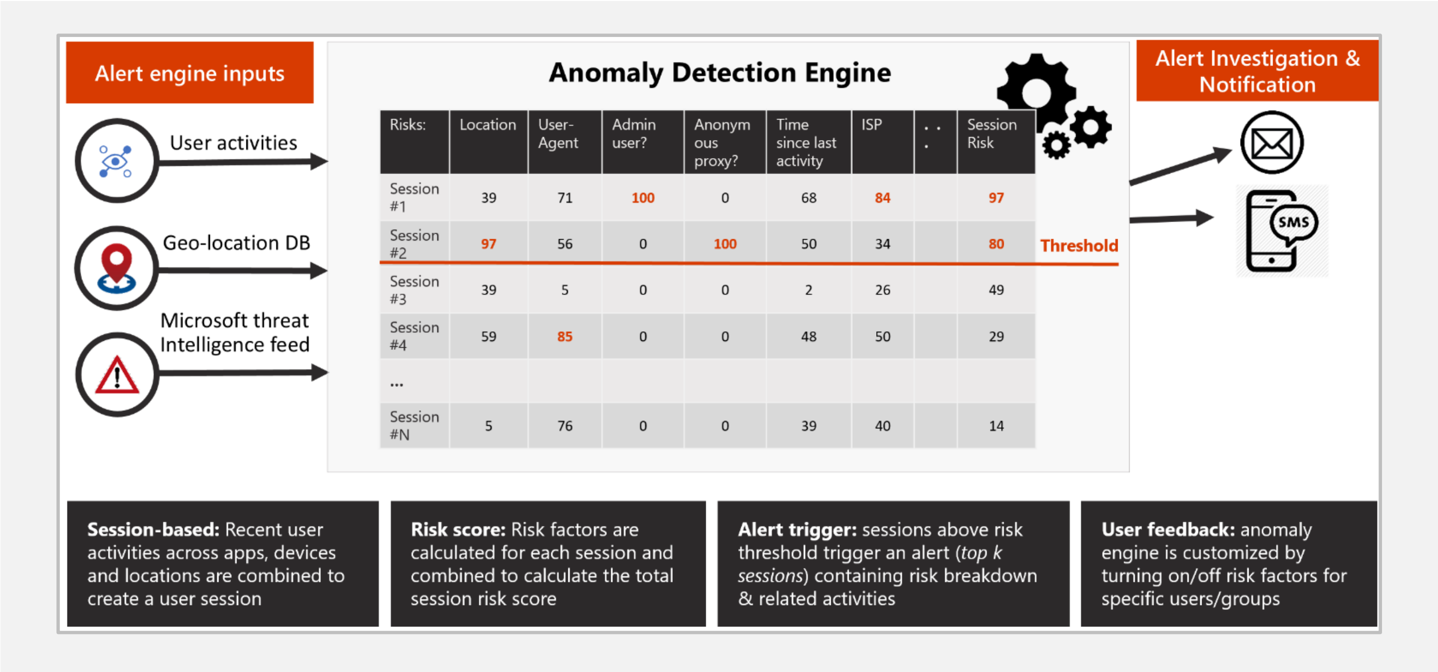
Great Employee Experience	Capabilities	Enabling Technologies	Up-sell/Cross-sell
Productivity without Compromise	1. Single Sign-On 2. Self Service 3. Advanced Multi-Factor Authentication 4. App Proxy without the need of VPN	Azure Active Directory Premium P1	No Prerequisites, up-sell with any Office 365 offer

SECURE & MONITOR YOUR CUSTOMER'S OFFICE 365 ENVIRONMENT WITH OFFICE 365 ADVANCED SECURITY MANAGEMENT

Advanced Security Management (ASM) provides enhanced visibility and control over Office 365. It increases the security of Office 365 environments by providing:

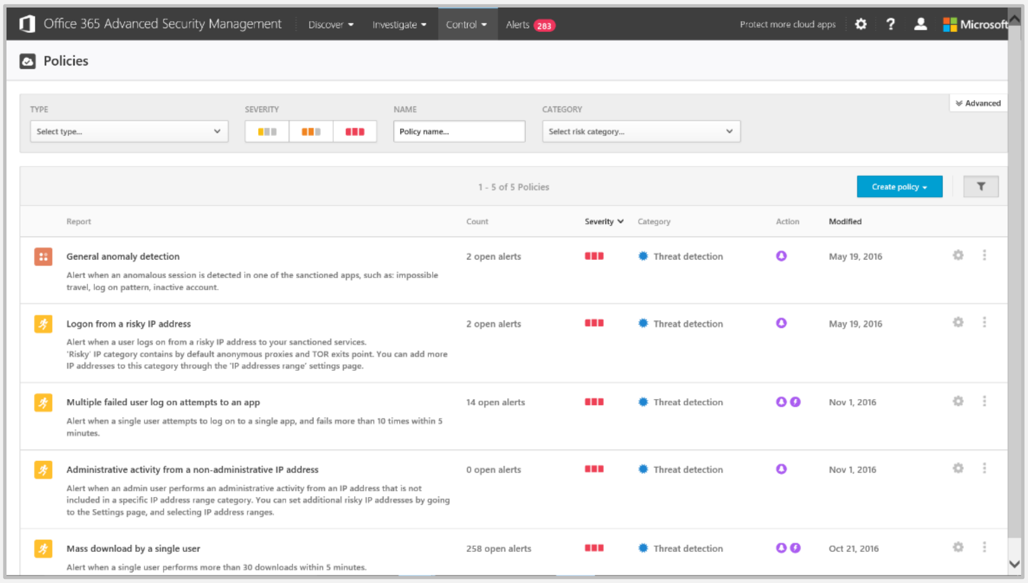
THREAT DETECTION

ASM enables you to identify high-risk user activities and abnormal usage (e.g., impossible travel, logon from unknown or risk IP address, mass downloads by a single user), security incidents, and threats. It provides insights into potential breaches by identifying anomalies in your Office 365 environment, applies behavioral analytics to help you assess your risk, and leverages Microsoft's Threat Intelligence to identify known attack pattern activities originating from risky sources.



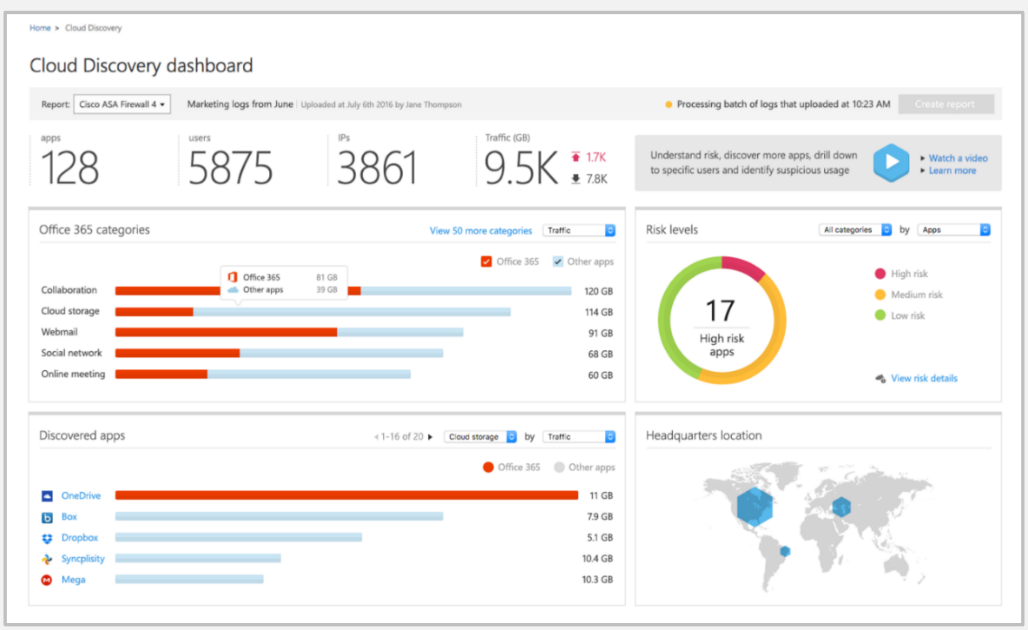
ENHANCED CONTROLS

ASM provides both out of the box and customizable policies, and provides visibility into violations of those policies as well as supports a response that includes the ability trigger email or SMS text message alerts and automatic remediation (such as by user suspension). Additionally, it enables you to assess the risk from SaaS apps that have permissions into Office 365 data and to remove their rights from a central location.



DISCOVERY & INSIGHT

ASM enables a view into your Office 365 usage via an easy to understand dashboard that helps you keep tabs on shadow IT by enabling the discovery of over a 1,000 SaaS applications in use on your network.



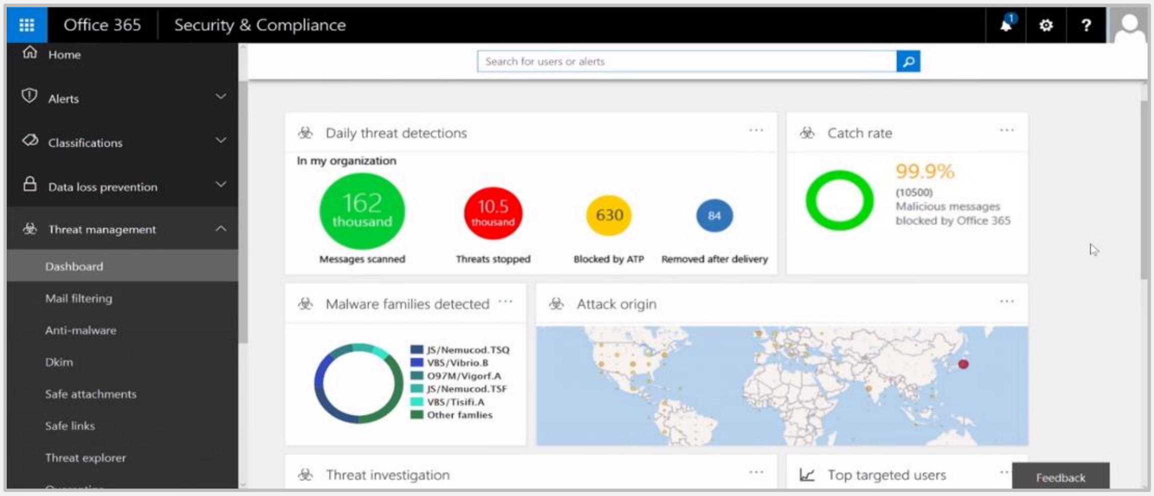
Microsoft

THE PARTNER OPPORTUNITY

Office 365 is the most widely-used productivity suite. For many organizations Office 365 is the main portal through which employees access company resources: email, calendars, documents and the company directory. The core opportunity for partners is to help customers understand the importance of leveraging ASM to secure their Office 365 environment, helping them with deployment, tuning and providing training. A managed service offering built around providing on-going monitoring services on behalf of the customer that bundles Office 365, ASM and the monitoring services fees into a single monthly fee represents an opportunity for partners to capture more profitable and recurring revenue.

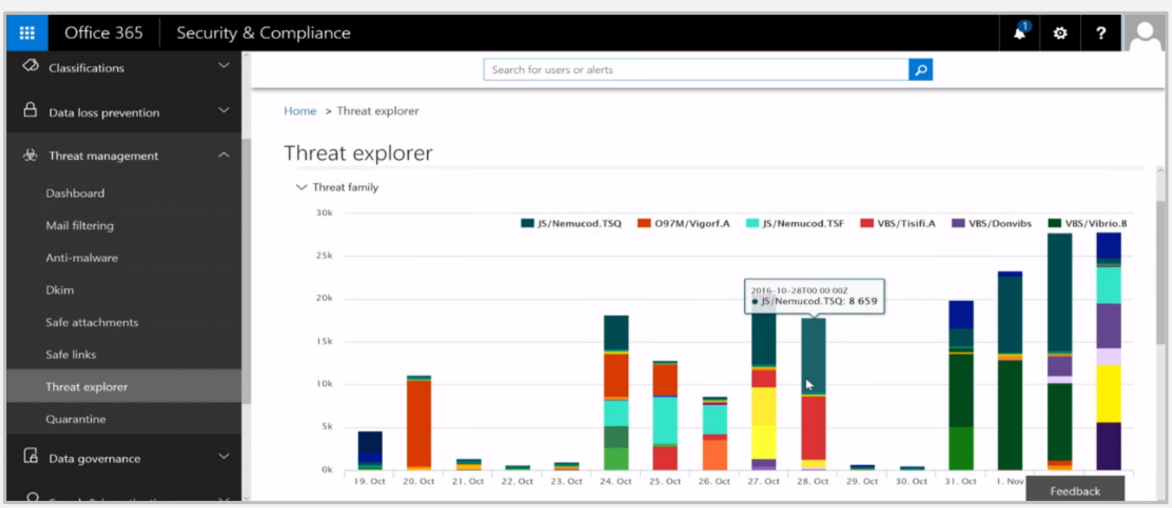
ENABLE THREAT ALERTING AND REMIDATION WITH OFFICE 365 THREAT INTELLIGENCE

Threat Intelligence allows you to take increased control over your Office 365 deployment by enabling full visibility into what threats are in your environment, which users are compromised and what data is at risk. Additionally, Threat Intelligence provides remediation capabilities for suspicious content.



By collecting rich threat signals from SharePoint, Exchange, OneDrive for Business, Skype for Business and Azure Active Directory, Threat Intelligence keeps you abreast of phishing, malware and suspicious activity. This threat data is enriched by correlation with security signals from across Microsoft, global targeting data and actor profiles which give you detailed background on threats present in your environment and those actively circulating globally.

Threat analytics provide information into mitigated and potential attacks, as well as investigation tools that allow you to explore attack campaigns, people and data. Threat Intelligence provides the tools to organize your incident response with task oriented workflows, attack alerts, detailed forensics and remediation workflows.



Threat explorer lets you interactively navigate a timeline view of threats and get more details on detected threats in your organization.

For a given threat, you are able to drill into the threat to get documentation on the threat, the users affected by that threat and the technical details of the threat (such as threats often associated with the selected threat).

Additionally, Threat Intelligence integrates with Windows Defender Advanced Threat Protection- when threats are detected on individual devices these signals are shared with Threat Intelligence so it can take appropriate action to protect other users and devices from the detected threat. For example, if a suspicious activity was detected by Windows Defender Advanced Threat Protection that resulted from opening an email with Outlook, this signal is shared with Threat Intelligence which automatically blocks all emails having a similar attachment.

THE PARTNER OPPORTUNITY

Threat Intelligence is included in the Office 365 Enterprise E5 plan and is also available as a standalone service. This enables partners to provide a managed services offer that includes Office 365 with Threat Intelligence and to provide additional value by including monitoring and remediation services that utilize Threat Intelligence for a consolidated monthly fee per user.

ENABLE POST BREACH DEFENSES AS A SERVICE WITH WINDOWS DEFENDER ATP

Traditional threat detection focuses on the datacenter and firewall, but device endpoints are often the weak link in the system. Windows Defender Advanced Threat Protection (ATP) layers on to Windows 10 devices a monitoring service that helps you detect advanced attacks and remediate them.

BUILT INTO WINDOWS

Windows Defender ATP is agentless, that is to say there is no additional deployment or infrastructure besides Windows 10. It stays continuously up-to-date.

STATE OF THE ART BEHAVIORAL DETECTION

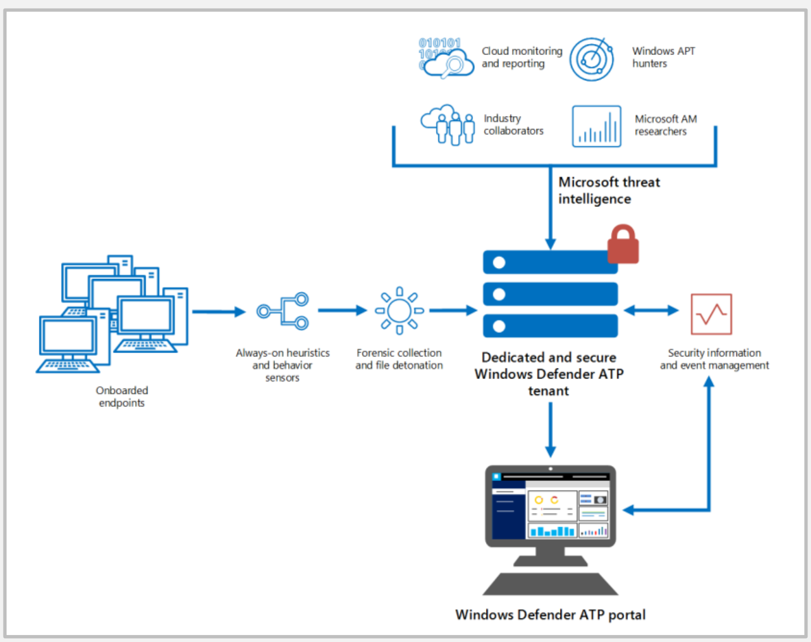
Provides signature-less, intelligent, behavioral, machine learning and past attack detections based on Microsoft's unparalleled optics and security experts.

SOPHISTICATED ANALYTICAL ENGINE

Makes it easy to understand the scope of a breach, surfacing data across endpoints with 6 months of stored log history, presented in a way that enables you to quickly understand the evolution of a breach and analyze the result.

UNIQUE THREAT INTELLIGENCE KNOWLEDGEBASE

The cloud based knowledgebase provides unparalleled threat optics across the world's largest device database to provide detailed actor profiles. Enhanced by 24x7 threat intelligence from both Microsoft and the community of security researchers, as well as 3rd party threat intelligence data.



THE PARTNER OPPORTUNITY

Windows Defender ATP is available only with the Windows 10 Enterprise E5 plan. For partners in the Cloud Solution Provider program this create multiple opportunities:

- Increase revenue: Drive customers to upgrade from the Windows 10 Enterprise E3 to E5 plan and double your Windows 10 license subscription revenue, and the profits that are associated with it.
- Managed service: Provide expert monitoring and remediation using Windows Defender ATP as a value-add, managed service to your customers. By combining the subscription price of the E5 plan with your price for the monitoring service, you can deliver a packaged offer that provides both for one monthly fee to your customers.

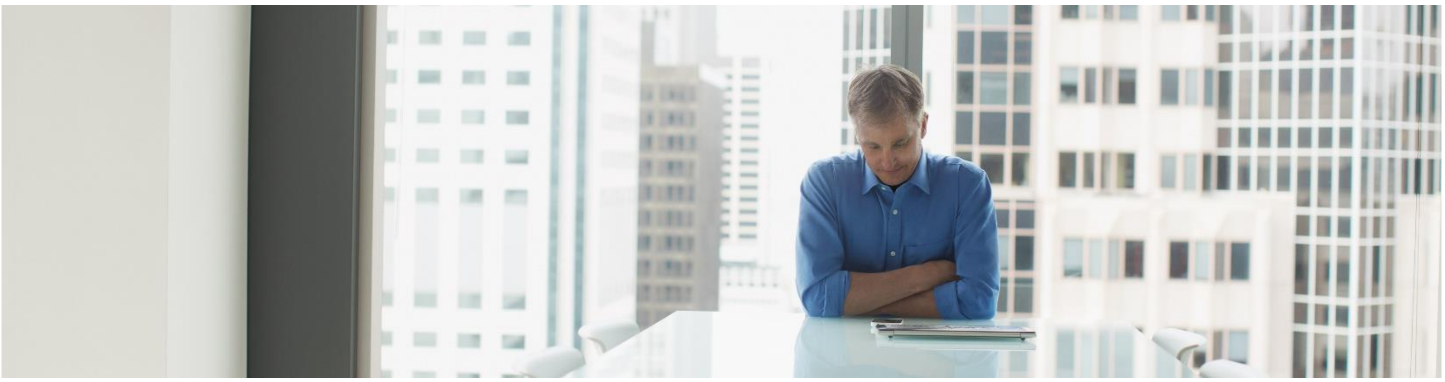
“

Customers are asking for more intelligence and insights into threats – it’s something they need and have been asking for constantly. Threat intelligence dashboard is going to be very valuable and will really enhance the solutions we offer.

ETHAN MCCONNELL
Vice President of Olive & Goose

Compliance as a Managed Service

The adherence to regulatory standards, government regulations, and other industry requirements represents a challenge most customers don't want to face alone — and presents an opportunity for a long-term relationship with partners.



As a partner you can help your customers on many different levels. You can provide services that help them to prepare and pre-check for audit, provide compliance auditing services, and help a customer define or implement their compliance strategy.

As a partner you can help customers meet general compliance requirements by:

- Ensuring they are aware of how Customer Lockbox can help them meet compliance obligations for controlling data access by Microsoft support engineers.
- Enabling them with full audit tracking to monitor and investigate events related to their data.
- Reduce their cost and risk with in-place intelligent Advanced eDiscovery.
- Empower them to efficiently perform risk assessment with Office 365 Service Assurance.
- Manage their data retention with Advanced Data Governance.

In any combination, these make up core components of any compliance-related managed services offer. However, there is an even more critical opportunity on the horizon that motivates building a compliance managed services offering — one that is predicated to create a $3.5 billion market opportunity for security and storage vendors according to IDC.

THE GENERAL DATA PROTECTION REGULATION OPPORTUNITY

In May 2018, a European privacy law is due to take effect that will require big changes, and potentially significant investments, by organizations all over the world. Known as the General Data Protection Regulation (GDPR), the law imposes new rules on companies, government agencies, non-profits, and other organizations that offer goods and services to people in the European Union (EU), or that collect and analyze data tied to EU residents. The GDPR applies no matter where you are located.

It gives EU residents more control over their "personal data" (which is precisely defined by the GDPR). The GDPR also seeks to ensure personal data is protected no matter where it is sent, processed, or stored.

The GDPR contains many requirements about how you collect, store and use personal information. This means not only how you identify and secure the personal data in your systems, but also how you accommodate new transparency requirements, detect and report personal data breaches, and train privacy personnel and employees.

PERSONAL PRIVACY	CONTROLS & NOTIFICATIONS	TRANSPARENT POLICIES	IT & TRAINING
Individuals have the right to: • Access their personal data • Correct errors in their personal data • Erase their personal data • Object to processing of their personal data • Export personal data	• Strict security requirements • Breach notification obligation • Appropriate consents for data processing • Confidentiality • Record keeping	Transparent and easily accessible policies regarding: • Notice of data collection • Notice of processing • Processing details • Data retention/deletion	Need to invest in: • Privacy personnel and employee training • Data policies • Data Protection Officer (larger organizations) • Processor/Vendor contract

Given how much is involved, you should not let your customers wait until the regulation takes effect in May 2018 to prepare. They need to begin reviewing your privacy and data management practices now. Failure to comply with the GDPR could prove costly, as companies that do not meet the requirements and obligations could face substantial fines and reputational harm. Companies can be fined up to €20m or 4% of annual global turnover, whichever is greater, for failure to meet certain requirements of the GDPR. Additional individual remedies could increase your risk if they fail to adhere to the GDPR requirements.

THE PARTNER OPPORTUNITY

GDPR applies to companies that trade products or services with European customers or in European market, creating the potential for a global impact. Resulting from this wide-spread impact, there will be a serious resource shortfall of Privacy Professionals — a perfect opportunity for partners to pick up the slack. IDC Predicts The General Data Protection Regulation (GDPR) Will Create a **$3.5B Market Opportunity** for Security and Storage Vendors (Source: IDC Press Release, https://www.idc.com , 03 Nov 2015

GDPR policies require privacy-by-design and by-default, and brings with it inherent operational complexity. Partners can become privacy consultants or implementers to support the customer GDPR journey.

The significant fines imposed for non-compliance could put many companies out of business. This means customers should be motivated to achieve compliance. With those motivators in mind, here are 4 opportunities for partners:

POTENTIAL GLOBAL IMPACT	OPERATIONAL COMPLEXITY	SIGNIFICANT FINES	NEED FOR PRIVACY PROFESSIONALS
The regulation applies to companies that trade products or services with european customers or in european market[3]	GDPR policies require privacy-by-design and by-default. Partners can become privacy consultants or implementers to support customer GDPR journey.	Fines for non-compliance can be up to **4% of your global revenues** or **€20 million, whichever is greater.** A fine of this magnitude could put many companies out of business[3].	There will be a serious resource shortfall of Privacy Professionals. Professional Services vendors will pick up the slack[4].

To plan accordingly, here are 5 Microsoft recommended next steps that require partners to act now in order to provide effective services to your customers:

GLOBAL MANDATE	A large number of firms that do business in the Europe market or with European customers will have to tackle privacy rules for the first time. Microsoft Cloud services and your GDPR-related services can be critical to compliance.
PRIVACY-BY-DESIGN	Partners can work closely with security leaders to provide GDPR assessments and determine how Microsoft Cloud services and partner services can enable customers to meet privacy-by-design requirements.
DATA BREACH NOTIFICATION	With 72-hour data breach notification, partners can utilize Microsoft Cloud services to become an incident response (IR) orchestrator through managed services or professional services.
DATA PRIVACY OFFICER (DPO)	At least 75,000 DPOs will be required by 2018 WW[2]. Partners can consider providing DPO as a service to customers.
EVIDENCE OF RISK MITIGATION	Per GDPR policy, organizations must demonstrate that they have implemented appropriate measures to mitigate privacy risks. Partners and customers can use Microsoft Cloud services to build evidence of mitigation strategies and controls.

Five Key Reasons

Why should partners utilize Microsoft Solutions for GDPR

- ☑ Microsoft is the first major cloud services provider to pledge GDPR compliance.
- ☑ Microsoft has been an industry leader on Model Clauses, HIPAA, ISO 27018, and is taking a similar lead on GDPR compliance.
- ☑ Microsoft offers the most comprehensive set of compliance capabilities of any major cloud service provider and has the best baseline to build from.
- ☑ Microsoft provides a single stack solution — all pieces work well together.
- ☑ Microsoft's speed of solution innovation is high (according to MDC Partner Research's Microsoft and Office 365 Security Solution Selling Qualitative Research Findings, December 2016) and will continue as it enables partners and customers to meet their compliance needs.

SOURCES:

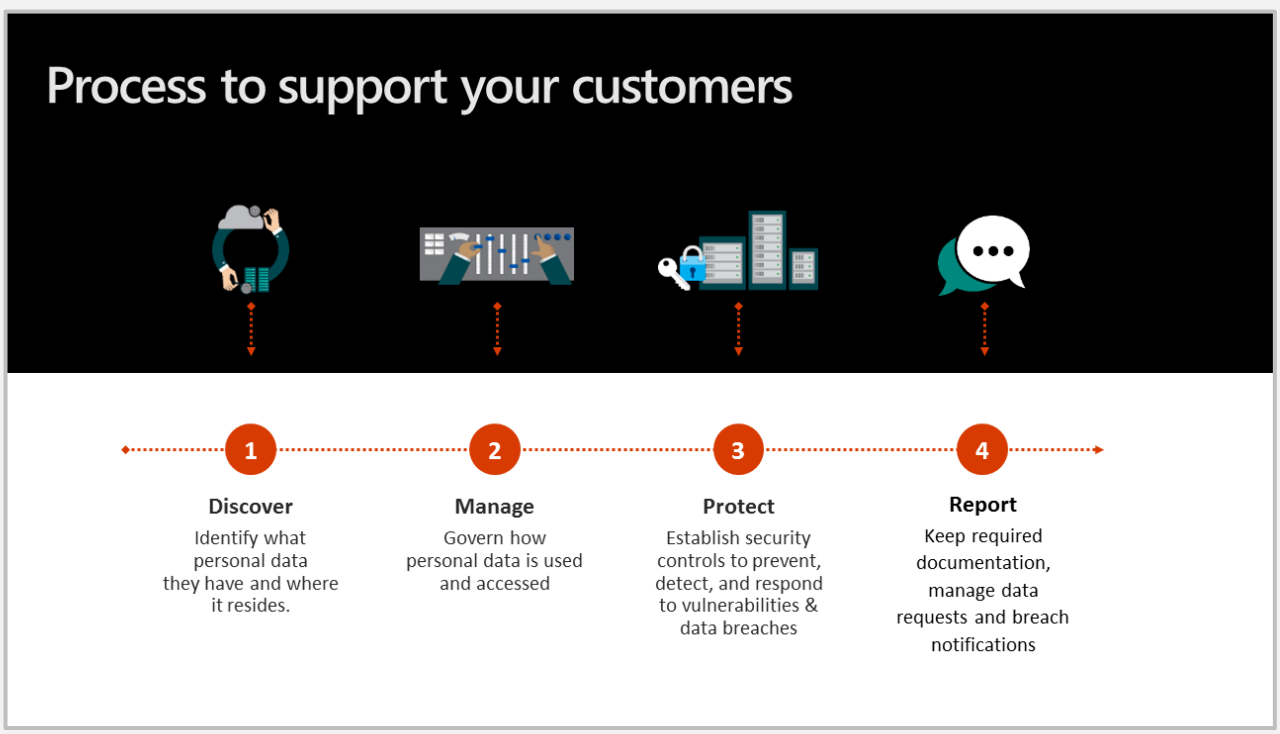
- Brief: You Need An Action Plan For The GDPR, Enza Iannopollo with Christopher McClean, Fatemeh Khatibloo, Bill Barringham, Andrew Reese, Oct. 14, 2016.
- Study: GDPR's global reach to require at least 75,000 DPOs worldwide, Rita Heimes, CIPP/US, Sam Pfeifle, Nov. 9, 2016.
- https://www.idc.com/getdoc.jsp?containerId=prEMEA40551915, 03 Nov 2015
- http://blogs.forrester.com/enza_iannopollo/16-04-20-the_eu_general_data_protection_regulation_gdpr_is_here , Enza Iannopollo, April 20, 2016
- Forrester's Predictions 2017: Six Ways Privacy Will Rock Global Business, By Fatemeh Khatibloo with Christopher McClean, Heidi Shey, Enza Iannopollo, Laura Koetzle, Srividya Sridharan, Alexander Spiliotes, Christian Austin, Nov 1, 2016

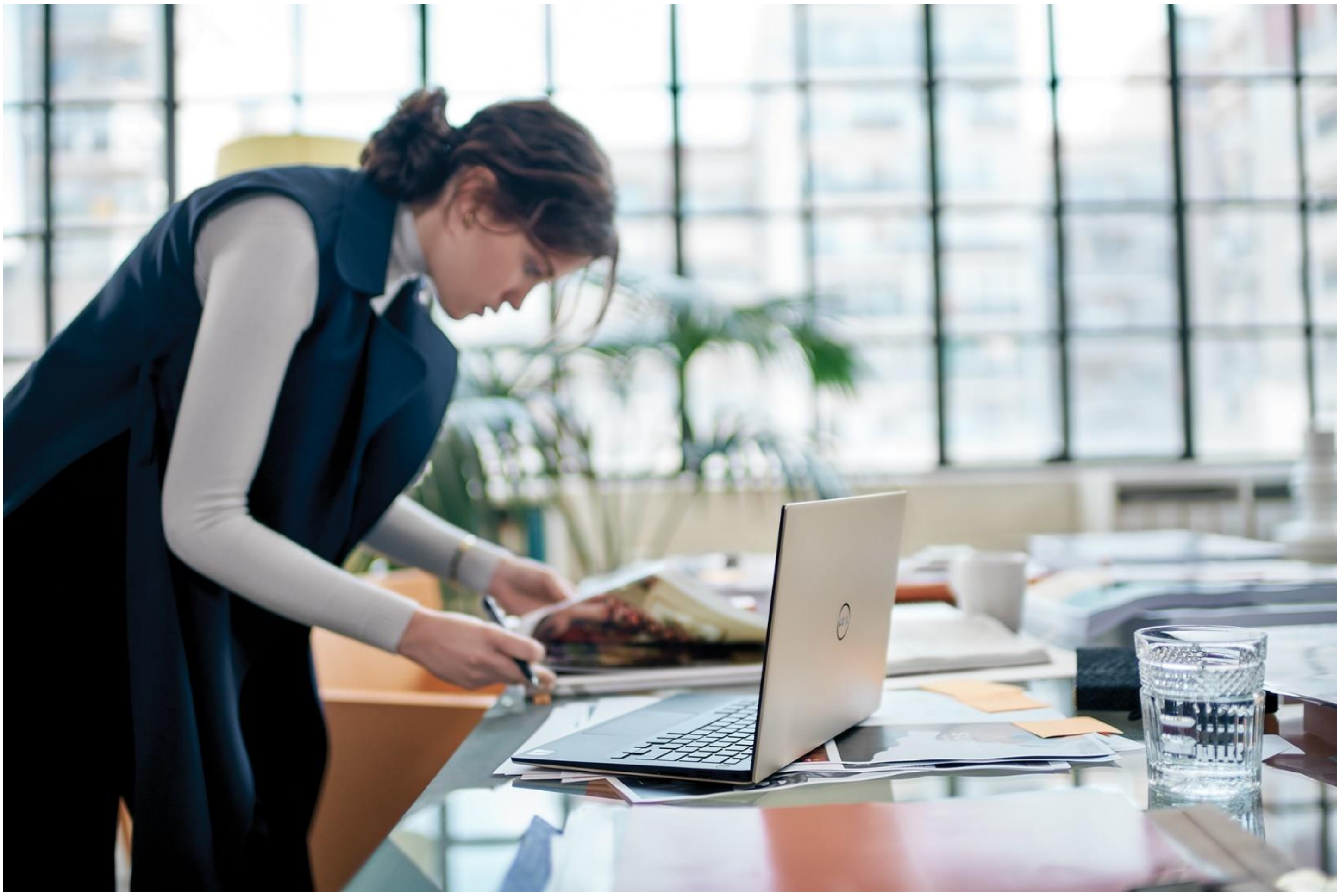
TAKE A PLATFORM APPROACH

Rather than track the controls required by individual standards or regulations on a case-by-case basis, a best practice is to identify an overall set of controls and capabilities to meet these requirements. Likewise, rather than assessing individual technologies and solutions against a comprehensive regulation such as the GDPR, taking a platform view—such as one encompassing Windows, Microsoft SQL Server, SharePoint, Exchange, Office 365, Azure, and Dynamics 365—can provide a clearer path to ensure your customer complies not only with the GDPR, but also with other requirements important to your customer as well.

THE PROCESS FOR SUPPORTING YOUR CUSTOMERS WITH GDPR COMPLIANCE

The following illustration summarizes a step-by-step process you can use as a foundation for your process in helping your customers towards GDPR compliance.





NEXT STEPS FOR PARTNERS

Follow this checklist:

- ☑ Determine if you need to be GDPR compliant. If so, act now!
- ☑ Reassure your customers that Microsoft Cloud services will be compliant with the GDPR and will share knowledge to help them get compliant in time for May 25, 2018.
- ☑ Learn more about the GDPR and Microsoft Security offerings using the Trust Center.
- ☑ Identify your offerings and go-to-market strategy using Microsoft Cloud.
- ☑ Review the Beginning your GDPR Journey whitepaper.
- ☑ Pilot your services and offerings with a few customers before you go broad.

Jumpstart Customer Engagement to Compliance

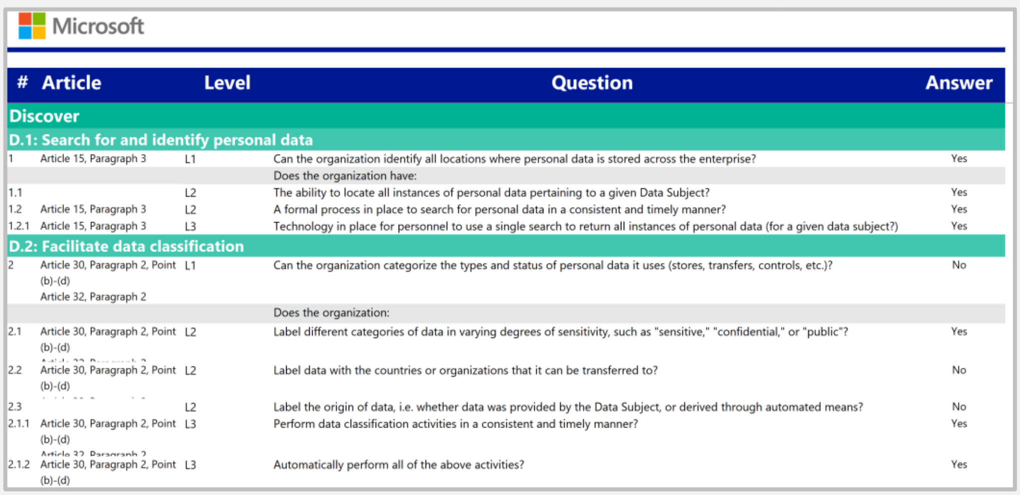
GDPR is a compelling event that partners can start taking advantage of now. Using the GDPR Detailed Assessment, partners can provide customers with a deep understanding of maturity towards compliance through assessing alignment to the GDPR categories.

- Kick Off the GDPR advisory relationship with customer
- Customizable to fit individual customer dynamics (organization culture, complexity, industry)
- Analysis of Microsoft cloud technology adoption, features purchased but not used,in-use/not in-use,etc
- Insight into 3rd party software overlap, and technology gaps that can help with compliance

The GDPR Detailed Assessment is an IP Kit partners can use to create/enhance GTM GDPR offerings.

GDPR Detailed Assessment

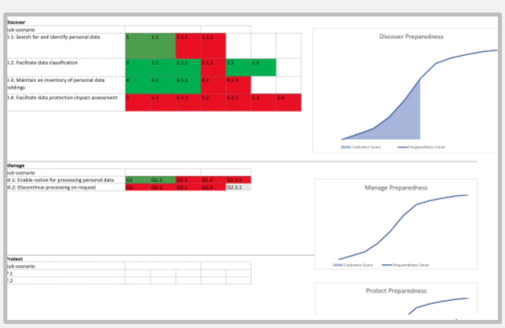
QUESTIONNAIRE

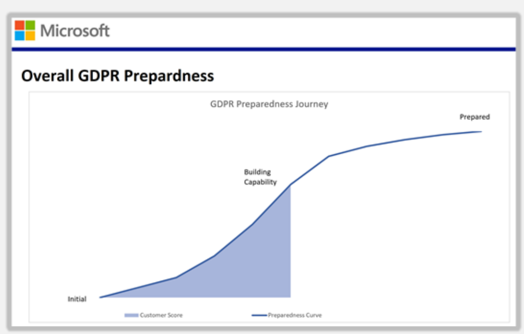


Microsoft

#	Article	Level	Question	Answer
Discover				
D.1: Search for and identify personal data				
1	Article 15, Paragraph 3	L1	Can the organization identify all locations where personal data is stored across the enterprise?	Yes
			Does the organization have:	
1.1		L2	The ability to locate all instances of personal data pertaining to a given Data Subject?	Yes
1.2	Article 15, Paragraph 3	L2	A formal process in place to search for personal data in a consistent and timely manner?	Yes
1.2.1	Article 15, Paragraph 3	L3	Technology in place for personnel to use a single search to return all instances of personal data (for a given data subject?)	Yes
D.2: Facilitate data classification				
2	Article 30, Paragraph 2, Point (b)-(d) Article 32, Paragraph 2	L1	Can the organization categorize the types and status of personal data it uses (stores, transfers, controls, etc.)?	No
			Does the organization:	
2.1	Article 30, Paragraph 2, Point (b)-(d)	L2	Label different categories of data in varying degrees of sensitivity, such as "sensitive," "confidential," or "public"?	Yes
2.2	Article 30, Paragraph 2, Point (b)-(d)	L2	Label data with the countries or organizations that it can be transferred to?	No
2.3		L2	Label the origin of data, i.e. whether data was provided by the Data Subject, or derived through automated means?	No
2.1.1	Article 30, Paragraph 2, Point (b)-(d)	L3	Perform data classification activities in a consistent and timely manner?	Yes
2.1.2	Article 30, Paragraph 2, Point (b)-(d)	L3	Automatically perform all of the above activities?	Yes

ANALYSIS ENGINE & MODEL

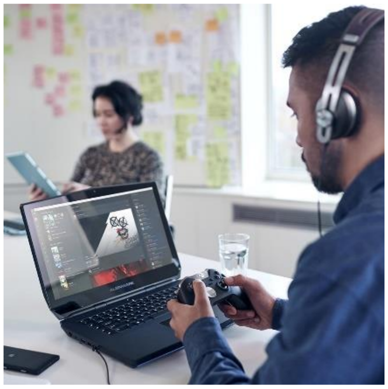




RESOURCES:

➔ [GDPR Detailed Assessment]

Resources



Adding managed support services to your offerings increases your value and profitability.

→ [Four ways owning the customer life cycle makes you more profitable]

Support as a Managed Service

It should go without saying that one of the most important functions of your MSP practice is supporting your customer once their applications and data are firmly in the cloud or a hybrid deployment.

No matter how well a cloud or hybrid environment is planned, provisioned, operated or monitored, problems will arise, and those problems will need to be remediated. It's your job as an MSP to offer support to your customers to deal with outages, breaches, inefficiencies, and disaster scenarios. MSPs need to consider the level of support that makes sense for their practice — in terms of resources and revenue — as well as what makes sense to the customers they serve.

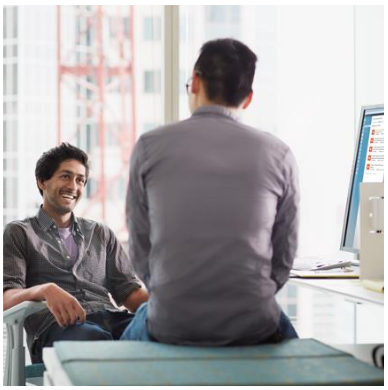
KEY CUSTOMER CHALLENGES

- They lack the expertise and resources to troubleshoot problems.
- They are unable to determine the root cause of performance issues and glitches.
- They have no knowledge of how to remediate problems when they correctly identify them.
- They do not want to spend time and resources fixing problems.

KEY SERVICES FOR THIS OFFERING

- **User Support:** Provide support for frequently asked questions, setup and usage, best practices, questions around billing and invoicing, break-fix support for developers, architecture design, and solution design support for architects.
- **System Support:** Provide customers with information on any service interruption, and relay expectations on when the system will be back online.
- **Product Support Support:** Provide support when the Microsoft product is not working as expected or the service stops working. Escalate to Microsoft when the issue cannot be resolved with existing documentation and/or training.
- **Extended Support Support Hours:** Many customers need the ability for 24/7 support support, but cannot justify the overhead internally.
- **Account Management:** Offering an account manager that is responsible for reporting service consumption and ultimately minimizing time to resolution is a service that can be offered at a premium.
- **Dedicated Support:** The value add of a dedicated support team cannot be understated. Engineering resources that already know your customers' environment, including the business and technical reasons for how a solution was implemented can add a tremendous value over the lifetime of an agreement.

Resources



- Azure Advisor
- Azure Application Insights
- Azure Diagnostics
- OMS Log Analytics
- System Center
- Log Analytics
- Automation
- Hybrid Workers

Cloud Monitoring Services

Back in the 2000s, Managed Services was synonymous with Remote Management & Monitoring (RMM).

In the cloud world, the tools and requirements have evolved, but the problem statement hasn't fundamentally changed. How do I monitor the health and performance of my IT infrastructure? There is no easy answer to this and customers expect their service providers to solve it for them. Most mid-market and enterprise organizations simply do not have the time, resources, or dedicated staff required to monitor every aspect of IT, and this is where MSPs add the most value. While Azure offers many monitoring capabilities built within the platform, there is still a place for partners who (a) provide additional, deeper monitoring tooling (b) triage the false positives from the real alerts (c) proactively act upon the alerts before any measurable loss in performance.

KEY CUSTOMER CHALLENGES

- I don't have the time or resources to monitor all my hosted and internal IT assets.
- I need a single pane of glass view that tells me how all my apps and VMs are performing, at any point in time.
- I find it challenging to diagnose the root cause of breakdowns or outages.
- How do I respond to so many alerts? How do I differentiate the false positives from the concerning ones?

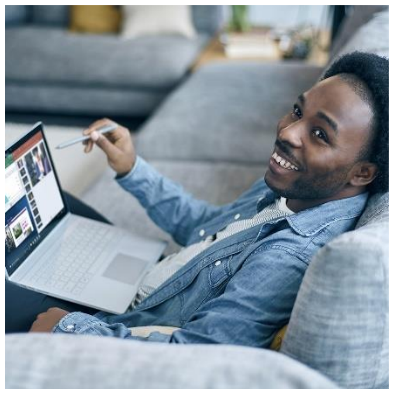
THIRD-PARTY RESOURCES

- App Dynamics
- DataDog
- Nagios
- New Relic
- Science Logic
- Splunk
- Logic Monitor

KEY SERVICES FOR THIS OFFERING

SYSTEM HEALTH MONITORING	LOG ANALYTICS AND ALERTING	DATABASE MONITORING	APPLICATION PERFORMANCE MONITORING
Complete monitoring of VMs, CPU utilization, memory usage, storage IOPs, and OS performance. Includes monitoring of application performance and operation health, and dashboards and reports on system health.	Every client, device, and user accessing a network produces data that is logged. Analyzing those logs can offer deep insight into performance, security, resource consumption, and a number of other meaningful metrics.	A view into your customer's database that helps MSPs ensure high availability of database servers. The process involves keeping logs of size, connection time and users of databases, analyzing use trends, and leveraging data to proactively remediate issues.	End-to-end tracking of all aspects of an application (or webpage). App monitoring involves watching every part — from shopping carts to registration pages — of a customer's app(s) for performance issues in an effort to provide the best user experience possible.

Resources



- [Managing Corporate Devices]
- [Choose between Microsoft Intune Standalone and Hybrid Mobile Device Management with System Center Configuration Manager]

Hybrid Device Management: Manage PCs, Servers and Devices

With the increasing demand to support bring-your-own-device (BYOD) scenarios, organizations are faced with the challenge of finding the right balance between allowing their employees to choose which devices they use, while making sure those devices have access to the right set of applications and meet corporate data protection and compliance requirements.

KEY CUSTOMER CHALLENGES (USER)

- Demand their own choice of devices and apps
- Expect anywhere connectivity and productivity

KEY CUSTOMER CHALLENGES (IT)

- Needs to maintain compliance and data protection
- Must avoid the complexity and cost associated with many discrete management infrastructures

KEY SERVICES FOR THIS OFFERING

Microsoft's solution builds on market-leading client management by combining System Center Configuration Manager with Microsoft Intune to provide organizations with a comprehensive, cross-platform, and user-centric way to deploy applications and manage users' devices, whether they are corporate-connected or cloud-based.

With Configuration Manager and Intune, organizations can enable their employees to choose devices, unify management infrastructure, and simplify IT administration. IT can deliver and manage consistent application experiences for employees based on their corporate identity, network connectivity, and device type, helping maintain productivity as employees use various devices throughout their day. Through a single infrastructure and administrative console, IT can manage PCs, servers, mobile devices, endpoint protection, and virtual machines across various platforms, including Windows, Linux/Unix, Mac OS X, iOS, and Android.

Simplified server and client deployment, streamlined updates, and consolidated reporting enable your IT staff to easily manage your mobile, physical, and virtual client environments, reducing costs and increasing efficiency through comprehensive application and device management. Unified security, including System Center Endpoint Protection, protects your corporate information and helps you better manage risk by deploying software updates and antimalware definitions to PCs, as well as enabling selective wipe of mobile devices. New improvements — such as the support of latest Windows 10 features, Windows in-place upgrade, more frequent and easier updates, unified end-user portal, and on-premises MDM — make deploying and managing Windows easier than ever.

Understanding Intellectual Property

The idea of coming up with "productized" IP may sound daunting. But many partners find that they already had IP, it just wasn't packaged that way. If you did something custom that was successful for one client, there may be more customers that would benefit from solving the same problem.

Review your most successful projects to see if there are repeatable elements that you can productize. Repeatable elements can be about your own vertical or process best practices, or even focus on common customer pain points. Start small. Your IP can be a simple template or just a few lines of code that automates a function in a way your market typically needs. Productizing IP and creating repeatable processes has been a very successful strategy for many partners. Some partners are achieving gross margins in excess of 70% by productizing IP and selling it to their customers on a recurring revenue basis. Productizing IP helps you create stickiness with customers and opens up opportunities to sell your solutions through the partner channel. If you don't want to create your own IP, you can also look to the partner ecosystem for incremental solutions that can be bundled with Microsoft's offerings to round out your total solution. There are multiple opportunities for building intellectual property that can be used to expedite engagements, or even as an entire engagement. With the ability to create fully automated solutions, partners can challenge their creative side to offer up solutions that can save their customers money, as well as add a striking differentiator amongst peers. In the Microsoft Cloud Practice Development Study, 486 partners that identified as having an Enterprise Mobility & Security practice were asked which intellectual property offerings they provide within their practice. The results are below. Consider this data when designing your intellectual property offerings.

SECURITY INTELLECTUAL PROPERTY BY REGION	Total n=484	APAC n=24*	Canada n=18*	CEE n=27*	Germany n=36	LATAM n=41	MEA n=32	UK n=43	US n=119	WE n=103
Identity & access control solutions	33%	38%	28%	37%	36%	39%	44%	21%	31%	30%
Information Protection Solutions	27%	21%	28%	37%	19%	34%	50%	23%	25%	19%
Mobility Solutions	26%	25%	33%	15%	36%	17%	38%	26%	24%	24%
Threat detection, monitoring and mitigation solutions	24%	29%	22%	15%	33%	15%	41%	21%	24%	22%
Auditing solutions	22%	17%	17%	30%	14%	34%	22%	19%	18%	24%
Customer Self-Serve Portals	21%	13%	33%	22%	17%	22%	34%	19%	20%	18%
Pre-Configured Dashboards	14%	17%	22%	15%	8%	22%	25%	9%	17%	9%
Turnkey BI Portals	6%	4%	17%	4%	3%	10%	9%	5%	7%	4%
We do not offer any of these intellectual property services	36%	42%	33%	33%	36%	32%	16%	49%	43%	36%

REVENUE

Total Median (n=309)	$41,091
SMB (n=269)	$38,211
Enterprise (n=40)	$472,222

When targeting your intellectual property offerings, our research with partners emphasized the importance of targeting the enterprise customer to attain significantly higher managed revenues.

Source: Microsoft Cloud Practice Development Study, MDC Research, June 2017.

Creating Intellectual Property in Your Security Practice

Making money in the cloud usually partially requires you to retain IP to drive annuity. Annuity is a key strategic component to a cloud practice.

INTEGRATE SECURITY API'S TO DELIVER HIGH-VALUE INTELLECTUAL PROPERTY

Consider providing customized solutions that provide experiences for your customers integrating the Microsoft Graph API (which provides access to data about emails, security events, users, files, and groups), the Office 365 Service Communications API (for reporting on service status), the Office 365 Management Activity API (to retrieve information about user, admin, system, and policy actions and events from Office 365 and Azure AD activity logs), the Office 365 Secure Score API (for monitoring and reporting your secure score) and the Azure Resource Usage API (to monitor usage of Azure resources) and the Azure REST API (for integrating data from and managing Azure services). Use these API's together to create solutions that provide integrated visualization, customized monitoring, and remediation workflows, and handle vertical-specific workloads.

PACKAGE YOUR PROCESS

Another way partners are creating IP in security practices is by packaging their assesments, documents, and processes into proprietary, reusable components that only they own and can deliver. For example, package a service around security monitoring that relies on the ongoing application and review of Secure Score.

“

Don’t be an ostrich. Cloud makes software your competitive advantage. We have packaged repeatable projects that are focused around rapidly demonstrating value within the cloud and identifying the big transformational opportunities.

ALEX BROWN
CEO, 10th Magnitude

Define Vertical Offerings

Resources

Delivering datacenter level networking expertise is critical to an enterprise hybrid cloud offering.

- Azure Government
- Available Services by Region
- Contact Microsoft About Azure Government
- Azure Compliance
- Maximize your profitability with vertical solutions
- Cloud Partner Strategy 2.0 Going Vertical

Consider Verticalizing Your Security Offer

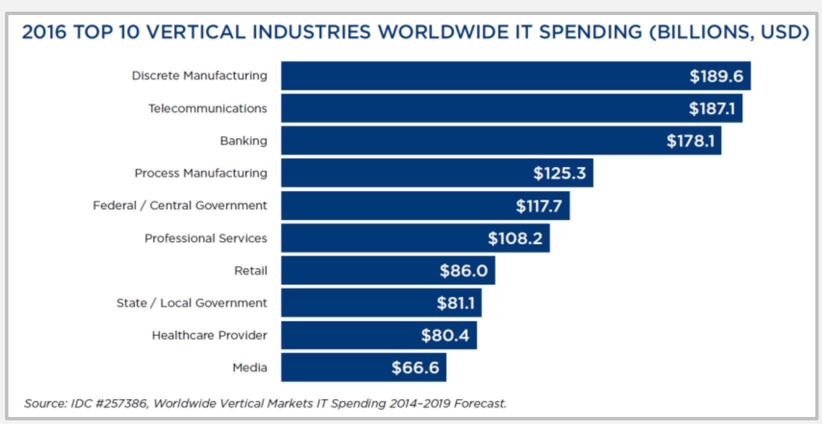
It is recommended that you specialize by vertical, functional process, or technology.

EXAMPLES OF THESE TYPES OF SPECIALIZATION:

- Vertical specialization: manufacturing, banking, retail
- Functional process specialization: accounting, human resources, marketing campaign management
- Technology specialization: systems management, analytics, enterprise resource planning

Think about it this way; if there is lack of differentiation in the market owing to approaches like verticalization, then price becomes the primary differentiator between you and your competition. This can erode your margins and trap you in a business they can't afford to invest in as prices race to the bottom in order to win customers.

Establish your company as an expert in your selected areas. You can also focus on a specific technology or become known as an early adopter and technology leader. But the real value comes from IP or expertise in an industry, vertical, or business process. The combination of adding IP to a vertical or business process expertise makes that advantage even more powerful.



Our research with partners suggests mastering one specialization before adding additional ones. We understand that it is easy to be distracted, by saying "yes" to every request, and by diversifying into too many offerings. But in the long run, it is better to say "no" to those projects that are outside of your focus. Partners have shown benefit from having a strict focus on one key solution and growing by expanding one vertical at a time.

Define Your Pricing Strategy

Pricing your offer is no longer determined simply by cost plus margin.

Pricing a product or offering is different in today's marketplace. Increasingly it is about return on value (ROV) — the added benefits (e.g., better per-unit price, improved service characteristics) your customer gets by being a better customer of yours (e.g., buying contracts with longer durations, making upfront payments, etc.). Customers will only pay as much as the value they estimate they will get from the offering. Price is rarely mentioned on service provider websites. The sales copy speaks of partnerships and the price is often relealed only after speaking to a sales representative. In an offer-based strategy, this will not work. In the business of cloud, price is always disclosed up front. Because price is part of your value proposition and solution offer, your pricing is something you can be proud of and share. Remember you are in a race against yourself and the competition. Be proud and show your price early, removing any customer concerns. Pricing is now a result of the product, and it begins with your value proposition. To understand how to price your offers, let's review the pricing strategies to see the benefit they bring to your solution offer.

STANDARD PRICING

Pricing is the consequence of the product and aligns to the accepted industry/application standard. Think of this as reference pricing; as in customers have seen similar products sold for this amount, so you price your offer so that it is similar. What's the standard price for a mobile phone app? $0.99. If you charge more, you are breaking from the industry accepted, standard pricing. This is an old way to look at pricing. Buyers today will accept this model, but they do not prefer it and it provides minimal help in getting your offer purchased.

VIRTUOUS PRICING

Virtuous pricing is about using the price as a sales weapon. The goal of virtuous pricing is to create a virtuous sales cycle within your customers, where each sale encourages the next sale within the customer organization. It fosters product adoption and proliferation. Let's begin with a counter example of what is not virtuous pricing — a fixed price per user. Here, you have a simple pricing structure (which is important), but there is nothing to encourage more aggressive purchasing by the customer.

Enter digressive pricing, which drops the per-unit price with the purchase of more units. Your customers get a discount per unit price the more they buy. This can help create a virtuous sales cycle within the customer because now the customer is looking for way to bring their cost per unit (e.g., user) down.

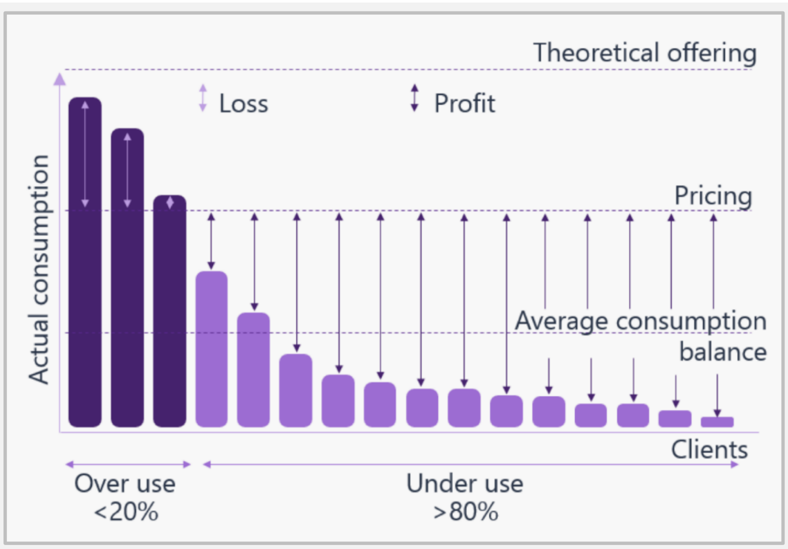
For example, assume one line of business has already purchased 19 users from you at $49 per user. Now, there are discussions within another line of business within the same customer organization to purchase a similar product from a competitor or to purchase yours. Your existing customer is incentivized to lobby on your behalf because if the other line of business purchases your product, their cost per user will drop to $39 per user. And the cycle can continue as each new group evaluates your solution offering.

There is a way to adjust digressive pricing slightly to make it significantly more profitable — step pricing This method sets the price for each step as the top number of users in the range. Building on the example from digressive pricing, let's say that the customer purchased 15 users. They would pay for the equivalent of 19 users since that is the price for this range of units. Why is this more profitable? Because your customer is effectively paying you for the 4 users they are not using (yet) — which goes straight into your profits. What's more is you have amplified the virtuous sales cycle because the customer wants to get as close the maximum number of users for the step as possible in order to get the lowest possible cost per unit within the step

FLAT RATING PRICING

This is one of the most powerful business pricing strategies.

You have probably already experienced it, although you may not have realized. Flat rating pricings is leveraged by banks, insurance, etc., every time you pay premiums. While it can have varying levels of sophistication (banks and insurance firms use sophisticated versions of this based on significant work by their actuaries), the model can be described and implemented in a simple fashion. The basic idea is that you provide a certain quantity of value for a set cost that all customers pay. Some customers may come close to (or even exceed) using the full value of what they pay for, while the rest are nowhere close. A well-crafted model identifies the average consumption across all of your customers, and creates a situation where over 80% of the customers are using less than what they are paying for (and ideally less than the average consumption) and fewer than 20% are using more. You set your price to be above the average consumption. By doing so, clients in the 80% who use less than what they pay for generate your profit. The further they are below the average consumption, the more profit they generate. For the 20% who use more than they pay for, you might take a loss on them individually. However, in the aggregate, the long tail represented by the 80% of customers who do not fully use what they pay for more than covers the cost of your heavy consumers, and these heavy consumers are likely to be your biggest champions. So, there are tangential benefits to supporting their cost. Pricing models built around flat rate pricing have shown between 1.5 and 3 times as much profit as traditional models.

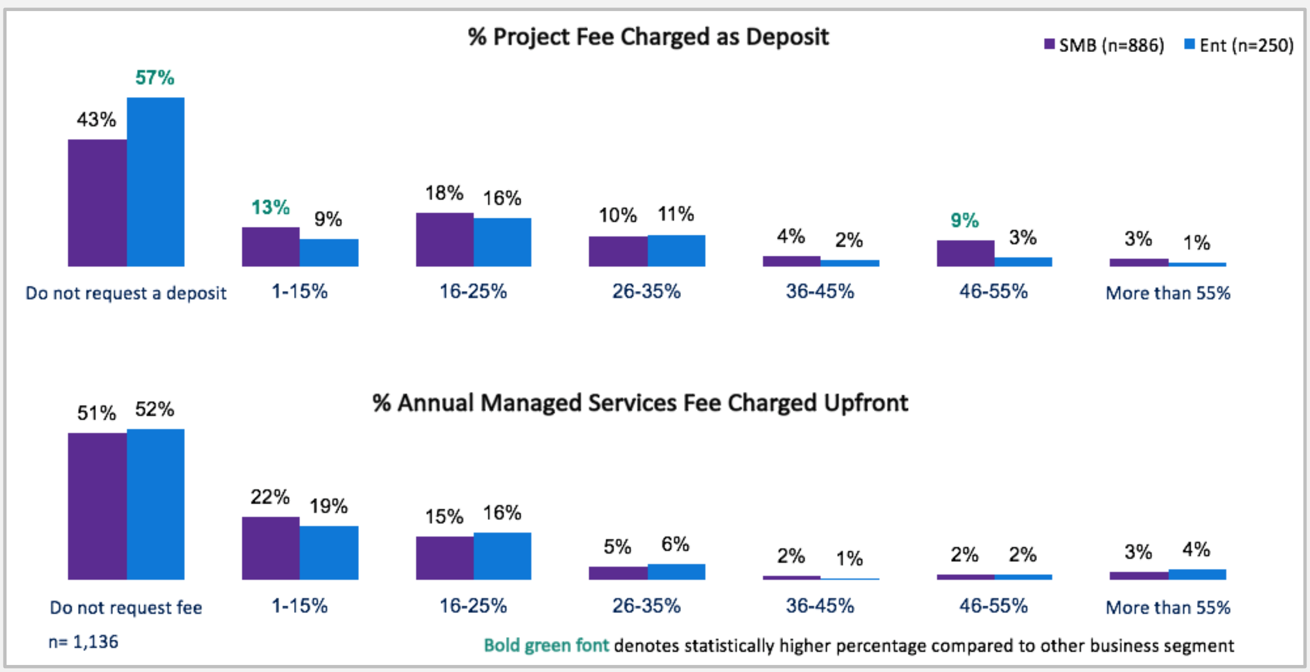


UPFRONT FEES

Another consideration of your pricing strategy is whether to charge your customers an upfront fee.

Reasons for doing so, including providing some working capital to get resources going in the early days of your practice, mitigate the risk that a customer abandons a project without any payment and ensure the customer is as invested in a project as you are. It can also serve to minimize financial impact to your practice when the customer has requested longer payment terms (see next section).

In our recent survey of 1,136 Azure partners, we found that only about half charged an upfront fee for project or managed services. When an upfront fee was requested, it was typically less than 25% of the total project or managed services fee.



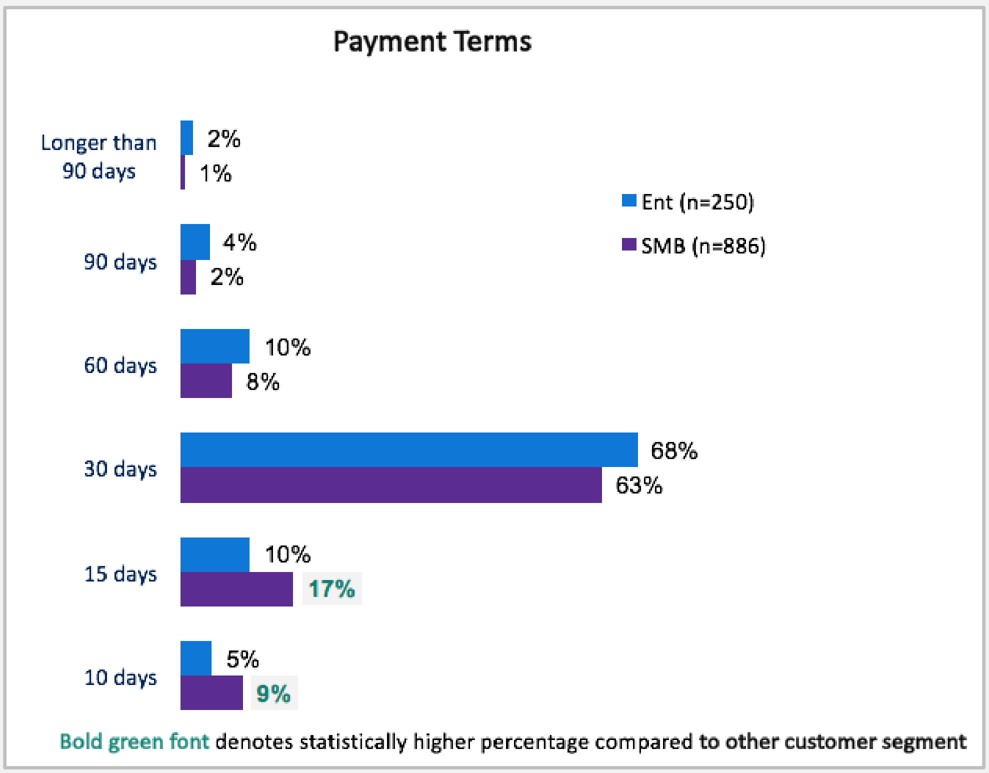
Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016

PAYMENT TERMS

The final consideration for your pricing strategy is the payment terms. This is defined as the duration of time between when you invoice the customer for service rendered and when you receive payment from the customer.

Payment terms are measured in days; for example 10 days, 15 days, 30 days or 90 days. These are usually expressed as NET 10, NET 15, NET 30 or NET 90 payment terms. In addition, you might consider offering the customer a discount for prompt payment on your shortest payment. For example NET 2/10/30 is used to describe terms where a 2% discount is provided for payment received within 10 days of invoicing, otherwise the full invoice amount is due in 30 days.

In the Microsoft Cloud Practice Development Study, we found that the most common payment terms used was NET 30, and that for SMB customers shorter payment terms were preferred.



Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016

Identify Partnership Opportunities

Partner to Partner

Build smart partner relationships and focus on what you do best.

It is tempting to want to do everything related to your business, but the fact remains you will never have enough time. This is a primary reason to seek out compatible partners that can help you to:

- Complete your solution
- Build credibility
- Partners for infrastructure
- Leverage joint marketing
- Add-on to sales
- Broaden your customer base

Finding the right type of partnerships is key to finding success in today's competitive market. Some partner combinations meld together well to create success. To help you find the right mix, here's an example of a partner recipe we know works:

ISV + channel-based MSP partners = international success

Find out what's in it for the Partners and customer and the secret of success.

Make connections with Dynasource.com

It's hard to beat the value of partner-to-partner conversations and networking. Luckily, there are communities to help you expand your network and make an even bigger impact on your business.

Dynasource is a global, two-sided marketplace that allows partners to connect with other firms that have complementary expertise and capabilities. If you have excess capacity, increase your billability and profitability by finding partners that can drive utilization of your staff. If you lack the capacity, Dynasource can help you connect with partners that have the expertise to enable and expand your solutions. If your customers are looking for a solution that is outside your particular expertise, you can use Dynasource to find an expert that can provide that solution. By connecting through Dynasource and working together, you can meet customer demand for needs across the Microsoft portfolio and grow your business.

TRANSFORM THROUGH COLLABORATION

After you've created a profile on Dynasource, you can search the Dynasource Microsoft Partner Community for qualified resources that can collaborate with your team on an opportunity. This allows you to transform your cloud business and expand your offerings at a pace that works for you.

INCREASE DEMAND FOR YOUR RESOURCES

Business is not always predictable, but retaining quality staff is essential to your success. With Dynasource, you can make your resources and capabilities available to partners who can utilize them today, making your workforce agile and billable.

GET STARTED NOW

In order to join Dynasource, all you'll need is general information about your business. Once you create a profile, you can search for other resources and jobs, as well as create and post your own. You can control the availability of your resources and what level of information you would like to share about your capabilities. With the Dynasource premium membership, you can request connections with other members and resources.

RESOURCES:

- Smart Partner-to-Partner Relationships
- A Recipe for Global Success
- Dynasource
- Selling thru Partners
- The right ingredients for partner-to-partner success
- 4 Ways to Increase Revenue through a Partner Channel - Entrepreneur.com

Define Engagement Process

Resources

Pitch decks and preparing your technical pre-sales is a critical factor with any successful delivery.

- Microsoft Secure Pitch Perfect
- EMS Sales Play
- Microsoft Advanced Threat Analytics Pitch Deck
- Cloud App Security Pitch Deck
- Identity and Access Management Teleguide
- Identity Driven Security Teleguide
- Cloud Adoption Framework
- Technical presales and deployment services
- Azure Pre-Sales Resources

Pre-and Post-Sales

For your practice, you should define the technical effort required before the sale (pre-sales) and required in support of a sale (post-sales). You will need to decide on the technical pre-sales and post-sales requirements for your solution offer.

PRE-SALES

The technical effort required to make the sale involves:

- Discuss the customer requirements and address their objections.
- Develop technical pitch decks.
- Technical demo: This demo may be generic or may need customization to better meet the requirements of the customer. The goal of the technical demo is to inspire confidence in your ability to deliver the desired solution by demonstrating you have "already done something like it before."

POST SALES

The technical effort required after the sale includes:

- Addressing follow-on customer concerns about the technology or implementation.
- Providing training to increase awareness of the solution that will be implemented.
- Providing a technical demo more customized for the customer to better understand their needs before moving on to the next phase of the project.
- Following up with the customer to ensure implementation is on track and meeting expectations.

In the resources section, you will find a list of presentations designed for the Enterprise Mobility + Security that can be used for technical briefings or sales pitches. You should customize each presentation to explain how your unique offering makes the overall solution a true differentiator.

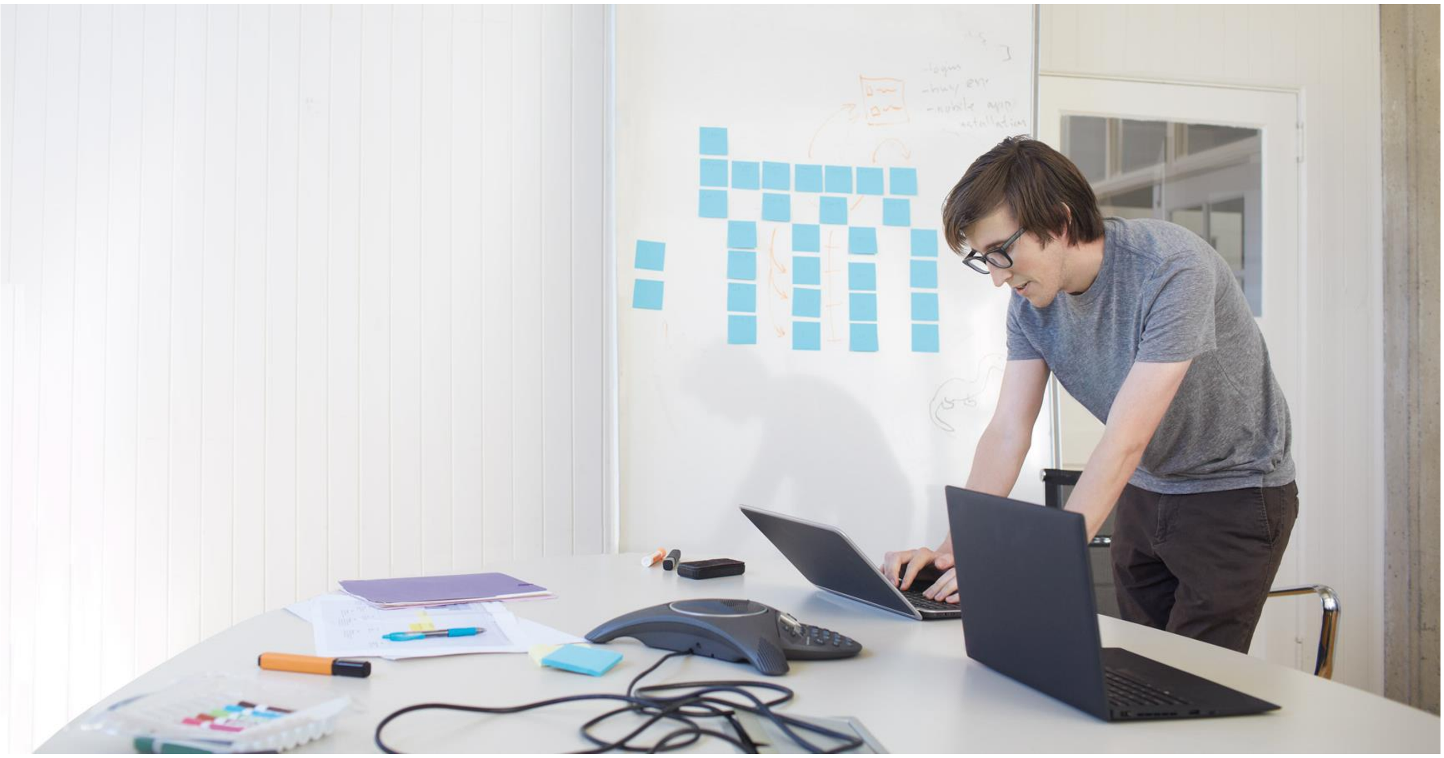
For guidance with these sales efforts, consider the Microsoft Partner University learning paths:

- Training for Sales and Technical Resources

Microsoft also provides support for technical presales and deployment services. See the section Supporting your Customer for more information on available resources using Partner Advisory Hours.

Implementation Process

The process you follow in delivering your solution to your customer is just as important as the technologies you use to deliver it.



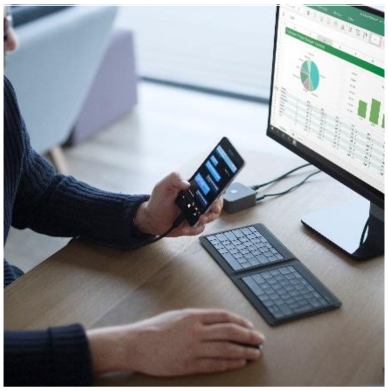
When it comes to delivering solutions for your security practice, consider that the processes you define become an important part of your intellectual property.

As a starting point, consider the following four phases for your security practice:

- **Assessment**: Raise your customer's awareness of their security environment, risks, threats, and opportunities for improvement.
- **Consultation**: Work with your customer to provide process and technology recommendations.
- **Implemention**: As a service provider you can help your customer's implementation in one of three ways. You can be the expert guiding their resource to do the work based on your recommendations; you can be the extra "pair of hands" helping them with their implementation; or you can be their implementation partner, balancing guidance and hands-on work.
- **Ongoing support**: Provide your services in managed service form so that the customer gets ongoing access to your capabilities and you get perpetual revenue. An important security service related to this is incident response — being the expert on call to help a customer resolve a security incident.

Join the Microsoft Partner Network

Resources



- [How does it work?]
- [Enroll as a Network Member]
- [Subscribe to Microsoft Action Pack]
- [Explore MPN Competencies]
- [Invite Users to Associate with your Company]
- [Channel Partner Profitability Whitepaper]
- [Cloud Enablement Desk Nomination]

Partnering with Microsoft

The Microsoft Partner Network is the start of your journey. One of the first steps to partnering with Microsoft for your Azure practice is to join the Microsoft Partner Network if you are not already a member. As a partner, you will gain access to resources like training, whitepapers, and marketing material described in this playbook. It's also where you will set up your users to gain Microsoft Partner competencies and access to your partner benefits.

TO BECOME AN MICROSOFT PARTNER

The Microsoft Partner Network provides three types of memberships. Each type provides a set of benefits to help you grow your business. As you achieve your goals, participate in the program at the level that suits your unique needs, so you can access more benefits and develop your relationship with Microsoft and other Microsoft Partners.

- **Network Member**: Receive a set of no-cost introductory benefits to help you save time and money. Use our resources to help build your business as a new partner and discover your next step.
- **Microsoft Action Pack (MAP)**: This affordable yearly subscription is for businesses looking to begin, build, and grow their Microsoft practice in the cloud-first, mobile-first world through a wide range of software and benefits.
- **Competency**: Get rewarded for your success with increased support, software, and training.

TAKE THE NEXT STEP WITH A COMPETENCY

As a competency partner, you can earn both gold and silver competencies in one or more areas. Earn a silver competency to help your business demonstrate its expertise or a gold competency to showcase your best-in-class capabilities within a Microsoft solution area. Later in this playbook we'll review the competencies relevant for launching a successful Microsoft Azure practice.

CLOUD ENABLEMENT DESK

The goal of the Cloud Enablement Desk is to assist partners in obtaining their first Silver Cloud Competency. Partners will be assigned a Cloud Program Specialist (CPS) for up to six months on their way to obtaining their first Silver Cloud Competency.

The Cloud Enablement Desk program requirements include:

- Partner must have a MPN ID.
- Partner must agree to and sign Conditions of Satisfaction that state partner is actively trying to achieve Silver Cloud Competency status and include the name of the primary contact person.
- Partner cannot have an existing Microsoft account management relationship.

Align individuals to MPN requirements

One of the next steps is to ensure you align the technical team to the MPN competency for your practice.

THE COMPETENCIES MOST APPLICABLE TO THE SECURITY PRACTICE ARE:

- Cloud Productivity
- Small and Midmarket Cloud Solutions
- Enterprise Mobility Management
- Cloud Platform Competency

One of the next steps is to ensure you align the technical team to the MPN competency for your practice.

The following tables summarize the **skill requirements** needed by people in your organization to achieve either a Gold or Silver Competency for the competencies relevant to the Data Platform and Analytics practice. Some competencies have alternative options your organization can elect to meet in order to achieve the competency. You only need to meet the requirements of one option in any given competency.

CLOUD PRODUCTIVITY COMPETENCY	SILVER REQUIREMENTS	GOLD REQUIREMENTS
Option 1: Managed Service Partner	One person must pass the following exams: • Exam 70-346: Managing Office 365 Identities and Requirements • Exam 70-347: Enabling Office 365 Services Or one person must obtain the following certification: • MCSA: Office 365	Two people must pass the following exams: • Exam 70-346: Managing Office 365 Identities and Requirements • Exam 70-347: Enabling Office 365 Services Or two people must obtain the following certification • MCSA: Office 365
Option 2: Learning Partner	You must have two Microsoft Certified Trainers who complete the following. One person must pass the following exams: • Exam 70-346: Managing Office 365 Identities and Requirements • Exam 70-347: Enabling Office 365 Services	You must have four Microsoft Certified Trainers who complete the following. Two people must pass the following exams: • Exam 70-346: Managing Office 365 Identities and Requirements • Exam 70-347: Enabling Office 365 Services Or two people must obtain the following certification: • MCSA: Office 365

	Or one person must obtain the following certification: • MCSA: Office 365	
Option 3: Distributor	One person must pass the following exams: • Exam 70-346: Managing Office 365 Identities and Requirements • Exam 70-347: Enabling Office 365 Services Or, one person must obtain the following certification: • MCSA: Office 365	Two people must pass the following exams: • Exam 70-346: Managing Office 365 Identities and Requirements • Exam 70-347: Enabling Office 365 Services Or, two people must obtain the following certification: • MCSA: Office 365

SMALL & MIDMARKET CLOUD SOLUTIONS COMPETENCY	SILVER REQUIREMENTS	GOLD REQUIREMENTS
Option 1: Office 365 Services	No exams or assessments required.	Two people must pass the following exam: • Exam 70-347: Enabling Office 365 Services

ENTERPRISE MOBILITY MANAGEMENT COMPETENCY	SILVER REQUIREMENTS	GOLD REQUIREMENTS
Option 1: Enterprise Mobility and Security Partner	One person must complete the following assessment: • Technical assessment for Enterprise Mobility Suite Overview And, one of the following assessments: • Technical assessment for Mobile Device Management	Two people must complete the following assessment: • Technical assessment for Enterprise Mobility Suite Overview And, each must pass one of the following assessments: • Technical assessment for Mobile Device Management • Technical assessment for Identity & Access Management

	• Technical assessment for Identity & Access Management • Technical assessment for Information Protection • Technical assessment for Cloud App Security	• Technical assessment for Information Protection • Technical assessment for Cloud App Security
Option 2: Learning Partner	You must have two Microsoft Certified Trainers (MCTs) who must complete the following: • Technical assessment for Enterprise Mobility Suite Overview And, one of the following assessments: • Technical assessment for Mobile Device Management • Technical assessment for Identity & Access Management • Technical assessment for Information Protection • Technical assessment for Cloud App Security	You must have four Microsoft Certified Trainers (MCTs) who must complete the following: • Technical assessment for Enterprise Mobility Suite Overview And, each MCT must complete one of the following assessments: • Technical assessment for Mobile Device Management • Technical assessment for Identity & Access Management • Technical assessment for Information Protection • Technical assessment for Cloud App Security

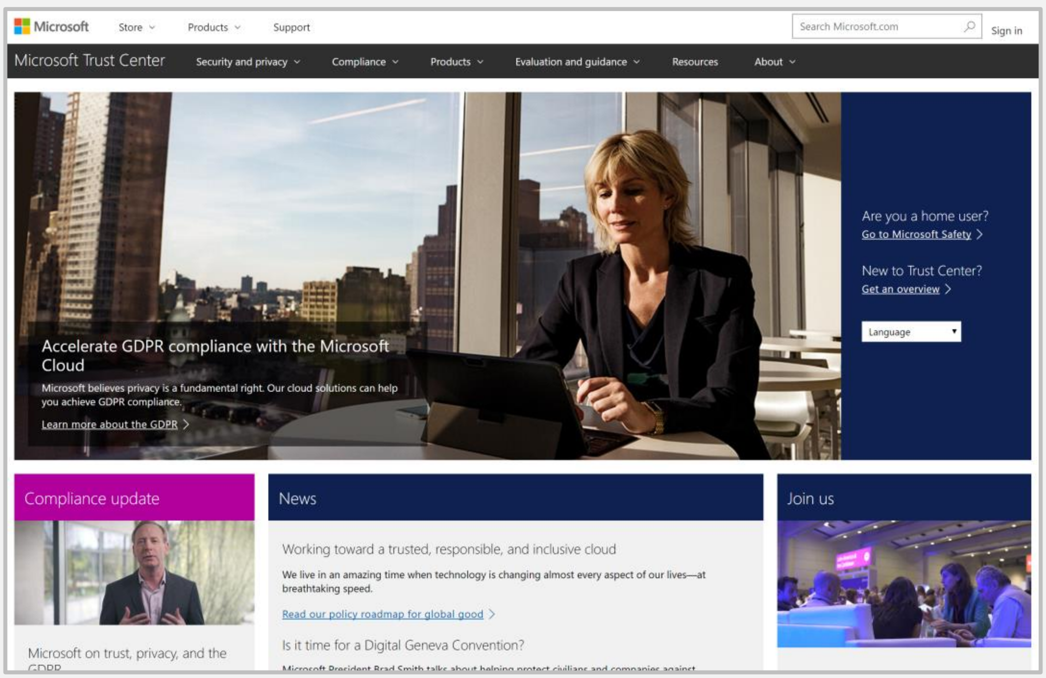
CLOUD PLATFORM COMPETENCY	SILVER REQUIREMENTS	GOLD REQUIREMENTS
Option 1: Azure Consumption Option	One person must pass one of the following assessments: Technical Assessment for Using Microsoft Azure for Datacenter Solutions Technical Assessment for Using Azure Remote Desktop Service Technical Assessment for Using Azure for Data Analytics and Data Platform Solutions Technical Assessment for Using Microsoft Azure for Application Development Technical Assessment for Using Azure for Internet of Things Solutions Or, one person must pass one of the following exams: Exam 70-532: Developing Microsoft Azure Solutions Exam 70-533: Implementing Microsoft Azure Infrastructure Solutions Exam 70-534: Architecting Microsoft Azure Solutions Exam 70-473: Designing and Implementing Cloud Data Platform Solutions Exam 70-475: Designing and Implementing Big Data Analytics Solutions MCSA: Linux on Azure	Two people each must complete one of the following assessments: Technical Assessment for Using Microsoft Azure for Datacenter Solutions Technical Assessment for Using Azure Remote Desktop Service Technical Assessment for Using Azure for Data Analytics and Data Platform Solutions Technical Assessment for Using Microsoft Azure for Application Development Technical Assessment for Using Azure for Internet of Things Solutions Or, two people each must pass one of the following exams: Exam 70-532: Developing Microsoft Azure Solutions Exam 70-533: Implementing Microsoft Azure Infrastructure Solutions Exam 70-534: Architecting Microsoft Azure Solutions Exam 70-473: Designing and Implementing Cloud Data Platform Solutions Exam 70-475: Designing and Implementing Big Data Analytics Solutions MCSA: Linux on Azure

Stay Informed on Security and Compliance Matters

There are two resources you should be very familiar with when defining your Security practice strategy. These are the Microsoft Trust Center and the Office 365 Security and Compliance Center.

Microsoft Trust Center

Microsoft Trust Center is your resource for learning how Microsoft implements and support security, privacy, compliance, transparency in its cloud products and services. The Trust Center is an important part of the Microsoft Trusted Cloud initiative and provides support and resources for the legal and compliance community.

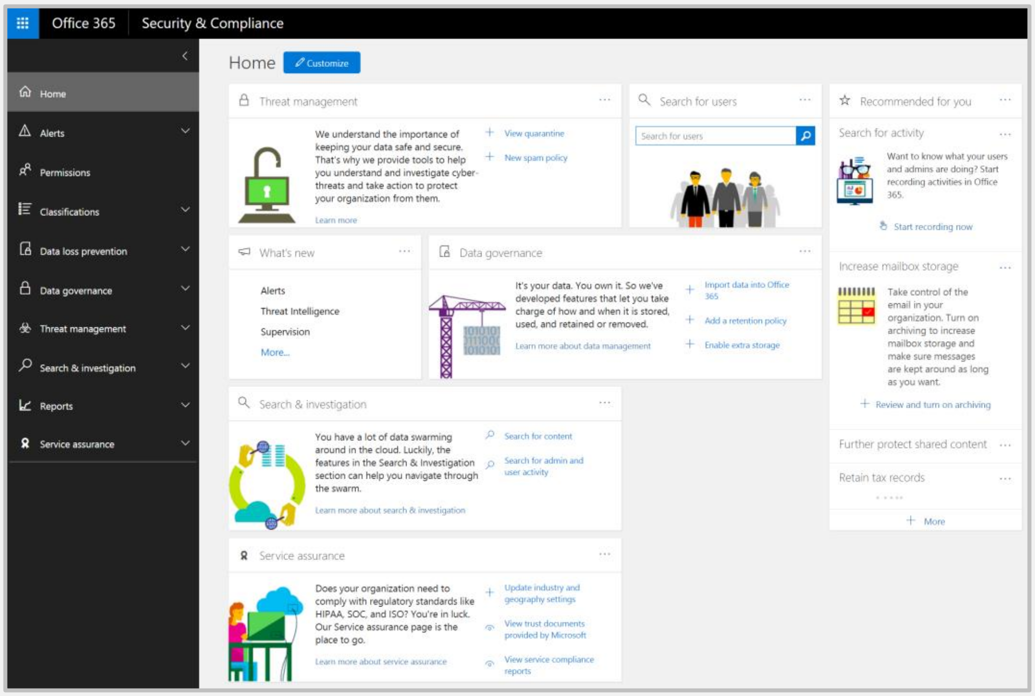


THE TRUST CENTER SITE PROVIDES:

- In-depth information about security, privacy, and compliance offerings, policies, features, and practices across Microsoft cloud products.
- Recommended resources, a curated list of the most applicable and widely-used resources for each topic.
- Information specific to key organizational roles, including business managers, tenant admins or data security teams, risk assessment and privacy officers, and legal compliance teams.
- Direct guidance and support, including options for contacting Microsoft in the Contact Trust Center section of the overview page.

Office 365 Security & Compliance Center

The Office 365 Security & Compliance Center is your one-stop portal for protecting your data in Office 365. Use it to help you address data protection or compliance needs, or to audit user activity in your organization. Use the Office 365 Security & Compliance Center to manage compliance for all of your organization's data across Office 365. You can manage eDiscovery searches and holds, access for mobiles devices, and more.



THE SECURITY & COMPLIANCE CENTER INCLUDES CAPABILITIES FOR:

- **Alerts**: View and manage alerts for your Office 365 organization, including Advanced Security Management alerts.
- **Permissions**: Grant permissions to people who perform compliance tasks like device management, data loss prevention, eDiscovery, and retention.
- **Threat management**: Manage mobile devices and set up data loss prevention for your organization. Help protect inbound and outbound messages from malicious software and spam. Manage which apps have access to Office 365.
- **Data governance**: Import email from other systems. Enable archive mailboxes or set policies for retaining email and other content within your organization.
- **Search & investigation**: Search for content and review user activity. Use eDiscovery to manage cases and set up supervisory review policies to help you capture communication for review.
- **Report**: Use a variety of reports to help you understand how your organization is using Office 365, including reports related to auditing, device management, Supervisory review, and data loss prevention. View user activity reports such as sign-ins for SharePoint Online, Exchange Online, and Azure Active Directory.
- **Service assurance**: View details about how Microsoft keeps Office 365 customer data safe, and how Office 365 helps customers meet industry compliance requirements.

Calculate Your Azure Practice Costs

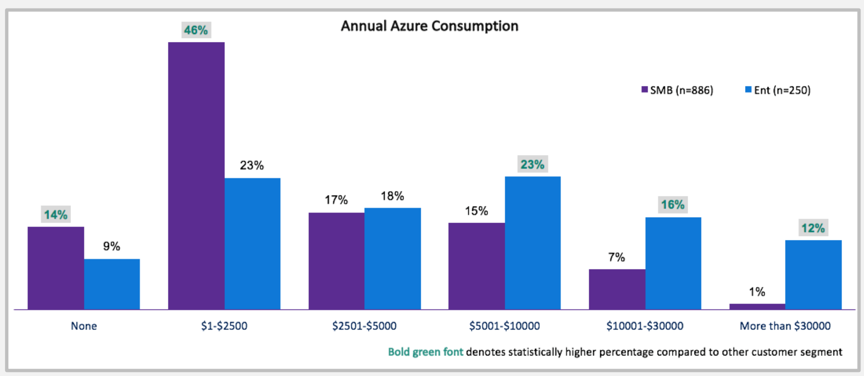
Resources

- [Azure Pricing Calculator]
- [Enterprise Agreements]
- [Azure Cost Modeling]
- [Enterprise Mobility + Security Pricing]
- [Azure Active Directory Pricing]
- [Azure Information Protection Pricing]
- [Microsoft Intune Pricing]
- [Advanced Threat Analytics Pricing]

Azure Practice Costs

Your practice relies on Azure services to deliver customer success, so understanding the Azure related expenses incurred in delivering a customer solution is critical. How do you calculate these Azure costs?

In our research of 1,136 Azure partners, we found that enterprise-focused partners spent a median of $8,107 in Azure for research and development annually; whereas SMB-focused partners spent a median of $1,933 annually.



Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016.

Use the Azure Pricing Calculator to estimate Azure costs and be sure to check the resources list for pricing on the various services within EMS. You can build an estimate online and export it to Excel for further refinement and analysis. This tool will give you the retail rates (also known as the Pay-As-You-Go option) for Azure services, so treat it like the "high end" of your consumption estimate.

Become familiar with the discounted pricing and Azure credits:

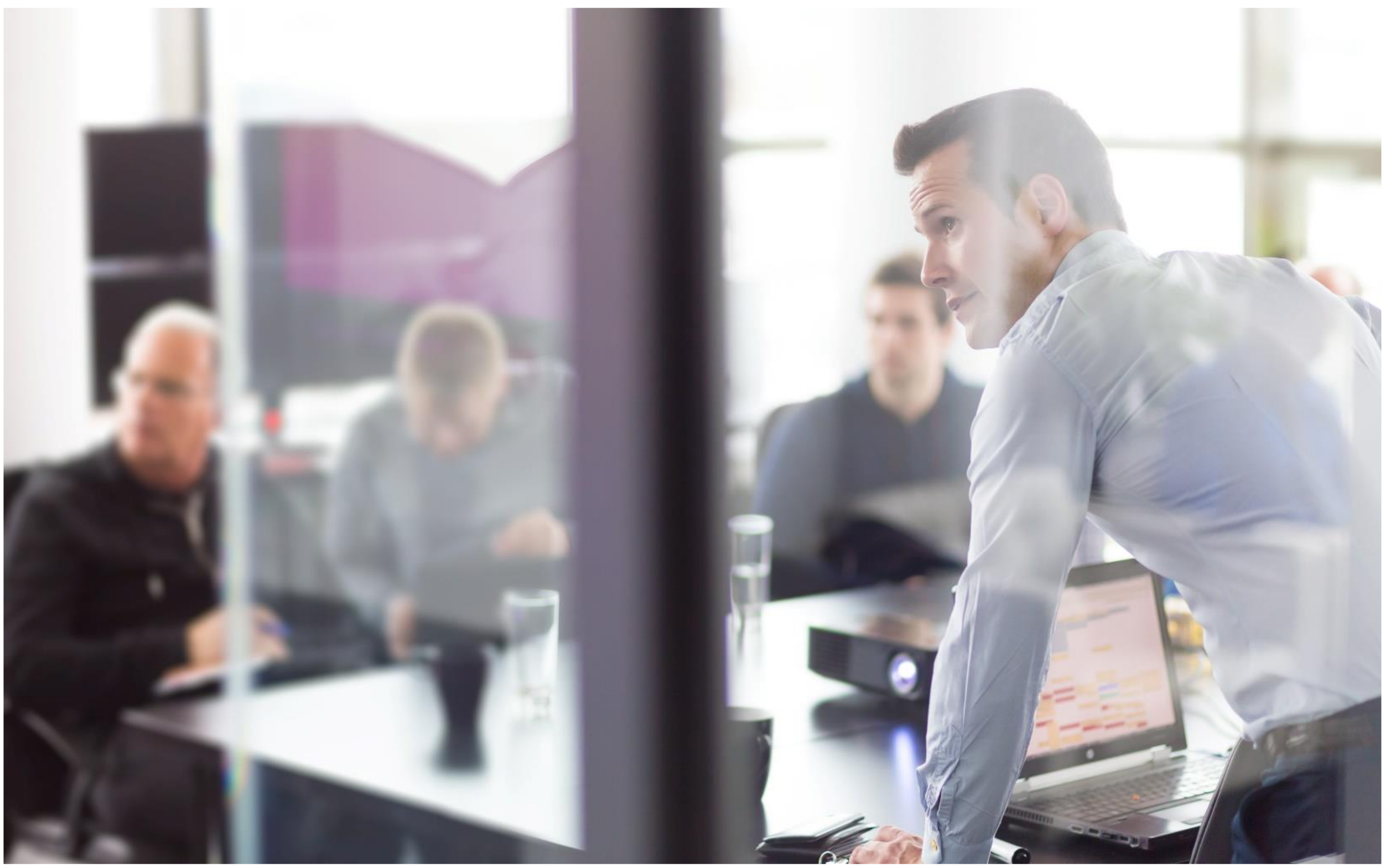
- **Graduated Pricing**: Services like Azure Storage have tiered pricing based upon the volume used. For example, if you use less than 100 TB per month it costs $0.024 per GB per month, but if you use significantly more it can drop to $0.223 per GB per month.
- **Enterprise Agreement**: By making a three-year monetary commitment, Azure services are available at a discount off retail rates. To learn more, see Enterprise Agreements.
- **Azure Credits**: Microsoft Partners can receive Azure credits as a part of their benefit. For example, partners with the Silver Cloud Platform Competency receive $350 USD per month in Azure credits; those with Gold Cloud Platform Competency receive $600 USD per month in Azure credits.

It can be helpful to identify items which are used elastically versus items that have a fixed monthly cost. Significant savings can be achieved via elastic use of resources because you can turn them off (or pause them) when they are not in use.

FOR EXAMPLE:

- **Elastic**: SQL Data Warehouse is used only during month-end calculations; it can be paused the rest of the month. Another example of elastic use is to leverage auto-scale capabilities of the resource, such as auto-scaling the number of App Services instances down in the evenings and back up during the workday.
- **Fixed**: Azure App Service hosting your website in a Web App. This App Service needs to run 24x7 because your visitors will arrive at all hours.

Finally, if you don't understand how much of a given resource you will use, consider building a scaled down proof-of-concept to get a first estimate.



Identify Potential Customers

Build your prospect hit list.

Your goal is to build the list of prospects that could potentially turn into customers. To accomplish this, create an awareness campaign to draw attention to your Azure practice, highlight your service offerings, and use your success to earn additional business with your customers and the industry at large.

Use these awareness activities to help generate new customers:

WEBINARS AND PODCASTS

A great way to transfer knowledge, establish yourself as an expert, and pique the interest of potential customers.

REFERRALS

Ask for referrals in email and phone calls when talking with existing customers, partners, and vendors who might know someone who is ready for your services.

WHITE PAPERS

These are a great way to build credibility with decision makers. Technical staff often expect a white paper to help them understand underlying architecture and technology of your solutions.

NEWS ARTICLES

Leverage public relation efforts to drive publicity around your technology, things your company is doing in the market, and other topics of current interest.

SOCIAL MEDIA

Social media such as Twitter, LinkedIn, etc., is a place to build awareness, reputation, and customer satisfaction — and gain new customers.

Also, consider offering your services as a pilot project to your prospects. With a pilot project, the customer receives two important values. First, they get to better understand how the project goals will be successful. Second, they have a production-grade starting point for their larger efforts.

It is important to keep the distinction between proof-of- concept (PoC) and pilot clear. A PoC should never be considered for direct deployment into production; whereas a pilot should be constructed with a production release in mind.

Case Study

BRISTOW GROUP

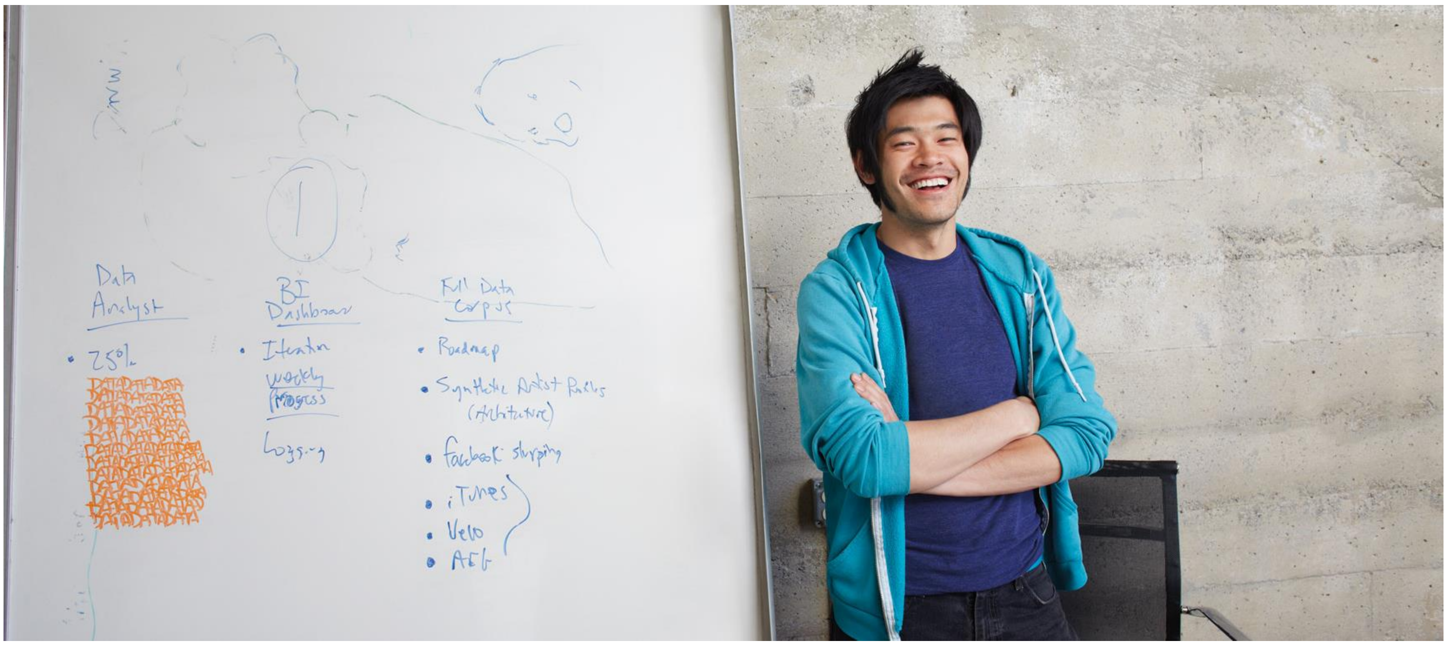
For many enterprises, mobility is one of a number of strategies used to help create a competitive business environment. For Bristow Group, the leading provider of industrial aviation services in the world, mobility is the whole point. More than half of the company's nearly 5,000 employees are either flying or maintaining helicopters on any given day.

Read the case study

Define Customer Support Program & Process

Support Overview

It has been said that an unhappy customer represents an opportunity to make a customer for life. Studies have found when a customer gets to the point of a complaint, they are very emotionally engaged. If you can turn that negative around to a positive, you may just have a customer for life.



When it comes to support, there are two perspectives you should consider. First, how will you support your customers when they have engaged you for project services, managed services, or are utilizing your intellectual property. Second, where do you go for Azure support from Microsoft for a solution you are building, or because you need assistance on behalf of your customer?

THE ITEMS YOU WILL NEED TO WORK THROUGH INCLUDE:

- Defining your support model
- Provisioning your support infrastructure
- Defining and implementing your escalation process
- Selecting and enabling your support options for Azure

We cover each of these topics in the pages that follow.

RESOURCES:

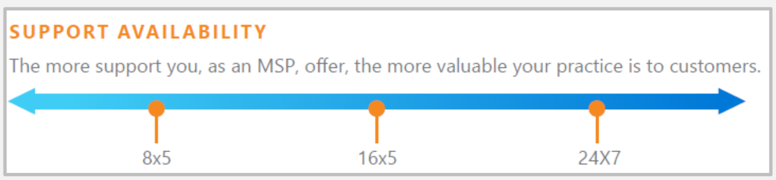
➔ Azure Support for Customers

Supporting Your Customers

Let's begin with the first scenario in which you support your customers directly. It should go without saying that one of the most important functions for your MSP practice will be supporting your customer once their applications and data are firmly in the cloud or sitting in a hybrid deployment. No matter how well a cloud or hybrid environment is planned, provisioned, operated, or monitored, problems will arise — and those problems will need to be remediated. It's your job as an MSP to offer support to your customers to deal with outages, breaches, inefficiencies, and disaster scenarios. MSPs need to consider the level of support that makes sense for their practice — in terms of resources and revenue — as well as what makes sense to the customers they serve.

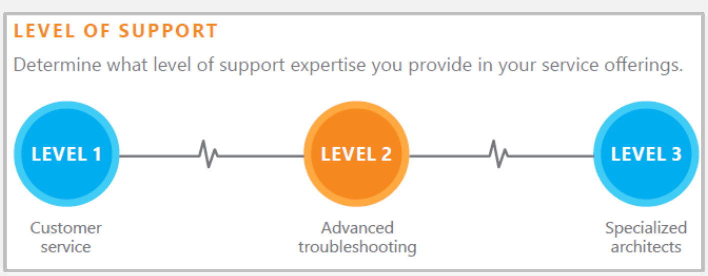
SUPPORT MODEL

How do you package and sell your support? The typical options are to provide support either on a retainer basis (where the customer pays a monthly fee for up to a certain number of "use it or lose it" support hours) or per incident (where the customer pays a fee every time they utilize your support). You must also define your support availability so your customers have a realistic expectation of when they can access your service.



ESCALATION PROCESS

How does a customer get help at the right technical level? For your support process to make economic sense, avoid having your most skilled and most expensive resources (e.g., architects, senior developers, data scientists, etc.) answer every support call. For your particular solution offering, consider implementing a tiered support offering of junior-level resources that are equipped to handle common issues. These resources should be equipped to escalate a customer support case to a more senior-level resource once the common issues have been ruled out. You will need to decide how many levels of tiered support to offer, but two to three tiers is most common. When defining your escalation process, do not forget about the basics. For example, how do customers get in touch with you for support in the first place? This could be a dedicated support telephone number, forum or chat room, Twitter handle, email address, etc.



Support infrastructure: How will you manage customer support requests and track them to closure? Many MSPs offer premium support offerings such as a Technical Account Manager who is responsible for tracking, reporting, and escalating an issue.

RESOURCES:

➔ [Azure Support for Customers]

Reach Customers

How do you reach customers with additional support from Microsoft?

SIGNATURE CLOUD SUPPORT

Signature Cloud Support is provided as benefit to Silver and Gold Partners. It primarily provdes support for issues occurring in Azure subscriptions you own or on which you are a co-admin. It is not intended for use in supporting issues in subscriptions owned by your customers.

MICROSOFT ADVANCED SUPPORT FOR PARTNERS

Microsoft Advanced Support for Partners is the ideal solution for partners who are growing their cloud business. Not quite ready for Premier Support, but need a higher level of service than the Microsoft Partner Network core benefits provide? The Advanced Support program delivers the right level of support to meet you in the middle while your business grows. With Advanced Support for Partners, you get cloud support at an accessible price point, which helps you be a great ally to your customers and grow your business faster. The program includes valuable proactive and reactive services delivered by experienced Services Account Managers and Partner Technical Consultants. Advanced Support for partners enables you to provide support on behalf of your end customers, in addition to providing support on subscriptions you own directly. Designed from the feedback of over 1,500 partners like you, Microsoft Advanced Support for Partners addresses the specific needs of Cloud Solutions Providers (CSPs), born-in-the-cloud partners, and all other partners selling Microsoft Cloud services.

MICROSOFT PREMIER SUPPORT FOR PARTNERS

Microsoft Premier Support for Partners delivers a managed support offering for you and your customers — proactive support services for developing, deploying, and supporting Microsoft technology whether on-premises, hybrid, or in the cloud. As the only partner program with complete, end-to-end managed support across the full Microsoft platform, Premier Support for Partners also provides a powerful marketing tool to gain competitive advantage in the marketplace.

Microsoft offers a range of paid support options for customers from developers starting their journey in the cloud to enterprises deploying business-critical, strategic applications on Microsoft Azure. These options are available in tiers — **Premier, Professional Direct, Standard and Developer Support Plans** — that are available for purchase directly for those who are not Microsoft Partners. In addition to these paid plans, Azure offers **core support**, which is free and provides support via forums, and help with account billing or management questions.

RESOURCES:

- Signature Cloud Support
- Microsoft Advanced Support for Partners
- Advanced Support Video
- Premier Support for Partners
- Azure Paid Support Plans
- Submit Azure Support Requests Step by Step

SUBMITTING AZURE SUPPORT REQUESTS

Support requests need to be submitted using the Azure Portal. First you must log in to the subscription for which you want to receive support. Next, submit a support request. Once submitted, you can manage the incident from the Azure Portal.

TECHNCIAL PRESALES ASSISTANCE & DEPLOYMENT SERVICES

Partner benefits are used as currency for technical presales and deployment services offered by the Microsoft Partner Services team.

As part of your company's Microsoft Partner Network membership, your organization receives partner advisory hours for attaining a Microsoft competency, membership in Microsoft Cloud Accelerate, and subscribing to Microsoft Action Pack Develop and Design.

NETWORK MEMBER	MAPS	SILVER	GOLD
0 hours	**Access + Advisory** Unlimited remote technical training 5 partner advisory hours for technical presales, development and deployment consultations	**Access + Advisory** Unlimited remote technical training Unlimited technical presales assistance for Cloud deals 20 partner advisory hours for development and deployment consultations	**Access + Advisory** Unlimited remote technical training Unlimited technical presales assistance for Cloud deals 50 partner advisory hours for development and deployment consultations

SUPPORT OPTIONS

PARTNER-FACING OPTIONS	RESPONSE TIME
Signature Cloud Support	Less than 2 hours
Microsoft Advanced Support for Partners	Less than 1 hour
Microsoft Premier Support for Partners	Less than 1 hour
Partner advisory hours	N/A

CUSTOMER-FACING OPTIONS	RESPONSE TIME
Premier	Less than 1 hour
Professional-Direct	Less than 1 hour
Standard	Less than 2 hours
Developer	Less than 8 hours
Core	N/A

RESOURCES:

➔ https://partner.microsoft.com/reach-customers/technical-presales-deployment-services

Identify Sales Incentives

Compensation for sales executives is an area all partners grapple with. Without the right mix in compensation, you won't attract and retain the best people, and they won't drive the offers you intend. Our research revealed three core principles of sales compensation.

REWARD A SALES ACTION

This means you need to reward an array of sales activities, not just the final close. Sometimes this can be challenging. The reward does not have to be big, but there must be something to reward the right sales behavior that will lead to the final sale.

THE LEVEL OF INCENTIVE VERSUS REQUIRED SELLING EFFORT

Not all sales are created equal. Sometimes a renewal, for instance, can be much easier than acquiring a new customer. You need to consider effort put in when setting up your compensation model. Reward the right behavior that gets you to the result. Don't over-compensate for routine activities that require less effort and expertise. You should always consider how much of the sales process can be done by lower-level sales staff versus the sales executive. This is also a way to keep sales compensation costs manageable.

SIMPLE ENOUGH TO BE UNDERSTOOD AND DRIVE ACTIONS

Always keep it simple. Sales people are brought on for their ability to communicate, engage and educate customers, and the always-important act of closing. Don't overly complicate the sales actions required in order to be compensated. Drive the behavior that you know leads to closing business. Reward that behavior and get your reps to see it through to the close of business.

Remember that everyone is a seller in most companies. You should train all employees in appropriate sales techniques. Everyone should be on the lookout for existing customer opportunities as well as new ones. Teach them the signs and how to react. Reward everyone in the company for positive sales behavior.

SALES COMPENSATION VARIABLES

When deciding how to calculate the compensation for your sales incentives, consider the variables that help describe the magnitude of the benefit of the sale to the company and the effort required to close the sale. Examples include:

- **Expected duration**: How long is the contract for? Longer contracts are more lucrative to the company and should have higher valued incentives.
- **Expected number of units**: How much of the service is purchased? Higher quantity purchases deliver more value to the company and should have higher valued incentives.
- **Feature options**: Some features are more profitable to the company than others. Consider incentivizing the higher profit margin features with higher valued incentives to drive sales.

POSITIONING THE OFFER VIA INCENTIVES

Depending on the maturity of your practice, you may have to create different incentives to encourage the selling of the offer. The above diagram illustrates a decision-making process you can follow to finetune your incentives based on how the offer's incentives compete with other company incentives.

Identify Solution Marketplace Platform

Resources

- ➔ Azure Marketplace
- ➔ Microsoft Azure Certified
- ➔ How to publish an offer in the Azure Marketplace

Azure Marketplace

Azure Marketplace is an online store that enables ecosystem partners to offer their solutions to enterprises and Azure customers around the world. Within a single, unified platform, customers can easily search, purchase, and deploy your solutions on Azure with just a few clicks.

Azure Marketplace is the source for thousands of software applications and services certified by Microsoft to run on Azure. Azure Marketplace supports offers that include virtual machines, developer services, and solution templates.

Azure Marketplace gives your solutions exposure through the marketplace page and the listings integrated with the Azure Portal. For example, HDInsight Applications are integrated into the steps users take to deploy an HDInsight cluster (so users could layer your application atop their HDInsight cluster), but are also available via the Marketplace blade of the Azure Portal.

The process of getting your solution listed in the Azure Marketplace is referred to as getting Microsoft Azure Certified. This comes with benefits, many of which include select benefits from the MPN Silver Cloud Competency.

CERTIFY APPLICATIONS AND SERVICES

Solutions sold in the Azure Marketplace must be Microsoft Azure Certified. This provides assurance to your customers that your offers have been tested for usability, readiness, and compatibility with Azure.

- Access broad-reaching Microsoft marketing channels, and receive co-marketing assistance and promotion outside of your Azure Marketplace listing.
- Leverage technical and business planning support to help you maximize your ROI.
- Utilize a self-service portal that contains ready-to-use marketing resources to enhance your communications and messaging.
- Take advantage of resources, such as the Sales Accelerator Toolkit and credits for display, and search advertising to help drive customer adoption.

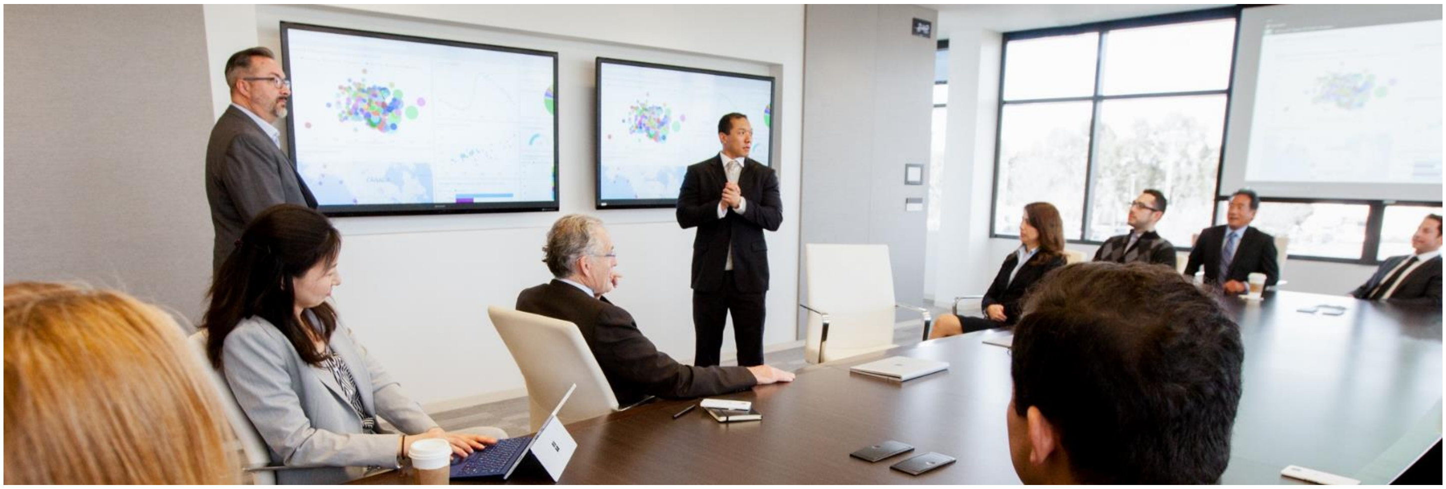
Hire & Train

Security

aka.ms/practiceplaybooks

Microsoft

Executive Summary



In the previous section, you evaluated the various services your business can pursue as you set up or build your Security practice. Now that you've identified some avenues of success, you may be wondering how to build and train your team.

First, we'll help you define the members of your team and the skills they should bring to the table. If you need to hire to fill gaps, we provide you with detailed job descriptions you can use, as well as ideas on where to look for resources, the factors you should look for in a candidate's skillset, and what you should expect to pay by role and region.

A big focus of this section is the critical piece of ensuring all of your practice resources are trained and continue to receive ongoing training. We cover not just the technical training, but also sales and marketing training.

Additionally, we'll give you details on the specific Microsoft certifications your technical resources should be working towards, both for their own professional development and to earn your organization Microsoft Partner Network competencies.

Top 5 things to do

You're crafting your gameplan to build your team, make sure you nail down these 5 tasks before you move to the next section.

- ☑ Define the members and roles required
- ☑ Identify capability and skills gaps
- ☑ Decide which skills to hire and train
- ☑ Hire to fill gaps in your team
- ☑ Train and certify your team

Creating a Hiring Plan

Resources

- [Should you hire or Train (adp.com)]
- [Grow your own or hire outside (inc.com)?]

Human Resources

Human resources are a critical asset to any services-based practice. Starting a new practice requires you to start with an evaluation of your existing team members (if any) and then make the decision of whether to hire new employees or bring your existing team up to speed.

The following sections describe the recommended resources across sales, technical and support functions that you will likely need. In many practices that are just getting started you may not be able to fill all roles with individual professionals. In this situation one person will likely be required to fulfill the duties of multiple roles.

Partner Skillsets

Referrals and LinkedIn are top sources for identifying skilled labor. Once a candidate is identified, work history, cultural fit, and years of experience become the important considerations.

Roles associated with cloud practices typically have at least 3 years' experience. Furthermore, most companies engage in at least annual ongoing staff learning efforts like conferences/ events and online training. A median of 8.5% of technical resources time is spent on training.

Hire, build, and train your team

Sales Resources

You have a vision for developing the next great Security solution, but even the best products need a sales strategy to gain maximum market traction. Consider hiring for the following sales positions for broad reach.

The **Solution Sales Manager** (SSM) is a senior leader within the enterprise sales organization. The SSM leads, develops, and manages a team of high-performing sales and technical pre-sales/post-sales resources to drive solution opportunity revenue and market share by leveraging the Microsoft Security and Cloud offerings to meet their customers' Mission Critical Tier1 security needs. Ten or more years of sales experience is required for this position. Qualifications include people management, business development, competitive selling, and the ability to thrive in complex, ambiguous, and dynamic environments.

The **Cloud Solutions Sales Manager** is a solution sales leadership role that is responsible for delivering sustainable new business growth across segments; providing thought-leadership; and driving customer acceleration to cloud and security across the enterprise sales and marketing teams. The Solution Sales Manager is a great sales coach and leader, has a challenger mentality, is savvy in sales leadership practice, and contributes with vision and flawless execution of solution sales across workloads and solution areas.

The **Technical Sales Manager** (TSM) is a senior leader within the enterprise sales organization. A TSM drives revenue and market share by leading a team of technical sellers that provide customers with insights and solutions. The Technical Sales Manager will manage, coach, and lead a team of solution architects and tech sales professionals to uncover and support the business and IT goals of customers by driving the technical decision and providing business value with the Microsoft platform, thus securing long-term sustainable growth. A computer science degree or related field is required for this role. Additional qualifications include strategic insight, project management, analytical problem solving, customer/partner relationship building, and exceptional product and technical expertise.

Technical Resources (Architecture, Infrastructure, and Development)

These roles form the heart of your Security solution. Hiring the right people can turn your vision into reality.

A **Cloud Architect** (CA) drives customer initiatives in collaboration with customers. The CA is a technical, customer-facing role that is accountable for the end-to-end customer cloud deployment experience. CAs own the technical customer engagement, including architectural design sessions, specific implementation projects and/or proofs of concepts. The ideal candidate will have experience in customer-facing roles and success leading deep technical architecture and application design discussions with senior customer executives to drive cloud deployment. A computer science or related engineering degree is required.

The **Mobility Solution Engineer** is responsible for the design, implementation, integration, support and monitoring of enterprise mobility solutions. The ideal candidate should have a diverse understanding of the current state of security best practices, including identity and access control, mobile technology, and mobile best practices throughout a variety of industries. In addition, this individual must have working knowledge of mobile development standards, can identify a landscape of mobile vendors (MDM, MADPs, etc.), and be familiar with the deployment of mobile applications across platforms. The candidate must have prior experience formulating, planning, and implementing a mobile strategy, including formulating policies for "bring your own device" (BYOD) policy and remote access. The candidate should have outstanding technical and analytical skills to outline why a mobile strategy is needed, and how to identify and prioritize applications, data, and devices to manage.

The **Identity Solution Engineer** is responsible for the design, implementation, integration, support, and monitoring of enterprise identity and access control solutions. The ideal candidate should have a diverse understanding of the current state of security best practices, including identity and access control, mobile technology, and best practices throughout a variety of industries. In addition, this individual must have a strong knowledge of identity standards and protocols, as well as a deep skillet with Windows Server Active Directory and industry security solutions.

Management

Consider the following management positions if your development effort will involve eight or more technical staff. In smaller teams, senior-level employees sometimes take on management duties along with their other responsibilities, removing the need for dedicated managers.

The **Product Manager** (or Product Management team) establishes and sustains the business case for the project and plays a key role in identifying and setting priorities across the target audience. This includes ensuring that business expectations are clearly articulated and understood by the project team, and that the functional specifications respond to business priorities.

Product Management owns the vision statement for the project. The vision statement is an informal document that communicates the expectations and assumptions on which the project is based.

Product Management is also responsible for high-level project communications such as business projections, project costing, and contract negotiation. Product Management communicates the high-level milestones to the target audience and other team members.

The **Program Manager** or Program Management team "owns" the specification for an application's features and functionality and coordinates the day-to-day communication required to develop and deliver the application effectively and consistently within organizational standards.

Program Management has a key communication and coordination role. With input from other team leads, Program Management assists Product Management in articulating the vision for the project. Using this vision, Program Management drafts the initial version of the functional specification and is considered the keeper of the functional specification. Program Management is responsible for all activities associated with analysis, specification, and architecture. Program Management is also responsible for defining how the project will interoperate with external standards, maintaining external technical coordination and communication, and managing the master schedule.

Support Resources

A lot of effort goes on behind the scenes, or in positions that involve post-sales customer engagement. To ensure long-term success of your projects, consider hiring some of these support roles.

A **Customer Success Manager** is passionate about engaging your customers and helping them expand their use cases. They have excellent relational skills, and can create win/win environments for all parties they work with. In their day-to-day responsibilities, they own the overall relationship with assigned clients by increasing adoption and ensuring retention and satisfaction. They make a large impact on your enterprise security business by establishing a trusted and strategic advisor relationship with each assigned client, driving continued value of your products and services. The Customer Success Manager will help drive sales by working to identify or develop upsell opportunities. Additionally, they will advocate customer needs and issues cross-departmentally and program manage account escalations. Qualifications include prior experience in customer success or equivalent history of increasing customer satisfaction, adoption, and retention.

A **Quality Assurance (QA) / Test Technician** is thorough and detail-oriented, and should work well with established processes. The primary goal of this role is to help avoid defects in your final product or solution. This person will be involved throughout the development process and use their intuition to problem solve and identify technical, procedural, and usability concerns. They must take meticulous notes, be organized about recording process steps, and work well with others since they will be coordinating with technical and management teams to ensure that the correct measures are put into place to align the final product with the initial goal.

An **Information Security Analyst** assesses and provides security advice on cloud infrastructure, including network, service, and application components. This role conducts risk assessments and architectural reviews, provides cyber security subject matter expertise, and assists in the building and design of secure solutions. Additional duties may include network and application penetration testing, and support for cyber security investigations, as well as on-call response for cyber security incidents. A computer science or related engineering degree is required, or the equivalent combination of education, professional training, or work experience.

A **User Support Specialist** assists customers who are having technical issues with your product, or who need help realizing the full benefit of your solution to help them deliver their cloud-based workloads. They will likely be in a position to help customers navigate the operational challenges of cloud computing, so thoroughly training them on both your product — and the infrastructure on which it is built — is paramount to their success, and ultimately, your customers' satisfaction. Qualifications include technical support experience and great communication and interpersonal skills (soft skills). Experience with cloud technologies is a major plus.

A **Data Protection Officer** assesses and advises across the company group for data protection and privacy matters related to security. This role is a subject matter expert in the handling of personal data, and ensures there are policy and compliance processes to comply with local data protection legislation. Expert knowledge of global and national data protection law and practices, as well as the General Data Protection Regulation (GDPR) is a requirement, as well as the ability to fulfil the tasks referred to in Article 39 of the GPDR. Experience in conduction data privacy compliance, reviews, and audits is beneficial.

Job Descriptions for your Technical Team

The following tables provides detailed job descriptions you can utilize to hire the key technical resources. All technical skills, non-technical skills, certifications, and technologies listed are potential items a candidate should have, but no candidate will have all the items listed.

CLOUD ARCHITECT

A Cloud Architect (CA) drives high-priority customer initiatives in collaboration with customers and the your sales team. The CA is a technical, customer-facing role that is accountable for the end-to-end customer cloud deployment experience. CAs own the Azure technical customer engagement, including: architectural design sessions, specific implementation projects and/or proofs of concepts. The ideal candidate will have experience in customer-facing roles and success leading deep technical architecture and application design discussions with senior customer executives to drive cloud deployment. Bachelor's degree in computer science or related field preferred.

Technical Skills	• Solid understanding of modern authentication protocols and a background in cyber security. • Deep understanding of cloud computing technologies, business drivers, and emerging computing trends. • Deep technical experience in enterprise mobile, identity & access control, and security solutions. • Working knowledge with AGILE development, SCRUM and Application Lifecycle Management (ALM) with one or more of the following programming languages: PowerShell, Bash, .NET, C++, Java, JSON, PHP, Perl, Python, Ruby on Rails, HTML, CSS, JavaScript, Responsive Web Design.
Non-Technical Skills	• Proven track record of building deep technical relationships with senior executives and growing cloud consumption share in large or highly strategic accounts. • Proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through. • Presentation skills with a high degree of comfort with both large and small audiences. • Prior work experience in a consulting/architecture position within a software and/or services company. • Problem-solving mentality leveraging internal and/or external resources. • Exceptional verbal and written communication.
Certifications	• MCSE Cloud Platform and Infrastructure, CompTIA Security+, CISSP, MCSA Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, AWS Certified Solution Architect • Exam priorities: Architecting Azure Solutions 70-534, 70-398: Planning for and Measuring Devices in the Enterprise
Project Experience Types / Qualities	• 5+ years of architecture, design, implementation, and/or support of highly distributed applications (i.e. having an architectural sense for ensuring availability, reliability, etc.). • 2+ years of experience in "migrating" on premise workloads to the cloud. • 5+ years of success in consultative/complex technical sales and deployment projects (where necessary, managing various stakeholder relationships to get consensus on solution/projects). • Oversight experience on major transformation projects and successful transitions to implementation support teams.

Technologies	• Enterprise Mobility Suite, Intune, Azure Information Protection, Azure Active Directory, Octa, Auth0, LDAP, OAuth, SAML, Cloud App Security, Firewalls, Office 365, Windows Server Active Directory, Azure AD Connect, Active Directory Federation Services (ADFS), Mobile Iron, Airwatch, iOS, Android, Windows, Azure Virtual Machines, Virtual Networks, ExpressRoute, Operations Management Suite, Azure Site Recovery, Azure Backup, Azure App Services, Azure Storage, Azure Import/Export, Azure SQL Database, Azure Web Jobs, Azure ExpressRoute, MySQL, SQL Server, SQL Server IaaS, SharePoint on Azure, AWS EC2, S3, AWS DirectConnect

MOBILITY SOLUTION ENGINEER

The Mobility Solution Engineer is responsible for the design, implementation, integration, support, and monitoring of enterprise mobility solutions. The ideal candidate should have a diverse understanding of the current state of security best practices, including identity and access control, mobile technology, and mobile best practices throughout a variety of industries. In addition, this individual must have working knowledge of mobile development standards, the ability to identify a landscape of mobile vendors (MDM, MADPs, etc.), and be familiar with the deployment of mobile applications across platforms. The candidate must have prior experience formulating, planning, and implementing a mobile strategy, including formulating policies for "bring your own device" (BYOD) policy and remote access. The candidate should have outstanding technical and analytical skills to outline why a mobile strategy is needed, and how to identify and prioritize applications, data, and devices to manage. Bachelor's degree in computer science or related field preferred.

Technical Skills	• Solid understanding of modern authentication protocols and a background in cyber security. • Deep understanding of cloud computing technologies, business drivers & emerging computing trends. • Experience with mobile device operating systems such as iOS, Android, and Windows. • Experienced troubleshooter, analyzing log files, network traffic, permissions issues, identifying problems with performance and scale. • Experience with engineering and deploying mobile solutions, including Enterprise Mobile Management (EMM), Mobile Content Management (MCM), and Mobile Application Management (MAM).
Non-Technical Skills	• Proven track record of driving decisions collaboratively, resolving conflicts, and ensuring follow through. • Presentation skills with a high degree of comfort with both large and small audiences. • Problem-solving mentality leveraging internal and/or external resources. • Exceptional verbal and written communication.
Certifications	• MCSE Cloud Platform and Infrastructure, CompTIA Security+, CISSP, MCSA Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, AWS Certified Solution Architect • Exam priorities: [70-398: Planning for and Measuring Devices in the Enterprise]()

Project Experience Types/Qualities	• 3–5+ years senior (tier 3) level support with mobility as part of responsibilities. • 3–5+ years of experience with mobility architecture and OS platforms including iOS and Android. • 3–5+ years of experience with enterprise mobility technologies and implementations, including MDM, MAM, Security and App Stores along with back-end infrastructure, including Active Directory, Exchange, remote network access, and Identity Management. • Management (EMM), Mobile Content Management (MCM), and Mobile Application Management (MAM).
Technologies	• Enterprise Mobility Suite, Intune, Azure Information Protection, Azure Active Directory, OAuth, SAML, Cloud App Security, Citrix XenMobile, MobileIron, Airwatch, Blackberry, Firewalls, Office 365, Windows, Linux, iOS, Android, System Center Configuration Manager • Developer Technologies: HTML, CSS, JavaScript, Responsive Web Design, Mobile Frameworks

IDENTITY SOLUTION ENGINEER

The Identity Solution Engineer is responsible for the design, implementation, integration, support, and monitoring of enterprise identity and access control solutions. The ideal candidate should have a diverse understanding of the current state of security best practices, including identity and access control, mobile technology, and best practices throughout a variety of industries. In addition, this individual must have a strong knowledge of identity standards and protocols as well as a deep skillet with Windows Server Active Directory and industry security solutions. The candidate must have prior experience formulating, planning, and implementing an identity and access control strategy, including formulating policies for the "bring your own device" (BYOD) policy and remote access. The ideal candidate will have a strong understanding of network infrastructure, such as firewalls, proxies, and cross-site connectivity options. Bachelor's degree in computer science or related field preferred.

Technical Skills	• Solid understanding of modern authentication protocols and a background in cyber security. • Deep understanding of cloud computing technologies, business drivers, and emerging computing trends. • Experience with Windows Server Active Directory and other LDAP-based directory services. • Experience with Azure AD and Azure Infrastructure as a Service (Virtual Machines, Virtual Networks). • Integration and migration experience with Skype for Business, Exchange, SharePoint & Office 365. • Experience with Windows, Linux, iOS, Android, Blackberry. • Experienced troubleshooter, analyzing log files, network traffic, permissions issues, identifying problems with performance and scale. • Developer experience with .NET, Java, HTML, CSS, JavaScript.

Non-Technical Skills	• Proven track record of driving decisions collaboratively, resolving conflicts, and ensuring follow through. • Presentation skills with a high degree of comfort with both large and small audiences. • Problem-solving mentality leveraging internal and/or external resources. • Exceptional verbal and written communication. • Basic understanding and knowledge of PCI and SOX regulatory standards.
Certifications	• MCSE Cloud Platform and Infrastructure, MCSA Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, CompTIA Security+, CISSP, AWS Certified Solution Architect. • Exam priorities: Identity with Window Server 2016, 70-533 Implementing Azure Infrastructure Solutions, 70-398: Planning for and Measuring Devices in the Enterprise,
Project Experience Types / Qualities	• 3–5+ years senior (tier 3) level support with identity management as part of responsibilities. • 5–8 years of experience with identity architecture and management. • 3–5 years deploying, migrating, or managing an Office 365 environment.
Technologies	• Azure Active Directory, Office 365, Windows Server Active Directory Domain Services, ADLDS, Rights Management Server, Microsoft Identity Manager (FIM/MIM), Active Directory Federation Services (ADFS), Active Directory Certificate Services (ADCS), Web App Proxy, Site Minder, Octa, Auth0, WebSphere, Enterprise Mobility Suite, Intune, Azure Information Protection, Azure Active Directory, OAuth, SAML, Cloud App Security, Citrix XenMobile, MobileIron, Airwatch, Blackberry, Firewalls, Office 365, Windows, Linux, iOS, Android, System Center Configuration Manager, Exchange, Skype for Business, SharePoint

ETHICAL HACKER / PENETRATION TESTER/ SECURITY ANALYST

An ethical hacker, also referred to as a penetration tester or security analyst, is responsible for testing the security of an organization, across a spectrum of targets that includes software solutions, infrastructure and personnel.

The ideal candidate should have a diverse understanding of the current state of security best practices, and be familiar with the vulnerability research process that includes footprinting, scanning, enumeration, systems hacking, escalation of privilege, covering of tracks and the planting of backdoors, as well as the tools that are deployed in each phase of the process. Additionally, the candidate should have strong written communication skills to document and categorize the threat level of discovered vulnerabilities, and in making suggestions about how to improve the target's security posture.

The ideal candidate will have a strong understanding of both the technical domains (network infrastructure, software, etc.) and human interaction domains (e.g., social engineering), as well as an awareness about current laws that may affect the way in which the analysis is conducted.

Technical Skills	• Solid understanding of modern authentication protocols and a background in cyber security. • Deep understanding of cloud computing technologies. • Experience with Windows, Linux, iOS, Android. • Experience in network security: TCP/IP, DNS, proxies, firewall configuration, intrusion detection and prevention systems, IPSec and TLS/SSL. • Experience with cryptography: symmetric and asymmetric cryptography, hashing. • Experience with tools for conducting port scans, network scans, fingerprinting and vulnerability scans. • Experience with tools for conducting enumeration of target environment and configuration. • Experience with tools used for system hacking (e.g., password cracking), malware creation/deployment, network traffic sniffers, session hijacking, denial of service and SQL injection.
Non-Technical Skills	• Proven track record of conducting vulnerability assessments and delivering clear, actionable reports. • Problem-solving mentality leveraging internal and/or external resources. • Exceptional written communication and strong verbal communication skills. • Awareness of current laws that may affect penetration testing and analysis, and in conducting test that stay within the law. • Experience with non-technical attacks and social engineering
Certifications	• Certified Information Systems Security Professional (CISSP), Certified Ethical Hacker (CEH), MCSE Cloud Platform and Infrastructure, MCSA Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, CompTIA Security+, AWS Certified Solution Architect.
Project Experience Types / Qualities	• 5+ years as a practicing security professional • Recent IT or IS degree preferred
Technologies	• Nmap, Hping3, Sysinternals suite, L0phtCrack, Wireshark, Cain & Abel, Kismet, Nessus, OpenVAS, Nexpose, Retina, Azure Active Directory, Office 365, Windows Server Active Directory Domain Services, ADLDS, Rights Management Server, Microsoft Identity Manager (FIM/MIM), Active Directory Federation Services (ADFS), Active Directory Certificate Services (ADCS), Web App Proxy, Site Minder, Octa, Auth0, WebSphere, Enterprise Mobility Suite, Intune, Azure Information Protection, Azure Active Directory, OAuth, SAML, Cloud App Security, Citrix XenMobile, MobileIron, Airwatch, Firewalls, Office 365, Windows, Linux, iOS, Android, System Center Configuration Manager, Exchange, Skype for Business, SharePoint

Recruiting Resources

Top 10 Sources to Find Skilled Labor and What to Look For

Sourcing skilled labor can be a challenge. In our recent survey with MDC of 1,132 Azure partners, we found that referrals and LinkedIn rank among the top sources for finding candidates. See the table below for the top 10 sources to identify skilled labor:

	TOTAL (n=1136)	SMB (n=886)	ENTERPRISE (n=250)
Referrals from employees or partnerships	70%	69%	73%
LinkedIn	59%	57%	66%
Posting on website	47%	45%	54%
Local Universities	38%	36%	46%
Local Technical Communities	36%	35%	43%
Recruit from competitors	30%	29%	36%
Meet ups	29%	29%	30%
GitHub	8%	8%	7%
Stack Overflow	8%	8%	7%
Other job posting sites	6%	6%	4%

Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016.

Now that you have an understanding of where to look, what are the most important factors to look for in a potential hire's skillset? In the Microsoft Cloud Practice Development Study, we asked the Azure partners this question. What they told us was that the top three most important factors were work history, cultural fit, and years of experience.

	TOTAL (n=1136)	SMB (n=886)	ENTERPRISE (n=250)
Work history	69%	68%	74%
Cultural fit	43%	40%	53%
Years of experience	42%	41%	47%
Professional certifications	32%	34%	22%
Referrals	28%	29%	26%
Professional training received	20%	21%	16%
Reputation through community	16%	15%	19%
Formal education	13%	14%	11%
Contract to hire or other means to test skills "hands-on"	13%	13%	13%
Publications	3%	3%	2%
Awards received	2%	2%	2%
Attitude	0%	0%	1%
Other	4%	4%	4%

Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016.

Training & Readiness

Resources

- [Microsoft Virtual Academy]
- [IT Pro Cloud Essentials]
- [IT Pro Career Center]
- [Microsoft Azure Certification and Training]

Preparing and Training IT Staff for the Cloud

For IT staff to function as change agents supporting current and emerging cloud technologies, their buy-in for the use and integration of these technologies is needed. For this, staff need three things:

- An understanding of their roles and any changes to their current position.
- Time and resources to explore the technologies.
- An understanding of the business case for the technologies.

USE THE FOLLOWING RESOURCES AS PART OF YOUR AZURE ONBOARDING FOR NEW AND EXISTING STAFF:

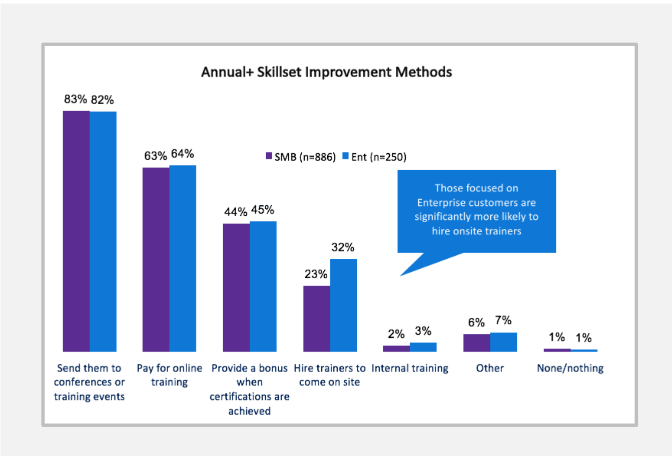
- Azure Skills provides a free online training option and great deals on certification, including significant discounts on Microsoft exam vouchers for Azure certifications. Microsoft and partners offer a variety of options for all audiences to develop their skills with Microsoft Azure services. The Microsoft Learning MOOC Catalog, a component of Azure Skills, provides in-depth courses with labs, office hours, and tests. After taking a massively open online course (MOOC), IT staff should have the hands-on skills they need to be able to deploy, build, and architect solutions on Azure.
- Microsoft Virtual Academy (https://mva.microsoft.com/product-training/microsoft-azure) offers training from the people who helped to build Microsoft Azure. From the basic overview to deep technical training, IT staff will learn how to leverage Microsoft Azure for their business.
- Microsoft IT Pro Cloud Essentials (https://www.itprocloudessentials.com) is a free annual subscription that includes cloud services, education, and support benefits. IT Pro Cloud Essentials provides IT implementers with hands-on experience, targeted educational opportunities, and access to experts in areas that matter most to increase knowledge and create a path to career advancement.
- The Microsoft IT Pro Career Center (https://www.itprocareercenter.com) is a free online resource to help map your cloud career path. Learn what industry experts suggest for your cloud role and the skills to get you there.

Follow a learning curriculum at your own pace to build the skills you need most to stay relevant. In the next section, you will see a list of suggested resources to help onboard your team for training success.

Technical Training

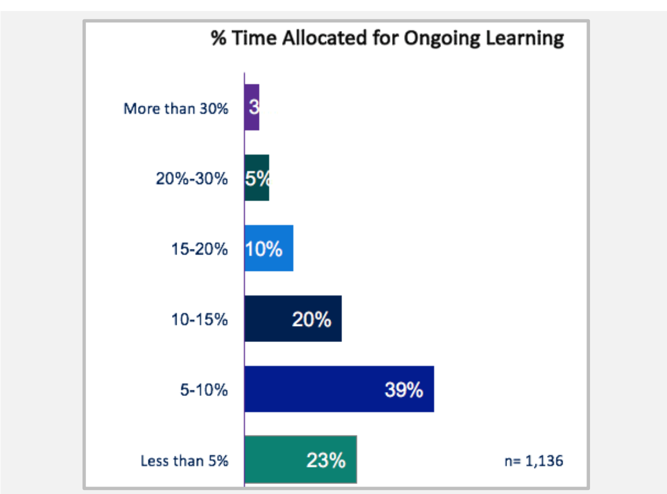
Whether you need to fill a skills gap or are looking to improve your team's skill surface area, technical training is critical to your success.

In our research, we found conferences and paid online training are the most common learning mechanisms.



Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016

We also found that partners spend a median of 8.5% of technical resource time on training.



Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016.

CLOUD PLATFORM UNIVERSITY

Cloud Platform University Online is an interactive, scenario-based training resource to equip you with the foundational elements of selling and supporting Microsoft cloud and enterprise technologies.

MPN LEARNING PATHS

Microsoft Partner Network (MPN) Learning Paths provide step-by-step guides displaying training opportunities and certification options organized by products, competencies, exams/accreditations, and business focus.

MICROSOFT INSPIRE CONFERENCE RECORDINGS

Even if you missed the annual live event, the Microsoft Inspire Conference provides many of its sessions as on-demand recordings — no conference pass required.

PARTNER COMMUNITY EVENTS, CALLS & WEBINARS

The Microsoft Partner Enablement Blog maintains a schedule of trainings available to partners. Visit often and plan your training calendar.

SMART PARTNER MARKETING

Leverage the Microsoft Smart Partner Marketing site as your starting point for training marketing resources.

For guidance on training your sales team on selling Azure, see Azure Sales Training within this playbook.

Resources

- H2 CY 2016 Partner Curriculum Guide
- Azure Skills
- Azure Skills Announcement
- Microsoft Official Curriculum - On-Demand
- Find a Microsoft Learning Partner
- Microsoft MOOC Azure Courses
- Microsoft Virtual Academy
- Pluralsight Azure Courses
- Opsgility On-Demand Azure Courses
- Opsgility Instructor-Led Azure Courses

Finding the Right Training Resource

The C+E Partner Curriculum Guide provides sales and technical curriculum for a variety of specialization areas. It describes the readiness programs, engines, and resources available to help build your skills around selling, deploying, and architecting Cloud Infrastructure and Management, Cloud Application Devevelopment, Data Platform and Data Analytics, Security and Mobility solutions.

Whether you're new to Azure or already a cloud professional, training is one of the best investments you can make in your career. Azure Skills provides a free online training option and great deals on certification, including significant discounts for Microsoft exam vouchers for Azure certifications.

For the Security practice, consider the Threat Protection and Prevention section in the C+E Partner Curriculum guide to help train your sales and technical teams

In addition to the C+E Partner Curriculum guide, consider the following resources:

Microsoft Learning offers a wide variety of official curriculum on-demand, as well as edX courses that are taught by Microsoft experts, and help you learn through hands-on experiences with a broad reach of Azure technologies.

Microsoft Learning Partners are available worldwide to help enable your team for Microsoft Azure via live instructor-led training. This can be scheduled as a dedicated delivery at your location or virtually using remote learning technologies. Many courses are scheduled as open-enrollment courses, which allows doesn't require you to schedule a dedicated class.

Microsoft Virtual Academy provides live and on-demand virtual training for your technical team, with new courses arriving weekly. It also includes access to a comprehensive assortment of e-books from Microsoft Press.

Pluralsight is a key Microsoft partner that offers Azure training. Find more than 40 beginner, intermediate, and advanced training courses on Azure. If you are a Visual Studio subscriber, use your benefits to access Azure training. 70-534 Training - 70-533 Training

Opsgility is a key Microsoft partner that offers Azure training. Find more than 70 online classes focused on Azure with full learning paths for Azure certification. Opsgility also offers a full set of instructor-led Azure trainings that focus on architects, developers, dev ops, operations, sales and decision makers. 70-534 Training - 70-533 Training - Real World EMS

O'Reilly Safari provides subscription access to more than 40,000 books, videos, and interactive tutorials from over 200 of the world's best publishers, including O'Reilly, Pearson, Harvard Business Review, and Packt. It also offers live online training courses led by instructors from O'Reilly's network of tech innovators and expert practitioners.

> #1 challenge for the cloud adoption is access to talent. Building a learning culture inside the organization is the success mantra for keeping our azure rockstars up-to-date on the ever improving azure platform.

ANIL SINGH
CEO, Hanu Software

Increase Readiness and Marketability with Certifications

Currently, there are seven Azure-specific certification exams that can lead to an MCSA or MCSE certification.

MCSA CLOUD PLATFORM

There are numerous assesments and certifications your team should consider as motiviation for advancing their skills, creating proof points for your practice and enabling you to achieve Microsoft Partner Network Competencies.

ENTERPRISE MOBILITY + SECURITY ASSESSMENTS

Training content for the assessments can be found in Partner University learning paths. Your team should pursue the following assessment:

Technical assessment for Entprise Mobility Suite Overview

Technical assessment for Mobile Device Management

Technical assessment for Identity & Access Management

Technical assessment for Information Protection

Technical assessment for Cloud App Security

CISSP – CERTIFIED INFORMATION SYSTEMS SECURITY PROFESSIONAL

The vendor-neutral CISSP certification is the ideal credential for those with proven deep technical and managerial competence, skills, experience, and credibility to design, engineer, implement, and manage their overall information security program to protect organizations from growing sophisticated attacks.

- CISSP Exam

MCP PLANNING FOR AND MEASURING DEVICES IN THE ENTERPRISE

Required Exams:

- 70-398: Planning for and Measuring Devices in the Enterprise

MCSA CLOUD PLATFORM

MCSA: Cloud Platform
Solutions Associate

Demonstrate your expertise in Microsoft cloud-related technologies to reduce IT costs and deliver more value for the modern business.

Required Exams:

- 70-532: Developing Microsoft Azure Solutions
- 70-533: Implementing Microsoft Azure Infrastructure Solutions

MCSA LINUX ON AZURE

MCSA: Linux on Azure
Solutions Associate

Demonstrate your ability to design, architect, implement, and maintain complex cloud-enabled Linux® solutions that leverage Microsoft Azure open source capabilities. This certification also validates your Linux system administration skills to show that you are fluent in today's cloud-native world.

Required Exams:

- 70-533: Implementing Microsoft Azure Infrastructure Solutions
- Linux Foundation Certified System Administrator

RESOURCES

→ MCSA Cloud Platform
→ MCSA Linux on Azure
→ Microsoft Badges from Acclaim

MCSE CLOUD PLATFORM AND INFRASTRUCTURE

MCSE: Cloud Platform and Infrastructure
Solutions Expert

The Microsoft Certified Solutions Expert (MCSE): Cloud Platform and Infrastructure certification validates that you have the skills needed to run a highly efficient and modern data center, with expertise in cloud technologies, identity management, systems management, virtualization, storage, and networking.

Pre-Requisites:

- Microsoft Certified Solutions Associate – Window Server 2016
- Microsoft Certified Solutions Associate – Cloud Platform
- Microsoft Certified Solutions Associate – Linux on Azure
- Microsoft Certified Solutions Associate – Windows Server 2012

Choose one of the following Azure exams:

- 70-532: Developing Microsoft Azure Solutions
- 70-533: Implementing Microsoft Azure Infrastructure Solutions (recommended)

MCSE DATA MANAGEMENT AND ANALYTICS

Demonstrate your broad skillset in SQL administration, building enterprise-scale data solutions and leveraging business intelligence data — both on-premises and in cloud environments.

Pre-Requisites:

- Microsoft Certified Solutions Architect – SQL Server 2012/2014
- Microsoft Certified Solutions Architect – SQL Server 2016 Database Administration
- Microsoft Certified Solutions Architect – SQL Server 2016 Database Development
- Microsoft Certified Solutions Architect – SQL Server 2016 Business Intelligence Development

Choose one of the following Azure exams:

- 70-473: Designing and Implementing Cloud Data Platform
- 70-475: Designing and Implementing Big Data Analytics Solutions

RESOURCES:

- MCSA Cloud Platform and Infrastructure
- MCSE Data Management and Analytics

MCSD APP BUILDER

The Microsoft Certified Solutions Developer (MCSD): App Builder certification validates that you have the skills needed to build modern mobile and/or web applications and services.

Pre-Requisites:

- Microsoft Certified Solutions Associate (MCSA) – Web applications
- Microsoft Certified Solutions Associate (MCSA) - Universal Applications

Choose one of the following Azure exams:

- 70-532: Developing Microsoft Azure Solutions - recommended
- 70-487: Developing Microsoft Azure and Web Services

RESOURCES:

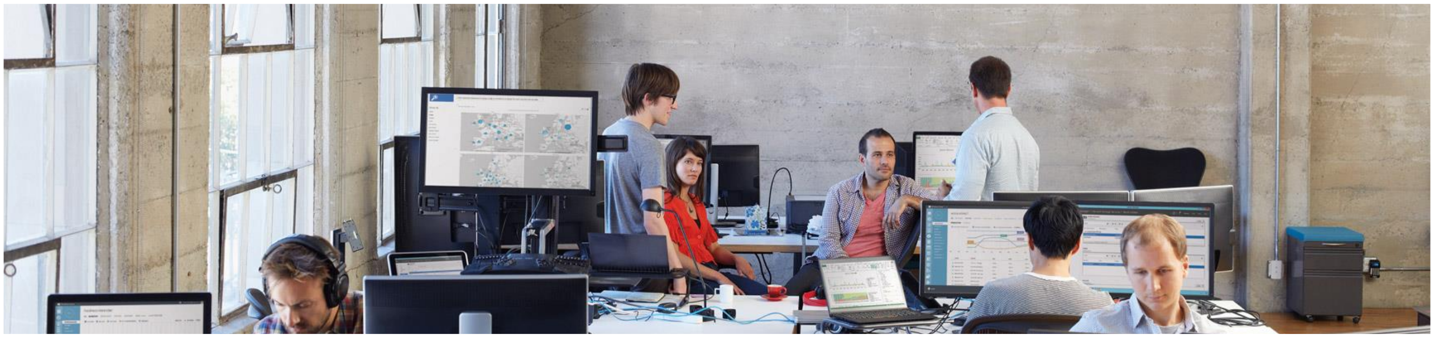
- MCSD App Builder
- Planning for and Managing Devices in the Enterprise
- MCSD Azure Solutions Architect

Operationalize

Security

aka.ms/practiceplaybooks

Executive Summary



In the previous section, we reviewed how you should hire, train, and equip your staff. In this section, we will guide your through the steps to operationalize your business plan.

We walk you through the options for leveraging your internal use benefits that provide you complimentary software licenses and subscriptions for use within your organization, as well as you how can deepen relationships with your customer by re-selling it as an overall package along with your custom software, creating a new revenue stream for your business.

This section also provides guidance on how to operate your business, from how to build materials to support your sales and marketing efforts to the key contracts you will want to put in place.

Whether you're building products, providing managed services, or performing project work for customers, your success may be impacted by your ability to manage your customer records, your projects, and your support trouble tickets. We provide guidance on what tools and systems you should consider implementing.

We also cover how you can increase visibility for your practice by reviewing the Microsoft marketplaces and how to get listed on them as well as provide guidance on the social offerings your practice should setup.

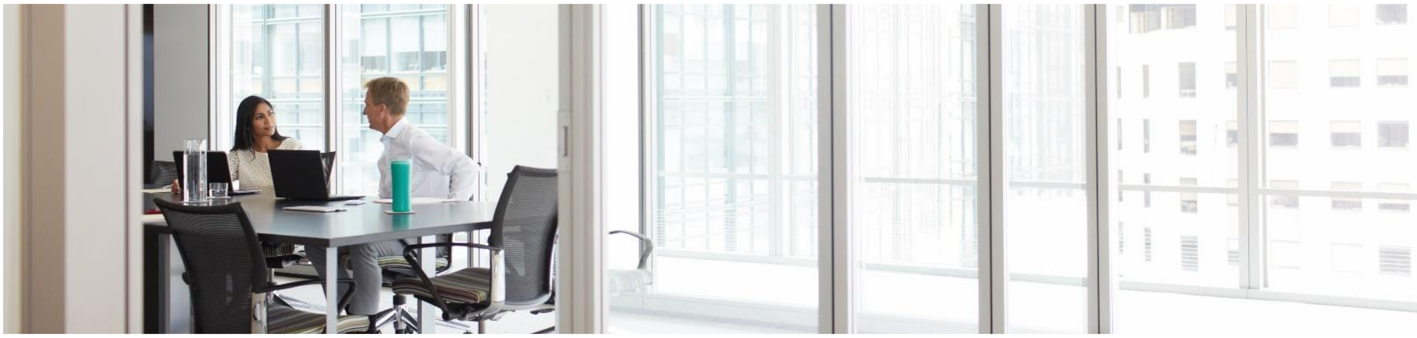
We conclude this section with checklists and templates you can use to standardize your customer engagement process.

Top 5 things to do

Get your practice off ground by putting your plan into action. These are the top 5 things you should do to get the momentum going.

- ☑ Leverage your internal use benefits
- ☑ Prepare your key contracts
- ☑ Setup your support process and systems
- ☑ Setup your social offerings
- ☑ Standardize your engagements using checklists

Claim Your Internal Use Benefits



AZURE CREDITS

Providing access to Azure for your technology professionals is one of the key first steps to preparing for a successful Azure practice. Microsoft provides several ways for your organization to gain access to Microsoft Azure for development of new services, testing workloads, delivering services, or learning in general. Members of the Microsoft Action Pack program receive $100 monthly Azure credits.

Microsoft Partners with the Cloud Productivity Competency get Azure credits as a part of the Visual Studio subscription's core benefit (see the next section on Visual Studio).

Microsoft Partners with a Cloud Platform Competency at the Silver or Gold level get even more — $6,000 per year and $12,000 per year respectively.

OFFICE 365 BENEFITS

As a Microsoft Partner, your core benefits include access to the Microsoft Office 365 Demo tenant that you can use to sell Microsoft Office 365, Power BI Pro, Microsoft Dynamics CRM Online and Project Online. You also get 25 seats of Office 365 E3 at the silver level or 100 seats of Office 365 E3 at the gold level from your core benefits.

As a Microsoft Partner with the Small & Midmarket Cloud Solutions competency, in addition to your core benefits, you get 10 seats of Office 365 E3 at the silver level and 25 seats of Office 365 at the gold level.

As a Microsoft Partner with the Cloud Productivity or Communications Competency, you get 25 seats to Office 365 E5 and 100 seats with the Gold competency.

VISUAL STUDIO

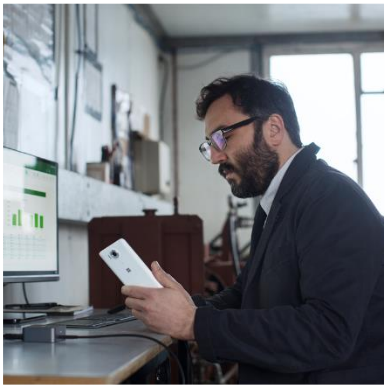
If your organization has Visual Studio subscriptions, you should know that each subscription has a set amount of Azure credits built in that the subscriber can use. The credit amount varies depending on the type of subscription purchased. You can also use MSDN software within your MSDN subscription on Azure Virtual Machines for development and test at no extra charge. The rate you will pay does not include any licensing costs — even virtual machines with SQL Server, SharePoint Server, or other software that is normally billed at a higher rate.

Providing your team access to Azure is just as important as providing them a computer.

$50 AZURE CREDIT	$100 AZURE CREDIT	$150 AZURE CREDIT
• Visual Studio Professional – annual • Visual Studio Professional with MSDN • Visual Studio Test Professional with MSDN	• MSDN Platforms	• Visual Studio Enterprise – annual • Visual Studio Enterprise with MSDN • Visual Studio Enterprise with MSDN (BizSpark) • Visual Studio

Microsoft

Resources



➔ Azure EA Portal

Ways to Purchase Azure

There are three primary ways you can purchase Azure and if you are a CSP, you have a built-in usage for testing your solution.

ENTERPRISE AGREEMENTS

Another option for getting access to your technical professionals is to purchase an Enterprise Agreement (EA). This arrangement is ideal for larger organizations that require the ability to create subscriptions for different departments, and even implement charge-back based on the department. Azure subscriptions within an EA agreement are managed through the Azure EA portal and allow for delegated administration and the ability to set quotas at the department or subscription level. For more information on how to get started with purchasing an enterprise agreement for Azure usage or adding Azure to an existing EA, visit: https://azure.microsoft.com/en-us/pricing/enterprise-agreement/.

PAY AS YOU GO AND TRIAL ACCOUNTS

You can also create a free trial with Azure and allow it to convert to a pay-as-you-go subscription. An Azure free trial is valid for 30 days and allows up to $200 in Azure credits. After the initial 30 days, any Azure usage is billed directly to you on your credit card. You can start a free trial by browsing http://azure.microsoft.com and clicking the free trial link.

OPEN LICENSE

You can also purchase Azure through a reseller using the Microsoft Open License Program. Open Value is the recommended program if you have a small to midsize organization with five or more desktop PCs and want to simplify license management, manage software costs, and get better control over your investment. It also includes Software Assurance, providing access to valuable benefits such as training, deployment planning, software upgrades, and product support to help you boost the productivity of your entire organization. For more information on the Microsoft Open Licensing program, visit: https://www.microsoft.com/en-us/licensing/licensing-programs/open-license.aspx.

CSP SANDBOX

Make sure you to take advantage of the CSP sandbox capability. Every Microsoft Partner onboarded in CSP has access to $200 worth of test accounts for every subscription they provision.

Create Key Contracts

Resources

- ➔ Sample Proposal
- ➔ Sample SOW

Key Contracts for your Practice

Azure practices need to use a set of legal documents to ensure compliance, deliverables, and a variety of other things.

SERVICE LEVEL AGREEMENT

A Service Level Agreement (SLA) is a contract between a service provider and the end user that defines the level of service expected from the service provider. SLAs are output-based in that they specifically define what the customer will receive both in terms of service levels and in form of compensation should service levels not be achieved.

MASTER SERVICES AGREEMENT

A Master Services Agreement (MSA) is a contract reached between parties in which the parties agree to the most common terms that will govern future transactions or future agreements. For example, it may detail standard rates from a the practice rate chart, services provided, standard payment terms and terms for liability, ownership of intellectual property, and the dispute resolution process.

STATEMENT OF WORK

A Statement of work (SOW) is a document that defines what work or deliverables will be provided to the client, including a brief description of the project, delivery milestones, costs, and payment schedule. This document typically references the MSA that is already in place with the customer and intended to allow the quick agreement on definition of an effort with minimal additional contractual paperwork.

MUTUAL NON-DISCLOSURE AGREEMENT

A mutual non-disclosure agreement (MNDA or NDA) is a document that defines the terms for the handling of confidential information exchanged between the vendor and customer. A mutual NDA is recommended because it fairly addresses the confidentiality needs of both parties and, as such, is often the first document signed before any detailed discussions begin (usually well before any of the other contracts listed on this page). An NDA (the non-mutual kind) is variant of the MNDA that is specifically authored to favor the confidential information disclosure of one party.

Resources

- Implementation Process
- GitHub
- Visual Studio Team Services
- Microsoft Dynamics 365 for Project Service Automation
- Microsoft Project Online
- SharePoint Online

Project Tools

Having selected an implementation process, how do you keep track of the progress of a project both in terms of progress against a project plan and project budget, as well as protect your IP? Here are some tooling options.

MICROSOFT PROJECT ONLINE

Project Online is a flexible online solution for project portfolio management (PPM) and everyday work. Delivered through Office 365, Project Online provides powerful project management capabilities for planning, prioritizing, and managing projects and project portfolio investments — from almost anywhere on almost any device. Project Online can be used by administrators, portfolio managers and viewers, project and resource managers, and team leads and members.

VISUAL STUDIO TEAM SERVICES

Provides various tools for tasks like running agile teams, providing support for Kanban boards, handling work item backlogs, scrum boards, source control, continuous integration and release management. Source control functionality provides Git support, which enables integration with GitHub if such integration is desired.

While Visual Studio Team Services will help you manage the technical aspects of your project, cost-containment requires a different set of tools.

MICROSOFT DYNAMICS 365 FOR PROJECT SERVICE AUTOMATION

Provides users with the capabilities required for setting up a project organization, engaging with customers, project scheduling and costing, managing and approving time and expenses, and closing projects. It is specially targeted to address the needs of a Project Services based practices, as it is designed for professionals who manage projects and the associated customer engagement process end to end.

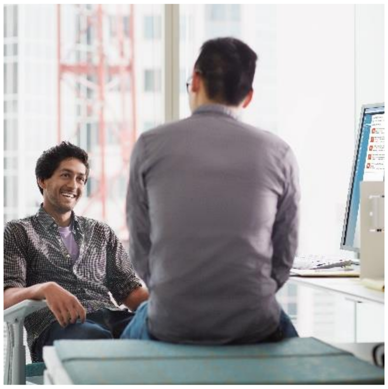
SHAREPOINT ONLINE FOR DOCUMENT MANAGEMENT

Document management controls the life cycle of documents in your organization — how they are created, reviewed, and published, and how they are ultimately disposed of or retained. Although the term "management" implies that information is controlled from the top of the organization, an effective document management system should reflect the culture of the organization that uses it.

GITHUB

Provides the hosted environment for developers to version control and share their source code both privately (e.g., internally to a team) and publicly (e.g., an open source project) and collaborate on development projects.

Resources



- [Microsoft Teams]
- [Yammer]
- [OneDrive for Business]
- [Skype for Business]

Collaboration Tools and File Sharing

Collaborating with customers through the lifecycle of a project or the duration of a managed services agreement is critical. There are several services that can help you share project plans, or set up lists for shared data.

MICROSOFT TEAMS

Microsoft Teams is the latest collaboration tool from Microsoft and is designed to make your content, tools, people, and conversations available in a single location.

YAMMER

Yammer is an enterprise social network collaboration offering to help teams collaborate and share files with each other.

ONEDRIVE FOR BUSINESS

OneDrive for Business is an enterprise file sharing service that is designed for automatic synchronization of files between your computer and the cloud. OneDrive makes it easy to share files with your customers or partners.

SKYPE FOR BUSINESS

Skype for Business is an enterprise online meeting and conference service designed for business communications.

SURFACE HUB

Microsoft Surface Hub is a Skype Online-integrated collaborations device, or "meeting room in a box." In addition to the built-in team experiences like Skype for Business, Microsoft Office, and Whiteboard, Microsoft Surface Hub is customizable with a wide array of applications. Universal apps built for Windows 10 shine on Microsoft Surface Hub and scale to the large screen. You can also connect apps from your personal device and drive them from Microsoft Surface Hub.

Using CRM to grow your business

CRM solutions streamline processes and increase profitability in your sales, marketing, and service divisions.

A strong CRM solution is a multifaceted platform where everything crucial to developing, improving, and retaining your customer relationships is stored. Without the support of an integrated CRM solution, you may miss growth opportunities and lose revenue because you're not maximizing your business relationships. Imagine misplacing customer contact information, only to learn that your delay pushed your client into the arms of a competitor. Or, picture your top two salespeople pursuing the same prospect, resulting in an annoyed potential customer and some unfriendly, in-house competition. Without a centralized program where your people can log and track customer interactions, your business falls behind schedule and out of touch.

THE FUNDAMENTALS OF CUSTOMER RELATIONSHIP MANAGEMENT

CRM tools make the customer-facing functions of business easier. They help you:

- Centralize customer information
- Automate marketing interactions
- Provide business intelligence
- Facilitate communications
- Track sales opportunities
- Analyze data
- Enable responsive customer service

Running a successful business is no simple task. When marketing campaigns, data analysis, meetings, customer care, and more, all happen simultaneously, you need a powerful CRM solution to bring all these functions together in one place.

As a sales professional, you'll be working with the following types of records:

ACCOUNTS: Account records contain information about the companies you do business with.

CONTACTS: Contact records contain information about the people you know and work with. Usually, multiple contacts are associated with one account. Contacts could include people responsible for making purchasing decisions or paying invoices, support technicians, or anyone you work with at the company.

LEADS: Leads are potential sales, and you or your company can get leads from many different sources. For example, you can generate sales leads from marketing campaigns, inquiries from your website, mailing lists, social media posts, or in person at a trade convention.

OPPORTUNITIES: When you qualify a lead, it becomes an opportunity, or a deal that you're getting ready to close.

Dynamics 365 can be customized, so you can also work with records relevant to your field and the way your organization does business.

RESOURCES:

- Microsoft Dynamics 365
- Dynamics for Sales
- Dynamics for Customer Service
- Field Service
- Project Service Automation
- Marketing

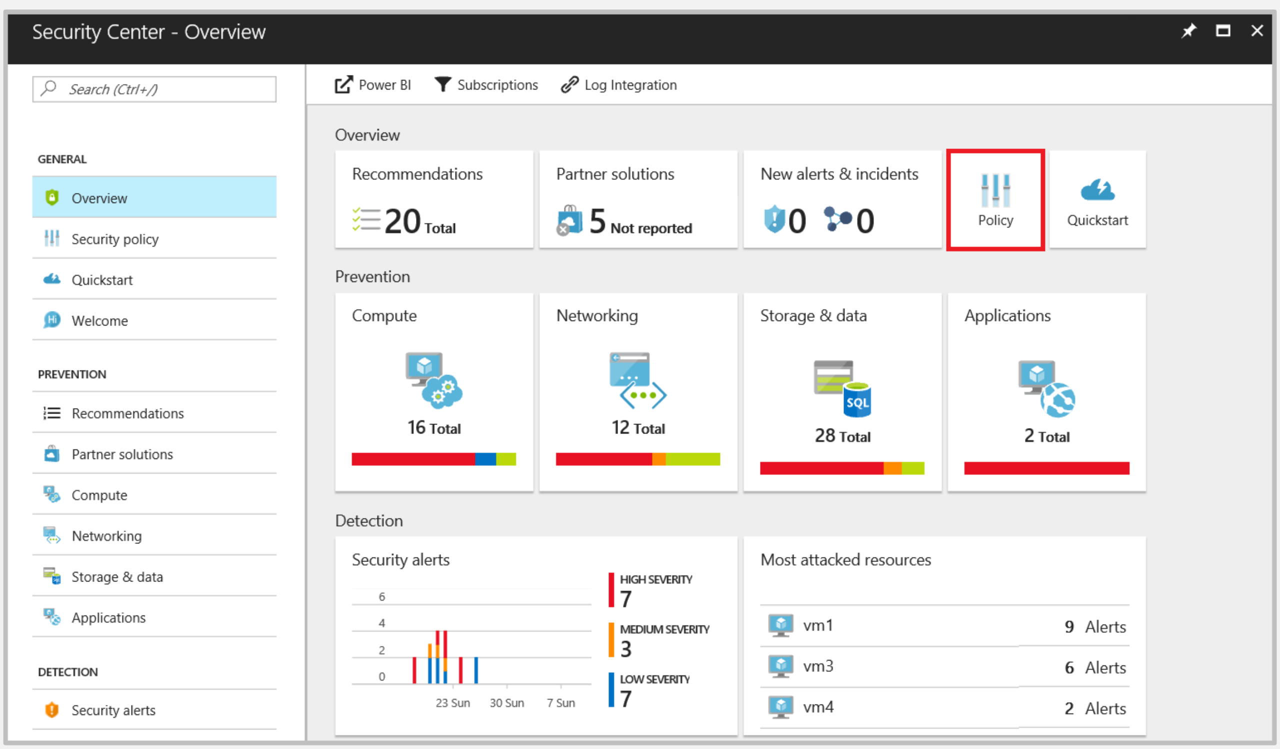
Manage and Support an Azure Deployment

Support Resources

Supporting an Azure deployment involves transitioning from deployment focus to ongoing health and occasional troubleshooting. Microsoft Azure offers several services to help manage and monitor workloads running in Azure, as well documentation for troubleshooting the services for your practice.

AZURE SECURITY CENTER

Security Center helps you prevent, detect, and respond to threats with increased visibility into and control over the security of your Azure resources. It provides integrated security monitoring and policy management across your Azure subscriptions, helps detect threats that might otherwise go unnoticed, and works with a broad ecosystem of security solutions. Azure Security Center should be part of any managed service practice to assist with monitoring and support.



Microsoft

Security Center delivers easy-to-use and effective threat prevention, detection, and response capabilities that are built in to Azure. Some of its key capabilities are:

- Monitor the security state of your Azure resources
- Defines policies for your Azure subscriptions and resource groups based on your company's security requirements, the types of applications that you use, and the sensitivity of your data
- Uses policy-driven security recommendations to guide service owners through the process of implementing needed controls
- Rapidly deploy security services and appliances from Microsoft and partners
- Automatically collect and analyze security data from your Azure resources, the network, and partner solutions like antimalware programs and firewalls
- Leverages global threat intelligence from Microsoft products and services, the Microsoft Digital Crimes Unit (DCU), the Microsoft Security Response Center (MSRC), and external feeds
- Apply advanced analytics, including machine learning and behavioral analysis
- Provides prioritized security incidents/alerts
- Offers insights into the source of the attack and impacted resources
- Suggests ways to stop the current attack and help prevent future attacks

AZURE ADVISOR (PREVIEW)

Azure Advisor analyzes your resource configuration and usage telemetry to detect risks and potential issues. It then draws on Azure best practices to recommend solutions that will reduce your cost and improve the security, performance, and reliability of your applications. In this blog post, we will do a quick tour of Azure Advisor and discuss how it can help optimize your Azure resources.

OMS LOG ANALYTICS

Even if you are not offering OMS as part of your core offering, using Log Analytics for support and monitoring can be a huge time saver. Log Analytics can help you collect and analyze data generated by resources in your cloud and on-premises environments. It gives you real-time insights using integrated search and custom dashboards to readily analyze millions of records across all your workloads and servers regardless of their physical location.

ENGAGING MICROSOFT SUPPORT

If you are a CSP or have sold support as part of your managed services solution you are the front-line support for your customer. At some point, you may need to contact Microsoft to escalate an issue. Microsoft offers several options via forum support or via paid options as discussed in the "Defining Your Strategy" section.

RESOURCES

- Azure Security Center Overview
- Azure Advisor Announcement
- Azure Forum Support Resources
- Partner Support Resources
- OMS Log Analytics

Support Ticket Setup and Tracking

Resources

➔ [Microsoft Dynamics 365 for Customer Service]

Customer Support

Setting up tickets, tracking issue resolution, and managing customer success are fundamentals of your practice.

Providing support to your customers from your practice is a non-trivial, omni-channel effort. We suggest implement Microsoft Dynamics 365 for customer service to help you quickly set up and start managing your customer support efforts.

MICROSOFT DYNAMICS 365 FOR CUSTOMER SERVICE

Microsoft Dynamics 365 for Customer Service is designed to manage the efforts of your customer support teams. It provides licensed users with access to core customer service capabilities for a significantly lower price than comparable offerings from other vendors, including enterprise case management, Interactive Service Hub, Unified Service Desk, SLAs and Entitlements, and other service group management functionality.

CREATE CONSISTENCY AND LOYALTY

Provide the seamless service your customers expect by meeting them where they are with the information they need, every time.

- Give customers great service on their channel of choice.
- Make help easy by providing relevant, personalized service.
- Proactively address issues by detecting customers' intent and social sentiment.

MAKE YOUR AGENTS' JOBS EASIER

Give your agents complete information — in a single customer service software app — to make smart decisions and provide great service.

- Reveal customers' case histories, preferences, and feedback.
- Provide guidance on entitlements and service-level agreements.
- Display it all in a single interface tailored to their job and skillset.

GET AN ADAPTIVE ENGINE

Respond quickly to customer and market changes within an agile, cloud-based environment that has digital intelligence built in.

- Adapt and customize easily using configuration, not code.
- Extend your functionality through a single interface.
- Rely on advanced analytics and a trusted cloud platform.

Integrate Into a Marketplace

Resources

- [How to Publish an Offer in the Azure Marketplace]
- [AppSource Review Guidelines]
- [Get Listed on PowerBI.com]

Increase your visibility

Once you identify and select the marketplace to target for promoting or selling your services, follow these steps.

Each marketplace is different in their approach to performing the integration, but your organization will likely need to go throught he following:

1. CREATE THE COMMERCIALS:

This involves putting the basic contracts in place and providing information about your company and the descriptions about the product or service you will list. In some cases, you may fneed to wait to be approved and onboarded before you can proceed.

2. PACKAGE AND INTEGRATE:

In this technical step, you will work with the marketplace API's to integrate your offering. At this stage you are typically able to test your marketplace offering and make sure everything works as expected and looks correct.

3. SUBMIT FOR APPROVAL:

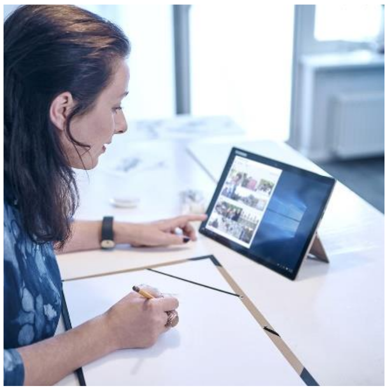
Once your integration is complete, you will need to submit your integrated package for review before it is made publicly available. You may need to iterate on this step as you get your package compliant with the marketplace requirements.

4. SHARE:

A marketplace can help increase your visibility. But without additional effort to call attention to your listing in the marketplace, a customer's ability to find you in the most popular marketplaces may be like finding the proverbial needle in a haystack. Make sure you publicize this offer, list it on your website, and ensure that your existing customers are aware so they can help point others to it.

Implement Intellectual Property Offerings

Resources



→ Building IP to Drive Margins
→ Create Stickiness with IP

Implementing IP in Your Security Offerings

Consider these tips to start productizing your IP and go to market.

1. DEFINE YOUR SOLUTION.

When we ask partners how they determined what IP they were going to build, we often get the same answer, which is that they realized most of their customers were asking for the same thing or something very similar. And rather than continuing to do high-cost custom work for every customer, they decided to productize what their customers were asking for. Bring your sales, marketing, technical, and delivery teams together to brainstorm and define what your solution will look like.

2. DETERMINE WHAT WILL DIFFERENTIATE YOUR SOLUTION FROM OTHERS IN THE MARKET.

It is important that you think about your differentiation strategy. What is going to make your solution better than other smiliar solutions in the industry?

3. MAINTAIN RIGHTS TO THE IP.

As partners make the transition from project or custom services to packaged IP, it is critical they revise their customer agreements so the partner can maintain the IP rights to the solutions.

4. ESTABLISH A RECURRING REVENUE MODEL.

The beauty of deploying IP in the cloud space is that you can light up the recurring revenue model, which will have a positive impact on the valuation of your business and even help your cash flows in the future.

5. CONSIDER YOUR CHANNEL STRATEGY.

One of the advantages of productizing your IP is that it opens up a lot of doors to sell your solution through channel partners.

Setup Social Offerings

Blogging, Meetups, and More!

Contributing to the technical community can help you increase credibility for your practice. It has the side benefit of strengthening the technical acumen of your delivery team by having them focus on a specific subject for a public-facing deliverable. Below are some suggested options to get started.

BLOGGING

Technical blogging is a great way to increase the skills of your technical team, as well as grow stature in the community at large with your organization. Blog posts should be well thought out and simple to digest. Visual aids such as diagrams or nicely formatted source code snippets go a long way towards readability.

MEETUPS AND USER GROUPS

Speaking at user groups is another valuable tool to increase the skills of your team. Similar to blog posts, its great practice for honing vital communication skills with your team, as well as a great opportunity to dig deeper into a specific subject related to your practice.

GLOBAL AZURE BOOTCAMP

Each user group will organize their own one-day deep dive class on Azure the way they see fit. The result is that thousands of people get to learn about Azure and join online under the social hashtag #GlobalAzure! This is a great opportunity to attend, participate as a speaker (reach out to your local organizer to see how you can help) or host your own. For more information, visit http://global.azurebootcamp.net/.

.

WEBINARS

Webinars are another resource to extend your teams skills. Similar in scope to speaking at a meetup or user group, the webinar allows a much broader reach as attendees from all over the globe can attend.

MICROSOFT MVP COMMUNITY

For more than two decades, the Microsoft MVP Award is our way of saying thank you to outstanding community leaders. The contributions MVPs make to the community, ranging from speaking engagements and social media posts to writing books and helping others in online communities, have incredible impact. Among other benefits, MVPs get early access to Microsoft products and direct communication channels with product teams, and are invited to the Global MVP Summit, an exclusive annual event hosted in Microsoft's global HQ in Redmond. They also have a very close relationship with the local Microsoft teams in their area, who are there to support and empower MVPs to address needs and opportunities in the local ecosystem.

Contributing to the Azure community not only helps the reputation of your practice, but it can also hone much-needed skills for your delivery team.

Create Engagement Checklists & Templates

Standardize Customer Engagement

Repeatable processes make for profitable practices. Use the following example to kickstart your own checklist for executing a new engagement.

- ☑ Conduct initial requirements meeting.
- ☑ Identify product owner/manager(s).
- ☑ Conduct follow-up meeting to clarify and establish next steps.
- ☑ Discuss minimal viable product (MVP) criteria.
- ☑ Establish development process (Agile, Scrum, etc.).
- ☑ Identify milestones and tasks; share with customer.
- ☑ Provide cost estimates for development, cloud services, and ongoing maintenance/support.
- ☑ Address customer objections to proposed technology and services.
- ☑ Acquire data (or sample of data) for initial data assessment and proof of concept development.
- ☑ Host project artifacts (issues, code, etc.) to share with internal team and customer (e.g., Visual Studio Team Services).
- ☑ Follow up with customer and provide status/demos on a regular basis (e.g., two-week sprint).
- ☑ Conduct a final handoff to customer.
- ☑ Conduct project debrief with customer.
- ☑ Conduct internal project post-mortem.
- ☑ Customer conducts acceptance tests.

RESOURCES:

- → EMS Strategy and Planning Workshop
- → Enterprise Mobility Proof of Concept Delivery Guidance
- → Cloud Only Enterprise Mobility Suite Proof of Concept

Go to Market & Close Deals

Security

aka.ms/practiceplaybooks

Microsoft

Executive Summary

In previous sections in the playbook, we covered topics from how to build your practice by selecting products or services to specialize in, to building and training your team help turn your ideas into reality, to bringing your special offering to market and finding and keeping great customers. So, what's left to do? In this section, we'll discover strategies to compel potential customers that may be sitting on the fence to take action, from creating a good value proposition to building marketing and sales materials that tell your story.

It has been said that your current customers are your best customers. Do you know who your best customers are? What do they have in common? And how do you find more like them? We'll start by helping you build foundational marketing materials such as marketing personas, points of differentiation, value propositions, and customer business needs.

Once you've built the foundation, we'll look at how you can put these materials to work. We'll go through the different ways you can attract new customers and look at best practices. How do you put it all together? We'll discuss why integrated marketing campaigns work the best, and the tools you need to run them, such as a CRM system and marketing automation.

But marketing is only half of the story. Your sales team is the other half. Don't forget how the two work together and what marketing can do to support sales. The job of the marketing team is to build out not only customer facing materials, but also compelling materials that can be used to train and arm your sales team.

The sales end of the bargain is to close the sale. One way to do this is by writing a winning proposal. Another way is to build a proof of concept or prototype of your product or service offering, which could help a prospect understand what it is you're offering, or solidify their vision of what you can help make possible. Microsoft is committed to helping your business grow, and provides both co-selling and co-marketing opportunities.

Finally, don't miss the Microsoft resources you can leverage to help build your marketing materials and campaigns, as well as resources to help your team close the deal.

Top 5 things to do

Add value to your practice and turn your prospective customers into lasting ones. These are the top 5 things you should do to go to market and get deals done.

- ☑ Identify your customer's business needs
- ☑ Write a compelling value propostion
- ☑ Leverage marketing to find customers
- ☑ Build marketing and sales materials
- ☑ Collaborate with partners

Marketing to the Security Buyer

Plan your customer's journey to buying

The cloud changes your partner business model. Buyers buy differently than in the past. With all the information on the internet, buyers tend to research and self-educate long before they engage with sales people. By the time they do engage with sales, they've already made some decisions.

And, while coud buyers are often eager to move to a SaaS model, with predictable monthly pricing, there are still concerns about the security of the cloud, and therefore, your cloud services. Businesses are seeking out more advanced security solutions including threat management, vulnerability management, firewalls, and anti-malware.

CONSIDER THE FOLLOWING:

- In 2016, there were 4,000 ransomware attacks DAILY*
- The average cost of a data breach is $4Million**

* 2017 FBI report "Ransomware Prevention and Response for CISOs"

** 2016 Ponemon Institute study

With increasing customer concerns around whether their information is secure, customers and prospects need to know that you understand the issues they are facing.

To help illustrate this, just think about the way a buyer might go about buying a new car. Before going to the car dealership, the buyer will likely read about various car models on the internet, read reviews, and make some decisions. When the buyer is ready to visit a dealership, they already knows what they want and how much they are willing to pay for that car. This poses a challenge for sellers. How can you get prospects to engage with you earlier in the process? Through marketing.

Another way partner businesses are changing is that when selling cloud solutions, you gain recurring revenue streams. Recurring revenues provide business stability and confidence for business owners and managers, allowing them to make business decisions that may not be as easy when revenues are irregular and lumpy. While these recurring revenues are smaller on a per-transaction basis than buyers' large capital expenditures, you adjust for this. You'll need a higher volume of transactions. To support that, you'll need a higher volume of high quality sales leads (through modern marketing techniques) coming in to create larger sales pipelines. Clients who are buying on a recurring basis represent great opportunities for you to upsell and cross-sell additional products and services.

Marketing is not an option anymore. Marketing helps you educate, identify, and engage with prospects earlier in the sales process. By identifying prospects who indicate interest in your products and services via their behavior (website visits, clicks, downloads, etc.), marketing can deliver high-quality leads.

Inbound marketing techniques such as search engine optimization and pay-per-click advertising make it easy for prospects to find you. Outbound marketing techniques, such as e-mail and telemarketing, enable you to tell prospects about your company's solutions.

Marketing is the toolset that addresses all these changes. Marketing today is digital and has the power to reach more people. Again, it's not to say that more traditional, non-digital marketing is ineffective. But to be found by prospective buyers that you don't have a relationship with, you need to employ digital marketing techniques. Modern marketing is focused on the prospects' and clients' views of the world.

RESOURCES:

- ➔ Planning your Cloud Business Transition: Sales Video
- ➔ Strategies for Unlocking Digital Transformation
- ➔ Customer Journey

Aligning Marketing Goals with Business Goals

What do you want your marketing efforts to accomplish? These goals should be clear, specific, realistic, measurable, and have a stated time period — usually one year. These should support your overall business goals.

One way to begin setting goals is to envision the result. For example, you may begin with the following statement: "By the end of the year we will achieve __________."

EXAMPLES COULD INCLUDE:

- By the end of the year our integrated marketing programs will increase sales by 25%.
- By mid-year we will have revamped all our marketing materials so they have a consistent look.
- By the end of the year, cloud-based solutions and services will represent 30% of our revenue mix.

The sales forecast is the level of sales an organization can expect based upon your marketing strategy. For the first year that you forecast, intuition and educated guessing play an important role. As you gain more experience with your marketplace, your sales forecasts will become much more accurate. Make sure that your sales forecast aligns with your business and marketing goals. This includes your stated timeline and target performance increases.

BEST PRACTICES

- Consult with the sales team.
- Don't set it and forget it; do periodic status checks.
- Reality check: Validate your plan and forecast with someone else.
- Build on your past forecasts and learn from the results of previous forecasts.

Compare your original forecast to actual results. Analyze the results at different stages throughout the customer journey. See if you can determine where you had success and where you had drop-off. For example, were you able to produce the right number of leads, but not the right number of conversions? By analyzing your results throughout the customer journey, you can better determine what needs to be corrected for the next campaign.

BUILDING YOUR MARKETING BUDGET

After you determine the sales forecast, you can set a marketing budget. As you build your marketing plan, you will determine the specific marketing tactics needed to accomplish your goals. But until you focus on and define the tactics you will use to achieve your goals, you can't accurately calculate your budget. As you can identify those specific tactics, try to associate costs with each. If you don't know what those tactics will be, you can begin by allocating a percentage of revenues.

MARKETING SPEND BEST PRACTICES:

Marketing spend can include all costs for planning, execution, media buys, tools, outside agency work, and marketing staff costs.

- Spend 5% of revenues (total revenue * 5%) to maintain current awareness and visibility.
- Spend 10% of revenues (total revenue * 10%) to grow and gain market share.

VALUE PROPOSITION AND SUPPORTING MESSAGING

The value proposition and supporting messaging is the foundation for all sales and marketing materials.

Developing strategic messaging and positioning is foundational work that is often overlooked by technology companies. It's difficult to quantify the impact of bad messaging. And it's just as difficult to present any accurate ROI for implementing or changing the approach of how we talk about a company or product. But consistent messaging is a key to building strong, effective marketing.

Clarity in communicating the value of your company and solutions is vital to attracting the right customers. A value proposition and supporting messaging provide the foundation for a consistent message across all your sales and marketing materials. You don't want each statement you make to a particular customer or put in a particular marketing piece to be different depending on where the statement is made, who wrote the copy, or how much space they have. Instead, your messaging should be consistent every time you talk about your company or solution. This foundational messaging is how you make that happen.

YOU CAN USE YOUR MESSAGING TO:

- Build sales decks for your customer-facing team.
- Create internal training.
- Build marketing campaigns.
- Create content for your offer to be used on your website — in landing pages or microsites, or in any social marketing.
- Create your solution sheet(s) and battlecard(s).

ELEMENTS OF YOUR VALUE PROPOSITION AND SUPPORTING MESSAGING:

- **Solution/Offer name**: What is the name of your solution/offer?
- **Value proposition**: How will your solution add value to your client? (See the value proposition module later in this document.)
- **Target audience**: Define your ideal customer; include demographics, geography, industry, company size, buyer roles, attitude toward IT, etc.
- **Customer experience**: What do you want your customer to say about you when the engagement is complete? Hint: Ask current customer what they think.
- **Key points of differentiation**: What makes you or your solution unique? You should have 3–5 main points that make you stand out from your competition.
- **Pain points**: What is your customer experiencing that makes them seek you out?
- **Results from engagement**: What will the customer be able to do once your product/solution is implemented that they cannot do today?
- **Lead solution messaging/key customer benefits**: What will you highlight in your campaigns and marketing?
- **Call to action**: Identify your main calls to action. Consider these action items: download more information, sign up for a webinar, sign up for a free assessment, click here to view our special offers.
- **Promotional offer(s)**: Identify any promotional offers you will attach. Consider items such as first 30 days free, free migration and set up.
- **Proof points**: Why should the prospect believe you? How can you show that what you say is true? List items you have or will create to prove to prospects you can do the work. Consider items such as special training or competencies, case studies or whitepapers, and customer testimonials.
- **Top obstacles to overcome**: What obstacles are your sales people likely to encounter? What can they say to overcome those objections?
- **Key competitors**: Who are your chief competitors?

Before you start work on any other marketing materials, make sure this foundation is solid. Work with key stakeholders in all areas inside the company — sales, marketing, finance, and operations — as well as with customers, to ensure you have buy-in.

MARKETING PERSONAS AND BEST CLIENTS

You can't send the same message to all your clients and prospects. Sure, it's tempting and easy, but it just doesn't work. We all get plenty of advertising and marketing and we filter out those things that aren't relevant. Messaging needs to be relevant to the recipient, the more specific the better. One concept that helps us to create and deliver the right message to the right person is called persona marketing.

What makes a client a best client? Biggest isn't always the best. Big ones may require more resources and demand discounts. Some pay slowly, while others are prompt. Clients who are loyal, require little support and don't squeeze you for discounts, may be a better client than the biggest ones.

Think about what a best client is for you. It may be those who pay the price you want without negotiating. Clients that don't consume a lot of time from your support staff and are happy and satisfied with your service may be the answer for your company. By identifying the characteristics of your best clients, you can replicate those by targeting prospects with similar attributes. Decide what attributes are important to you. Look at existing clients that meet those criteria. Then search for prospects that match those characteristics. This way you will be able to target prospects that you want as clients. Now, instead of having a few great clients, you can have many.

USING A SEGMENTED DATABASE

Chances are your database has many names of contacts, prospects, and clients, but they may not be separated into logical groups. By segmenting your database into groups, you can deliver messages and marketing materials appropriate to their needs and interests.

The importance of segmentation cannot be underestimated. You must be able to find prospects that fit "best client" characteristics when searching your database. Since many cloud buying decisions are made by business departments such as operations, sales, marketing, human resources, or other non-IT departments, it's important to identify them along those lines as well. You can't lump them in with the technical decision makers because they usually have different goals and concerns. Therefore, the marketing messages and content you use for them should be different.

Search for prospects that match "best client" criteria. This is a fast and easy way of growing your base of quality clients and focusing on who you want to sell to.

A persona is a fictional representation or a profile of your target client. It is not a specific individual person, but rather a composite picture that represents each of your targeted client types. Once you know what that persona "looks like," you can use it to find and attract ideal prospective clients that match that profile. By understanding the persona, you can create segmented marketing that will resonate with them. This might seem a bit obscure at first, but with just a little bit of practice you'll quickly see how to use these.

You can think about these in the context of head, heart, and hands. Head is what they think about. It is the logical aspects of their thinking. Heart is about their passions, their worries that keep them up at night. It's also about what gets them excited. Hands is about what they do.

We suggest you begin by trying to create just one or two personas. You can use your sales history to begin the analysis. Of course, your marketing and sales people can help with this. You're trying to categorize using the following criteria:

- Who bought what
- Why they bought
- Why they bought from you
- Common characteristics

The personas you identify should evolve over time and become more detailed, exact, and personal. Initially, you may not have many personal details, so a good practice is to ask your clients about themselves. What do they care about? How do they spend their time away from work? What do they do for fun? These personal details will let you create marketing materials that resonate with them at more than just a logical business level.

Here is an example of a persona. An Azure partner that sells to IT departments might have the following persona:

- Your target Persona is John Malcolm.
- John is 45 years old with two children at home.
- He lives in Toronto, and loves the outside.
- He is the Director of IT at a manufacturing company.
- He supports an organization that has eight offices throughout Canada.
- He works long hours and is on call on weekends.
- He is technology savvy and spends a lot of time online.
- He's been with this company for 10 years, starting as an Exchange Administrator.
- He is an early adopter of new technology and led the move to the cloud at this company.
- He plans to use Azure to allow the 750 employees in his manufacturing company access to the most current files, and help the company expand its infrastructure as the company grows.
- **Customer Needs:** Since it's a manufacturing company, the company is concerned about security in the cloud and a potential loss of IP.

POINTS OF DIFFERENTIATION (PODS)

Making your company stand out in a crowded marketplace is essential for your company positioning, and ultimately determines your sales success.

Without differentiating yourself from competitors, you become a “me too” organization that offers the same solution as other organizations. With solid points of differentiation, your company can start taking steps to being a leader in its space and avoid being a “me too” organization.

A common concern that many partners have is how to sound different, and how to highlight the benefits their company offers. This tends to occur when marketers don’t search deep enough in their PODs. A good POD will offer details — number of years, number of projects, types of industries, and specific skills.

FOR EXAMPLE:

- Generic: Experts in migration.
- More detailed: We have migrated and managed over 3,500 Office 365 seats for law firms in the past five years.

The first example is very generic and doesn’t differentiate them well from competitors. Ask yourself, “Why have our current customers selected us?” If you don’t know the answer, the best way to find out is to ask your customers.

CONSIDER THESE AREAS AS YOU THINK ABOUT YOUR POINTS OF DIFFERENTIATION:

- Client service
- Deep vertical market knowledge and experience
- Product expertise
- Geographies served
- Types of businesses served
- Cloud experience
- Price
- What do you have that they don’t?
- What is your wow factor?
- How do you compare to your competition?

VALUE PROPOSITION

Prospects have many partner choices for purchasing IT products and services. It is critical that your organization can articulate a meaningful, and differentiated, value proposition to prospects. Being able to clearly express the value of your company and its solution offering is a key factor in the decision-making process. If prospects can clearly see your ability to address their biggest business pain points and understand how you differ from your competitors, you will move to the top of the consideration list.

Prospects and clients need to hear that you understand them, their businesses, their needs, and that you can solve their business challenges. They also need to understand why you, how do you differ, and what you do better than other solution providers.

These messages are not about technical mastery, number of certifications, or being a one-stop shop. These messages should be in the language of business and of their vertical markets. Your thought leadership-oriented messages should convey your experience and expertise. You need to be thought leaders who they can trust and rely upon to help them successfully adopt, embrace, and consume cloud-based solutions. They need to see that you will provide an excellent client-centric experience, whereby they will gain all the benefits of the cloud.

In simple terms, the value proposition is a short paragraph that describes the value of your product/service, combined with the value your company provides.

WHY IS A VALUE PROPOSITION IMPORTANT?

- Potential buyers must need what you’re selling. It must **resonate** with them.
- Prospects must see why you stand out from other available options. You must **differentiate** yourself.
- Prospects must believe that you can deliver on your promises. You must **substantiate** your claims.

For example, Palmetto Technology Group tackles the question of, “Why would you work with us?” head on:

Why would you work with us? PTG helps clients reach a standard and then move forward beyond that. We want our customers to say, "How did I ever live without PTG?" Anyone can get you to the cloud, but once you are there, what are you going to do with it? PTG is there to make your team more *secure*, more *productive*, and help you *leverage your investment*.

These statements do a nice job of presenting their value and differentiators at the same time.

Onsupport provides cybersecurity risk assessments, remediation, and ongoing monitoring services to healthcare provider organizations. Here is its value proposition:

Onsupport has worked with over 60 healthcare facilities to help assess their compliance with HIPPA and HITECH guidelines for the security and privacy of electronic protected healthcare information.

This value proposition immediately describes what they do and provides the validation of their expertise.

Keep these key points in mind when writing and reviewing your value proposition:

- Value propositions should articulate your specialties and describe what makes your solution different.
- They should be memorable and stated simply and clearly.
- Focus on the key things that you want prospects to know about you.
- What vertical markets and industries do you specialize in?
- Which market segments do you focus on?
- Which geographical locations?
- Know who your target audience is so you can create appropriate value propositions. Craft variations for each persona.

REFINE CUSTOMER VALUE PROPOSITION AND OFFER

Having delivered to your customers, work with your customers, staff, partners, and others with whom you engage to better understand how you can improve your value proposition. Ask them how you could do better by using the four magic questions:

- What do your customers love about your company?
- What would they change?
- What keeps them awake at night that we solve?
- What are competitors doing they wish you did?

Take the answers to these questions and refine your value proposition, and if necessary, your offer.

UPDATING AND REFRESHING

Value propositions, like many other things, need to be revisited and refreshed from time to time. Your business may have changed. Certainly, the cloud, as we've said, changes things. Clients and their needs have changed. The market and competition have changed. So, your value propositions may need to be changed.

Ask yourself these questions when considering whether to update your company's value proposition:

- Does it resonate with current prospects?
- Does it still help close sales opportunities?
- Does it still attract new prospective buyers?
- Does it generate sales leads?

If the answer is "no," or "not as well as it has in the past," it's time to update it.

YOUR SOLUTION FEATURES AND BENEFITS

A best practice of marketing is to focus your content on what your solution DOES, not what it IS. If you mention what the features are, always describe the benefits.

Feature – What it is

Benefit – How it helps your business

EXAMPLE:

- Enterprise-grade security: Protect your business with anti-malware/anti-spam, continuous data backup, globally distributed datacenters, and a 99.9% uptime.
- **Features**: Anti-spam, anti-malware filters, continuous data backup, globally distributed datacenters, 99.9% uptime guarantee.
- **Benefits**: Protect your networks and data, improve uptime, save money dealing with data breaches or malware, and improve productivity

PROOF POINTS

When introducing yourself to new prospects or a potential referral source unfamiliar with your company, you can accelerate the sales process by establishing credibility. That means answering the basic question, "why should I believe you can do the job?" There are many ways to prove your stated points of differentiation, including:

- Third-party accreditation
- Client retention rates
- Awards
- Case studies
- Testimonials

Identify key awards or testimonials relevant to your prospects and customers. Keep track of your client's successes and write case studies. Ask satisfied clients for testimonials. Feature your case studies and testimonials on your website. Join key industry trade associations to align yourself with prospects.

EXAMPLES OF PROOF POINTS:

- Microsoft Partner
- Microsoft Gold Partner in a specific competency
- Member of the Better Business Bureau
- Chamber of Commerce member/board of directors/planning committee member
- Member of XYX association (vertical industry)
- 98% customer retention rate
- Winner of Business Journal Small Business of the Year
- Microsoft Partner of the Year Finalist/Winner

CUSTOMER JOURNEY

The research firm IDC identified the stages a buyer goes through in making buying decisions. Like the sales cycle, this model provides guidance as to what the buyer is concerned about throughout the various stages. Our goal is to nurture them through the various stages using appropriate messaging and content.

The first three phases — explore, evaluate, and purchase — all focus on **prospective clients**.

Explore: At this stage, prospects have a business challenge and are looking for solutions. Their goals could include lowering costs, raising productivity, and/or responding to competition in their own market. They're looking for information, so partners need to clearly communicate to that prospective client what their unique value proposition is. And be specific! As prospects search, they use keywords specific to their needs, so focus on business segment and vertical as much as you can.

Evaluation: The prospect is validating sellers by taking demos, following references, and enlisting in product trials. Partners want to get to know and keep track of those prospects, and find good points of intersection. At this stage, the prospect may share information with the partner — this is where you begin to get to know the prospects and can ensure your messages are relevant and valuable.

Purchase: The prospect is ready to commit and become a client. This is a great spot for partners to provide testimonials, quotes, ROI tools, case studies, whatever the prospect needs to tip them over the edge.

The next three phases are focused on what happens **once they are clients**.

Expansion: Onboarding, driving consumption and growth. The prospect has purchased and is now a client that is using the solution. Now they're ready to move from pilot to company-wide rollout, for example. At this point, partners should consider providing best practices to drive success, plus leverage your service, sales, and marketing staff to help cross- and up-sell into happy accounts.

Renewal: The client is reviewing to decide whether to continue the relationship. A key insight from successful cloud partners is to reach out and check in with your clients starting 90 days in advance of renewal. Then make sure all outstanding issues are resolved and avenues for cross-sell or up-sell are addressed. Don't leave renewal to billing or auto-renewal.

Advocacy: The client loves you! They want to be an advocate for you, so let them. Make your client the hero in your marketing. Get testimonials, case studies, and shout outs on social media.

Tweak your messaging and content depending on where the recipient is along this journey. This way, you can fine tune your messaging so you can use email to help nurture prospects into clients and clients into long-term business relationships. This leads directly to creating a quality client experience. Look to each stage of the buyer's journey and determine how you can improve the experience. Then look at the complete journey and see the experience from the client's viewpoint. Throw in some problems, learnings, and questions, and see how it's handled by your team. It's no longer great service that defines a great relationship and retention, but the whole of the experience. For example, how can you make a prospect's experience during the evaluate stage exceptional? One idea is to make sure your website is self-explanatory and easy to navigate, with plenty of thought leadership documents to download.

EXPLORE	EVALUATE	PURCHASE	EXPAND	RENEW	ADVOCACY
Customer Goals: Fit a solution to a business challenge. Could include lowering cost, raising capacity or productivity, creating or responding to competitive threat.	**Customer Goals:** Validate and compare vendor claims through demos, references, product trials	**Customer Goals:** Commit to deploying the solution and negotiate terms and conditions	**Customer Goals:** Master the solution, consider adding functionality and users.	**Customer Goals:** Review satisfaction with the solution and provider; assess performance and potential decide whether to continue the relationship.	**Customer Goals:** Develop a strategic partnership with the supplier, become a reference account, and actively promote their success.

BEST PRACTICE:

Think about what a customer's journey might look like, beginning as a prospect who is exploring, then evaluating, and ultimately reaching the purchasing stage. Walk through the entire journey, read what's on your website, use the chat function, call into your support team, and make a purchase to see what a customer truly experiences.

RESOURCES:

- Readytogo.microsoft.com
- Smartpartnermarketing.microsoft.com

UNDERSTANDING CUSTOMER PURCHASING NEEDS

Do you understand why your customers buy your solution? Do you really understand what makes them buy? If you can find prospects experiencing pain, they will be highly motivated to buy your solution to get rid of their pain.

One of the ways you can focus your marketing message is to look at what pain points they are facing. If you can identify pain points that your solutions solve, and position your solution as the answer to these issues, you'll be able to bring in new business.

Studies show that people are more often motivated by fear of loss than hope of gain. You can use this desire to avoid pain to make your marketing more effective. For example, when selling security, address what would happen if the company had a security breach.

If you want to find more customers, focus on messaging that provides them with a solution to their pain points.

DISCOVER YOUR CUSTOMER'S CHALLENGES

The easiest way is to ask your existing customers. You can send out surveys, conduct interviews, or simply call and talk to them. You probably already have an idea of these issues, so you can frame your questions with that knowledge in mind. For example:

- What challenges do you face with securing your IT infrastructure?
- Have you experienced a malware incident?
- What does your IT team struggle with day to day?

You can also look to your competitors to see what challenges they are using in their messaging. What do they talk about in their newsletter, blog, or landing pages? Do these pain points resonate with your customers?

USE PAIN POINTS TO CREATE CONTENT

Once you have created a list of customer opportunities and challenges that you want to target, you can create a list of keywords. Then use these keywords to create a compelling headline for your materials.

With customer challenges and business needs, look to inform your audience; so your headlines should reflect that by including the keyword that your audience would use to search for information on your chosen topic. Remember when you're selecting keywords to use words that your customers would use, which may not be the same words you would use.

The rest of your copy will also need to support your headline and continue to tell the story of how your solution can eliminate their pain.

PUT IT TO USE

You can use customer challenges to drive targeted marketing for the following:

- Creating attention capturing headlines for your campaigns
- Landing pages
- Email campaign subject lines
- Digital marketing campaigns
- Webinar titles
- Blog, whitepaper, and eBook topics
- FAQs
- Positioning your solution's key benefits

OVERCOMING OBJECTIONS

Facing customer objections is a standard element in the sales process. It is beneficial for customers to air their objections. It's better to hear their objections directly, rather than never hear from them again as they work with your competitor.

The voiced objection gives you or your sales team the opportunity to overcome them.

But how can we use customer objections in our marketing materials?

The first step is to identify your most common customer objections. You can find these by talking with your sales team and determining what roadblocks they run into in progressing a sale.

If you're selling a new product or solution, you may need to turn to outside resources like Microsoft sales battlecards for common objections to certain types of solutions or products. From there, you can apply these to your specific solution.

Some of the most common sales objections include pricing, benefits compared to your competition, and a perceived lack of need for your solution. Your marketing department should provide sales reps with competitive comparison data and price promotions to answer these concerns.

You can also take this further and provide sales training materials with well thought-out, strategic answers to the most common objections. For example, if the objection is about being too expensive, you can put together an answer that addresses the perceived price point and arm your sales team so they are prepared. Without these materials, the initial response may be to drop your price or give away some service. With training, you team can provide a professional response and properly position your solution.

You will also want to include answers to common objections throughout your marketing content. Be sure your landing pages address these objections. They also make good topics for blogs, demos, case studies, and more advanced marketing materials.

Creating Marketing for Every Phase of the Sales Journey

Marketing tactics by stage of journey

EXPLORE	EVALUATE	PURCHASE	EXPAND	RENEW	ADVOCACY
Website SEO and content	Social media – including blogs	Sales presentations	Website content	Social media	Social media
Social media – including blogs	Email Campaigns	ROI tools	Social media – including blogs	Email marketing	Case studies
White papers	Telemarketing	Case studies	Case studies	Telemarketing	Public relations
Web content syndication	Events – online or in person	Offers and incentives	Proof of concepts	Newsletters	Referrals
Social Selling	Videos	Proof of Concepts	ROI tools	Account management	
Educational Videos	Product trials and demos	Account management	Account management		

You must understand your customers through research and experience. You watch your customers and learn what compels them and when they are ready to make a positive move towards buying.

Engaging with your customers means finding out where they spend their time. It is learning where they gather information and who they listen to.

Content should be made available for each stage of the customer journey. For instance, content for early interest in security would be educational and level 100. You might also want to create early content that reflects the business value of security. At level 200, you'd provide case studies, feature/benefit drill downs, and more advanced content. At the point a prospect is ready for the purchase, your content should be very directive. You should lead customers to the buying process. You should connect the prospect with someone who can close the sale — direct or through another partner.

RESOURCES:

- Smart Partner Marketing Resources
- DigitalStride Marketing Services

Marketing Tactics

SEO

In simple terms, search engine optimization (SEO) is the act of strategically structuring a website so search engines map a specific site to relevant searches. SEO can be organic (non-paid) or paid placement.

DID YOU KNOW?

- 70% of the links search users click on are organic, not paid (Marketing Sherpa). SOURCE: MARKETING SHERPA, FEBRUARY 2007
- Since 75% of users never scroll past the first page of search results (MarketShareHitsLink.com), it is important for your company's website to land on the first page of top search terms related to the solution you provide. SOURCE: MARKETSHARE.HITSLINK.COM, OCTOBER 2010

OPTIMIZING YOUR WEBSITE

There are several key elements that determine your website's ranking among search engines. Below is a brief overview of the most important things to consider when optimizing your site.

- **Descriptive title tags:** The title tag, which is meant to be an accurate and concise paragraph description of your page content, is the single most important element that search engines use to determine the relevance of your site to a search term. A title tag can include company information, product or services offered, promotions, page content, etc
- **Accurate heading tags:** Use descriptions and accurate heading tags on your site. Search engines quickly scan headers on website pages to get an understanding of what the site is about. Make sure these reflect the content on your page and the types of searches that will be brought to your page.
- **Descriptive URLs:** Use descriptive URLs for different pages of your site to describe the content for each page (e.g. www.site.com/Security instead of www.site.com?page=10). Search engines use URLs to determine if content maps to certain search terms.
- **Rename images:** Rename images on your site to have descriptive titles that are relevant to searches. Also, consider providing "alt attributes"/alternative text, which is a brief description of each image, because these also get scanned by search engines.
- **Link to other sites:** Include quality (not quantity) links in and out of your site. Find complementary sites to link to from your website that have a lot of traffic. Consider adding links to Microsoft and your profile on your website.
- **Integrate social media:** Integrate social media onto your site by adding company Twitter, Facebook, or LinkedIn accounts. Also, use social bookmarking widgets that allow users to share your site content on their social media sites.
- **Create specific landing pages:** Use landing pages to bring visitors with specific searches directly to a landing page designed for your unique product/services or offer.

RESOURCES:

→ DigitalStride: Microsoft DigitalStride offers partners a packaged set of digital marketing services at a low price.

WEB: WEBSITE, LANDING PAGES, AND MICROSITES

The most important marketing element is your website because it acts as your silent salesperson and includes all the information about your company in one place. Specifically:

- Search engines drive traffic to your website.
- It's the first place prospects go to learn about your company.
- It's the hub of all your marketing activities.

Think of your website as your salesperson BEFORE the prospect even speaks to your sales team.

DID YOU KNOW?

- 57% of B2B purchase evaluation is done without speaking to a human. (McKinsey & Company)
- 88% of business research is done online before purchasing offline. (McKinsey & Company)

Since your website is in a position to make such a big impression on your prospects and customers, it is imperative it serves to advocate for your company, rather than hinder it. Remember, your website is your personal salesman and will do the talking for you. When reviewing your website, it is important to think from a customer's perspective.

WEBSITE BEST PRACTICES:

P	Precisely define your company's value on your home page.
R	Rely on customer testimonials and case studies to tell your story.
E	Equip your site to handle mobile and tablet visitors.
S	Skimmable design with white space, subheads, and visuals.
E	Engaging content that is fresh, well-written, and gives the user a reason to return.
N	Navigation that is simple and easily allows the reader to find what they came for.
C	Calls to action that are prominent and lead the user through your sales cycle.
E	Easy-to-find contact information on every page.

Ensure tracking is in place to track leads and pull them into your CRM for lead tracking and scoring.

To be discoverable in the major search engines, you will need to spend time on SEO. Additionally, you will want to carve out your keyword niche by identifying those strong keywords that customers are likely to use to search for your services. Ensure these are the words that are consistently used throughout your website. With a keyword list in mind, consider making targeted ad buys on the major search engines. This is called search engine marketing (SEM) and, along with SEO, represents the minimum you need to be nurturing for your website to succeed.

RESOURCES:

Smartpartnermarketing.microsoft.com – The Smart Partner Marketing website offer many resources on building an effective website.

- → Smart Partner Marketing
- → DigitalStride Marketing Services

Launch Digital Marketing Activities

Resources

- Smart Partner Marketing
- Search Engine Optimization Video
- How to Build a Website
- Customer Journey
- MPN Marketing Resources
- Building a Digital Marketing Solution on Azure

Your website is all-important.

Microsoft understands the need for you to build compelling content and lead capture mechanisms mapped to the customer journey. Ensure tracking is in place to track leads and pull them into your CRM for lead tracking and scoring.

To be discoverable in the major search engines, you will need to spend time on Search Engine Optimization (SEO). Additionally, you will want to carve out your keyword niche, by identifying those strong keywords that customers are likely to use to search for your services and ensure these are the words that are consistently used throughout your website. With a keyword list in mind, you should also consider making targeted ad buys on the major search engines. This is Search Engine Marketing (SEM) and along with SEO represents the minimum you need to be nurturing for your website to succeed.

A web site is still where customers most frequently go to learn about your business, products, and services. The Smart Partner Marketing website from Microsoft offers many resources on building an effective web site.

A cornerstone of demand generation is content … effective content.

You must understand your customers through research and experience. You watch your customers and learn about what compels them and when they are ready to make a positive move towards buying. Content should be made available for each stage of the customer journey. For instance, content for early interest in Azure would be very educational and level 100. You might also want to create early content that reflects the business value of Azure. At level 200 you'd have case studies, feature/benefit drill downs and more advanced content. At the point a prospect is ready for the purchase, your content should be very directive. You should lead customers to the buying process. You should connect the prospect with someone who can close the sale – direct or through another partner.

The most effective content marketers are dedicated to the task. Content decisions and creation should be led by an assigned team that understands the key target audiences. Don't make content an afterthought or small component of your strategic marketing plans. Ensure the right authors are creating pertinent information for every stage of the buying process.

Engaging with your customers means finding out where they spend their time. It is learning where they gather information. Who do they listen to? A few of these "places" are covered here. Keep in mind there are many other places/online locations users gather.

Resource to Help You Build Your Digital Marketing Content

INNOVATORS GUIDE TO UNCOMPROMISED FREEDOM E-BOOK

Fortunately, with The Innovator's Guide to Uncompromised Freedom, flexibility and adaptation is easier than ever. The authority on achieving the freedom employees desire and the protection IT departments require, this eBook demonstrates how Microsoft's Enterprise Mobility Suite (EMS) helps businesses create a more secure and productive work environment from virtually anywhere.

PERMISSION SLIPS

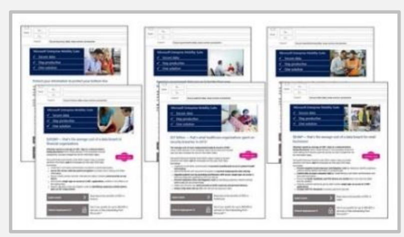
Three permission slips every business leader should sign

BRING YOUR OWN DEVICE INFOGRAPHIC

Infographic that shows multiple solutions for the mobile worker with BYOD

FIND YOUR SWEET SPOT SCENARIOS

Help your customer find the sweet spot for their employees.



ENTERPRISE MOBILITY SUITE EMAIL TEMPLATES

Overview of EMS templates designed for your sales team to articulate the vision and value proposition of EMS. Includes versions for 5 key verticals.

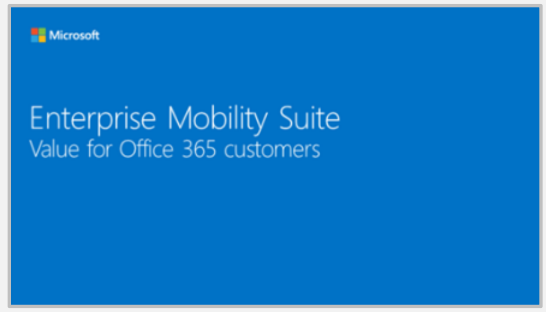
ENTERPRISE MOBILITY SUITE INFOGRAPHIC/POSTER

The EMS infographic is designed for printing or digita marketing efforts.

ENTERPRISE MOBILITY SUITE DATASHEETS

The datasheets are designed for sales and marketing audiences and cover 5 key verticals that your team can use for quick overview reference material when designing your own marketing material or when discussing with potential customers.

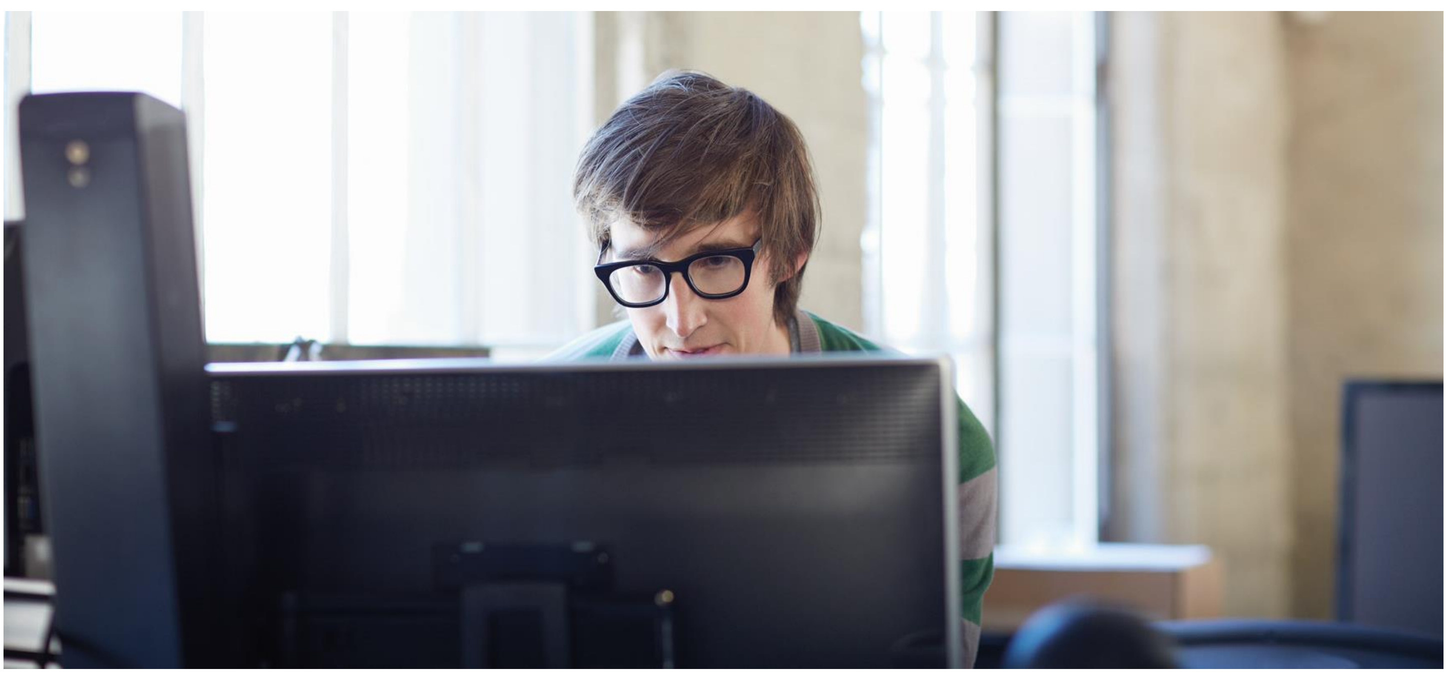
ENTERPRISE MOBILITY SUITE PARTNER IGNITION KIT



This presentation is designed for a sales audience and is designed to provide guidance on selling, EMS itself, and the revenue opportunity that is open to you as an Enterprise Mobility + Security partner

ENTERPRISE MOBILITY SUITE VALUE TO OFFICE 365 DECK

This presentation is intended for a sales audience and is designed to help you articulate the vision and value proposition of Microsoft Enterprise Mobility Suite for existing or new Office 365 customers.



> If we stand proudly on the strength of the microsoft platform; and follow the vision of ceo Satya Nadella 'to empower all stakeholders'; then, together with integrity, we will transform the cloud possibilities into unlimited realities for work, home, worship and play and together we will build a better world for all stakeholders.

RICHARD JORGENSEN
PHD (HC), The Awarecomm Vision ®,
The Partners United Reality

Social marketing is the process of gaining attention or website traffic through social media sites. You can create a sense of community through forums, posts, blogs, and interest groups. It also allows you to be an influencer in the marketplace.

Social media has a specific role to fill in your marketing plan. It can set you up as a subject matter expert (SME), and help build awareness about your company. Social media levels the playing field with competitors of all sizes. It also can be a great way to deepen existing customer relationships and nurture leads, as well as provide customer service and support.

WHY USE SOCIAL MEDIA?

- 84% of B2B marketers use social media in some form. (Aberdeen)
- 60% of LinkedIn users have clicked on an ad on the site. (Lab42)
- 100% of business decision makers use social media for work purposes. (Forrester Research)

HOW ARE PARTNERS USING SOCIAL MEDIA?

- To start and lead user groups
- To offer advice and ideas in existing groups
- To position themselves as experts by utilizing the 80-10-10 rule of content:
    - ➔ 80% repurposed industry specific or expert content
    - ➔ 10% original content
    - ➔ 10% interesting posts
- For recruiting
- To promote events and new products
- To gauge social environments and get feedback
- To build a reputation with testimonials, reviews, and rankings

WHAT SOCIAL MEDIA AVENUES SHOULD YOU USE?

- LinkedIn – 74% of businesses use
- Twitter – 42% of businesses use
- Facebook – 39% of business use

Source: Forrester Research – Q1 2013 North America and Europe B2B Social and Community Marketing Online Survey

GETTING STARTED WITH LINKEDIN

LinkedIn provides a B2B platform that can be a good starting point for your social media efforts. Start by building a company page. Then you can link with employees, customers, prospects, and vendors. Once you have that foundation built, start posting interesting facts, articles, and events to position your company as an industry SME. Have your team join existing groups and participate in them. Be sure to follow client and prospect companies for early information.

DIGITAL ADVERTISING AND SEARCH ENGINE MARKETING (SEM)

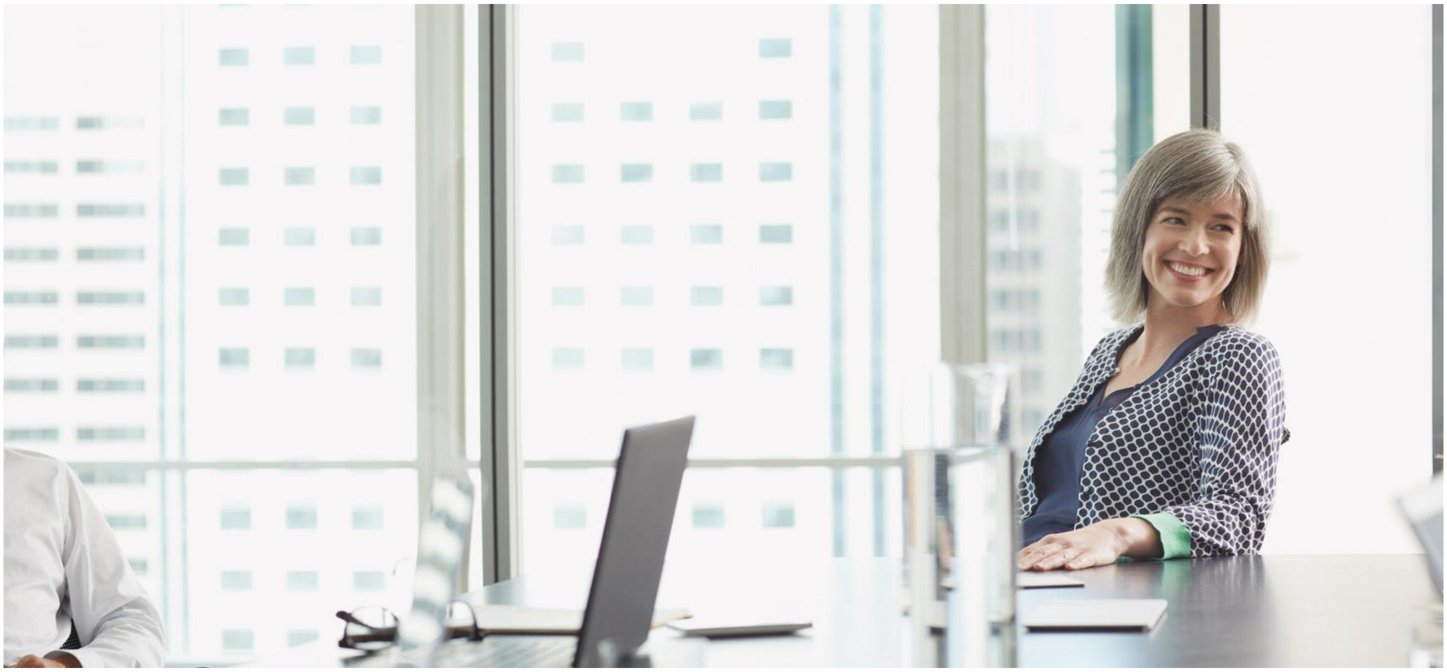
Digital marketing provides a great tool for lead generation. Partners are using digital marketing to attract customers to their website with promotional offers, inviting prospects to events, highlighting new products/solutions, and allowing prospects to get more information.

One of the keys to a successful digital campaign is to make sure you keep your message simple. What is your one key takeaway? Stick to one benefit, one promotion, or one product feature. Don't try to do too much. You also need to appeal to a specific audience for the best results. Target your campaign to one industry or role within a company so you can focus your message.

Digital media requires good design. You want to use professionally designed elements with vibrant colors and photos or graphics. Make sure you have a good call to action that is clear, and easy to read and execute.

For best results, use a campaign-specific landing page on your website. Bring the reader directly to the information they are looking for. Don't make them search your website.

And, don't forget to look at the results. One of the advantages of digital advertising is that it is easy to measure and track results. For SEM, you can track click-throughs. For websites and landing pages, track downloads, visits, and conversion rates. You will track open rates and click-throughs for emails. It is also the perfect medium for testing. Test your creative, headlines, subject lines, audiences, timing, and media sources. This will help you get the best results for dollars spent.



EMAIL

Relevant emails drive 18 times more revenue than broadcast emails. (Jupiter Research)

EMAIL TIPS FOR B2B:

- Tuesday is the best day to send.
- Friday is the worst day to send.
- 8 a.m.–12:00 p.m. is the best time to send.
- Content offers are the best calls to action (webinars, whitepapers, case studies, multimedia).

SEM

Search Engine Marketing (SEM) is a paid marketing campaign that runs on search engines. Campaigns usually run for a finite amount of time and can be linked to a specific promotion, product or services, or call to action.

SEM TAKES FIVE STEPS TO GET UP AND RUNNING:

- **Set up your campaign.** Choose your source and set up your account.
- **Build your keyword list.** Make sure it's from the customer perspective.
- **Create your ads**. Focus on one action and have a strong call to action.
- **Set your bids**. Use bid estimator tools in the platform and create bids specific to each keyword.
- **Monitor and optimize**. Install link conversion tracking codes to measure traffic and test all elements to maximize your return

CONTENT: BLOGS, EBOOKS, AND WHITEPAPERS

A cornerstone of demand generation is effective content through blogs, eBooks, and whitepapers. In doing so, it provides partner branded information that includes targeted information for those that need it.

What is content marketing? It's using articles, whitepapers, videos, checklists, and other types of content to nurture prospects and clients along each step of the buyer's journey.

The most effective content marketers are dedicated to the task. Content decisions and creation should be led by an assigned team that understands the key target audiences. Don't make content an afterthought or small component of your strategic marketing plans. Ensure the right authors are creating pertinent information for every stage of the buying process.

Helpful to this cause is the journey that a prospect takes to becoming a client and their journey as a client. Explore, evaluate, and purchase, are phases before the sale, and expand renew, and advocacy come after the sale. To help a client or prospect through their journey, make content appropriate to each stage available. Appropriate content you may already own or need to develop could be whitepapers, articles, social postings, blogs, benchmark reports, landing pages, downloadable tools, worksheets, infographics, or videos. Almost anything that's client facing, either in whole or in part, could be an asset used to provide valuable information to a client or prospect.

Remember in the cloud era people purchase very differently. They research extensively before they even attempt to make contact with a partner. Understand where your persona gathers information; for example, what social groups they frequent, blogs they follow, and topics of interest you can tweet about. Don't only count on yourself for these sources; utilize your entire team and company employees to get your message out. Most importantly, make sure all content available on your website is search engine optimized — specifically on pages that can help you identify in which stage in the buyer journey the prospect or client finds themself. Connect your content to a landing page and a marketing automation system (like Google Analytics), and you'll be able to measure the uptake of your assets.

According to Content Marketing Institute, 88% of B2B marketers currently use content marketing as part of their marketing strategy.. (Source: Content Marketing Institute)

You will want to have appropriate content for each stage of the customer journey. You may not have all these items today. Identify the gaps in your content, and build a schedule for developing those missing pieces into your marketing plan.

Tip: Some content items may be usable for multiple personas. Sometimes just a few small tweaks are all that's needed to make it useable for a different persona.

When thinking about the content you need, consider these guidelines:

It's never about you, it's always about the client. Whatever content you develop, focus on the client's needs, not just what you're trying to sell. Just for fun, bring up a white paper or article that you own, and count how many times your company name is mentioned, how many times you refer to "we" or "I". A few times is ok, but if it seems like the piece focuses on your wants rather than the client's needs, it may be time for a rewrite.

Content is available everywhere if you know where to find it. Visit the Microsoft Partner Marketing Center for access to valuable content you can reuse..

Besides the content you own and Microsoft content you can leverage, you should attribute the content to the author whenever published content is used.

YouTube is a great source of video content and a good search engine for locating appropriate content for your campaigns.

Your business partners can be another great source of content as they share via social media and online articles. Bing and Google can be powerful locates of content. Just be careful that the content is appropriate and owned by the visited website.

One of the most overlooked sources of content is the repurposing and updating of content you already own. Print out the content you've created over the last 3–5 years, including white papers, articles, blogs, and sales materials. Re-read the content and determine if the collateral needs updating, and if sections stand alone or can be combined with fresh content.

BLOGS

Blogs are helpful in establishing your expertise and bringing visitors to your website. Through your blog, you can position you company as an industry leader. Blogs should be kept brief (remember, they're not a whitepaper). The best blogs are written on topics of interest to your target audience, and are not specifically about a product or service you sell.

Take some time to "listen" to what your customers are talking about online. Look for articles that are re-posted or "liked." Keep track of the topics that are of interest and write about those.

- Small businesses with blogs generate 126% more leads. (ignitespot)
- 81% of all U.S. consumers trust advice and information from blogs. (ignitespot)

But, before you jump in, consider if a blog is right for you:

- Can you sustain content?
- If you don't sustain it, what does that say about your company?
- Does this help establish you as an expert in the industry?
- How will you market your blog?

EVENTS: IN-PERSON, WEBINARS, PODCASTS, TRADESHOWS/CONFERENCES, AND WORKSHOPS

Events allow you to engage with your user community in different ways. This level of engagement goes beyond name recognition or branding. It builds trust and rapport with existing and prospective customers. It demonstrates that you are a serious contender in the marketplace, but also have something more than your product to offer.

WEBINARS AND PODCASTS – CONTENT IS KING

Webinars and podcasts are nothing new. They are, however, more sophisticated. The technology to make them happen for the end user is simple to use. The presenter has a little to learn to be successful. It is very different presenting via webinars and podcasts instead of in front of people. It takes some practice to get good. Don't forget to allow that preparation time.

Webinars vary in length. The best ones are less than 30 minutes. If appropriate for the audience and the tools, allow time for live questions and answers. Always record your presentation for future viewing. Make the most of the time by putting your webinar on your website, YouTube, and other venues that invite this type of content. You can also share a link to a short webinar in a prospective customer email.

Video content marketing is very popular. In less than a minute, you can deliver powerful messages that keep the audience's attention.

MEETUPS – GETTING IN FRONT OF THE CUSTOMER

Meetups are generally more local and smaller sized groups. They come together around a common interest and regularly talk. They usually meet in person in a limited geographic area. A great example of a meetup is the Boston Azure Meetup.

A meetup is your opportunity to speak to an audience that wants to hear your message. Do you have a recent case study you can discuss? Maybe you've had a breakthrough with the technology? Maybe you are just good at talking about the benefits of security?

Be sure to understand the nature of the meetup — is it technical or business focused? This determines the content you will deliver.

COMMUNITY RELATIONS

Another great way to have direct contact with prospects is to get involved in your community. There are many avenues you can explore:

- Local chamber of commerce
- Industry-specific association
- Charity
- Local LinkedIn Group (e.g., LinkedIn Seattle Networking)
- Local chapter of IAMCP or other technology association
- Local Microsoft events

It's not just a matter of joining an association or charity; you need to get involved. To make lasting relationships, consider joining a committee. For example, the technology committee. Or if you have expertise in financial services, join the finance committee.

Join the board. Get to know others on the board. Remember, these people can be great referral resources, as well as prospects.

Offer to be a speaker. Think about topics that would interest members of the group. The local chamber of commerce is always looking for luncheon speakers. Take this opportunity to establish yourself as an expert. Be sure to present topics that will have an immediate action step and offer to assist as needed.

INTEGRATED MARKETING CAMPAIGNS

Consider the effect of listening to music in surround sound. By leveraging its position, each speaker accomplishes the goal of harmonic precision. Likewise, each element of the marketing communication mix, by exploiting its unique position and strength, must surround the consumer with a consistent message.

Today's buyers are more independent and more informed. specifically,

- They tend to do their own research.
- They take time to talk to your customers.
- They consult with their trusted network.
- They are overwhelmed with information.

A well-executed integrated marketing campaign will create multiple touchpoints with your prospects. This will allow you to gain general awareness (breadth) and build on your expertise (depth).

A typical integrated marketing campaign might include:

- A landing page for your campaign and/or event registration
- An introductory email
- A follow-up phone call
- Simultaneous SEO
- Simultaneous digital ads
- A blog article on a complementary topic
- A second email with a downloadable case study
- An invitation to an event or webinar
- Event or webinar promotion on social media
- A follow-up phone call to the invitation
- A last-minute to register email
- Event or webinar execution
- Follow-up email and phone call to those who attended, and separate follow-up to those that signed up but did not attend, with materials attached

CRM AND MARKETING AUTOMATION

When people talk about customer relationship management (CRM), they are usually referring to a CRM system — a tool that helps with contact management, sales management, productivity, and more. CRM systems help focus and track an organization's relationships with customers, prospects, service users, partners, and suppliers.

Marketing automation refers to software platforms and technologies designed for marketing departments and organizations to market on multiple channels more effectively online (such as email, social media, websites, etc.) and automate repetitive tasks. We recommend investing in marketing automation tools to effectively engage customers, nurture them through the buying process, and measure/track adoption.

Integrating marketing automation with your CRM provides the benefit of consistent messaging and gives you a unified approach to data managements as all the contact, communication, and other data is saved under one single platform. The data is organized, easy to view and edit, and faster to analyze. Also, a single system means that new data is easy to input and organize, and tracking and reporting becomes more efficient.

An investment in marketing automation helps to organize touchpoints and reach prospects and customers at a time that is right for them, rather than reaching everyone at the same time. Today's cloud customer requires information and education to make an informed purchase decision. Only through nurturing your prospects and existing customers with appropriate content will you find your pipeline full.

One of the key features of marketing automation is lead scoring. This feature allows scoring or grading of leads based on their interaction with your marketing content. This allows your sales force to stay focused on those prospects most likely to purchase. You can measure number of visits, companies they come from, behavior on websites, reaction to emails, and what links the prospect clicked on.

All this intelligence allows you to follow up with an informed perspective. Customers appreciate you taking the time to know what is important to them and presenting that material upon contact.

Some of the popular marketing automation platforms include Microsoft Dynamics Marketing, Adobe Marketing Cloud, ClickDimensions, Marketo, Eloqua, and Hubspot.

SALES SUPPORT MATERIALS

Your marketing department should arm your sales teams with several sales tools to make selling the solution as easy as possible. Sales materials should help reps be prepared for objection handling, competitive positioning, and explaining the benefits of the solution. Ensure sales materials are telling the same story as your marketing materials.

To get started, visit the Partner Marketing Center for examples.

SALES SUPPORT MATERIALS

- **Solution sheet/Data sheet** – Your solution sheet will be used for external customers and prospects. Think of this as a one-sheet that offers the reader a reason to purchase your product. Your solution sheet tells a story about the product/service, the benefits to their company, and the reason they should purchase the product from you. This is also a good place to introduce promotional offers. Be sure to have a strong call to action.
- **Battlecard** – A battlecard is an internal document designed for your sales people with a solution overview, customer pain points, company differentiators, and proof points. It can be used to train sales people and serve as a quick reference sheet during the selling process.
- **Sales playbook** – This is a sales guide with solution overview, questions for prospects, FAQs with answers, objection handling, etc.
- **Telesales/Conversation guides** – This is a guide for sales, and includes key benefits, sales questions, objection handling, and promotions. The questions are open ended and designed to keep the prospect talking. Try to come up with questions that require detailed answers. Remember, selling is more about listening than talking, so shift the focus onto the prospect.
- **Customer-facing sales presentations –** These are sales materials to be used by sales people when selling solutions to new or existing customers. They should clearly articulate the product or solution, have screenshots or live demos built in, and articulate the value add of your company and what makes you different.
- **Customer scenarios** – These are real world examples of how the product or solution is used. Usually you pick an industry, business size, and role of individual, and then explain how the solution benefitted them personally — and their business as a whole.

USE MARKETING ASSETS TO CONVINCE AND SUPPORT YOUR CUSTOMERS:

- Full ATP Through-Partner Sales Kit, including demo script, tele sales script, email template, customer presentation, ATP infographic, and ATP overview sheet.
- Office 365 Secure Score Assessment IP Kit for partners to run a Security Assessment Workshop with clients.

SOLUTION SHEETS/DATA SHEETS

Creating a customer-facing solution sheet or data sheet will help you tell your story in a single voice and with clarity across all media channels both internally and externally. As such, it becomes your marketing source document. Refer to it when creating all your campaign and marketing collateral, website content, and sales training materials.

Typical Solution Sheet Layout

TYPICAL ELEMENTS OF THE FRONT SIDE OF THE SHEET INCLUDE:	TYPICAL ELEMENTS OF THE BACK SIDE OF THE SHEET INCLUDE:
• Graphical depiction of the solution • The value proposition • Key benefits • Promotional offer • Call to action • Logos • Contact information	• Your offers (plans and pricing) • Optional add-ons to your product • Additional partner services you provide • Proof points (testimonials, service guarantees, certifications, etc.) • Promotional offer • Call to action • Contact information

Keep in mind that people in western civilizations read left to right, top to bottom. This means that our eye starts on this page in the upper left hand corner and moves down in a "Z" fashion.

Also, remember it's highly unlikely that an actual sale will come from a prospect receiving your solution sheet. The goal is to intrigue the prospective customer enough to earn a sales conversation.

FRONT SIDE

Content on the front side provides high-level information about solution, as well as the top features, advantages, and benefits.

A COMPELLING HEADLINE

References a key pain or differentiating point to capture the reader's attention and promise hope

SUB-HEADLINE

Sometimes, but not always needed; used to build on the message of your headline

REFERENCE TO MICROSOFT BRAND

Research shows that this reference positively influences buyer intent.

EYE-CATCHING GRAPHIC

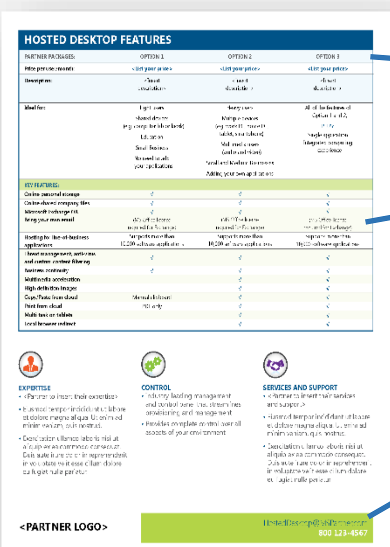
A powerful visual that communicates at-a-glance your solution and its benefits.

KEY MESSAGING PILLARS & SUPPORT POINTS

These are your top 3-4 messaging pillars where you address prospect pain points and create interest that your solution solves their business needs.

BACK SIDE

Content on this side helps readers get deeper, richer information about your offer, and confirms to them that you're selling something **that will benefit their business.**



VERSIONS AND OPTIONS

If there are options or levels of service in your offering, lay them out clearly. This will build trust and potentially stimulate questions during the first actual conversation with your sales team.

PRODUCT GRID DISPLAYING IMPORTANT FEATURES

This is good space to provide well-organized information about not only the Microsoft Hosted Desktop technology, but also the features and benefits unique to your company's offer.

YOUR CTA AND OTHER INFORMATION.

Make sure your prospective customers know what action they should take to keep the conversation alive. Should they call? Click? Chat? All of the above? Remember to include your Microsoft Partner Logo!

BATTLECARDS/PLAYBOOKS

Battlecards are short, sales-ready documents that provide sales teams with an understanding of key sales messages, product information, engaging questions, common objections, and tactical value propositions to use when selling against your competitors. Typically, battlecards are no longer than two pages, and provide your sales team with a "cheat sheet" for customer conversations.

Effective battlecards provide valuable talking points that lie at the intersection of buyer expectations and needs and the product advantages and competitive differentiators that satisfy those needs. Great battlecards don't deluge your sales team with facts out of context, but rather equip them with usable insights to engage customers about meeting their needs.

BATTLECARD ELEMENTS:

- **Lead messaging**: Informs the sales team on the current messaging around the product/solution.
- **Key features and benefits**: Focuses on benefits and advantages of your solution that can be used to sell against competitive offerings.
- **Points of differentiation**: Focuses on why a prospect should buy this solution from you versus your competition.
- **Target audience**: Identifies the target audience for this solution.
- **Conversation guide/Engaging questions**: Helps your sales team engage the prospect and get them talking about their needs and pain points. Can include questions to determine if a prospect is a good candidate for your solution, as well as leading the conversation to highlight the benefits of your solution.
- **Objection handling/Common objections**: Outlines the typical objections your sales team hears from prospects about your solution and provides strategic answers they can respond with.
- **Promotional offers**: Lists any promotional offers available to the sales team to close a deal.
- **Additional resources available to them**: Could include things like Microsoft resources, documents on an internal/external SharePoint site, available customer presentations.

PRESENTATIONS/PITCH DECK

Sales decks have become an essential tool in selling to new or existing customers. Today, sales decks help position your solution and build the case for why a prospect should work with you. They help guide a sales person through your story, establish trust, and build rapport.

WHAT SHOULD BE IN YOUR PRESENTATION DECK?

- Start with a brief overview of your company to establish credibility. Showcase a few of your top clients to resonate with your prospect.
- Identify with the audience and their pain points. Start your pitch by showing that you understand their situation, goals, fears, and pain points.
- Demonstrate that you understand the problem. Show how your solution could help them overcome the problem.
- Use your points of differentiation to show the value of your solution. Explain why your solution would offer the best results.
- Showcase your proof points to back up the claims you've made. Offer a case study, testimonials, stats, or other data to prove that your solution has helped others in a similar situation.
- Display a clear call to action that will move the sales journey forward.

DESIGN BEST PRACTICES:

- Keep the look and feel consistent with your branding. Use a template.
- Use 16-point font or higher.
- Use white space to denote the most important elements and help them stand out.
- Don't clutter your slides with graphics and text.
- Use photos and graphics to tell the story.
- Limit the use of animations, particularly if hosting the presentation online.

CONVERSATION/TELESALES GUIDE

The first sales conversation with a new prospect can be tough. After all, prospects tend to distrust sales people; they're guarded with their information, and they're extremely busy. The fact that they agreed to meet with you in the first place is a great sign. But much of your selling success hinges on your ability to lead an effective first conversation, and get them to agree to a second conversation with you.

The conversation guide is a framework for your sales team to have an initial conversation with prospects, and includes key benefits, sales questions, objection handling, and promotions. The questions are open-ended and are designed to keep the prospect talking. Try to come up with questions that require detailed answers. Remember, selling is more about listening than talking, so shift the focus to the prospect.

TYPICAL ELEMENTS YOU WOULD INCLUDE IN A CONVERSATION OR TELESALES GUIDE:

- **Target audience**: Identify the audience for the conversation guide. This could include questions to determine if the customer they are talking to qualifies.
- **Key features and benefits of your solution**: Provide talking points about your solutions. This could include a brief description, as well as more in-depth messaging.
- **Engaging questions to target customer pain points**: The heart of the conversation guide is your engaging questions. Help your sales person with questions to get the customer talking and discussing their current situation and the pain points they face.
- **Response guidance for customer answers**: This can be high-level guidance as to how to structure an answer if the customer says "ABC," or be very scripted with detailed answers and support points.
- **Script**: Depending on your needs, you may want to include a script for the entire conversation or some part. Typically, it's good to include a script to get the conversation started.
- **Call to action/promotion**: Always provide a next step to work towards. Give your sales team something to close and progress the sale.

DEMO/VIDEO

Most prospects will want to see your solution in action before purchasing, and there are many ways to offer this opportunity in addition to a one-on-one demo.

CHECKLIST

Key components to keep in mind when developing your demo and video:

- ❑ **1.** Live video with demo
- ❑ **2.** Customer video testimonial
- ❑ **3.** Webinar
- ❑ **4.** Online selection tool
- ❑ **5.** Online widget

LIVE VIDEO

It is relatively simple to create a live video with your president, chief engineer, or sales manager speaking. You can show the demo live, or through a series of screen captures in a PowerPoint deck. Videos can be shot in your office or at a location, such as the Microsoft offices. You will want to make sure it looks professional, so having a videographer is recommended. Also, make sure you have a script written out and have practiced the lines over and over. It looks easy to talk on-screen for 5–10 minutes, but it's definitely not!

VIDEO TESTIMONIALS

Another way to display what your solution can do is to create a customer video testimonial. These are not expected to look as professional as a full video, so they can be shot with a simple camera or phone. Again, make sure you have a rough script, as you want your customer to look professional and you want to have them do a good job of highlighting your company.

ADDITIONAL IDEAS

Other options include hosting a webinar, or creating online tools. An online selection tool walks customers through a series of questions that ultimately leads to a recommendation for them, based on their needs. These are effective for a few reasons. First, it offers a way for customers to be fully engaged with your company, even if there isn't a sales person present. Second, it offers them a customized solution. And finally, it leads them down your purchase path, as you can highlight key solution benefits along the question path. Another online tool is a widget. A widget is an add-on to your website that works very similarly to the selection tool. However, these can be made much simpler, and can establish readiness — rather than get to an individualized product recommendation.

Sales Training Materials

BEST PRACTICES FOR SALES TRAINING

Create sales Ttraining plan and objectives. Includes training materials, frequency of trainings, number of sales people to be trained, etc. Training is not a one-time thing. Ongoing training and refreshers are important to keep up on the latest updates.

Create sales training materials weeks prior to launch. Leverage online training resources from Microsoft — level 100, 200, and 300, if possible.

Designate sales and technical product/solution subject matter experts (SMEs) to help with training. As early as possible, arrange deeper training for SMEs. The SMEs are the go-to people for tough questions, challenging or competitive sales or technical situations, and training.

Include objection handling and competitive information where the focus is selling a new solution. Objections are a normal part of the sales process, but a trained salesperson can anticipate them and develop techniques for overcoming them. Information on the company's product, as well as those of competitors, is fundamental. A training program will give an opportunity to inform the sales team about the products or services that the organization provides. If it is a new launch, allow your team to test the material so they can better understand the product.

In training, include a flow-chart on the customer journey from pre-sales through deployment. This will help clearly lay out roles and responsibilities (sales, operations, support). Understanding who does what and where the natural hand-off points are in the customer journey will help sales people articulate the process to the customers and give them more confidence to buy from you.

Include customer scenarios and role-playing exercises in training materials. Scenarios are prototypical business use cases for the solution. In-person role-playing exercises using the scenarios will help sales people understand and articulate how the Microsoft solutions fix real world problems for customers.

Building sales scenarios based on typical customer experiences helps sales reps feel confident in their ability to explain how the solution solves similar business challenges.

USING SCENARIOS IN TRAINING

- **Identification with the customer**: Understanding the customer's business needs and pain points, and the impact relieving the pain.
- **Recommendation of most appropriate solution**: Steps to map correct products to a customer's business needs.
- **Move the customer to a decision**: Once your customer is convinced of the value, arrange a pilot.

BEST PRACTICES

Include a key contact list for sales people. This would include sales, technical and operations escalation contacts when sales people need help.

Include sales compensation plan info as part of training. Sales people want to know how they make the most money selling the solution. Also, explain the annuity model and ensure sales plans compensate for the monthly billing model.

Incent sales people who complete trainings with gift cards or raffle prizes. By employing this tactic, usually word gets around if you give away fun items, and subsequent training attendance goes up.

Include product/solution-themed giveaways as part of training. This could include things like coffee mugs, T-shirts, keychains, stress balls, etc.

Sales

Find Your First Customer

MICROSOFT PROVIDES THESE RESOURCES TO HELP YOU FIND YOUR FIRST CUSTOMER.

The Microsoft Partner Network makes it easy for you to find professional, personalized marketing resources that will help you to market your business and find new customers. Save time, save money, and get the tools and support you need to reach your customers.

SMART PARTNER MARKETING

Build the foundations you need to reach your first customer by following the Smart Partner Marketing program, which provides what you need to know for marketing Microsoft solutions in a cloud-first world: assess your status, learn smart marketing principles, and execute marketing tactics.

PROJECT LEADGEN

Project LeadGen is a great way to find your first cloud customer. Project LeadGen is a comprehensive sales and marketing program to help Microsoft partners develop sales opportunities built on Microsoft Cloud solutions. Utilize key assets from Microsoft Community Connections. This five-part training series includes instructional videos, event assets, and personal coaching. This program is for partners who would like to learn about Seminar Selling and how they can leverage Microsoft branding to build business leads.

Project LeadGen can be used to acquire new customers, as well as address existing loyal customers. Remember, informing your existing customers of new services is appreciated by your clients. Coming from a trusted source, they are more likely to show interest that leads to a sale.

ENGAGING TECHNICAL PRE-SALES IN SALES CONVERSATIONS

From the start of your engagement with a prospect, you need to be aware of the need for technical pre-sales assistance. Many times, you are dealing with business decision makers during the buying cycle. In that case, you are less likely to have a need for technical assistance. However, more than ever before, technical staff are a part of decision making. When the customer has one or more technical resources on the purchase committee, you need to engage technical pre-sales.

Your technical pre-sales staff should be experienced users of your products and services. These employees need training or experience as a user of your products. Former support employees often make good technical pre-sales staff.

The technical pre-sales staff is in place to explain technology, how it works, how it meets a business need, and to answer any other questions. The business benefits can be left to the sales and marketing staff. This is where they shine.

The technical staff should excel at the more complex issues that come from prospects. Technical staff should be dedicated to pre-sales. They should work together with sales efforts. One without the other cannot be effective. You need the sales staff to speak to business decision makers. Equally, you need pre-sales to answer all technical inquiries.

Solution Selling

Solution selling is a sales methodology. Rather than just promoting an existing product, the salesperson focuses on the customer's problems and addresses the issue with appropriate offerings (products and services). The problem resolution is what constitutes a "solution".

When products or services are hard to describe, intangible, have long sell cycles, or are expensive, chances are they're difficult to sell. In situations like this, conventional sales techniques not only don't help, but they also may hinder success. Solution selling is a process to take the guesswork out of difficult-to-sell, intangible products and services. It enables sellers to make the way they sell as big of an advantage as their product or service.

The solution sales rep focuses on three questions: the what, the which, and the why. By working through these key areas, the sales rep can enhance the customer's understanding of their own pain points and how they can be resolved.

BEST PRACTICES:

- **The best reps combine solution selling with insights.** To gain credibility in the eyes of the buyer, the solutions sales rep must introduce content and data that adds value to the sales call. These insights also help to earn the buyer's trust, adding a sense of legitimacy to the solutions put forward.
- **Ask good questions.** The successful solutions seller remains sensitive to the buyer's needs and asks important questions at the right moment. Buyers will be keen to learn, but they will also want to spend time covering the areas that most concern them. The solution seller must help the buyer talk through these problems before putting forward a resolution.
- **Listen actively.** Solution selling requires considerable understanding of the buyer's needs, which will only come from listening attentively. Solution sellers should actively listen as the buyer details their organizational needs, taking notes and asking considerate questions in the process. Solution selling techniques require an acute awareness of the level of buyer tone, pitch, and enthusiasm during the sales call.
- **Offer guidance.** Solution sellers must guide the buyer towards the solution being offered. This guidance comes as the solution seller adopts something of a teaching role, helping the buyer to overcome business challenges by utilizing their deep knowledge of industry pain points and trends. The solution seller must strike a balance between helping the buyer understand their challenges and guiding the buyer towards the solution.

The Office 365 Advanced Security Sales Formula

To get to the sale tipping point for Office 365 Advanced Security, it is important that partners know and understand how to showcase the customer value and benefits of Office 365 Advanced Security features.

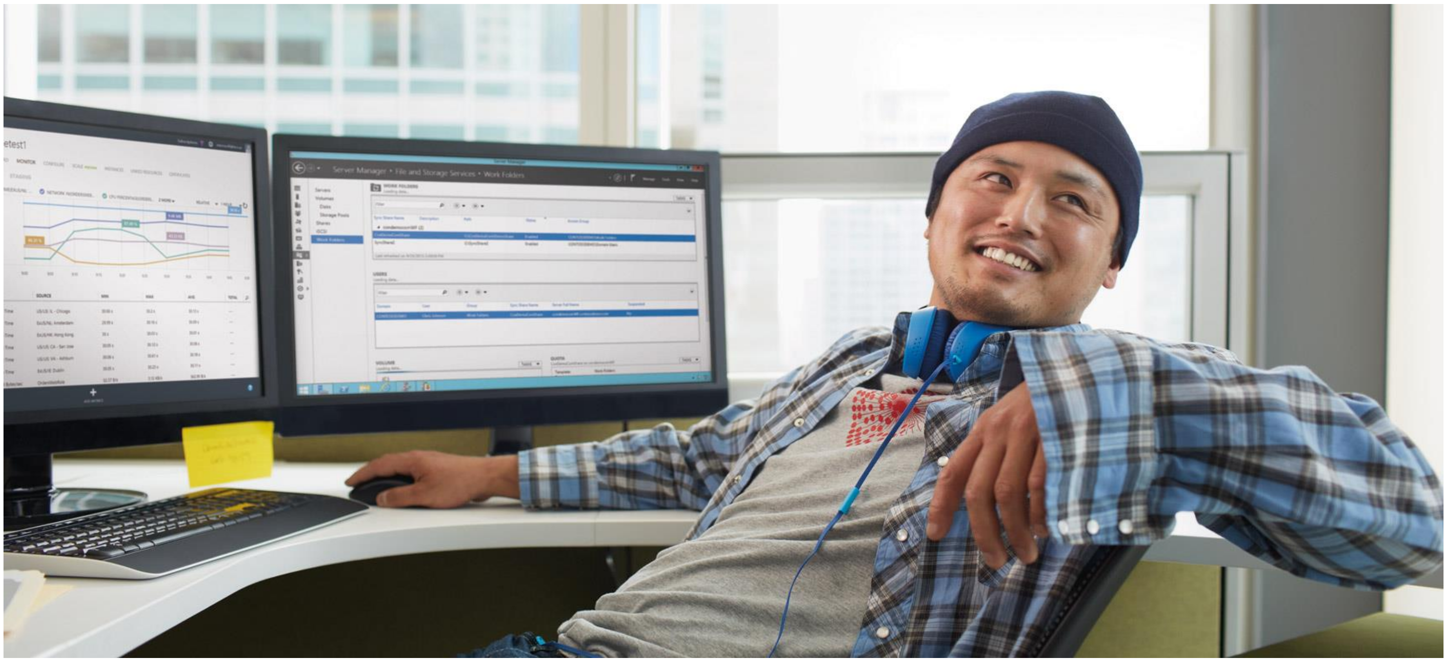
Most effective Advanced Security sales start early and with an assessment. Sales cycles can be long, so start as early as possible. Ensure the right partner solution specialists are fully engaged as part of the end-to-end sales process. Security workloads are complex; be sure to leverage the most strategic sellers and consultants as part of your wider team.

Prepare	Select + Qualify Lead	Develop Strategy	Present Value	Prove Value	Drive Adoption
Know the product, programs, tools, training and research to get ready.	Target the right industry verticals to maximize effort. Explore customers who have existing Exchange Online deployments or EMS customers	Learn the Digital Transformation vision presentation and the Advanced Security and Secure Score demos.	Showcase Advanced Security capability by demonstrating the Customer Immersion Experience.	Walk customer through Value Tools to show economic value and value of security assessments by leveraging Office 365 Secure Score	Drive advanced security workloads by realizing the benefits identified in the security assessment workshop and bringing customer security environments up to the customer desired level.
Prepare by attending Office University: Office 365 Advanced Security Training (In-Person or Online); learn how to demo and use customer value and demo tools	Have a CISO discussion to drive engagement and possible security assessment workshop.	Leverage Value Discovery Workshop to learn how to support customers security needs.	Utilize customer evidence and success stories to showcase customers leveraging Office 365 Advanced Security.	Close the deal with the new Office 365 E5 Step-up Promotion .	
Discuss with customers their security needs, identify how best to deliver a Security Assessment Workshop.	*Understand the customer landscape and define positioning of the Advanced Security Workload post Security Assessment Workshop*	*Create Security Assessment Workshop strategy, publish security offerings, baseline offering strategy, land with customers*	*Showcase the value of Office 365 Advanced Security through proof points and demos.*	*Use the Value of Office Calculator & customer evidence to demonstrate the ROI and business impact*	*Build security into the Customer Success Plan and help customers realize the value of security identified in the Security Assessment Workshop*

Microsoft

	RESOURCES FOR USE DURING SELLING	STEPS FOR SELLING TO CUSTOMER
Prepare	Know the product, programs, tools, training and research to get ready. Prepare by attending Office University: Office 365 Advanced Security Training (In-Person or Webinar); learn how to demo and use customer value and demo tools	Discuss with customers their security needs, identify how best to deliver a Security Assessment Workshop.
Select + Qualify Lead	Target the right industry verticals to maximize effort. Explore customers who have existing Exchange Online deployments or EMS customers. Have a CISO discussion to drive engagement and possible security assessment workshop.	Understand the customer landscape and define positioning of the Advanced Security Workload post Security Assessment Workshop.
Develop Strategy	Learn the Digital Transformation vision presentation and the Advanced Security and Secure Score demos. Leverage Value Discovery Workshop to learn how to support customers security needs.	Create Security Assessment Workshop strategy, publish security offerings, baseline offering strategy, land with customers.
Present Value	Showcase Advanced Security capability by demonstrating the Customer Immersion Experience. Utilize customer evidence and success stories to showcase customers leveraging Office 365 Advanced Security.	Showcase the value of Office 365 Advanced Security through proof points and demos.
Prove Value	Walk customer through Value Tools to show economic value and value of security assessments by leveraging Office 365 Secure Score. Close the deal with the new Office 365 E5 Step-up Promotion .	Use the Value of Office Calculator & customer evidence to demonstrate the ROI and business impact.
Drive Adoption	Drive advanced security workloads by realizing the benefits identified in the security assessment workshop and bringing customer security environments up to the customer desired level.	Build security into the Customer Success Plan and help customers realize the value of security identified in the Security Assessment Workshop

Closing the Sale



WRITING WINNING PROPOSALS

Customer proposals are a cornerstone of the sales process. You must put together a compilation of information and data that's compelling enough to move your prospect to a sale. When you get to the proposal stage, you should be very well poised to close the business.

When writing a proposal, there are a few key things to keep in mind.

- First, you should have already discussed what you are proposing with the customer; never rely on a proposal for negotiation.
- Second, write your proposal so that the customer is provided a choice of "YES's." Give your customer multiple paths to move forward, and make the path to not moving forward unattractive.
- Third, structure your proposal so that the material that is most readily agreed to comes first. Then gradually layer in the items that might introduce friction. A simple example of this is to not put the proposal fee or estimate at the beginning.

For more suggestions on writing successful proposals, see the book Million Dollar Consulting: The Professional's Guide to Growing a Practice.

RESOURCES

During your pre-sales process, note that Microsoft has resources to assist you. Gain a competitive advantage to win more deals by connecting with Microsoft experts for personalized remote technical assistance during the pre-sales phase to help you position Microsoft solutions, overcome customer objections, demonstrate the value of solutions, and present solutions to your prospective customers. This includes:

- Proof-of-concept guidance
- Business value proposition
- Competitive assistance
- Feature overview and comparison guidance
- Request for proposal (RFP) questions
- Technical licensing recommendations

THE ART OF NEGOTIATION

In negotiation, neither party holds all the aces. Since both parties want to win, what is the best way to proceed?

1. ESTABLISH THE RELATIONSHIP

The wise negotiator establishes the relationship before proceeding further. Doing so allows you to get a feeling for the person with whom you are dealing, and vice versa. Though often ignored, "feeling" itself is an essential part of negotiation. So, always be open and sincere. Honesty, integrity, and dignity are palpable qualities — and the foundation upon which constructive negotiations are built. You are best positioned to negotiate when the other party respects you, not only as a businessperson, but as a human being. Trust, which is gained through that respect, is the key to successful negotiation.

2. BUILD RAPPORT

Never underestimate the natural ability of other people to sense who you really are. Disingenuous, manipulative, and secretive are feelings cannot be hidden. When negotiating, you can sense if the other party's values are subpar or lack integrity altogether. No greater red flag exists in the entire arena of negotiation.

3. FOCUS ON THE WIN-WIN

Win-wins are the only way to go. If you approach a negotiation thinking only of yourself, you are a terrible negotiator. Understanding what all parties need, and working for all concerned is vital. Keep in mind that seeing things in only black and white (win-lose) creates limited thinking; creativity is essential to good negotiation. Ultimately, all people involved should find themselves on the same side of the fence. You want to be a player, not a pain. Keep your eye on the big picture and don't get caught up in the small stuff. Stay out of the weeds.

4. RESPECT THE RHYTHM OF THE RELATIONSHIP

Always remember that there is a rhythm to everything. Don't push it. Oftentimes, it is best to say nothing. Never forget that silent pauses can be a very powerful tool. Give yourself and others the time and space to reflect upon everything that has been said. Don't rush it. Try to sense the natural and appropriate rhythm of all the people at the table, including yourself.

5. ASK FOR THE BUSINESS DIRECTLY

Have you ever noticed that some people always seem to get what they want, regardless of the situation? They don't have special powers; they simply ask for what they want. And, most of the time, when done correctly, it results in them receiving exactly what they want. The truth is, most people are too nervous to ask.

Why ask for the business?

- It allows you to get a firm yes or no. By asking direct questions, you can quickly find out how interested someone is regarding the outcome of the negotiation. Are they eager to buy or sell? Are they willing to move on terms? The sooner you can determine interest level, the faster you can reach the final stretch of the negotiation process. Cut out the "maybe," and get a decision early in the process. No one wants their time wasted if neither party is being direct.

- It allows you to get the negotiation back on track. If the negotiation begins to get off track, you can ask questions to pull the other party back in. Asking questions can help you adjust your strategy mid-negotiation by learning what makes the other person tick.

- It allows you to gather missing information. No matter how prepared you think you are going into a negotiation, you aren't going to have 100 percent of the necessary information. Asking honest questions allows you to fill in the gaps and gain additional information required to put yourself in the best possible position. You never want to assume anything. If you aren't sure of something, just ask.

- It allows you to get the other person involved in the discussion. Asking questions forces the other party to engage in a discussion. Silence is a deal killer. If both sides aren't speaking back and forth openly, the negotiations come to a stop. The more involved they are in the discussion, the more you can learn about them.

Negotiation is all about relationships. By cultivating and maintaining a good rapport with everyone at the table, every player can win. You're not just creating an agreement, you are cultivating a long-term relationship, as well as a reputation.

PITCH PERFECT CONVERSATION CHECKLIST

To be successful with selling, a partner needs to discuss the customer's business environment and industry confidently, and offer new perspectives that contribute to the unique value of the combined Microsoft and partner solution. Below are some value tips for a pitch perfect conversation.

- Demonstrate knowledge of the customer business climate.
- Discuss the short/long-term business implications of industry trends around the cloud.
- Ask questions to validate understanding and/or uncover the business drivers and critical business goals.
- Ask probing questions to fully understand the BDM's problems/needs, potential business value if problems are solved, and/or implications if the problems are not solved, and actions that have been taken to solve problems.
- Position the business value of the Microsoft security vision without immediately communicating the product/specific features.
- Explain how the end-to-end Microsoft security vision can provide business value to the BDM in his/her context.
- Use competitive knowledge to position Microsoft/partner solution strengths.
- Effectively handle BDM objections.
- Share a relevant Microsoft security workload story to solve business challenges and/or satisfy business needs that the BDM is facing.
- Skillfully integrate a demonstration that articulates the key elements of the solution. Demonstration should successfully integrate a demo that reinforces how it solves the customer's business challenges.
- Close with appropriate next steps.

RESOURCES:

➔ Microsoft Partner University course: Pitch Perfect – Microsoft Secure (Published July 1) (Before accessing any content, a partner must be both associated to his/her company's MPN ID and must have onboarded or logged into Partner University for the first time. The partner-facing instructions for completing both steps can be found on CloudDAM here.

➔ Cloud App Security Pitch Deck

“

Every office 365 engagement that we’re a part of has a component of security discussion or deployment and implementation with a customer... our primary focus is making sure the customer is doing well, and that approach has worked well for us. We make sure their security and compliance needs are met, while also helping them save money.

ETHAN MCCONNELL
Vice President, Olive & Goose

Engage Technical Pre-Sales in Sales Conversations

Selling is Technical

How to be sure you talk to the technical and business decision maker.

From the very start of your engagement with a prospect, you need to be aware of the need for technical pre-sales assistance. Many times, you are dealing with business decision makers during the buying cycle. In that case, you are less likely to have a need for technical assistance. However more than ever before, technical staff are a part of decision making with Azure practices. When the customer has one or more technical resources on the purchase committee, you need to engage technical pre-sales.

Your technical pre-sales staff should be very experienced users of your products and services. These employees need training or experience as a user of your products. Former support employees often make good technical pre-sales staff. The technical pre-sales staff is in place to explain technology, how it works, how it meets a business need and to answer any other questions. The business benefits can be left to the sales and marketing staff. This is where they shine. The technical staff should excel at the more complex issues that come from prospects. Technical staff should be dedicated to pre-sales. They should work together with sales efforts. One without the other cannot be effective. You need the sales staff to speak to business decision makers. Equally, you need pre-sales to answer all technical inquiries.

Examples of technical probing questions to ask during presales conversations supporting a Cloud Application Development Practice:

- Where does your data reside?
- What on-premises or cloud data stores do you currently leverage?
- For our area of interest, what is the volume of data?
- How often is it updated or is new data received?
- Is the data highly variable in schema?
- What application development and technologies are within your existing team's comfort zone?
- What application platforms would you like to target? Web, mobile, desktop, IoT, etc.
- Do you have any compliance or regulatory requirements that pertain to the handling of your data?
- Can you walk us thru the high level of where data enters your system and how it is ultimately consumed?
- Across what geographies is your data stored and from which regions is it consumed?

RESOURCES:

- Azure Briefing and Pitch Decks
- Azure Pre-Sales Resources
- Azure Training Resources
- Engagement Offerings

Microsoft Technology Centers

The Microsoft Technology Center (MTC) can help you find the right solutions to transform your customer's business in a mobile-first, cloud-first world.

With over 40 locations around the globe, the MTCs bring together the right resources to help you accelerate your customer's digital transformation.

- **People:** The MTC staff is comprised of experts in Microsoft solutions. Their tenure in the industry ensures they will effectively guide your team to rapidly find solutions to your technology challenges.
- **Partners:** The MTCs have formed alliances with industry leaders who provide comprehensive resources, including hardware, software, and services to explore during your engagements.
- **Place:** The MTC environment provides rich interactive and immersive experiences for you to learn first-hand how Microsoft and partner technologies can help you take on your most difficult challenges.

Start your digital transformation by experiencing the Microsoft cloud at one of the 40+ centers around the globe.

The MTC can work with you to help you close sales with these engagement offerings:

- **Strategy Briefing:** This one-day briefing starts by examining your current IT environment and business objectives. Then it moves into the Envisioning Center, where you'll see Microsoft solutions in action through powerful demos and scenarios customized to meet your needs. The day includes mutual discovery, tailored product and technology drill-downs, and expert presentations. It culminates with the delivery of a clear and actionable picture of how Microsoft and partner technologies can help you reach your business goals.
- **Architecture Design Session:** This custom session focuses on your business objectives and aligns them with specific applications of Microsoft software to help you not only meet your goals, but also capitalize on them. We'll provide architectural guidance, consultation on preferred practices, and risk analysis to chief technology officers, architects, and senior members of your development team.
- **Proof-of-Concept:** In this multi week, in-depth workshop, our architects work closely with key members of your technical staff to transfer knowledge and prove out customized solutions. This workshop may also include detailed demos and training sessions. Your team will have a private, secure, and fully loaded development suite that's preconfigured prior to their arrival.
- **Workshops:** If seeing is believing, then imagine what a hands-on immersive experience can do! Attend a custom briefing that includes a facilitated, hands-on environment where you and your colleagues can experience the vision of Microsoft's platform and solutions firsthand.

RESOURCES:

➔ https://www.microsoft.com/en-us/mtc/offerings.aspx

Architecture Design Session (ADS)

An architecture design session is a working session between your experts and the customer.

This intensive, two-day session delivers in-depth technical information on integrating data from across your customer's entire organization and delivering it in an analysis-ready form. Presentations, demonstrations, and whiteboard discussions are customized to address your customer's needs. In many cases, the design session is used to identify candidate proofs of concept. Here are some potential topics that are covered during an architecture design session:

- **Server topology**: To plan and deploy your customer's business productivity solution, it's necessary to understand the required server topology.
- **Integration platform**: The Azure services work seamlessly together and can also be integrated with third-party and LOB applications. The ADS will endeavor to fit diverse systems together.
- **Social computing**: Companies need to leverage their employees' ability to make business connections and create, share, and evaluate content in a natural way.
- **Secure framework**: Companies can create experiences that are both user-based and role-based. Choose from a range of options for restricting sensitive information, and deliver the most relevant experience while meeting industry standards and enterprise security requirements.
- **Virtualization and cloud computing**: Extending your customer's enterprise by leveraging cloud resources or virtualization reduces the cost of hardware and additional resources.

PRIMARY AUDIENCE

- Architects
- Developers
- Test and quality assurance (QA) engineers
- Technical staff

Phases of a successful architecture design session

BEFORE THE ARCHITECTURE DESIGN SESSION

Prior to performing the architecture design session, it is important to conduct a simple session with the customer to establish the scenario. This session is oftentimes referred to as ideation or opportunity definition. The goal is to establish the five Ws (who, what, when, where, and why) of their needs, which can be used as a guide for the ADS, streamlining the brainstorming process, and informing the agenda and milestone goals you will bring to the session.

- **Schedule a time for the design session**: This is normally 1–2 days.
- **Schedule a location**: Ensure you have whiteboards and a projector.
- **Schedule resources**: This could include experts from your team and a cross-cutting panel of technical and business stakeholders from the customer.
- **Build an agenda**: Establish milestone goals in advance so that the ADS doesn't get consumed discussing a single topic.
- **Prepare preliminary documentation and architectural diagrams**: Even if you only have the basic building blocks, it's good to come prepared with something you can modify during or after the session.
- **Perform a security assessment**: Prior to the ADS, perform a security assessment (such as by using Secure Score) to baseline the customer's current security situation and identify preliminary opportunities for improvement.

DURING THE ARCHITECTURE DESIGN SESSION

Begin by reviewing requirements with your customer. As you conduct the design session, whiteboard the requirements and proposed solutions, and arrive at a consensus for each major topic. During this time, be sure to capture photos of the whiteboard so as not to lose your notes.

There are typically the following phases during an architecture design session: discovery, envisioning, and planning.

DISCOVERY

- Customer background and business technology strategy
- Project background and its drivers/aims
- Functional and non-functional requirements
- Usage scenarios
- Technology landscape

ENVISIONING

- Key functions and capabilities
- Components of the solution
- External connections and integration points
- Security considerations
- Abilities considerations
- Map requirements and scenarios to components

PLANNING

- Establish proof points
- Exclusions, risks, and issues
- Pre-requisites
- Deliverables
- Resources
- Escalation, communication, and long-term plans

AFTER THE ARCHITECTURE DESIGN SESSION

During the ADS, you and your customer planned a high-level architecture framework and conceptual design for a solution that addresses their organization's business goals and technical requirements. In addition to a summary of the engagement, you'll deliver information about:

- Special areas of concern to your customer's organization, such as security, compliance, and compatibility.
- Deployment scenarios that map to established deployment and practices and that cite specific examples where applicable.
- Familiarity with the Microsoft technologies proposed for the solution, in addition to any trade-offs among the differing technology options.
- The capabilities of your solution to deliver business performance on premises or in the cloud.

The outcome should be polished architecture diagrams that can be reviewed and signed off on by the customer. If one or more proof of concepts are desired, provide a plan and a timeline to deliver.

Implement Proof of Concepts

Resources

- Enterprise Mobility Proof of Concept Delivery Guidance
- Cloud Only Enterprise Mobility Suite Proof of Concepts
- Pricing Azure Services with the Calculator

Proof of Concepts

The ability to quickly provision infrastructure and managed services makes it easier to stand up a proof of concept and demonstration for key stakeholders.

The acceptance criteria for a proof of concept should be chosen early, with short but clearly defined milestones that lead the way to a successful proof of concept. Some common best practices that can help you as you and your customer go through the journey of an Azure PoC include:

- Start small by identifying the minimum problem you are trying to solve — and focus on it.
- Look for high-value but low-risk opportunities when getting started.
- Take advantage of the platform. Azure can replicate some of the best technology in your datacenter, but it can also do much more. Consider PaaS services that can accelerate your milestones and lower your overall burden from manageability and support.
- Treat each PoC as a continuous learning and improvement process. As your skills in Azure improve, so will the way you approach a PoC.
- After you prove the concept, test it for performance, security, usability, and supportability.
- If you need additional support in buildling out a PoC, you may also leverage the Techncial Presales Assistance from a Microsoft expert.

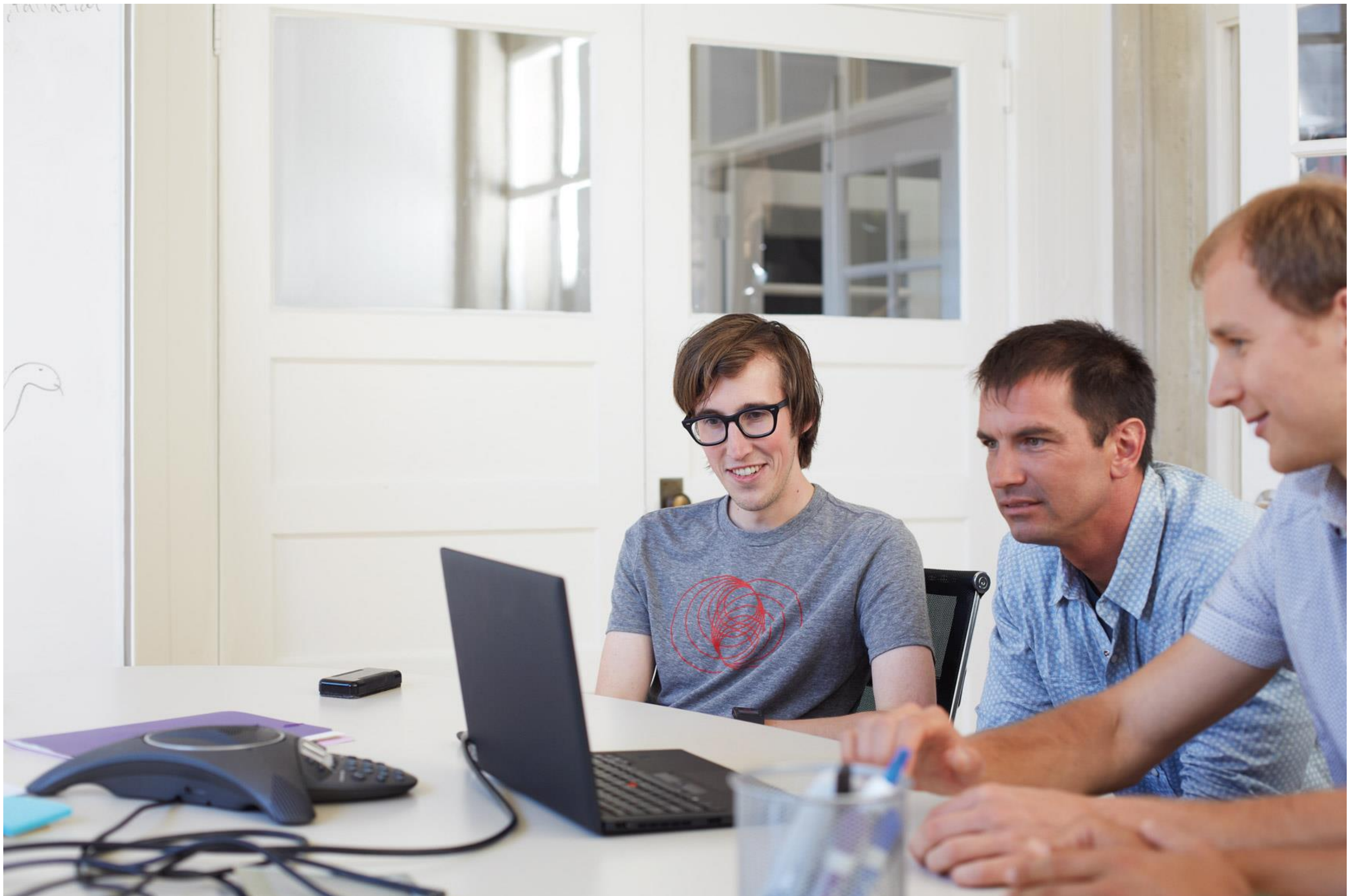
ESTABLISH EVALUATION CRITERIA

Ideally the solution you are deploying in Azure offers some key benefits over deploying the same solution on-premises. Establish goals early on and measure them throughout the PoC. Some common goals your customers may ask for include:

- How easy is it to scale up or down?
- Does it offer the service to users in different regions?
- How can I monitor and support the solution if it fails?
- How do I know my data is secure?

COMMON PROOF OF CONCEPTS FOR SECURITY

- Chalk talk to workshop training to orientate customer to EMS capabilities
- Synchronize Windows Server AD with Azure AD using Azure AD Connect
- Configure devices for security, patching, and policy with Microsoft Intune
- Configure a demonstration of Azure Information Protection
- Configure self-service password reset with Azure AD
- Configure multi-factor authentication with Azure AD
- Configure single sign-on with SaaS applications
- Deploy Advanced Threat Analytics (ATA)
- Deploy Advanced Threat Protection (ATP)



Optimize & Grow

Security

aka.ms/practiceplaybooks

Microsoft

Executive Summary

So far we've covered strategies for building your security practice, finding and keeping customers providing them with ongoing support.

In this section, we'll focus on how to optimize your practice, strengthen your relationship with customers, and evaluate your performance to help you continue to delight prospects and customers

Are your customers delighted by your services and products? Delighted and not just satisfied? In this section, you'll learn why customer lifetime value is so important, and how to create more customers for life. We'll share how to get to know your customers better by following their journey with secret shopping and analysis. We'll also explore the use of a "land and expand" strategy and see how getting to know your customers better can lead to incremental opportunities to provide additional services

You will also discover ways you can keep your solutions top of mind for prospects and customers through nurture marketing, and how to grow and improve your lead generation practice through a well-planned referral marketing program. We'll show you how to make the most of your renewal process, and how to get ahead of deadlines.

We will help you learn how to grow your business by identifying the best customer personas and creating "look-alike" prospects, deepening your expertise in key verticals and marketing that expertise, and collaborating with other partners to offer your customers a more comprehensive level of service and support.

We will end by discussing how important it is to create advocates for your company. This includes turning a customer into a fan and collecting testimonials to create case studies that can be used in future marketing campaigns. Map your customer's experience and ask for feedback to ensure you are turning satisfied customers into delighted customers who can wait to tell your story!

Use the strategies we provide in this section to optimize and grow your practice.

Top 5 things to do

Learn from your customers and experience to optimize your practice, and expand to new markets through strategic partnerships. These are the top 5 things you should do to optimize and grow your practice.

- ☑ Gather feedback from your customers
- ☑ Nurture existing customers
- ☑ Turn customers into advocates
- ☑ Generate referrals with marketing
- ☑ Nurture strategic partnerships

Understanding Customer Lifetime Value

Customer lifetime value (CLV) is the revenue from a customer over the lifetime of their relationship with you.

As most businesses have experienced within the tech industry, a lifelong customer is of far greater value than any one-off transaction. It's no longer enough for companies to invest their time and resources into the generation of single purchases. Especially in the cloud world, it is critical for businesses to develop relationships and solutions that engage a customer for life.

CLV allows businesses to step back and look at not just one sale, not just one customer, but the customer base as a whole. It's about defining the economic value of each customer within that base and using that metric to make data-based decisions. If you don't know what a client is worth, you don't know what you should spend to get or keep one.

Knowing the CLV helps you make critical business decisions about sales, marketing, product development, and customer support. For example:

- **Marketing:** What should my acquisition costs be?
- **Sales:** What types of customers should sales reps spend the most time on trying to acquire?
- **Product:** How can I tailor my products and services to my best customers?
- **Customer Support:** How much can I afford to spend to provide customer service to my customers?

CLV is also a good way to guide and reward your sales team. Pay them more for bringing in customers with high potential lifetime value. By measuring and monitoring your cloud customer CLV, you can:

- Gain insight into your customers' cloud consumption and usage.
- Qualify for MPN cloud competencies that will help you grow your business.
- Help your customers reach their desired business outcomes.
- Leverage insight for cross-sell/upsell and proactively engage customers for extension opportunities.

By increasing your customer adoption rates, you can increase your CLV, particularly with cloud customers. The more employees you can get to use your service or solution, the more likely you are to increase CLV. Here are some ways to improve adoption:

What do you need to do to be successful?

Key attributes of a successful adoption approach

Define a vision & identify business scenarios	Prioritize solution & create an adoption plan	Commit resources & execute an adoption plan	Measure, share success, & iterate
A deep understanding of the business goals, as well as people challenges and needs to achieve them.	A solution that people love and that helps them achieve business goals and get things done more effectively.	A strategy to drive adoption including communications, readiness, and community.	A benchmark, KPIs, and success stories to help demonstrate success internally, improve, & expand.

While it's important to define and track your metrics, there are some simple things you can do to increase your CLV.

Your customer strategy must be built on a culture of customer success and tracking customer satisfaction. Critical success factors, when it comes to CLV, are:

- Being sensitive to customers' emotions.
- Maintaining good communication.
- Listening to customer pain points.
- Understanding that there are multiple layers to any one concern.
- Doing business with an understanding and empathy for where your customer is coming from.

NEXT STEPS:

- Identify customer lifetime value of your five best customers.
- Identify your average customer lifetime value along with your Microsoft contact.
- Identify actions to increase your average customer lifetime value.

If you need a place to start in modeling CLV as it relates to your business, take some time to explore the modeling tool available on the MPN portal.

Getting to Know Your Existing Customers

SECRET SHOPPING: THINK LIKE A CUSTOMER

Typically, secret shopping is thought of as something that retailers do — where they pay mystery shoppers to go into their stores and conduct secret shops to help the company get better at what it does. However, secret shopping is a vital component to improving your overall customer experience. The information gathered when secret shopping and mapping your customer journey provides critical data that can be used to improve what you do in the future.

With your core audience in mind, imagine the decision-making process a potential customer goes through in their buying journey as they research and compare available offers in the marketplace. Viewing Figure 1 below, a customer will fact check down the pyramid in a familiar pattern beginning with social media comments, reading product reviews, browsing various websites (including competitive offers), talking with peers and influencers, and narrowing their options as they approach the bottom. As they move down the funnel (Path of Reference), they gain clarity while growing in confidence and trust of the few remaining offers they are interested in.

As a seller, if you don't have someone on your team who goes through the same fact checking process (secret shopping) as the audience you are trying to reach, you are practicing what amounts to "blind marketing." This means you have no insight into what the prospective customer sees and hears along their purchasing journey. Secret shopping provides insight into how employees, from varying departments in the company, interact with customers. It can be difficult to know how employees conduct themselves when a manager or supervisor is not around.

Notice the pyramid includes new customers and existing customers, resellers and their sales agents, your own sales team, and your internal staff from product and operations up through the executive team. Why? Because they are all talking about your products and services in a variety of venues — and your prospective customers are listening.

The critical question is: Are all the "voices" saying the same thing? Specifically,

- Do they all clearly communicate your value proposition?
- Is their message consistent with how you brand your company and position offers?
- Are they strongly differentiating your offer from the competition?

In other words, are you communicating a consistent message and story through your media mix and sales engagements? If not, your marketing is a confusing array of inconsistent and imprecise statements about who you are and the value of what you are selling.

What they hear at the top should be what they hear at the bottom — and all the way through the buying journey.

Referral Marketing

Referral marketing is the art of harnessing your customers, employees, friends, and vendors to communicate your company’s value.

Study after study has proven that referral marketing is one of the best forms of marketing when it comes to sales and conversions. Referral marketing is powerful because people trust the opinions of other people in their lives and people they respect, whether that be co-workers, trusted vendors, friends, or other influencers such as attorneys or accountants.

Why Referral Marketing? 84% of B2B decision makers start with a referral! (Source: LinkedIn)

5 Keys to Successful Referral Marketing

Implementing your own referral strategy to increase referrals and sales isn't difficult. Here are some ideas:

1. PROVIDE AN EXCEPTIONAL CUSTOMER EXPERIENCE

Valuable products and services, exceptional customer service, and a positive buying experience are at the core of every referral. This is fundamental to any referral campaign. Think about the services and support you offer, looking at it from a customer perspective, and ask yourself what you offer that is worth sharing with co-workers or friends.

2. MAKE SURE YOUR REFERRAL SOURCES KNOW WHAT YOU DO AND THE BEST TYPE OF CLIENTS FOR YOU

One of the drawbacks of referral marketing is that your referral sources are telling your story for you. To ensure they know your complete story, formalize your program with a simple one-sheet that explains what you do best. Include a profile of your ideal customer, so your referral sources send you the most qualified leads, creating a win-win for you and them.

3. PAY ATTENTION TO YOUR ANALYTICS

You're probably already getting referrals and don't even know it. Some referrals are coming to you directly, and others are done online. If you implement a more structured program, you can reach out to your referral sources and thank them for helping you out. In exchange, you can offer to refer business back to them, or highlight them in your marketing, or offer to share a small percentage of your profit with them.

4. MAKE IT EASY FOR CUSTOMERS TO REFER YOUR BRAND

Make it as easy as possible to share your products and refer your brand. There are many ways you can do this. In some cases, companies have added a "share" function to their main website navigation. Add social sharing badges to every page on your website.

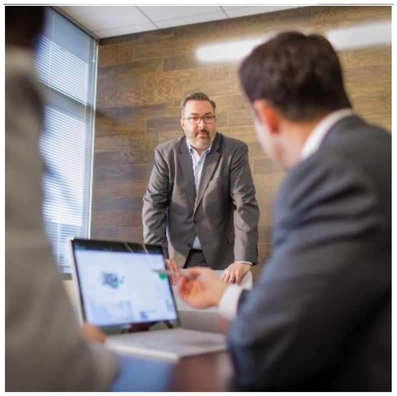
5. CAPITALIZE ON INFLUENCERS

Influencers within your niche can be a goldmine for referral traffic and sales. The key is to find influencers whose following is as close as possible to your target market. Influencer marketing can be as easy as reaching out to a popular blogger, a group lead on LinkedIn, or a popular writer on Twitter, and asking if they do sponsored postings or if they would like your product to review.

Referral marketing is a powerful and important component for every business. Implementing some basic tactics can help encourage and facilitate the referral process, which can be a major source of new sales.

Execute Nurture Marketing Efforts

Resources



➔ MPN Marketing Resources

Creating Long Term Customer Relationships

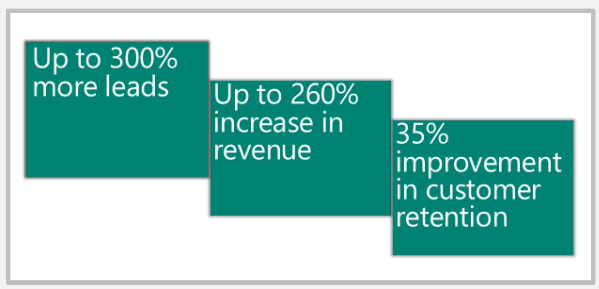
Nurture marketing means staying in front of your customer by providing them valuable content.

Nurture marketing is a systematic approach to keeping leads and customers warm. Nurture marketing ensures that there are communications at every phase of your customer journey, so you will be top of mind when prospects and customers are ready to buy.

Nurture marketing is about being viewed as a thought leader. It's about your clients' perception of your credibility and trustworthiness. It's about being the indispensable resource they need and want. Nurture marketing is about delivering relevant content at the right time in a structured way. This is what creates long-term relationships.

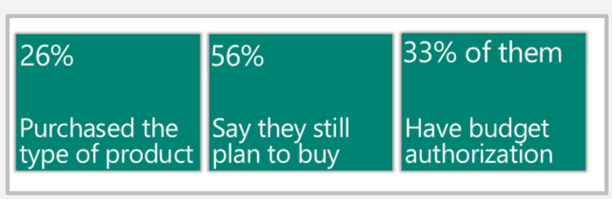
WHY NURTURE?

Simply put, nurture marketing yields significantly more leads, increased revenue and improved customer satisfaction- all things critical to growing your practice.



INVEST IN RELATIONSHIPS

Nurture campaigns are a clear investment in your customers. It is a commitment to learn where they are in the buyers journey and deliver the right message when they need it. Did you know a sales rep needs to touch someone 7 times before a purchase. Most reps give up after 2-3 calls. Keep the following in mind that is true about prospects *6 months after* the prospect expressed interest:



Nurture marketing is often associated with email marketing. It is related. However, nurturing customers is not simply sending out a generic email blast periodically. Nurturing is understanding of your customer needs and behaviors. Nurturing is ensuring the customer gets just what they need when they need it to make a buying decision in your favor.

The five keys to successfully nurture prospects are as follows:

AUTHENTICITY

- There is no substitute for knowing what it is like to in the shoes of your customer
- You must sound like you have true business insight
- The language you use is key
- A vertical stand focus is usually critical
- Get this wrong and your message will be ignored

RELEVANCE

- Speak to known business pains (as opposed to technical)
- Speak to where in the buying cycle the prospect is at
- Remain consistent to your core value proposition
- Speak to the emotional triggers (focus on the "why") including fear, gain/greed, curiosity

VARIETY

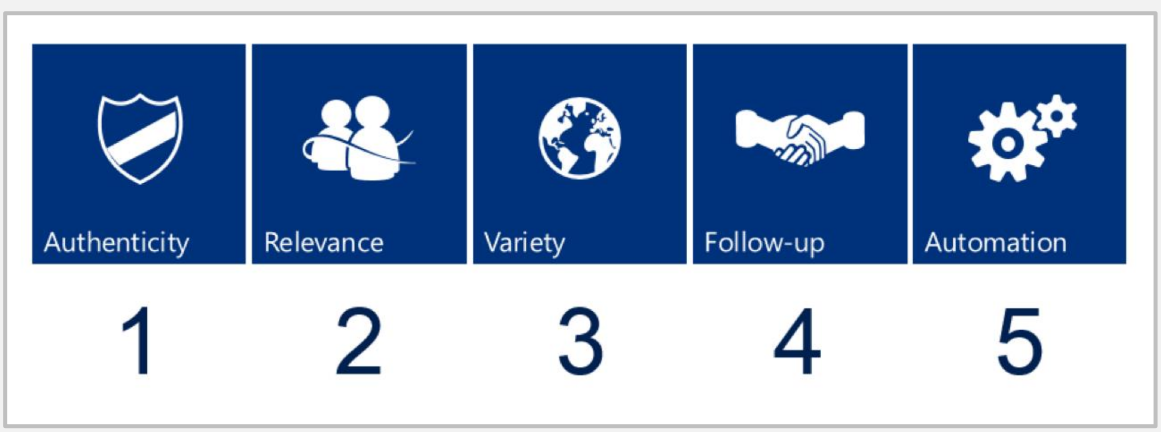
- "Feed" the prospect's hunger for information
- Find the right cadence and frequency
- Do not overwhelm or they will unsubscribe

FOLLOW-UP

- The handoff to sales is critical, but it must happen at the right time
- Track buyer engagement to determine optimum timing by monitoring the frequency of interaction and the level of interest based on lead scoring

AUTOMATION

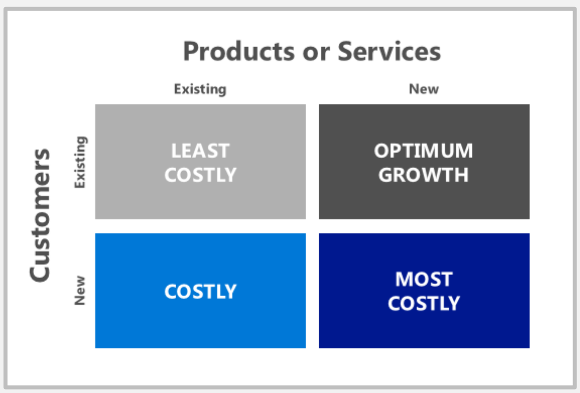
- Timing, consistency, and frequency matter
- The only way to ensure the thoroughness of timing, consistency and frequency is with the use of marketing automation software



CREATING LONG-TERM CUSTOMER RELATIONSHIPS

Customer lifecycle management (CLM) is a process by which partners can assist customers in evaluating and maintaining loyalty to a product, service, and supplier over a sustained period of time. The objective is to secure and increase the customer lifetime value.

Hunt or farm? What is the cost of acquiring new customers versus retention and upsell? Selling something to someone you know is least costly, while selling to someone you don't know is most costly.



DRIVE CUSTOMER ONBOARDING QUICKLY

Ensure there is a dedicated onboarding and deployment process from welcome, administration, implementation, adoption, and training. The first 14 days is critical. Customers must incorporate your solution into their daily lives to realize value. Adoption represents a state of satisfaction with the service and sustained usage over time.

Things to think about include:

- What are your processes for onboarding new customers?
- What do you do well for onboarding customers, and what do you think you can improve?
- What are your top two challenges when onboarding customers?
- Is there a defined timeline to ensure customers are onboarded and using the service within 30 days?

ENSURE A CUSTOMER NURTURE PROCESS EXISTS.

Hold continuous touch points to learn more about the customers' needs, including CSAT, assessments, blogs, emails, etc.

IDENTIFY AND TRAP CUSTOMER TRIGGERS.

Identify the logical next steps for customers to get to the full solution and drive your hero motion.

CUSTOMER LIFECYCLE MANAGEMENT (CLM) EXECUTION ACTIONS:

Good:

- Ensure customer onboarding within 15 days of purchase.
- Ensure you are set up as Partner of Record.
- Quote renewals early to ensure they don't have interruption in service.

Better:

- Drive automation of activation and initial seats deployment.
- Deliver end user training.
- Follow up yearly with needs assessment.
- Provide upsell services and training.

Best:

- Monitor customer health and deployment.
- Deliver end user training and additional services.
- Follow up quarterly with needs assessment.
- Monitor for customer trigger events with offer/action for each.

Land & Expand

Resources

- [Deliver Customer Lifetime Value eBook]
- [Cloud Services Partner Dashboard]

Cross Sell and Upsell

With a successful customer engagement behind you, you will want to understand how you can increase the scope of the services you provide to your customer.

We call this the "land and expand" strategy. When using this strategy, look for opportunities to provide incremental project services with the goal of driving stronger usage of your services. You should look for opportunities to cross-sell and upsell incremental solutions to customers based on needs identified during service delivery.

For example, if you are the Digital Partner of Record on your customer's Microsoft subscriptions, you have access to their cloud solution usage and consumption data via the Cloud Services Partner Dashboard. You can use it to identify areas where you should be encouraging deeper and wider usage of Azure, as well as areas where the customer may benefit from incremental project or advisory services.

Here is an example of using the "land and expand" approach in a security practice.

LAND

Say, for example, the customer brought your practice in to help them build a custom line-of-business (LOB) web application. You successfully build, deploy, and make incremental improvements to their new web application.

EXPAND

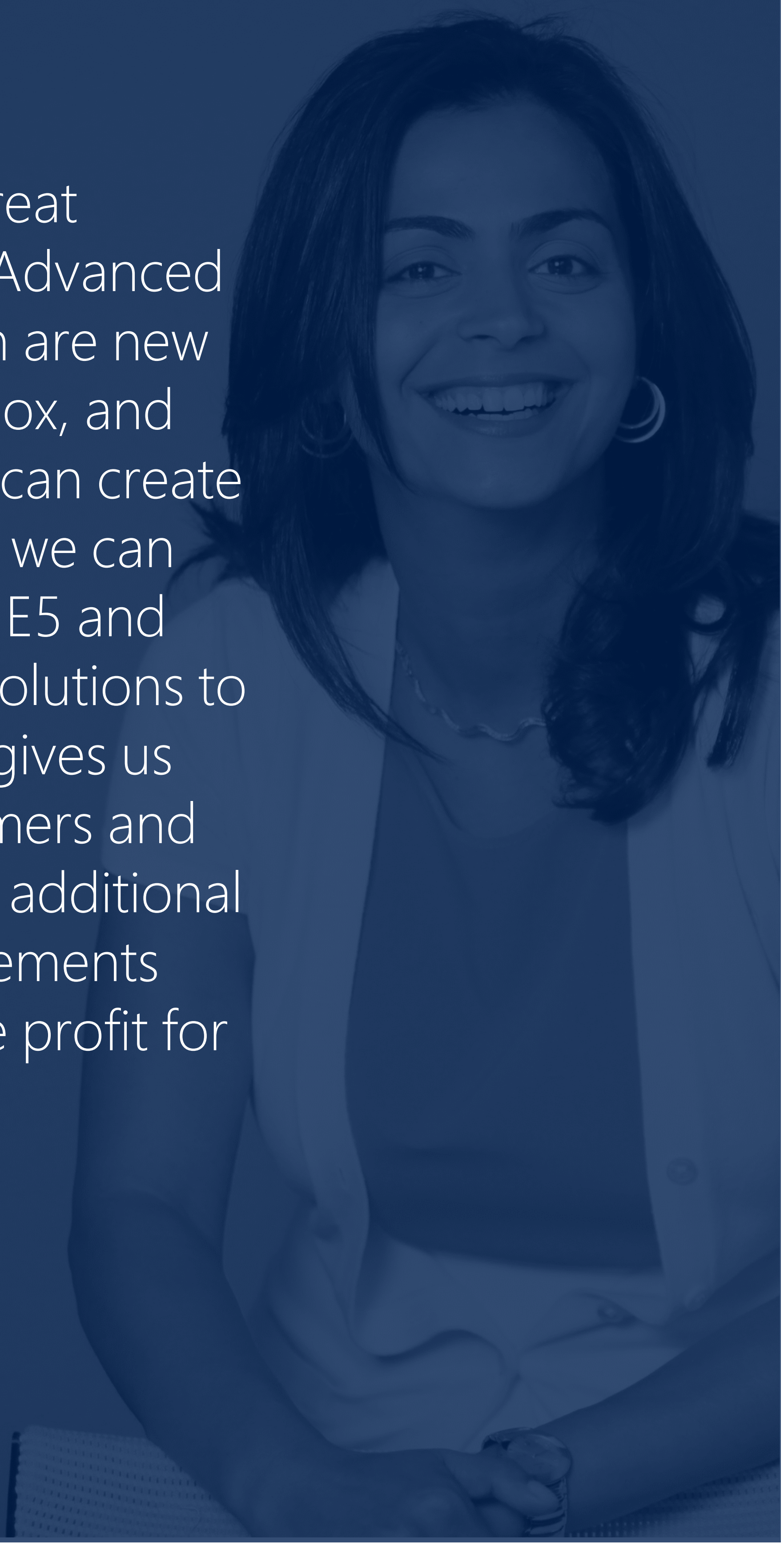
Expand selling is about accelerating revenue growth through cost-efficient selling models and motions. It is used with existing customers, in the context of customers' existing technology and services, and in many cases, is focused on driving customer outcomes.

The companies who do the best at expand selling, and properly identify cross sell and up-sell opportunities, train their employees at every customer touch point to identify ongoing needs. There should be a process for identifying and then communicating ongoing customer needs to the sales or account teams. Training employees in customer service, accounting, marketing, customer training, on-site support, and operations can be the key to unlocking big opportunities with existing customers.

TIP: Create a process to identify the next logical steps and review them during your quarterly or annual review with your clients.

Tools such as Threat Intelligence and Advanced Threat Protection are new tools in our toolbox, and any one of them can create a scenario where we can upsell Office 365 E5 and other Microsoft solutions to customers. That gives us more new customers and opportunities for additional customer engagements that lead to more profit for our business.

JEFF FOWLER
Federal Senior Cloud Strategist
Planet Technologies



Renewals

The most successful enterprise SaaS companies know that growing revenue only through new customer acquisition is the less efficient way to scale. Rather, they understand that growing revenue within your existing customer base — through up-sells, cross-sells, and expanded use — is the most profitable way to scale.

In fact, enterprise SaaS companies that grow revenue — and company valuation — by expanding revenue within their existing customer base also know the key to making this work is to focus on — and operationalize — customer success.

Poor user adoption and the lack of perceived value by customers is the greatest challenge faced by SaaS companies today. A customer that is not using your software and not realizing measurable business value from their IT investment will not be your customer for long.

When your customer makes their initial purchase decision, they are buying your software based on their hopes and expectations that soon they will realize tangible business benefits from its use. All the evidence they consider — marketing information, product demos, references from previous customers, and reviews on social media — contribute to their expectations for the future.

This is very different from how customers make renewal decisions. The decision to renew is based on customers' actual experiences working directly with your organization. If the customer's experience is positive and the value they have received from using your software matched their expectations, customers renew quickly and easily.

One way to ensure your customer has a positive experience with your company is to map the critical path to customer success. Map out the path from the time they decide to invest in technology all the way to the point at which they will declare their program a success. Be sure to identify your customer's goals, so you can refer to this when it's renewal time. Goals might include cost savings, employee adoption rates, and efficiencies realized.

One of the biggest problems organizations face is getting their staff to adopt technology and incorporate it into daily work activities. A system that sits unused is not delivering any value to the customer's organization. This user adoption risk — the potential that staff will not adopt systems and business processes as they are designed — is perhaps the greatest threat to customer success, and therefore renewal rates.

Since customers will not renew a system that is sitting idle, and since you (the software vendor) need customer renewals to grow, you now share a portion of your customers' user adoption risk. In many ways, customers' user adoption risk translates into your renewal risk.

Develop a customer support capability that moves customers along the critical path to success.

Once you understand the critical path to success, you need to figure out where customers are getting stuck and why they struggle to move forward. You will find that many these issues have nothing directly to do with your system. Yet, you need to figure out how to get customers to resolve these issues.

You may think it is not your responsibility to help your customers resolve their internal user adoption issues, and in many ways, you are right. But remember, while that may not be your responsibility, it is most definitely your problem.

3 Steps for Successful Renewals

1. HAVE A PROCESS

The worst thing you can do is call a customer and let them know a renewal is due next month when they haven't heard from you since they bought the product. Instead, your organization needs to spend time and map out a process. Here is an example:

- Day after sale: Sales introduces customer to Customer Success Manager (CSM).
- 2 weeks after the sale: The CSM reviews the customer's usage of the product and calls with a check-up.
- 2 months after the sale: The CSM reviews the outcomes of training and discusses with customer.
- 6 months after the sale: The CSM meets with the client to discuss goals, successes, areas for improvement, and next logical steps.
- 3 months before renewal: The CSM reviews account for opportunities to increase licenses or move client to higher level of license. Nurture marketing program should be offering information about options for upsell.
- 2 months before renewal: Begin the discussion about renewals.
- 1 month before renewal: Have specific meeting about the renewals.
- 2 weeks before renewal: Deal should be closed. If it isn't, situation should be escalated to the leadership team.

2. BUILD THE PROCESS INTO YOUR CRM

Create mandatory fields in your CRM to ensure your organization knows when customers are due for renewals.

3. REWARD RENEWALS WITH COMMISSIONS

Some organizations are hesitant to provide commissions on renewals. A SaaS renewal needs to be worked like any other sale. It isn't easy and renewals aren't automatic. CSMs deserve a commission, especially when they are able to upsell the customer to a higher tier of license, or convince them to buy more licenses.

Renewals, especially for B2B organizations, can't be taken for granted. The amount invested in acquiring each customer just means there is too much at stake. Renewals need to be treated with the same respect and gravity as sales. That is the reality of the SaaS business model.

Advocacy: Case Studies and Testimonials

At the top of the customer success pyramid lies your advocates. When you can get customers to do the "selling" for you, you have done your job. A customer who becomes an advocate is the most valuable marketing tool you can have in your arsenal.

Advocacy, the final stage of the buyer's journey, exemplifies the telling of your story from the point of view of your clients. Advocacy is the willingness of clients to speak positively on your company's behalf, formally and informally. It is the time when clients are most likely to promote the services they are using, or make referrals to brands or partners.

Turning clients into advocates doesn't happen by accident. It happens by success. When you diligently listen to clients' needs, provide solutions to their needs, and deliver exceptional client experiences, they want to help you succeed.

When analyzing content gaps, consider creating content that uses client success stories. An example is a case study featuring your client describing how you solved their problems and how much they like working with your company. Powerful!

Advocates have many ways to show their appreciation. They can agree to write a testimonial, be a part of a case study, provide referrals, post positive comments on social networks, and attend an event you're sponsoring or producing.

BUILDING A QUALITY CASE STUDY

Your case study should be no more than two pages, showcasing the value you provide, solutions you deliver, and the positive impact you have on your customer's business.

There are three main ingredients in a case study:

1. Description of the customer, along with their Initial customer pain points. Describe the client's business challenge or opportunity.
2. Solution implemented. This portion naturally flows into describing how you addressed the client's problems, what options you considered, and what solutions were used.
3. Business problem solved. Here you describe the positive impact your solution had on the customer's business. The more you can quantify the results, the better.

TIP: Include an actual testimonial from the client wherever possible.

CHOOSING THE BEST OPTIONS FOR A CASE STUDY REQUIRES SOME STRATEGY THOUGHT. ASK YOURSELF:

- How did you arrive at your suggested solution? What options did you explore?
- What was the solution implemented? Lead with the solution offered first, then the products used.
- What was the outcome? List benefits here. Were there unexpected benefits to the outcome?
- What did your customer have to say about your solution, product, team members, and customer service at the end of the project?
- Did you retain or grow the customer?

You should consider creating 1–3 case studies for each product and vertical markets you serve. For example, if you service both dental offices and CPA firms with Office 365 installation and support, consider creating 1–3 case studies for dental offices and CPA firms. Prospects want to see that you have successful experiences with the type of work you'll be doing for them.

The overall effect is that a well-written case study can be used effectively in many different selling solutions. Here are some best practices on how to prepare a client for participating in a case study:

- At the start of an engagement, consider including a case study as a requirement as part of your contract or statement of work. Throughout the project, acclimate the client to the prospect of granting a case study. Say things like, "we should include this pain point when we do the project case study." This way, the case study becomes a natural part of the project, not a favor that is granted at completion or months or years down the road.
- If a client is concerned about the amount of time a case study will take, tell the client that you will keep reference telephone calls to a maximum of 15 minutes

and you will provide the agenda and questions for review before the call. This way the call will be orchestrated and reduce the potential time exposure by reducing tangents.
- Have examples ready, so they see what a finished product looks like and how it reads.
- Legal objections can come up from time to time. You may hear a client say that "their legal department does not allow references or testimonials." In this case, you need to clarify what is not allowed. For example, perhaps an endorsement that includes the company name is not permitted, but a general description of the company without mentioning your client name may be permitted. You might say, "a major software and hardware manufacturer" instead of Microsoft.
- A more difficult objection to overcome is if the client doesn't think that you did a job worthy of a reference. Don't worry, it happens to everyone. Use this as an opportunity to understand what went wrong, and to correct the problem. This helps to rebuild trust and fosters a strong relationship.

Implementing Customer Evidence

Infuse pieces of customer evidence into your marketing engine:

IN COLLATERAL

- Solution sheet
- Brochures
- Battlecards

ON YOUR WEBSITE

DURING WEBINARS AND EVENTS

- Guest speakers
- Showcase a case study

IN SALES DECKS

- Testimonials, scenario-based (for sensitive industries and new to market)

TRADE SHOW BOOTHS:

- Proof points (banners)
- Testimonials (banners)

IN-HOUSE TRAINING

- Paragraph, proof points

ON POSTERS OR DISPLAY MATERIALS

- Testimonial, customer profile

COLLECTING TESTIMONIALS

The easiest was to get testimonials is to simply ask your client. The worst answer you can get is "no." But that may not be the final answer. Your client may be concerned about the amount of time needed, legal issues, or perhaps they believe the project may not be worthy of a reference or testimonial.

Some clients may be inexperienced in providing testimonials and might fear that it's outside of their area of responsibility. Coach them through the process. Offer to write the testimonial for them, but give them the right to edit and change the testimonial in any way they choose.

Have them speak with their manager, or in larger companies, their HR departments. Most companies have a process to follow when granting testimonials. Encourage your client to find out how things work in their company.

STORYTELLING

Everyone loves a good story. Storytelling can help you craft a compelling answer to marketing's toughest questions: Who are you and what do you do? Think about how to tell your story so it's interesting and draws your audience in. Remember that stories can be told in pictures and videos, as well as writing great prose.

Before you craft your story, look at your audience. Who will you be speaking to? If your audience is mostly technical people, tell your story from their point of view. If it's a business audience, keep the technical part of your story to a high level and speak to topics that interest your business audience. As we already discussed, cloud applications are frequently sold to the business buyer with help from your client's technical team. Always speak to the decision maker in your audience, gearing your discussion to their level.

You must know and understand your audience. To be successful, they also have to understand you. Therefore, you want to use the same language. We're not referring to French, English, Spanish, or Chinese. It's about the right vocabulary and the right voice. Unless you are talking with a technologist, it's most than likely your buyer will talk in the language of business. You want to do the same. What do they care about? Usually they have a business problem they are trying to solve. You want to express how you can solve their business problems. If they are in a specific vertical market, know, understand, and use the vocabulary of their industry. Don't fake it — learn it! Become an expert in that industry.

TIP: Video is an excellent medium to use. Video case studies of client successes are excellent places to use storytelling.

LEARN BEST PRACTICES FROM OTHER PARTNERS:

- Microsoft technologies allow Seattle-based Olive + Goose to offer a cost-effective integrated security solution.
- Netherlands-based Wortell uses Secure Score to start conversations and drive more security deals.
- Dyntek helps customers maximize the value they get from Office 365, using solutions like Advanced Threat Protection to help them retire more expensive solutions.
- Planet Technologies helps state government to be secured with Office 365 Advanced Threat Protection.
- Chicago-based Peters & Associates recognizes Advanced Threat Protection as a valuable tool for establishing and extending customer engagements.

Customer Experience

CREATING A POSITIVE CUSTOMER EXPERIENCE

The main ingredient in building lifetime customer relationships is to create a positive customer experience. Positive customer experiences don't happen by accident. It takes a commitment to create, measure, and continuously improve your customer journey. This means looking at the journey before they become a customer, and looking at the journey after they become one.

How often are you talking to customers about their experience with your team? How do they feel about the service you are providing at every level in your company?

Satisfied customers have no reason to change suppliers, but of course you won't know how satisfied they are unless you ask them. It is critically important to have a mechanism in place to solicit feedback.

If you provide managed services, this might involve asking users about their level of satisfaction with the service they receive. If you are more focused on providing project or professional services, consider sending out a satisfaction survey at the end of each project to collect feedback.

Consider using the Net Promoter Score (NPS) as one measure for satisfaction. The NPS is calculated based on responses to a single question: How likely is it that you would recommend our company/product/ service to a friend or colleague? Those who respond with a score of 9 or 10 are called promoters, and are likely to remain customers for longer and make more referrals to other potential customers. Those who respond with a score of 0 to 6 are labeled detractors, and are less likely to remain as customers in the long term. You subtract the percentage of customers who are detractors from the percentage of promoters to arrive at the NPS score. Companies that use this method strive for a score of 50 or higher.

In addition to soliciting a quantitative measure of satisfaction, you should also provide customers with the opportunity to tell you why they are satisfied or dissatisfied.

Regardless of how you measure customer satisfaction, it is important to act on the feedback you receive and follow up with customers to demonstrate that you are taking measures to address their concerns. If your customer is dissatisfied, get to the root cause and fix it. And then tell/show them how you fixed it.

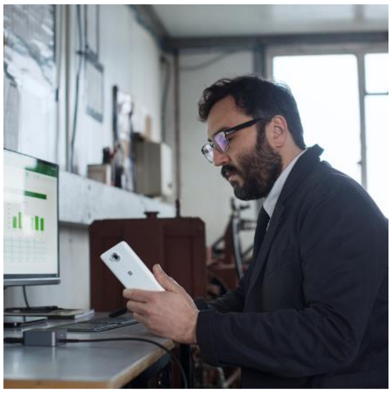
If you provide project services, another technique is to conduct a post mortem of the delivered project. Here you should involve both the technical project team and the customer success manager to enumerate what went well, what went wrong, and what could have been done better. Focus on the latter two for opportunities to improve your solution or your process.

KEY COMPONENTS OF A CUSTOMER SATISFACTION SURVEY:

- Qualitative questions around solution, pain points alleviated, quality of work, and customer service
- Quantitative questions around cost of implementation, incremental cost savings, and other measurable metrics
- Track results over time for validated stats
- Capture customer information

Optimize and Grow from Feedback

Resources



➔ [Optimize Your Operations eBook]

Use Feedback to Optimize and Grow

Take the feedback you have collected from the customer and your customer team to optimize delivery and look for opportunities to document and improve processes and automate tasks.

Work to identify opportunities to optimize the costs incurred in delivering the solution. Often times, this will lead to either opportunities for IP creation or for the creation of repeatable processes you can use with your next round of customers.

Many people automatically associate intellectual property (IP) with software, apps, and technology tools. But standardized and repeatable processes can also be your secret sauce. When you document the steps involved in completing a job or build templates for deliverables, you are creating intellectual property.

It's common to get caught up in delivering projects and solutions and never get to the task of documenting what's been done and the lessons learned along the way. But unless you build in the time to take a breath and take stock of what worked well and what didn't, you will never be able to develop repeatable methods and processes. You need to make harvesting repeatable work products a standard task and hold staff accountable (or reward them) for completing it.

Think broadly about your repeatable processes. Go back and look at your last 20 or 30 or even 50 projects and see what they have in common. You may be surprised at how many times you have completed a type of project or specific task over and over again. And if you have done something often enough, chances are you have a latent specialization. Successful partners take this discovery to the next level by wrapping that depth of experience up as a "product" that can then be sold, publicized, and marketed as a differentiated skill or service.

Performing a Post Mortem

Resources

- Deliver Customer Lifetime Value eBook
- Cloud Services Partner Dashboard

What is a Post Mortem?

A project post mortem, also called a project retrospective, is a process for evaluating the success (or failure) of a project's ability to meet business goals.

A typical post-mortem meeting begins with a restatement of the project's scope. Team members and business owners are then asked by a facilitator to share answers to the following questions:

- What worked well for the team?
- What did not work well for the team?

The facilitator may solicit quantitative data related to cost management or qualitative data, such as perceived quality of the product. Ideally, the feedback gathered from a project post mortem will be used to ensure continuous improvement of the management of future projects. Post mortems are generally conducted at the end of the project process, but are also useful at the end of each stage of a multi-phase project. The term post mortem literally means "after death." In medicine, the term is used to describe an examination of a dead body in order to discover the cause of death, and in project management the term is used to understand how the project reached the conclusion it did.

Refine Customer Value Proposition

Resources

➔ [How to Tell Your Story: Value Propositions Video]

Refine Customer Value Proposition and Offer

Focus on what you could do better — and communicate.

Work with your customers, staff, partners, and others with whom you engaged to better understand how you can improve your value proposition.

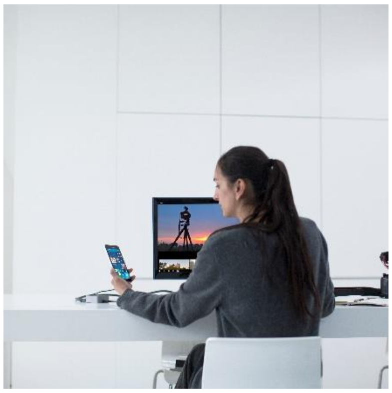
Start with these four questions:

- ☑ What do your customers love about your company?
- ☑ What would they change?
- ☑ What keeps them awake at night that we solve?
- ☑ What are competitors doing they wish you did?

Take the answers to these questions and refine your value proposition, and if necessary, your offer.

Expand to Similar Customers

Resources



➔ [Modern Partner Optimize Operations]

Vertical Customer Play

Each vertical market is unique, but may be familiar.

All partners are looking to grow their customer base from time to time. One of the best things you can do is to make advancements in new vertical markets. Some of the vertical markets to consider include retail, financial services, healthcare, and public sector.

Partners may consider using marketing campaigns and featuring case studies to show success in other industries. Be prepared to offer a free engagement, advice, or proof of offering to break into a new industry.

When deciding which industry to focus on, consider the following:

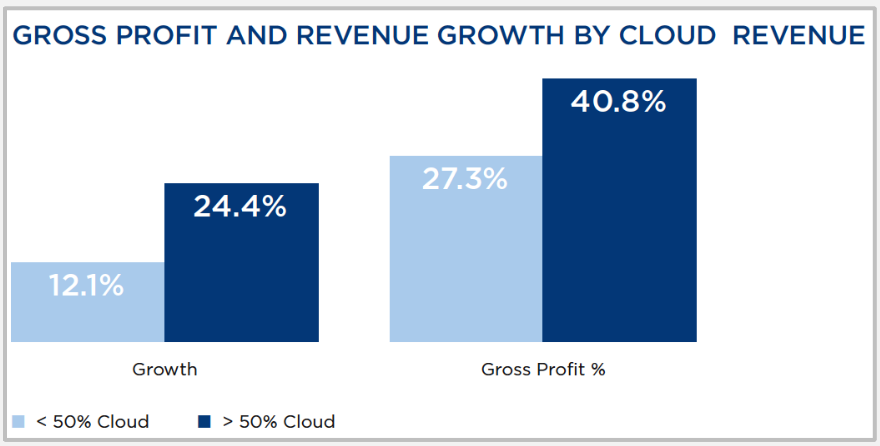
- Does your business have the capacity for additional customers?
- Do you have specific expertise in the industry? Or can you hire someone with the expertise to help you grow in that industry?
- How does that industry feel about technology? Are they early adopters, or laggards? (Either can be successful, but you need to understand where they are.)
- Lastly, appropriate content by industry is critical. You will be wise to commission a collection of marketing materials to use for your marketing automation, website, proposals, emails, and more. Having the correct content for the specific market instills confidence in your business.

Optimize Costs

Efficiency, Profit and Growth

Optimize profit to fund growth.

We all want to have profitable businesses and IDC's research shows that those that are heavily invested in cloud do better than their peers with respect to profitability. But profit doesn't happen automatically just because of cloud. You need to have the right processes and methods in place to drive the efficiencies that reduce costs while still delivering high-quality services. If you are able to achieve that balance, profit should follow.



Source: IDC eBook, sponsored by Microsoft, The Modern Microsoft Partner Series, Part 1: The Booming Cloud Opportunity, 2016

But, it doesn't stop there. If you have efficiency and profit, you have also created the fuel for growth. Your profit provides the funding to invest in pre-requisites for growth, whether it's hiring special skills, buying a company, or renting more office space.

To acquire and maintain a profitable group of customers, you will want to create "look-alike profiles." To do this, look at your most profitable customers. What size is the company? What solution did they purchase? Did you offer any particular expertise? Did they have an unique business need? Were they in a particular industry?

Once you build a profile (or profiles) for your best customers, you can use that profile to find others like them. This is called "Look-Alike" marketing. It helps to narrow your focus when choosing who to market to, or what medium to utilize. It helps to create content for those specific types of customers. It also helps with referral marketing, allowing you to clearly articulate the best fit for your company.

TIP: Use your look-alike profiles to procure prospect lists to market to.

RESOURCES:

→ [Modern Partner Optimize Operations]

Measure Results

Measuring your strengths and gaps is key to ongoing success. To determine if your cloud business is performing to the best of its ability, you need to establish key performance indicators (KPIs) to measure your success. Consider using this approach and applied measurement to ensure you are monitoring and rewarding the right behavior:

- **Take a disciplined and structured approach.** Financial discipline is key to the success of any business, but it needs to empower and inform decisions, not limit them.
- **Set and review targets.** Set targets and objectives for your next year or mid-year, and review them along with corrections of errors if needed.
- **Align execution.** Ensure all internal teams are aligned against the same metrics.
- **Benchmark.** Benchmark your organization with clear key performance indicators (KPIs) to drive your progress. Below is an example of a dashboard with KPIs:

SOME OF THE SPECIFIC ITEMS YOU MAY WANT TO MEASURE INCLUDE:

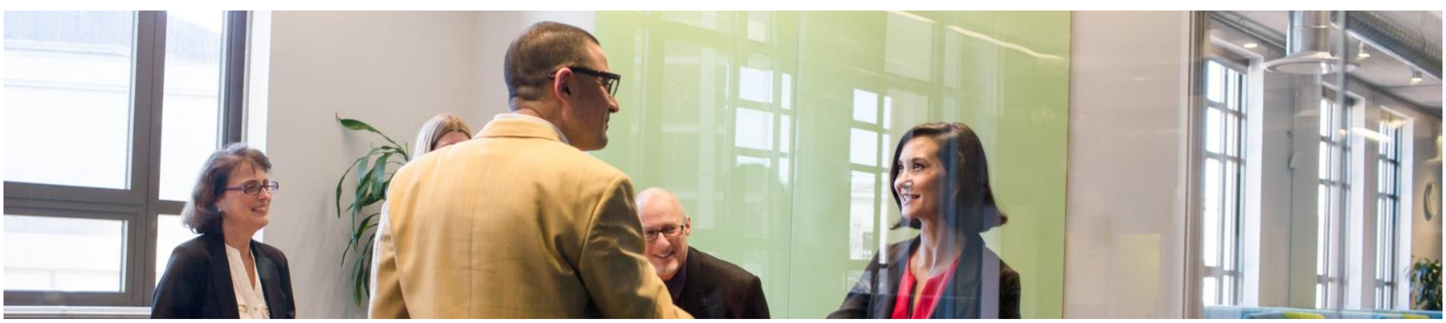
- **Staff utilization:** The amount of time spent on billable work divided by the number of billable hours per person, per year (typically 1,500 to 1,700 hours; taking statutory holidays, vacation, and training into account).
- **Billable markup rate (BMUR):** This measures the profitability of billable resources. It is calculated by taking the hourly charge-out rate of the individual and dividing it by their loaded cost (salary, variable pay, benefits) per billable hour. Best-in-class partners score 2.5 on this metric, while 2.0 is the generally accepted baseline.
- **Backlog**. This is the total amount of work you have outstanding in days (including project work, support work, and ad hoc work with clients) divided by the total number of billable resources. Anything beyond 120 days indicates a strong pipeline of work; anything less than 30 days may be problematic.
- **Rate of customer acquisition**. The number of new customers acquired per month, quarter, or year.
- **Average revenue per user (ARPU)**. Total revenue divided by the number of users.
- **Average revenue per customer (ARC)**. The average amount spent per month among customers who subscribe to managed services offerings.
- **Direct sales cost**. This measure determines the value a seller is providing to the company. In the cloud, 8–10 percent is ideal and 15 percent is acceptable, but anything beyond that means either their quota is too low or their income is too high.
- **Percentage of billed revenue spent on marketing**. It's common to see less than 1 or 2 percent of revenue being spent on driving net new demand. However, some of the most successful partners spend anywhere from 8 to 10 percent.
- **Renewal rate**. This is the percentage of customers that renew their cloud subscriptions. Typically, you're looking for something less than 8 to 10 percent per year of annual churn.
- **Attach rate of secondary offerings**. The value of secondary offerings sold in addition to the solution sold as the first step in the engagement (e.g. Office 365). IDC research shows that the average partner sells $4.14 of their own offerings for every $1 of Microsoft Cloud solutions they sell. Partners with more than 50% of their revenue in the cloud attach $5.86 of their own offerings.
- **Services attach rate**. This is the percentage of active customers paying for managed services in addition to core product offerings. You want to aim for a 70% or

higher attach rate if managed services is a primary focal point for your business.

- **Percent of revenue from recurring sources**. Ideally, a partner starting their journey to the cloud should aim to have 15 percent of revenue from these sources by the end of year one, 33 percent by year two, and 45 percent or more by year three.
- **Gross margin by offering**. For project services, striving for 30 percent or more gross margin is important; managed services should return at least 40 percent and IP over 50 percent.
- **Efficiency factor**. The measure of how much work you've already done that can be repurposed, packaged, and resold as IP.
- **Average calls per customer**. The average number of calls per customer in a given month for managed services. It's reasonable to expect lots of calls in the early stages of the customer relationship, but over the long term, call volume should subside.
- **Average case duration**. The amount of time it takes to field the call, work, resolve, and document a case ticket.
- **Services rep utilization**. This is calculated as the average amount of hours annually spent per representative actively working cases, divided by the number of available hours.
- **These measures aren't new.** In fact, they've been around for as long as services businesses have been in place. The challenge is how you manage them. Are these metrics being tracked on a regular basis? Do you have process and cadence for reviewing them?

Creating Scorecards

You should have scorecards set up for your business that all your employees pay attention to. Create scorecard and financial impact actions that include:



GOOD

- Track your gross services margin across your business.
- Review your ARPU monthly.

BETTER

- Set a target for your gross managed services margin and ARPU for the year.
- Track your gross margin for all revenue streams across your business (managed services, project services, resell, and IP), as well as ARPU.
- Review the KPIs monthly with correction of errors implemented.

BEST

- Instrument the KPIs of your business including gross margin, ARPU, service attach, delivery, and contract renewals.
- Integrate these KPIs into the operational aspects of your business, including contract reviews and compensation.
- Align the compensation of your leadership on a few KPIs.

Partner to Partner Relationships

Grow Partnerships

Nurture your partner relationships.

Partnerships, when done well, help to reduce the cost of going to market, increase your reach, build your market reputation and market share, better compete and win new business, increase your overall profitability, and grow your customer lifetime value.

Working with other partners can help you expand your geographic reach or provide ongoing customer support more efficiently than you can yourself. In most scenarios, working with other partners allows you to focus on your own core advantages.

A 2013 IDC study, The Value of Partnering, found that those companies that had been involved with the most partner-to-partner activity also had some of the best business metrics. The study showed that the group of partners who associated 30% or more of their revenue with partner-to-partner collaboration were also the ones who were growing the fastest — 19% growth versus 10–12% for the rest. Clearly, there is a strong correlation with high growth and partnering.

In some cases, demand for services or products may come from vertical markets that you are not equipped to serve. Instead of trying to develop all the vertical expertise in-house, consider partnering with others to complete the vertical solution that is outside of your expertise.

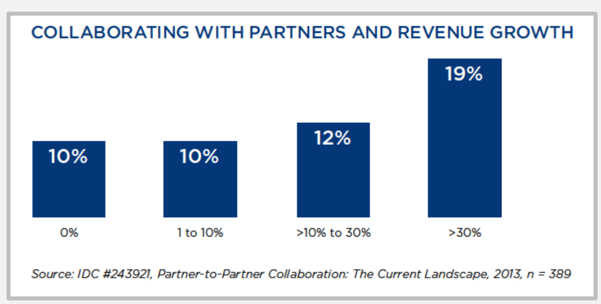
If you have horizontal intellectual property (IP) or unique skills, you may be able to differentiate by working with partners who have specific vertical expertise. You can decide how the relationship works on a partner-by-partner basis. For instance, you may just need a partner to introduce you to the right decision maker in a vertical. If you don't speak the language of the vertical, you may need a partner to take on the sales consultant role. You may want the partnership to extend to scoping the requirements for a vertical, or to jointly build a vertical-specific version of your IP.

Use your own experience as the basis for best practices for your customers. Start by identifying small, incremental initiatives that will make a visible impact for the customer. If you haven't done this kind of project before, recruit a friendly customer for a proof of concept.

According to IDC, "currently 49% of partners offering solutions for specific business functions partner with other channel partners to enhance their total solution." (Source: IDC) In order to optimize this opportunity, more partners need to be engaging in partnerships.

As IP becomes increasingly more important to compete with other companies, partners will consider looking at outsourcing the development of their IP, and they will be looking at ways to differentiate by adding proactive managed services. Partners are evolving in new ways to stay more competitive and meet customer needs, and these changes require a clear partnering strategy to speed the change, gain greater efficiencies, and go to market faster.

Partners should consider both portfolio-style partnering for immediate needs, projects, and talent and also longer-term strategic joint ventures and alliances for long-term competitive growth and differentiation. As partners mature in their partnering model, the need for channel development and cross-border partnerships will evolve.



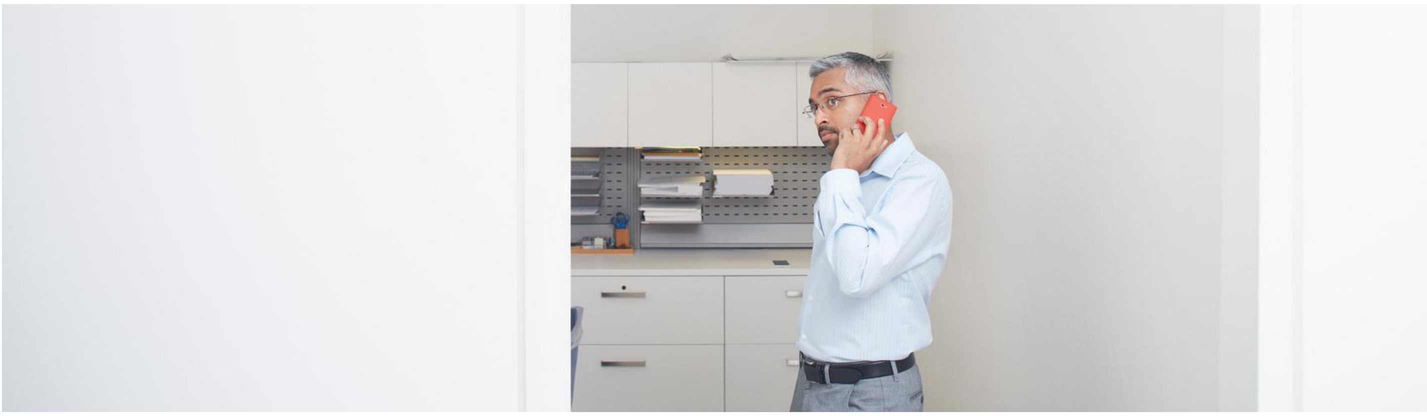
Source: IDC #243921, Partner-to-Partner Collaboration: The Current Landscape, 2013, n = 389

RESOURCES:

➔ Enterprise Cloud Strategy eBook.

Security Playbook Summary

Thank you for taking the time to review this playbook. We hope you have gained new insight on how to successfully grow your security practice by taking advantage of unique offerings from Microsoft, engaging with your customers, and forming strategic partnerships.



Our goal, when creating this playbook, was to organize resources and provide insight that you can use to quickly accelerate or optimize your security practice. To this end, we laid out the practice's opportunity, then provided relevant information on business strategies and technical topics to capitalize on the opportunity, within five sections that you can review in order, or individually at any time.

In the first section, **Define Your Strategy**, we helped you define the strategy upon which your practice will be built. The key actions we prompted you to take are: identify your unique value proposition, define and price your offer, build your business plan, leverage the Microsoft Partner Network, and plan your support options.

In the second section, **Hire & Train**, we focused on the importance of hiring the right team, and then providing appropriate and ongoing training and certifications.

In the third section, **Operationalize**, we suggested you put your plan into action. Leverage your internal use benefits to get your Microsoft licenses and subscriptions, create your key contracts, setup your support process, setup your social offerings and organize your enagement process into checklists.

The fourth section, **Go to Market & Close Deals**, emphasized getting your practice off the ground by defining your sales process, building materials to support sales and marketing, finding new customers, and then nurturing and investing in them to build lasting relationships. We also provided you tells to help you in the sales process with the pitch and negotiation.

The final section, **Optimize & Grow your Practice**, stressed the importance of learning from your customers and your experience in providing solutions to them to optimize your practice and expand to new vertical markets through strategic partnerships. The top five actions we provided for you in this section were: Gather feedback from your customers, learn from your project successes and failures, create case studies and a marketing plan to expand into new vertical markets, maximize your efficiency and profit to fuel growth, and establish and nurture strategic partnerships.

FEEDBACK

Share feedback on how we can improve this and other playbooks by emailing playbookfeedback@microsoft.com

Additional Resources

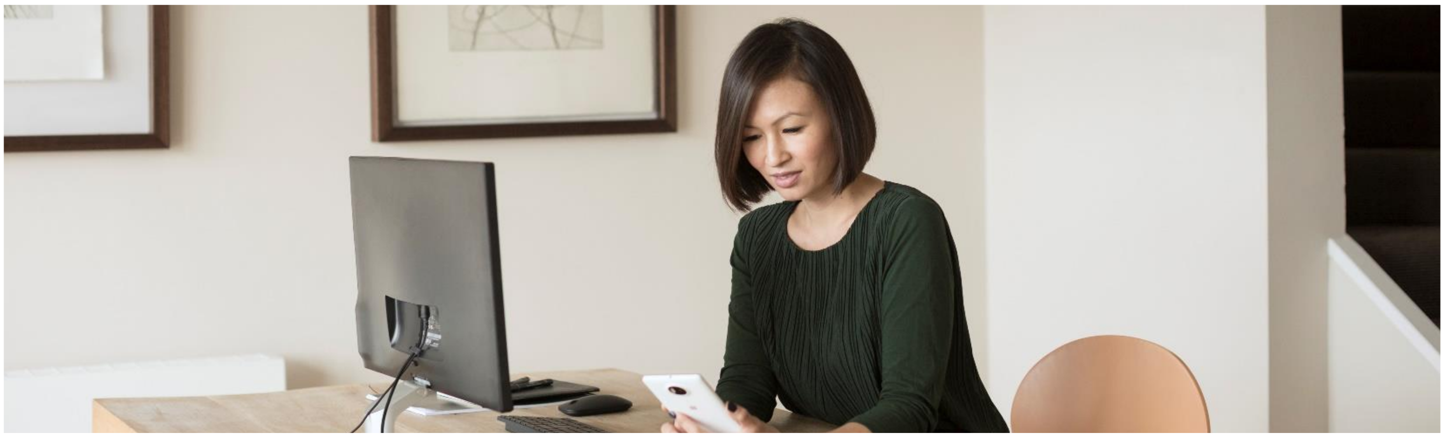
Security

aka.ms/practiceplaybooks

Microsoft

Why choose Microsoft?

A trusted global leader. Committed to partners. A leading security platform.



More than 86% of Fortune 500 companies have the Microsoft Cloud (source: Microsoft), which offers companies a fully integrated stack for any kind of data from on-premises, hybrid or fully in the cloud, with an open cloud platform that supports a wide variety of Operating Systems and programming languages.

36 REGIONS AND COUNTING

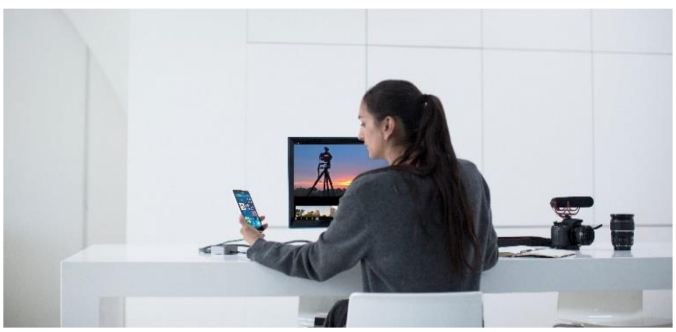
In order to help organizations meet data residency, sovereignty, and compliance requirements, Microsoft has a worldwide network of more than 30 announced Microsoft-managed datacenter regions. Microsoft also continues to make significant investments in geo-expansion through our local and sovereign offerings in more than 10 unique geographic regions worldwide.

WHY CHOOSE THE MICROSOFT CLOUD

No other company has such a complete portfolio, from IaaS to PaaS and SaaS, from productivity and social solutions to ERP, from smartphones to PPIs. Microsoft offers the most connected, comprehensive set of cloud solutions (Azure, Office 365, Microsoft Dynamics), with an unmatched breadth and depth of capabilities from platform to productivity apps to business solutions. Our integrated portfolio of cloud services works across devices and is supported by one of world's largest developer and partner ecosystems. From a customer perspective, this means a lower cost and complexity associated with the product/services integration, IT provider management, and support.

THE ONLY CLOUD: ENTERPRISE LEVEL, HYPER SCALE, AND TRUE HYBRID

Microsoft is the only cloud provider that combines a hyper scale cloud offering, a truly hybrid platform and enterprise-level support for your cloud workloads with enterprise-level SLAs.



COMPLETE SET OF INTEGRATED CLOUD OFFERINGS

Microsoft has a complete set of integrated cloud offerings, from infrastructure as a service (IaaS), to Platform as a Service (PaaS) and all its Software as a Service (SaaS) offerings. As an example, a PaaS development can easily integrate with a VM on Azure IaaS as well as app services like SharePoint and CRM Online.

NATIVE SSO AMONG SERVICES AND ON-PREMISES

Being able to offer Single Sign On is key among multiple cloud services, and on-premises apps are key for employee productivity and IT management. Microsoft natively offers SSO among its cloud services, REST API for custom apps, and federation and directory sync services with AD and other directories.

BROADEST PARTNER ECOSYSTEM

Microsoft Partner Network includes over 430,000 organizations worldwide. By working with this broad partner ecosystem, we can offer better solutions and better services to our customers.

BEST AND MOST INNOVATIVE ENTERPRISE CLOUD PRODUCTIVITY SOLUTION

No other cloud provider offers such a complete suite of productivity services. Office 365 is recognized as the leading cloud productivity platform. Our customers can access the productivity platform through the browser or through the Office application, used by 1 billion users worldwide.

INTEGRATED BUT SEPARATED ENTERPRISE AND CONSUMER CLOUD OFFERINGS

Not all competitors in this space offer consumer solutions. Others have only one consumer platform that they extend to the enterprise, mixing SLAs and involving the greater risk of sharing private information in a public environment.

ENTERPRISE MOBILITY

The Enterprise Mobility Suite (EMS) is the first comprehensive offering in the industry to recognize that success in enterprise mobility is not just about devices. A complete mobility strategy requires the cohesive management of data, identity, and devices. With an integrated platform for universal device management, identity/access management, and data protection, EMS reduces licensing complexity and makes it easier to extend your existing productivity infrastructure to the cloud.

MICROSOFT CLOUD COMPLIANCE CERTIFICATIONS & ATTESTATIONS, SEPT 2016

All of Microsoft's services are independently verified to meet legal and compliance requirements, financially backed, and offer transparent information on their availability. Microsoft was the first cloud provider to adhere to ISO 27018 and ISO 22301.

	Regulatory and Compliance Domain	Office 365	Microsoft Azure	Microsoft Dynamics CRM	Microsoft Intune
Broadly Applicable	ISO 27018:2014	✓	✓	✓	✓
	ISO 27001:2013	✓	✓	✓	✓
	SOC 1 Type 2 (SSAE 16/ISAE 3402)	✓	✓	✓	✓
	SOC 2 Type 2 (AT Section 101)	✓	✓	✓	✓
	CSA STAR 1	✓	✓	✓	No
United States Government	FedRAMP Moderate	✓	✓	✓	No
	CJIS Security Policy, Version 5.3	✓	✓	✓	No
	DISA SRG Level 2 P-ATO	✓	✓	✓	No
	FDA 21 CFR Part 11	✓	✓	✓	No
	ITAR	✓	✓	No	No
	IRS 1075	✓	✓	No	No
Industry Specific	HIPAA BAA	✓	✓	✓	✓
	PCI DSS Level 1	N/A	✓	N/A	N/A
	FERPA	✓	✓	✓	N/A
	CDSA	N/A	✓	N/A	N/A
Region/Country Specific	EU Model Clauses	✓	✓	✓	✓
	UK G-Cloud v6	✓	✓	✓	✓
	Australia Gov ASD	✓	✓	✓	No
	Singapore MTCS	✓	✓	✓	No
	Japan FISC	✓	✓	No	No
	New Zealand GCIO	✓	✓	✓	✓
	EU-US Privacy Shield	✓	✓	✓	✓
	China (MLPS, TRUCS, GB 18030)	✓	No	No	No

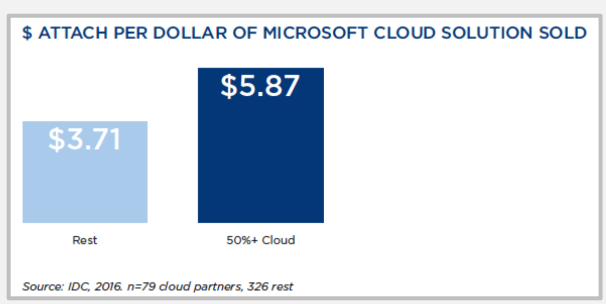
COMMITMENT TO OPEN SOURCE

With Azure, you have choices. [Choices that help you maximize your existing investments.] Get support for infrastructure as a service (IaaS) on Linux and Java and PHP Web application platforms. Develop and test your Linux and open source components in Azure. You bring the tools you love and skills you already have, and run virtually any application, using your data source, with your operating system, on your device. [Much of the Azure tooling and frameworks your technical teams use is open source and hosted in GitHub.]

COMMITTED TO PARTNERS

From the diverse range of partner focused training Microsoft produces on sales, marketing and technical topics, to the business investment funds it makes available to help partners succeed in their customer engagements, to unique programs like the Cloud Solution Provider program that enable partners to own the complete customer relationship and to marketplaces and digital show cases that highlight partners to new customers and give partners broad exposure, Microsoft is committed to enabling partner success in Data Platform and Analytics.

Research shows this commitment to partners also shows appears in the partner revenue, as the average partner sells over $4 of their own offering for every $1 of Microsoft cloud solution that they sell or influence the sale of. For partners who focus on cloud (e.g., where cloud revenue is more than 50% of their revenue), that number jumps closer to $6.



Common Security Objections

OFFICE 365 ADVANCED THREAT PROTECTION OBJECTIONS

QUESTION	ANSWER
Why isn't this just part of my current Office 365 subscription?	All Office 365 commercial workloads are designed following the Microsoft Security Development Lifecycle, and include built-in security capabilities such as encryption at-rest and in-transit, along with access to the Office 365 Management Activity API which provides a programmatic way to pull events related to information protection and compliance in Office 365. Enterprise plans are intended to meet a range of security and compliance needs. Advanced security capabilities such as Advanced Threat Protection provide an additional level of security and control for those customers who require it, and are available as add-ons to enterprise plans in addition to being included in the E5 plan. Office 365 Advanced Security Management will be available for customers to purchase as an add-on to all Office 365 enterprise plans. It is also important to note that when Microsoft learns about threats from the new advanced security capabilities, those insights are used to improve security for all Office 365 customers.
What support will Microsoft provide in migrating my custom business rules from another solution to ATP?	Microsoft offers industry-leading, 24x7x365 support and partners that can help migrate custom business rules to ATP.
How does ATP compare with the competition?	We have a strong security team defending our network: world-class experts, cyber threat hunters, reverse engineers, and threat analysts. We also have a network of other security firms, and unique optics that combine to create an exclusive holistic view of enterprises with a global view of the Internet. We are constantly monitoring our global threats for emerging and known threats (more information can be found here)
I'm happy with my existing cyber security strategy, why should I consider ATP?	Microsoft is constantly innovating security solutions into ATP and as a result, has rapidly advanced as one of the leaders for Secure Email Gateways. We will continue to innovate and enhance our position relative to other competitors.

I've seen demos where competitors products outperform Office 365 ExO and ATP. How can you explain that?	Please clarify the type of performance you are referring to (is it scanning time, total message throughput, other)? Performance metrics are important, but it's also important to identify which metrics are important to you. Office 365 ATP's performance is well placed in the market and can outperform the competition for attachment sandboxing time.
Will ATP catch 100% of malicious attacks?	No. In fact, no advanced threat protection product can catch 100% of malicious attacks, despite claims to the contrary.
What is Microsoft's SLA on virus and spam detection?	Microsoft's SLA on known viruses is 100%, with a spam effectiveness SLA of greater than 90%, a false positive ratio SLA of 1:250,000, and a monthly uptime SLA of 99.999%. Additionally, we keep continuously updated lists of malicious URLs that is checked approximately every 20 minutes.
In June 2016, Office 365 was the target of a massive, zero-day Cerber ransomware attack. What is Microsoft's responsibility when such attacks breach Exchange Online Protection and/or Office 365 Advanced Threat Protection security?	Microsoft has a responsibility to continue to evolve the service to be ahead of the malware attacks. As part of our ongoing effort to provide better malware protection, the July 2016 release of the Microsoft Malicious Software Removal Tool (MSRT) includes detection for Win32/Cerber, a prevalent ransomware family. The inclusion in MSRT complements our Cerber-specific family detections in Windows Defender, and our ransomware-dedicated cloud protection features.
How does ATP recognize threats that haven't already been identified?	Unidentified threats would be detected with static and heuristics of our ATP detection system. We also can provide protection if a customer has Windows Defender Advanced Threat Protection.
I already have Exchange Online Protection, isn't that enough?	Advanced Threat Protection compliments EOP antimalware filtering to help safeguard your messaging system from more sophisticated attacks. Only those attachments that successfully pass EOP antimalware scanning are impacted by Safe Attachments or Safe Links policies.

HANDLING OBJECTIONS AROUND ADVANCED SECURITY MANAGEMENT

QUESTION	ANSWER
Do all users need to have an ASM license or do I just need to license it for IT?	ASM will need to be licensed for all users who will be protected by the service not just the IT Pros that access the administration console.
Will Office 365o be licensed for all users k for any non-Microsoft products and services?	No. This functionality is being used to provide additional visibility for customers into the state of their Office 365 userstration console.ly those a is powered by Microsoft Cloud App Security. For cross-cloud support including non-Microsoft products and services, customers should consider purchasing Microsoft Cloud App Security.
Will Office 365 Advanced Security Management store any of my data outside Office 365?	As Office 365 Advanced Security Management is powered by Microsoft Cloud App Security, the Office 365 information will be stored within Cloud App Security which is hosted in Azure. Azure offers industry-leading, 24x7x365 support and financially backed SLAs.
What datacenters will my Office 365 Advanced Security Management information be stored?	Information in Office 365 Advanced Security Management is currently available in the US datacenters only. Customers, if they choose to, can still use Office 365 Advanced Security Management worldwide at general availability.
How do ASM features compare to what is available in other Microsoft offerings, such as Cloud App Security?	ASM provides a subset of the features that are found in Microsoft Cloud App Security, and will only focus on providing customers with enhanced visibility and control for their Office 365 environment. Cloud App Security should be considered for customers that need to manage additional SaaS applications.

Microsoft Fast Track

Resources

- [Fast Track FAQ]
- [Sign in to the Fast Track portal]

Microsoft Fast Track

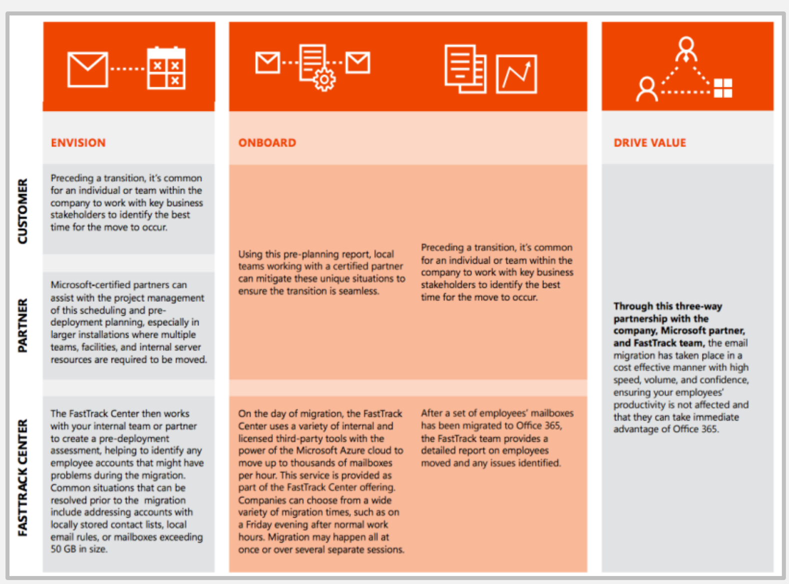
FastTrack helps you discover what's possible, plan for successful rollouts, and onboard new users and capabilities at your own pace.

FastTrack is Microsoft's customer success service designed to help your customers realize business value faster with the Microsoft Cloud. With Microsoft FastTrack, your customers can make a smooth transition to Office 365 and Microsoft Enterprise Mobility + Security. Microsoft works closely with both you as the Microsoft partner and any customer internal teams. FastTrack ensures that you have a full suite of best practices, tools, remote assistance, and resources at your disposal during your digital transformation.

THE MICROSOFT FASTTRACK SERVICE CAN HELP YOU:

- Provide a great customer onboarding experience.
- Shorten customer time-to-value.
- Accelerate your customer engagements through high-margin, high-value services

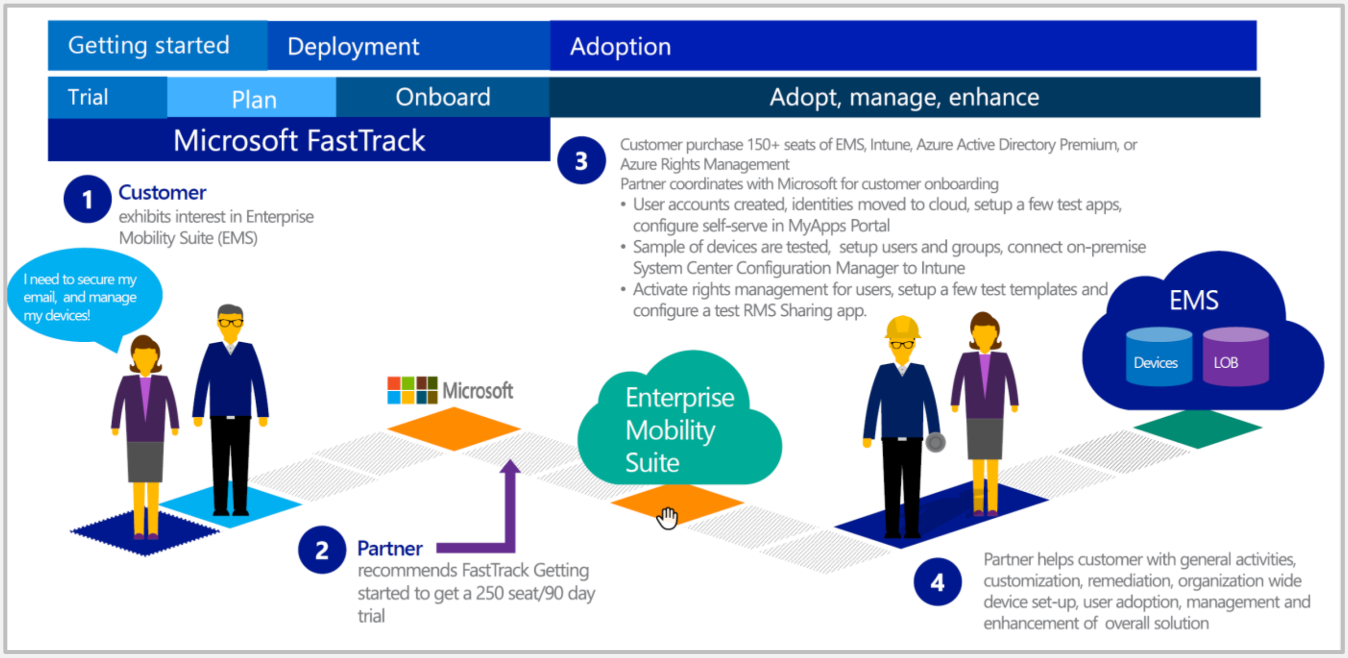
By way of example, here is a summary of what a Fast Track engagement works like, in this case in an e-mail migration scenario.



Partner Engagement with FastTrack

How does a partner engage with FastTrack?

THE SCENE BELOW DESCRIBES THE PROCESS IN FOUR STEPS.



Managing the Engagement

Steps to take to ensure you are at the center of the engagement

- Build a strong sales and deployment practices for Enterprise Mobility Suite
- Set-up the initial customer trial through the FastTrack portal
- Work with your Partner Sales Executive to help close the opportunity
- Register your opportunity at the FastTrack portal
- Set clear expectations with the customer
- Have a deployment and adoption plan in place
- Attach yourself as the digital partner of record
- Submit your deployment plan in the FastTrack portal

Best practices for running an EM+S project

Deploying or creating a solution in EM+S and Azure can cover a broad surface area of technologies and services. A common problem for customers implementing solutions on their own is the lack of best practices and existing reference architectures. Ensure that your team is aware and takes advantage of established best practices from Microsoft when possible. We have compiled a list of best practice resources as it relates to the security practice.

DOCUMENT	OVERVIEW
Azure Guidance from Patterns and Practices	Checklists for availability, scalability, security for a broad list of topics and services in Azure.
Azure Reference Architectures	A collection of documented best practices for deploying virtual machines and VPN connectivity in Azure.
Azure Security Best Practices and Patterns	Best practices and patterns.
Best Practices for Network Security	Best practices for protecting networks using virtual appliances, network security, groups and hybrid connectivity solutions.
Azure Active Directory Design Considerations	Best practice and design considerations for enabling hybrid identity with Windows Server Active Directory and Azure Active Directory.
Azure Identity Management and Access Control	Best practices for managing identities and controlling access to applications. Topics include single-sign on, password management, Multi-Factor Authentication, role-based access control and SaaS management.
Guidelines for Deploying Windows Server Active Directory in Azure Virtual Machines	The paper explains the important differences between deploying Windows Server Active Directory Domain Services (AD DS) and Active Directory Federation Services (AD FS) on-premises versus deploying them on Microsoft Azure virtual machines.
Multi-Factor Authentication Best Practices	Best practices for using Azure Active Directory to enable Multi-Factor Authentication.
Mobile Device Management from Microsoft IT	Technical case from Microsoft IT with insights about setting up the Microsoft corporate Mobile Device Management (MDM) infrastructure.
Deploying Advanced Threat Analytics	Pre-install guidance and walkthrough for deploying Advanced Threat Analytics.
Advanced Threat Analytics Capacity Planning	How to determine the amount of ATA services needed and documentation on the ATA sizing tool.
Operating ATA	Operator documentation for ATA.
Advanced Threat Analytic Architecture	Architecture documentation for ATA.

Troubleshooting Resources

Use these resources to assist with troubleshooting in your Azure-focused practice.

MSDN SUPPORT FORUMS

MSDN support forums are moderated by Microsoft staff and others in the community. This is a great location for asking troubleshooting questions for Azure.

DIRECT LINKS TO EMS FORUMS:

- Azure Active Directory (AAD)
- Advanced Threat Analytics (ATA)
- Cloud App Security (CAS)

STACK OVERFLOW

Stack Overflow is the largest online community for programmers to learn, share their knowledge, and advance their careers. This a great community-based resource for assisting developers with troubleshooting code-related issues on Azure.

SERVER FAULT

Server Fault is a question and answer site for system and network administrators. This a great community-based resource for assisting IT Professionals with troubleshooting infrastructure-related issues on Azure.

AZURE TROUBLESHOOTING RESOURCES

TROUBLESHOOTING AZURE ACTIVE DIRECTORY	
Azure AD Connectivity	Password Management
Azure AD Domain Services	Azure AD Connect Synchronization Issues

TROUBLESHOOTING MICROSOFT INTUNE	
Device Enrollment	App Deployment
Client Setup	Policies
Conditional Access	Endpoint Protection
Company Resource Access Problems	Software Updates
Exchange Connector	Mobile App Management
Lookout Integration	

TROUBLESHOOTING INFORMATION PROTECTION	
Troubleshooting Azure AD Connectivity	Troubleshooting Password Management
Troubleshooting Azure AD Domain Services	Troubleshooting Azure AD Connect Synchronization Issues

TROUBLESHOOTING ADVANCED THREAT ANALYTICS	
Troubleshooting using Known Errors	Troubleshooting ATA using Logs
Troubleshooting using performance counters	Troubleshooting using the ATA Database

TROUBLESHOOTING AZURE INFRASTRUCTURE AS A SERVICE	
Troubleshooting RDP Connections	Reset Remote Desktop Connections
Troubleshoot Creating a new VM	Troubleshooting Specific RDP errors
Troubleshoot restarting or resizing a VM	Troubleshoot Application Access
Troubleshoot Allocation failures on Windows	Troubleshooting SSH connections
Troubleshooting Application Access on Linux	Troubleshooting Allocation issues on Linux
Troubleshooting Resource Manager Deployment issues with Linux	Redeploying a Virtual Machine
Troubleshooting ARM Template Deployment Errors	Troubleshooting and monitoring Azure Storage
End-to-End Storage Troubleshooting	

Azure Web Apps

Resources

- Using Deployment Slots for Testing
- Testing Web Apps in Production
- Penetration Testing Terms with Azure

Staged Publishing with Azure Web Apps

When using Azure Web Apps, you can create multiple deployment slots that can be used for deploying different versions of a website.

- You can validate Azure Web App changes in a staging deployment slot before swapping it with the production slot.
- Deploying an Azure Web App to a slot first and swapping it into production ensures that all instances of the slot are warmed up before being swapped into production. This eliminates downtime when you deploy your Azure Web App. The traffic redirection is seamless, and no requests are dropped as a result of swapping operations. This entire workflow can be automated by configuring Auto Swap when pre-swap validation is not needed.
- After a swap, the slot with the previously staged Azure Web App now has the previous production version. If the changes swapped into the production slot are not as you expected, you can perform the same swap immediately to get your "last known good site" back.

WEB APPS TESTING IN PRODUCTION

Testing in production, or live-testing your Azure Web App using live customer traffic, is a test strategy that app developers increasingly integrate into their agile development methodology. It enables you to test the quality of your apps with live user traffic in your production environment, as opposed to synthesized data in a test environment. By exposing your new app to real users, you can see the real problems your app may face once it is deployed. You can verify the functionality, performance, and value of your app updates against the volume, velocity, and variety of real user traffic, which you can never approximate in a test environment.

PENETRATION TESTING

Microsoft conducts regular penetration testing to improve Azure security controls and processes. We understand that security assessment is also an important part of our customers' application development and deployment. Therefore, we have established a policy for customers to carry out authorized penetration testing on their applications hosted in Azure. Because such testing can be indistinguishable from a real attack, it is critical that customers conduct penetration testing only after notifying Microsoft. Penetration testing must be conducted in accordance with our terms and conditions.

Case Studies

One important avenue Microsoft provides is a track record of successful partner engagements. A track record of customer success is an easy way to build confidence in the solutions your practice recommends, and helps win over customers. Microsoft provides a collection of case studies highlighting how partners make their customers successful through security, including PDFs and PowerPoint slides summarizing the key learnings and videos. The Mobility & Security section of the Partner Stories website also provides a curated collection of case studies.

Additionally, Microsoft provides Office 365 Security and Compliance Best Practices Case Studies written from the partner lens. Some of which are highlighted in the table that follows.

PARTNER	SUMMARY
Olive + Goose	New Office 365 security and compliance capabilities help deliver a cost-effective, integrated customer solution.
Wortell	Secure Score provides foundation for customer conversations and sales.
Dyntek	Incremental Office 365 upgrades increase customer values, sales.
Planet Technologies	Office 365 advanced security capabilities drive public sector engagements, build trust.
Peters & Associates	Advanced security thought leadership and proof of concept fuel adoption, business growth.

The following is a selection of case studies available from the Microsoft Customer Stories website. Check back periodically for new case studies that empower your efforts as a partner.

CUSTOMER	CHALLENGE	SOLUTION	RESULT
Whole Foods Market	Provide an easy, cost-effective, and secure way for all employees to access both cloud-based and datacenter-based applications. The company's workers complained about having to remember multiple	In just 12 weeks, WFM rolled out Azure Active Directory Premium to all 91,000 employees, who use it to gain single sign-on to more than 30 SaaS applications. "Employees love using Azure Active Directory for sign-on versus having multiple passwords and different accounts to manage," says Lamb.	Whole Foods has achieved a 32 percent savings on its support contract by utilizing Azure Active Directory Premium versus having its help-desk staff reset passwords. It's also reduced its pre-onboarding support for SaaS applications by 50 percent. Instead of working with

See the full case study here	passwords for various business applications, and IT invested a lot of time in dealing with user credential issues such as password resets.	WFM takes advantage of a range of Azure Active Directory Premium features to simplify identity management work. Using the Azure Active Directory Premium self-service password reset feature, employees can reset passwords on their own—something that previously cost WFM hundreds of thousands of dollars annually. Plus, when users reset their passwords, Azure Active Directory Premium and the company's on-premises Active Directory talk to one another to ensure that the change is made in both places (a feature called Azure Active Directory Premium password write-back). "Identity is the new firewall of the future," Lamb says. "We can't continue to use our old way of controlling application access, because business isn't happening exclusively in our network anymore. With Azure Active Directory Premium, we can stay in control, no matter where our users roam."	individual SaaS vendors to enable support for single sign-on and perform extensive testing, the WFM team simply works with Microsoft to ensure that needed applications are pre-integrated with Azure Active Directory. Then there's the cost avoidance for expanding its on-premises Active Directory infrastructure to accommodate double the number of employees. "If we'd had to support an on-premises Active Directory infrastructure for 71,000 more employees, it would have been cost-prohibitive—about $350,00 for servers and labor," Lamb says.
Earth Network See the full case study here	Like many companies its size, Earth Networks relies on a small IT team to manage the company's PCs, which run either the Windows XP operating system or the Windows 7 Professional operating system. Earth Networks used third-party endpoint protection software to keep PCs safe. "The PC management software	With Windows Intune, the company can monitor PC health, update and distribute software, provide endpoint protection, set security policies, and track hardware and software inventory. "We can force an update on remote PCs—and the process is invisible to the user," says McCracken. "We also get alerts if a PC's processor is running at a high level for a long time or if a hard drive is getting full."	By deploying Windows Intune, Earth Networks has nearly eliminated concerns about endpoint protection, realized significant IT savings, and provided a high-quality PC management solution that promotes improved productivity. Since it deployed Windows Intune, the company has experienced a 90 percent decrease in security-related issues. Earth Networks has

	we had been using was not effective and has relied on users to report any issues," says McCracken. "If a PC had issues, we would have to enable a remote connection to the PC, apply updates, and verify that the machine was stable." When they couldn't reach a PC remotely to install updates and applications, the IT staff sent users a CD or USB drive. Sometimes employees would send their PCs to headquarters for repairs. "It was a labor-intensive process to keep employees' PCs running," says McCracken. "Our WeatherBug applications rely on innovative technology, and we needed a better management solution."	Windows Intune employs the same Microsoft Malware Protection Engine used by System Center 2012 Endpoint Protection. The company uses the solution to conduct twice daily scans on all PCs, and it does full scans weekly. "The solution is robust and stable and it doesn't use much memory or processor power, so it doesn't slow down PCs," says McCracken. "At one point, we reported an incident that Windows Intune hadn't detected, and within 13 hours, Microsoft had implemented a security update."	confidence that Windows Intune is helping to protect its PCs, which significantly simplifies the management of its IT environment. "We went from having low confidence in our security program to trusting Windows Intune to provide a very high level of endpoint protection. We can now focus on implementing software, training users, and doing other tasks," says McCracken. "It just makes sense to have Microsoft provide security for its own operating systems." By adopting Windows Intune, the company has reduced the costs of managing PCs. Its help desk receives 90 percent fewer support calls related to PC management. It's also saving money by using the inventory tools in the solution to identify software that it no longer needs to license. "The biggest savings we've realized is in freeing up our IT staff to focus on higher value activities and better serve our users, who are the lifeblood of our company," says Long. "We can't put a price tag on what Windows Intune has provided for us."
vetco affordable. quality. care.™ Vetco Clinics	The queue of customers waiting for the Vetco clinic to open can be long and	Although pet health data is not governed by data protection regulations as is human health data, Bentzel says that could well	PetPass will help forge stronger relationships at every customer touchpoint. When a customer walks up, a mobile Vetco greeter

See the full case study here

the crowd impatient. Families line up with dogs and cats, waiting to get vaccinations, health screenings, microchips, and other care for their furry family members.

When the clinic finally opens, customers eagerly wait their turn as the line inches forward. The animals are anxious, the owners restless. The clinic staff rifles through paper, not sure who's been there before. And there's lots of paperwork to fill out. Some customers drift away, possibly never to return.

be on the way. Even without regulatory requirements to meet, Vetco wants to keep pet and family data safe. It uses Microsoft Azure Active Directory Premium (part of the Microsoft Enterprise Mobility Suite) to help safeguard access to data through Multi-Factor Authentication, and Azure AD Connect to connect its on-premises Active Directory with Azure Active Directory.

Vetco will use other Microsoft Enterprise Mobility Suite products—specifically, Microsoft Intune—to manage its approximately 700 tablets nationwide and control what employees can access from the browser. "We have a lot of turnover in our store workforce so we have to be able to train people quickly and keep information secure," Bentzel says. "We give them a username and password, and they're able to reset their own passwords through Azure Active Directory. This is important, because we have such a small IT staff."

carrying a tablet computer will welcome him or her. Using PetPass running on the tablet, the greeter will capture basic information such as customer and pet names, cell phone number, and reason for visit, and provide the customer with an estimated wait time. If the customer has been there before, PetPass knows and auto-fills the information, leaving the greeter to simply confirm. The whole process takes a minute or two, and the customer is then free to shop in the Petco store while waiting. No more standing in line with agitated animals.

The Vetco staff sends the customer a text message when it's her turn. The customer brings her pet into the clinic, where a quick consultation takes place about why Fido or Fluffy is there. Everything is recorded in PetPass. The vet technician then sees Fido and performs the exam, draws blood, inserts a microchip, or performs other care, recording medical information in PetPass. Everything's digital, which increases accuracy and also speeds staff access to patient history.

Even before the customer walks out the Petco door, Vetco has sent her an email message containing a description of the services performed, relevant rabies or other vaccination certifications, and a copy of the invoice.

The state's almost 1.5 million residents welcome more than 11 million visitors annually to six main islands and numerous smaller islands that stretch over 1,500 miles in the Pacific Ocean. Keeping the commerce across Hawaii running smoothly and ensuring that the state's citizens receive excellent services is the responsibility of the state's 21,000 employees, who are divided into 13 different departments.

Hawaii acquired the Microsoft Enterprise Mobility Suite (EMS), and this is leading to new ways of working for state employees. The suite includes identity and access management with Microsoft Azure Active Directory Premium, mobile device and application management with Microsoft Intune, and information protection with Azure Rights Management, all of which the state is using.

"When I first started going to meetings here, every single person brought in printed agendas and took notes by hand on paper," explains Nacapuy. "Nobody even brought a laptop—even though we had Wi-Fi in every building, it wasn't integrated with the state network and staff couldn't connect back to their own servers. Now, just a year later, having the Enterprise Mobility Suite has led to a marked increase in mobile computing. Half of the attendees show up with iPads, iPhones, Android Phones, Microsoft Surface Devices, and Windows Phones, and that number just keeps increasing—it has fundamentally changed the way a lot of people work, saving them time and making them more effective, which has made them happier in their jobs. We have a bring-your-own-device arrangement for mobile devices, so employees can choose from multiple platforms, but more and more the go-to solution for our users is the Surface devices—they love them so much that it's almost become the de facto standard."