Microsoft

Secure Remote Work

Microsoft Practice Development Playbook

Published: February 2021

aka.ms/practiceplaybooks

About the Playbook

Developed by partners, for partners, as a guide to building or expanding a secure remote work practice.

The goal of this playbook is to help partners accelerate or optimize a secure remote work practice and understand the opportunity to provide customers with services that help them securely communicate, collaborate, and access company resources and applications. It provides high-level guidance and valuable resources for driving new revenue opportunities, developing strategies for marketing and lead capture, selling, and building deeper and longer-term engagements with customers through potential new offerings such as managed services.

The playbook offers guidance on the technical skills needed, the Microsoft resources available to accelerate learning, and the key opportunities for technical delivery. The intent is to help partners understand the practice opportunity and best practices, not to re-write the existing body of detailed guidance on how to perform any given recommendation. Instead, it points to the relevant resources at any given stage of building a remote work practice.

Many of the resources and programs referenced in this playbook require membership in the Microsoft Partner Network (MPN) to access. There is no cost to join. Information about the program and how to register can be found on the MPN website.

Partner practice development framework

The playbook is structured into five stages that take a practice from concept to growth.

Define strategy	Hire and train	Operationalize	Go to market and close deals	Optimize and grow
Define the offer, benchmark the practice, and identify required resources	Hire talent, train resources, and complete certifications	Prepare for launch with systems, tools, and process in place	Execute sales and marketing strategy to find customers and close deals with winning proposals	Collect feedback, identify expansion opportunities, optimize the practice, grow partnerships, and refine the offer

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How this playbook was made

This playbook is part of a series of guidance written by Opsgility, a Microsoft partner, in conjunction with the Microsoft One Commercial Partner group and 10 other successful Microsoft partners that have volunteered time to provide input and best practices to share with the rest of the partner community.

To validate the guidance provided in these playbooks, Microsoft worked with MDC Research to conduct a survey of 1,173 global partners. 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, the practices, and services they offer; and the 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.

CONTRIBUTING PARTNERS	
Accenture/Avanade	Anunta
Insight	Softchoice
CDW	AtBot
MetroStar	SoftwareONE
Softline	ClearPeople

Contents

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Market Opportunity

The ability for employees to work from anywhere and still be able to communicate and collaborate is a current area of growth in the global marketplace. More organizations are allowing employees to work from home in addition to those that travel and require the ability to access information. The ability to keep identities, devices, applications, and data secure becomes a top priority to those organizations.

Since 2005, there has been a 140% growth in remote work with non-self-employed workers. The increase in workers that were telecommuting between 2017 and 2018 increased by 22%. This increase in remote work has taken place outside of the 2020 global Covid-19 pandemic, which, according to some estimates, has driven a 3x increase in telecommuting.[1]

This increase will continue as organizations determine that they are able to retain employees by offering them a remote work option. Studies have shown that retention rates could increase by 10% in the current year, and organizations save approximately $11,000 per employee through cost avoidance in electricity, property, and office supplies, among other areas.[2]

These savings and the current safety concerns create the market opportunity for partners to provide remote work services and provide customers with the expertise in deployment and managed services that brings value while maintaining the level of security and compliance that they require.

[1] The Coronavirus Pandemic is Driving Huge Growth in Remote Freelance Work (https://www.forbes.com/sites/jonyounger/2020/03/29/this-pandemic-is-driving-huge-growth-in-remote-freelance-work/#552d01cb7747)

[2] Remote Working Statistics 2021: 15 Exciting Trends (https://remotebliss.com/remote-working-statistics-and-trends/)

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COVID-19 Impact on Microsoft Remote Work Services Workload
(n=1173)

■ Decreased workload   ■ No impact   ■ Increased workload

| 17% | 18% | 66% |

Median Change in Workload

14% increase

Net % of Partners with Increased Workload

+49%

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Overview of Microsoft Remote Work Services Activity in Past Year

Status of Microsoft Remote Work Services Practice

□ Actively working towards   ■ Currently offering

Total (n=1173)

| 19% | 81% |

n=945

Number of Projects Completed

Median: 14

Mean: 49

n=898

Total Median Revenue From:

Completed Projects	Post-Project Services
$225k	$190k

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

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Define the Strategy

Secure Remote Work

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Introduction

Now that the opportunity is understood, it is time to define the strategy for building a secure remote work practice. Like the foundation of a house, the right strategy is critical to the long-term success of the practice — and it is worth it to take the time to think this strategy through.

It begins with an overview of the areas of expertise within a secure remote work practice. A practice may have expertise in just one of the areas, across multiple, or all areas. For each area of expertise, partners will find 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 this section will offer guidance on the process of defining an offer and its value proposition. This is a critical piece of the strategy — specifically, the definition of what will be sold and why customers will want to buy it. This section will review the four cloud business models (reselling, project services, managed services, and intellectual property), their respective profitability and how to assess the profitability of a practice. Discover the options for pricing an offer, including pricing strategies for driving adoption, and how to minimize risk by establishing up-front fees and payment terms. The goal is to help partners build a solid business plan that addresses the team, marketing, sales, and financial aspects of the strategy.

Next, there is a dive deeper into sales, including the pre-sales and post-sales engagement process, and how to compensate sales executives.

Not yet a Microsoft Partner? This section provides a quick tour of the Microsoft Partner Network, the programs for growing a practice, how to earn competencies that yield additional benefits, and how to maximize the benefits of the program.

After that, there will be guidance on how to identify potential customers when starting a practice, and the potential service offerings.

This section concludes with a discussion on how to support customers and Microsoft's support offerings.

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Define the Practice Focus

As more companies allow users to work outside the office, the opportunity for delivering applications through cloud services becomes more plausible as maintaining application workloads within a local datacenter becomes costly, less agile, and less effective over time.

Microsoft offers services that allow users to work remotely by leveraging cloud technologies like Microsoft 365, Microsoft Teams, and Windows Virtual Desktop. For end-user devices, Microsoft Defender services, BitLocker, and Mobile Device Management with Intune can keep Windows 10 and other devices secure.

So where do partners fit? Most organizations do not have the skills or the time to take on and plan what is necessary for a successful migration to a secure remote work environment, much less the ability to continuously monitor and manage the adoption and utilization after the migration.

Partners can bridge this gap by offering solutions that allow customers to focus on their business needs while allowing their users to work remotely while maintaining security and increasing efficiency.

To determine which services to offer, first consider the current capabilities of the team, the investment and additional skills required to build the practice. With a clear direction for the practice, it becomes easier to provide the intended value that will make customers successful.

Benefits of Secure Remote Work

The ability to deliver applications and data to users securely becomes a challenge to any organization with workers in remote locations needing to collaborate with others internally as well as external partners.

If workers are not commuting to an office daily, they are increasing their available work hours to be more effective and produce more work. Having remote workers can also increase morale with a better work-life balance. And workers that travel can securely and easily access files for better collaboration, and more efficient workflows and approvals.

It has been observed that employees who are provided with the opportunity to work remotely have a renewed commitment to their job and a drive to exceed their goals. The flexibility to work comfortably from home, or from a warm outside setting like a cafe, creates a renewed passion to perform. This increases the overall productivity of the entire workforce and benefits the organization. The perceived potential increase in employee productivity was agreed upon by up to 65% of individuals that work full-time. In addition, employees that are more committed to their job experience up to 41% less absenteeism.[1]

Providing flexibility through remote work has also been known to increase retention, with organizations that offer remote work arrangements reporting reductions in employee turnover up to a 12%. Employees have also stated that they would be more likely to change positions if a similar position is offered with remote work flexibility.[2]

All these benefits add up to better performance, productivity, and employee engagement, which equates to higher profitability for the customer. Employees who are no longer commuting or travelling allow the organization to save money on expenses. In addition, utilizing secure remote work best practices provides more security and protection of company asset", both physical and intellectual with the property.

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[1] 5 Proven Benefits Of Remote Work For Companies (https://www.forbes.com/sites/laurelfarrer/2020/02/12/top-5-benefits-of-remote-work-for-companies/#50edd24716c8)

[2] Remote Work and its Increasing Popularity (https://www.helppier.com/en/benefits-of-remote-work/)

Understanding the Secure Remote Work Opportunity

Providing the roadmap to enable communication and collaboration remotely while adhering to security best practices is a growing partner opportunity. Partners who have the expertise to monitor and manage these environments decrease the administrative overhead of the customer.

As more organizations begin to move to a remote work environment, the need for guidance and experience becomes paramount to help employees navigate the capabilities and tools for remote access, security, accessibility, and digital inclusion. As more departments and users migrate to a remote workforce, adoption and change management assistance from these experts can provide additional support.

PARTNER OPPORTUNITIES

- Collaboration and communication
- Secure access
- Digital workplace
- Device management

KEY CUSTOMER CHALLENGES

- Protecting personal and company data along with maintaining regulatory compliance while allowing users to work remotely.
- Architecting how information and applications are accessed, shared, and stored to ensure bad actors do not have access to user devices.

PRODUCTS AND SERVICES

- Teams Meetings, Calling, and Devices for Meetings and Meeting Rooms, Live Events, and Calling
- Secure remote work utilizing identity and access management, device deployment and management, mobile device management, and governance.
- Windows Virtual Desktop for remote desktop access, including native deployments, Citrix Cloud on Azure, and VMware Horizon Cloud on Azure.

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Results of the MDC Research Remote Work survey show the level of project work for each of these services. Respondents were asked which of the services (Microsoft Teams, Secure Remote Work, and Virtual Desktop Services) are or will be part of their remote work services. Teams projects account for the majority of project revenue, follow-on revenue, and projects completed in the last 12 months. Note that partners report follow-on revenue nearly equal to their project revenue across all three services areas.

Share of practice by Microsoft remote work area

Share of Each Microsoft Remote Work Area For:

Service Areas Included in Practice	% Completing Projects in Past Year (among those active; n=945)	Total Projects Completed	Project Revenue	Follow-on Revenue
Microsoft Teams	93%	54%	53%	52%
Secure Remote Work	71%	34%	35%	36%
Virtual Desktop Services	50%	12%	12%	12%

95%   n=898
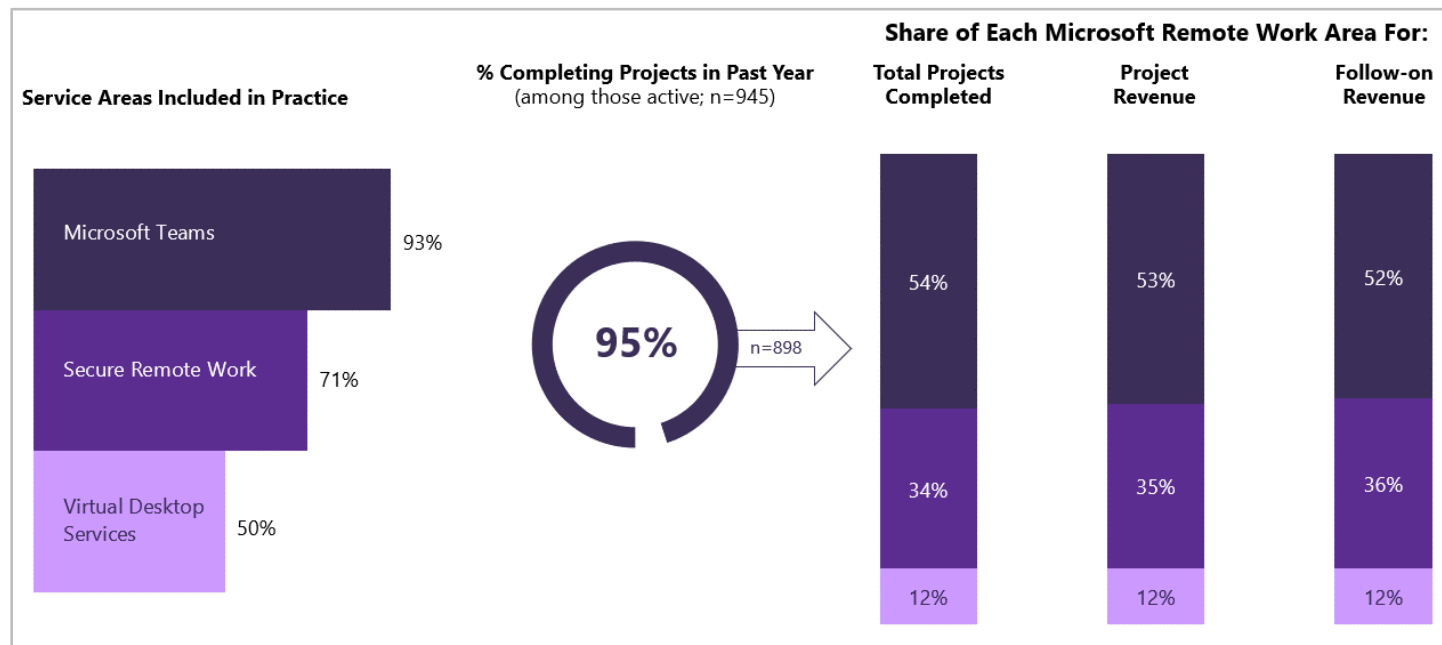
Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

RESOURCES
- Teams Partner Playbook
- Secure Remote Work resource center
- Navigating COVID-19 (microsoft.com)
- Windows Virtual Desktop | Microsoft Azure
- Enabling Remote Work technical guide
- Security, Compliance, and Identity accelerated workshop
- Secure Remote Work accelerated workshop
- Azure Immersion Workshop: Windows Virtual Desktop

Teams Meetings, Calling, and Devices

Microsoft Teams delivers immersive experiences that can help customers work more efficiently across their organization and stay connected wherever they are, on any device. Make the most of this opportunity by offering integrated messaging, calling, and meeting solutions built on Teams.

Teams is the hub for teamwork through the implementation of meetings, calling, and devices. There is an increasing opportunity to integrate meeting services, meeting rooms, and calling into a unified collaboration and communication solution for customers. In addition, by migrating existing Skype for Business accounts to Teams, partners can create significant additional opportunities for providing custom solutions.

Microsoft has published additional guidance in the Microsoft Teams Practice Development Playbook. (https://aka.ms/teamspracticeplaybook). This includes information on the value proposition, partner opportunity, practice building and go-to-market planning.

MEETINGS

Teams meetings deliver a rich, high-definition audio and video experience that enables users to interact and collaborate easily, regardless of the device or network. Whether it is one-on-one video calls on mobile and desktop devices, conference meetings held across worldwide boardrooms , or global live events delivered to thousands of people utilizing Teams Live Events, Teams Meetings provides a seamless, scalable, and secure experience for users. And, because Teams supports a range of best-in-class devices, partners can offer more immersive experiences to improve collaboration across teams.

CALLING

Deepen customer engagements and simplify communication and collaboration by adding calling (PSTN) capabilities in Office 365 and Microsoft Teams. Phone System, when paired with Calling Plan and/or Direct Routing, provides a rich cloud-based calling experience through Microsoft Teams for Office 365 users, globally.

DEVICES

For every work experience, space, and working style, there is a Microsoft Teams device to choose from. The Teams UI delivers seamless experiences across a variety of certified devices. In addition, Microsoft Teams Rooms brings a modern, easy-to-use, and consistent experience to meeting spaces with one-touch join and a rich set of artificial intelligence-enabled capabilities.

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The partner survey data shows that, within the past year, partners have seen an increase in projects for Microsoft Teams.

Areas Included as Part of Microsoft Teams Practice
Among those completing a Teams project in past year (n=824)

Any Part of Teams Practice

Meeting, calling, and devices	85%
Planning and deployment services	72%
Adoption and change management	66%
Teams custom solution development	30%

Largest Part of Teams Practice

Meeting, calling, and devices	42%
Planning and deployment services	32%
Adoption and change management	20%
Teams custom solution development	6%

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

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This chart provides further breakdown of the subsets of the services provided within the areas of planning and deployment services, and meeting, calling and devices services.

Planning and Deployment Services Offered
(n=596)

Service	Percentage
Core onboarding to Office 365/Microsoft 365	92%
Configuration and implementation of OneDrive for Business	84%
Configuration and implementation of Exchange Online	79%
Configuration and implementation of SharePoint Online	75%
Configuration and implementation of Microsoft Teams governance	70%
Skype for Business to Microsoft Teams transition	49%
Slack (or other teamwork collaboration tools) to Microsoft Teams migration	18%
None of the above	1%

Among those with planning and deployment as part of Microsoft Teams practice

Meeting, Calling, and Devices Services Offered
(n=702)

Service	Percentage
General Teams configuration	87%
Personal device configuration and management	66%
Remote work devices	65%
Audio conferencing	63%
Teams usage and activity reporting	50%
Meeting room device configuration and management	50%
Hardware installation and configuration	47%
Bandwidth planning and optimization	37%
None of the above	2%

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

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Secure Remote Work Services

Almost all practices will have an opportunity to deploy secure remote work capabilities. Some examples include identity and access management, workplace security, device deployment and management, mobile device management, and offering configuration and management services to help customers better secure and govern their Windows environements and emplloyee-owned devices, as well as surrounding workloads such as Microsoft 365, Teams, Exchange, and SharePoint.

But a practice does not end with planning and deployment. Deployment is an on-ramp to architecture and security planning and on-going management along with services such as migration from existing on-premises applications and business solutions to Microsoft 365.

IDENTITY AND ACCESS MANAGEMENT

Identity and access management services might provide Active Directory to Azure AD integration, multi-factor authentication (MFA), single sign-on (SSO), monitoring and managing conditional access activity and policies, and app proxy services for third party applications. Or providing support and configuration to companies for policies and configuration of self-service password reset (SSPR) for users. This benefits the customer by reducing overhead within the helpdesk for this task.

Partners can provide managed services to support the identity and access management infrastructure by providing support in creating roles and monitoring activities within the environment. Services can be performed for creating policies and assigning role-based access control to applications and services across cloud and on-premises platforms. Azure AD Identity Governance helps ensure that the right people have the right access to the right resources. These and related Azure AD and Enterprise Mobility + Security features help mitigate access risk by protecting, monitoring, and auditing access to critical assets while ensuring employee and business partner productivity.

WORKPLACE SECURITY

Workplace security services monitor and manage activity and vulnerabilities at the user and organizational level to avoid breaches in policy and regulatory compliance. Partners can provide subject matter expertise and best practices in creating a secure workplace environment. This includes projects to enable security and compliance standards and policies. Partners also provide managed services to continually monitor and remediate vulnerabilities and threats that may be found within the environment.

DEVICE DEPLOYMENT AND MANAGEMENT

Device deployment and management services provide hardware and profile deployment utilizing tools such as AutoPilot for consistent delivery to users. Partners can assist customers in the deployment of devices through automated capabilities and continue to manage them for updates and compliance.
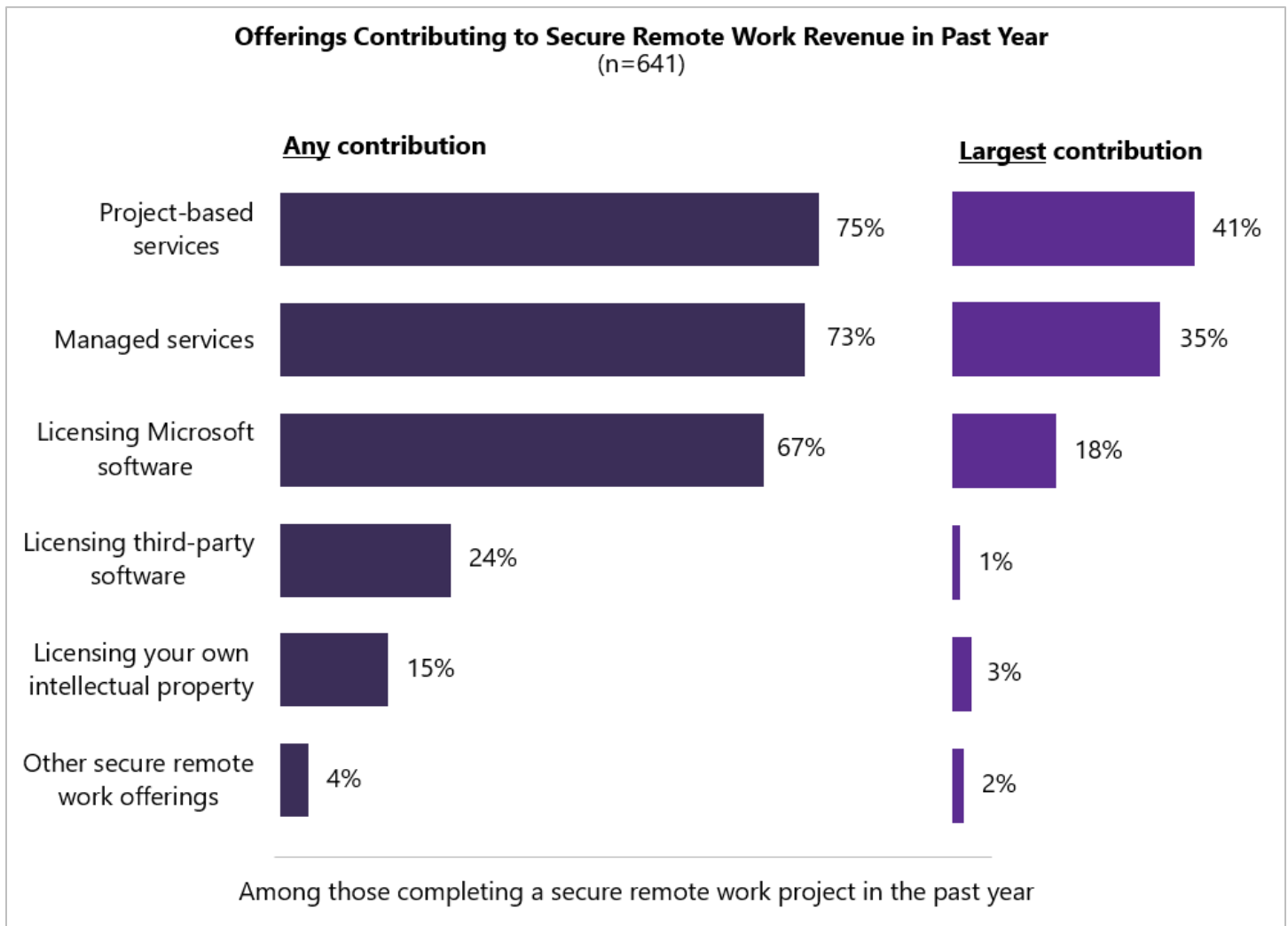
ENDPOINT MANAGEMENT

A mobile device management service might start with Endpoint Manager to monitor and maintain organizational device compliance with patch updates, security controls, and isolating sensitive applications when users want to use their own devices. Customers that allow their workers to perform remote work on both company-owned and personal devices introduce a number of potential challenges. Partners with the experience and best practices for monitoring and managing these devices provide companies with the benefit of increased security and decreased company overhead. Partners can provide the configuration for endpoint management as part of device deployment projects, and ensure that devices are properly enrolled and compliant.

These services all fit within the Microsoft 365 cross-workload offering of security, compliance, and modern desktop to deliver a secure remote workspace.

Providing these services can be a plausible evolution for partners that have provided software licensing, hardware support, and resold hardware.

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Partners have seen an increase in project, licensing, and managed services contributions over the past year.

Offerings Contributing to Secure Remote Work Revenue in Past Year
(n=641)

	Any contribution	Largest contribution
Project-based services	75%	41%
Managed services	73%	35%
Licensing Microsoft software	67%	18%
Licensing third-party software	24%	1%
Licensing your own intellectual property	15%	3%
Other secure remote work offerings	4%	2%

Among those completing a secure remote work project in the past year

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

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Windows Virtual Desktop

Customers may want to provide their end users with the familiarity and compatibility of Windows 10 devices for remote work while saving costs by using the same Windows licenses they already have. Windows Virtual Desktop allows users to access their corporate desktops on any device in a secure way. Partners that provide customers with hosting services such as virtual machines with managed services have a compelling option in providing a virtual desktop infrastructure.

Virtual desktop infrastructure, or VDI, is a prime option for customers that offer their employees a remote work environment, but also have high security needs. With VDI, all applications and data remain on the company's virtual infrastructure, with no files or data residing on the local computer, or host. Organizations in highly regulated verticals, such as healthcare, government, and financial services, can easily manage and maintain their control requirements with limited touch to the local host.

For partners already providing and hosting virtual desktop services, Microsoft has created several options to leverage the Azure infrastructure for virtual desktop services. For partners that have also supported hardware, building a practice for virtual desktop services can decrease management overhead by removing the physical device from the scope by allowing users to utilize personal devices. Utilizing a virtual desktop on a personal device protects company data by maintaining the device image at the server level. Rather than managing data protection at the personal device.

Virtual Desktop services allow a partner to support, monitor, and manage the customer's line-of-business applications and operating system from within the hosted Azure environment. Since the physical device is no longer holding data and applications locally, virtual desktop services become a highly secure option for remote work delivery. Partners can deploy these environments and then monitor and manage these services as an add-on to existing cloud infrastructure managed services. The three options that are offered by Microsoft within Azure are Windows Virtual Desktop (Microsoft Control Plane), Windows Virtual Desktop (Citrix Cloud on Azure), and Windows Virtual Desktop (VMware Horizon Cloud Service on Azure).

WINDOWS VIRTUAL DESKTOP (MICROSOFT CONTROL PLANE)

Windows Virtual Desktop deployments provide a full scalable Windows 10 virtual desktop infrastructure within Azure. Virtual machine host pools provide the compute power to the virtual desktop with Azure storage file share creating a file server environment. Microsoft 365 and Windows multi-session licensing allows companies to use the licenses they may currently have within the Windows Virtual Desktop environment without the need to purchase additional licenses.

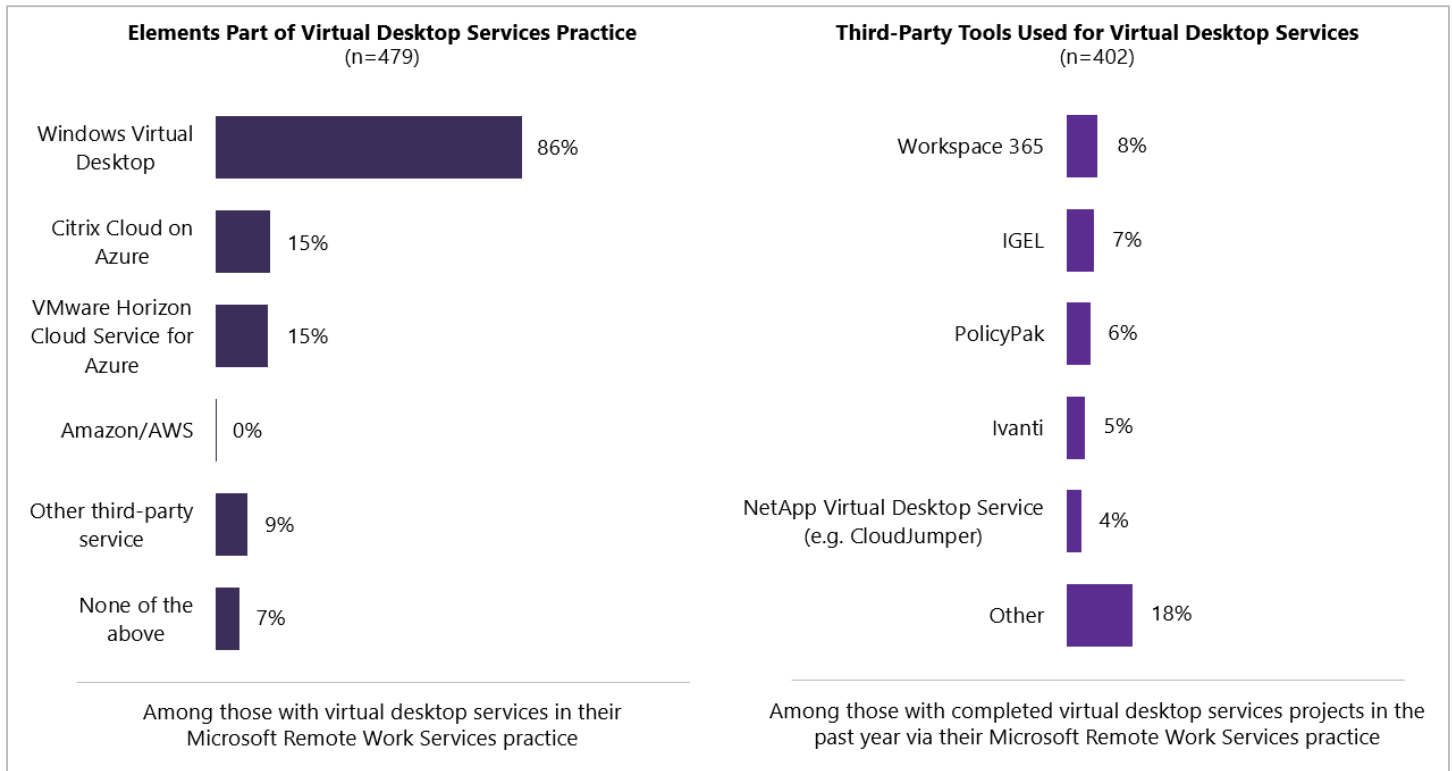### WINDOWS VIRTUAL DESKTOP (CITRIX CLOUD ON AZURE)

Companies may have already made an investment in Citrix Cloud to manage their virtual desktop infrastructure. Through Microsoft's partnership with Citrix, existing licenses can be utilized to manage their Windows Virtual Desktop solution while benefiting from the simplicity and familiarity of Citrix Cloud.

WINDOWS VIRTUAL DESKTOP (VMWARE HORIZON CLOUD ON AZURE)

The Azure VMware Solution can be used for migrating or extending a customer's current VMware architecture into the Azure cloud. The VMware Horizon Cloud on Azure allows customers to use their existing licenses to manage their Windows Virtual Desktop solution to simplify the delivery of on-premises and cloud virtual desktops and applications.

There are also use cases where there may be a requirement for legacy Remote Desktop Protocol (RDP) usage within a hosted environment. These options are mostly from a service management standpoint and are outside the scope of the current Windows Virtual Desktop service offering.

The survey results show that there was a significant increase in Windows Virtual Desktop practices over the past year.

Elements Part of Virtual Desktop Services Practice
(n=479)

Windows Virtual Desktop	86%
Citrix Cloud on Azure	15%
VMware Horizon Cloud Service for Azure	15%
Amazon/AWS	0%
Other third-party service	9%
None of the above	7%

Among those with virtual desktop services in their Microsoft Remote Work Services practice

Third-Party Tools Used for Virtual Desktop Services
(n=402)

Workspace 365	8%
IGEL	7%
PolicyPak	6%
Ivanti	5%
NetApp Virtual Desktop Service (e.g. CloudJumper)	4%
Other	18%

Among those with completed virtual desktop services projects in the past year via their Microsoft Remote Work Services practice

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

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Define and Design the Solution Offer

The next step is to create the solution offer or, ideally, multiple offers based on the solution or set of services.

With the increasing cost of customer acquisition and longer sales cycles, partners are moving ever larger portions of their businesses from project-based time and materials offers to a more predictable outcome-based model with steadier cash flow. This model leverages the resources, expertise and skills across projects and customers already in the pipeline and extends the customer lifetime value.

The goal is to shift the conversation from cost avoidance and savings to enabling and transforming the business. As a result, the lift-and-shift cloud project service offerings are fast becoming bundled combinations of Microsoft cloud services, ISV solutions, a partner's own IP, and one or more project, managed, adoption, consumption, or advisory services offered with a monthly subscription fee.

The offers will vary by partner type, but all are driving for higher levels of vertical or workflow specialization with offers that map to where the customers are in their cloud journey and tell an integrated transformation story that extends the customer lifetime value.

MAKING THE SHIFT

Partners that are successfully shifting customers to modern cloud solutions are performing the following tasks:

- Shift from time-and-materials pricing to monthly subscription pricing to maximize margins and cash flow
- Accelerate the go-live by starting with smaller projects that deliver value and build trust
- Use analytics to monitor and measure the ongoing customer investment to help them realize ROI sooner
- Target market segments and specialize by industry or workload (i.e. industry vertical or HPC application desktops)
- Identify 3 offers for every segment (basic, standard, premium) and make pricing transparent
- Determine subscription tier pricing (Per user/location/hour/transaction/device, usage, % of savings, etc.)
- Ascend the IP staircase toward full vertically integrated cloud solutions
- Place packaged offers on AppSource or Azure Marketplace

For more, watch [Nine Steps to Shift form Project Services to Subscription Revenue](#)

MAP OFFERS TO THE CUSTOMER CLOUD JOURNEY

Partners are not shifting from project services to more meaningful and profitable app modernization and managed services overnight. They may start by driving the need for cloud optimized versions of traditional on-premises managed services and helping customers build their vision and define the business benefits of moving to the cloud. This might be delivered as cloud advisory services with readiness assessments to compel prospects to share their long-range business objectives.

As the customer's trust builds, the next step might be to have the partner progress to performance monitoring and infrastructure management services. And as customers move more workloads to the cloud, it drives the need for multi-cloud or hybrid cloud management, identity and access management, and application integration and management services. Mapping and providing best practices in security and governance for companies can build long-term relationships with the partner.

And the last step in the customer cloud journey allows them to focus on innovation, using advanced analytics and insights as a service to drive more value from their cloud investment.
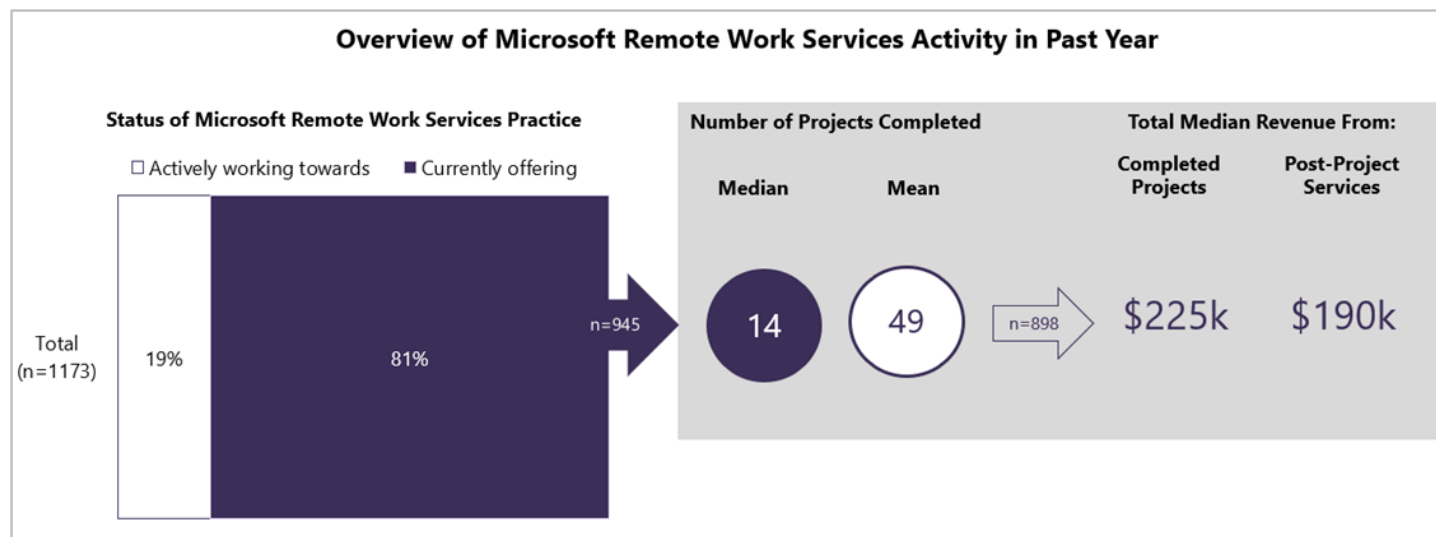
RESOURCES

- [The solution lifecycle](#)
- [Cloud Business Development Essentials learning path](#)
- [Solution Workspace (exclusive to MPN members)](#)

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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 is important to start with a vision of what the business will do, what problems it will solve, and how it will make money.

Project-based services are services to help customers design, configure, implement, or support a solution and are typically charged on a one-time or non-recurring revenue basis.

Overview of Microsoft Remote Work Services Activity in Past Year

Status of Microsoft Remote Work Services Practice

☐ Actively working towards   ■ Currently offering

Total (n=1173)   19%   81%

n=945

Number of Projects Completed

Median   Mean

14   49

n=898

Total Median Revenue From:

Completed Projects   Post-Project Services

$225k $190k

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Top project services

Below are some popular project-based services to consider for a secure remote work practice. Project services provide the client an initial view into the partner organization, and how they manage their processes and procedures of discovery, architecture, deployment, and change management. Most partners offer both project-based and managed services to clients to design build an environment that they will then hand off to the service delivery team to continue to manage.

MICROSOFT 365 AND MICROSOFT TEAMS DEPLOYMENT

Companies are moving more of their productivity and communication applications to SaaS-based services, such as Microsoft 365 and Teams and partners provide value with strong skills in migrating existing Exchange, SharePoint, and Skype servers to Microsoft 365 cloud services. Partners can build intellectual property by standardizing processes and procedures that can be used across multiple clients needing efficient and effective migration services.

IDENTITY AND ACCESS MANAGEMENT AND SECURITY DEPLOYMENT

As companies migrate to cloud native services, they will require expertise in how to provide a seamless identity and access experience for their users. Within the Microsoft 365 and Azure environment, this requires use of Azure Active Directory. However, these companies will most likely require need their existing Active Directory Domain Service (AD DS) to remain intact to access legacy applications.

Partners should understand the requirements and the deployment capabilities of Azure AD Connect to properly synchronize an existing AD DS infrastructure to Azure AD, it often becomes an important aspect to any remote work and infrastructure deployment. In addition, should understand how to deploy and implement the security capabilities of Azure Active Directory, utilizing MFA and strong authentication, Premium P1 and P2 licensing features, and Microsoft Defender for Identity.

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DEVICE RESALE AND DEPLOYMENT

Partners creating a remote work practice may also sell and deploy devices as another value add to clients.

If the partner determines that they do not want to provide the resale of devices, they still can provide deployment services. Deployment of devices on a wide scale for a large company could require significant hours from a stretched IT staff. So partners with a strong practice and process for deploying devices with Microsoft Autopilot and Endpoint Management tools provide value by accelerating the time to deploy these devices and make them available to users.

VIRTUAL DESKTOP DEPLOYMENT

As stated in the previous section, virtual desktop infrastructure, or VDI, is a prime option for companies that offer their employees a remote work environment, but also have high security needs.

Since many partners may already have or be looking at the Cloud Infrastructure Playbook (https://aka.ms/cloudinfraplaybook), they have an opportunity to provide their deployment expertise to stand up a VDI environment. Many partners that offer Windows Virtual Desktop provide a proof-of-concept option or departmental deployment to start, and then deploy the remainder as requested. The elasticity of the Azure infrastructure allows this without additional hardware investment to support the expanded Windows Virtual Desktop workload.
The ability to expand the Windows Virtual Desktop footprint without expanding capital hardware investment should be an intriguing option to partners that maintain and offer their own hosted infrastructure to clients. They can scale out quickly to meet a client's needs without purchasing additional hardware for their own datacenter.

MICROSOFT TEAMS CALLING MIGRATION

Building a practice for migrating current Skype or phone systems to Microsoft Teams calling plans requires a different skillset. Partners that do have the expertise in evaluating and reviewing call quality and bandwidth for voice traffic, and setting up calling features for companies, can build a niche practice that may benefit other partners, as well. More information on creating a practice on Teams can be found in the Microsoft Teams Playbook (https://aka.ms/teamspracticeplaybook).

EDUCATION AND TRAINING

Providing a level of end user education and training on how a remote work environment will make customers more efficient could bring significant value. In addition, providing companies with security awareness training and best practices for avoiding inbound password and phishing attacks can be extremely valuable.
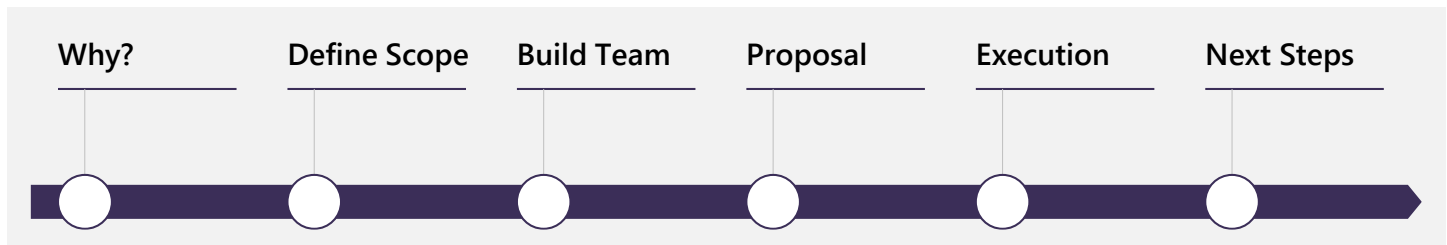
CHANGE MANAGEMENT

Being able to manage adoption of changes in a customer's environment is very important. If a user does not understand what is going to be different and why it needs to happen, they will not adapt to and adopt the new environment. Managing this change based on prior experience provides a high level of value to the client.

Plan a proof of concept

One of the key services in a project service's arsenal is the proof of concept (PoC).

PROOF OF CONCEPT HIGH LEVEL FLOW

| Why? | Define Scope | Build Team | Proposal | Execution | Next Steps |

Why Perform a Proof of Concept?

Proofs of concept (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 a 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 a 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

Identify the technical resources needed for the PoC, including the technical implementation team and project management for tracking the progress of the engagement. Ensure all members of the team and the customer's technical team (if participating) are clear on responsibilities. During the PoC it is important that the initial design follows best practices and is designed for production (scaled down) from the beginning. Ensure communication to all stakeholders on a regular basis to drive awareness of the progress of the PoC.

Define Scope

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

- Identify workloads and features to demonstrate.
- Determine what needs to be proven 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.

Microsoft

Understanding Managed Services

With managed services, partners help customers on a regular basis by offering white-glove services. Managed service provider offerings can span from planning and enablement to day-to-day operations and support for secure remote work services.

Managed services are not a new business model. For more than 20 years, large companies have relied on service providers to manage their IT assets. Whether they are called 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. Secure remote work, however, requires a new method of management because of its focus on identity and access, devices and communications, and virtual desktop services.

For CIOs, the secure remote work represents a paradigm shift in the way they think about embracing IT. Secure remote work has changed the way that workforces are accessing information. Device and data proliferation mean customers can do much more with their IT assets, with the cloud providing the computing resources to do so. Because of the 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 shift 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	ENABLEMENT	SUPPORT OPERATIONS
• Assess a customer's IT environment and determine the data and apps that are viable opportunities for device migration • Offer customers a roadmap for secure remote work adoption and associated values • Provide a TCO and ROI analysis for moving their applications to Azure to support secure remote work	• Migrate workloads to Microsoft 365, Microsoft Teams, and Windows Virtual Desktop • Re-platform applications to run in the cloud • Optimize workloads and devices running in hybrid and public cloud environments • Help customers with staging, testing, and validation before moving their production environments to secure remote work configurations	• Offer support while delivering on SLAs and uptime guarantees • Operate and monitor a customer's Azure and hybrid cloud environments to support secure remote work • Provide customers with governance over their cloud usage by managing their billing and Microsoft 365 and Azure capacity planning

Microsoft

Top remote work managed services

Partners can extend the lifetime value of their customers with higher-margin managed service offerings that are purchased on a subscription basis. Managed services for a remote work environment may include:

DESKTOP AS A SERVICE – VIRTUAL DESKTOP MANAGEMENT

Clients that migrate to a virtual desktop environment most likely do not have the personnel or skillset to monitor, manage, and maintain these infrastructures. Whether it is a Windows Virtual Desktop deployment via Microsoft control plane or through Citrix Cloud on Azure or VMware Horizon Cloud on Azure, a high level of understanding regarding the infrastructure, end-user experience, and application access can be bundled as managed services within the practice portfolio.

DEVICE MANAGEMENT

Whether an organization is migrating its remote workforce to a virtual desktop environment or they are providing devices to the users, managing those devices is necessary. This could mean simply providing access to the Azure portal to help them administer Windows Virtual Desktop, or full endpoint management with Microsoft Defender and Microsoft Endpoint Management with update monitoring and management. Users with bring-your-own-device (BYOD) connections and remote access use become a particular challenge to organizations.

MICROSOFT 365 AND MICROSOFT TEAMS MANAGEMENT

Once the client has been migrated to a Microsoft 365 subscription and is utilizing Microsoft Teams for collaboration and communication, the partner has an opportunity for continuous monitoring and management of the Microsoft 365 cloud services. This could include monitoring activity and security controls, managing policies for access and cloud applications, and providing governance and compliance services for data and users within the environment.

MICROSOFT TEAMS CALLING

Some organizations use Microsoft Teams for more than just collaboration of files, chat services, and conference calling. Many have begun to replace traditional phone systems with Microsoft Teams calling plans. Most organizations that have moved from a traditional phone system, do not have the skillset or understanding of the differences within bandwidth requirements and performance for voice over IP calling. Partners that can not only configure and migrate, but also provide on-going management and monitoring of call quality can provide a value to clients.

IDENTITY AND ACCESS MANAGEMENT

As organizations adopt more cloud services, how users authenticate and access resources changes. Knowing how to protect access to sensitive resources and assign proper authorization to users within the organization is a challenge. Azure Active Directory can be utilized in conjunction with Azure AD Connect to provide a fully integrated hybrid identity structure with on-premises Active Directory Domain Services. Partners with a strong understanding and documented best practices for a comprehensive IAM approach provide a great customer benefit. In addition, being able to monitor and manage login activity and identify anomalous activity is not necessarily something that an organization is prepared to control. This may include evaluating the current Active Directory Domain Services structure and readjusting and supporting these changes.

WORKPLACE SECURITY

As more and more services move off premises, information security becomes paramount. Partners that provide migration services for user devices, virtual desktop, and Microsoft 365 should have a workplace security practice as part of their remote work solution. This would include services such as information protection, Data Loss Protection (DLP), and insider risk management, among others. They can use Microsoft services, such as Security Center, Information Protection, and the Service Trust Portal, to provide clients with governance, compliance management, and security controls monitoring.

Microsoft

Support as a managed service

One of the most important functions of a managed service practice is supporting customers once their applications and data are firmly in the cloud and being accessed within a secure remote work environment.

No matter how well a secure remote work environment is planned, provisioned, operated, or monitored, problems will arise. It is the job of a Managed Service Provider (MSP) to deal with outages, breaches, inefficiencies, and disaster scenarios. MSPs need to consider the level of support that makes sense in terms of resources and revenue, as well as 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 do not know 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:** 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 Hours:** Many customers need the ability for 24/7 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:** Engineering resources that already know the 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.
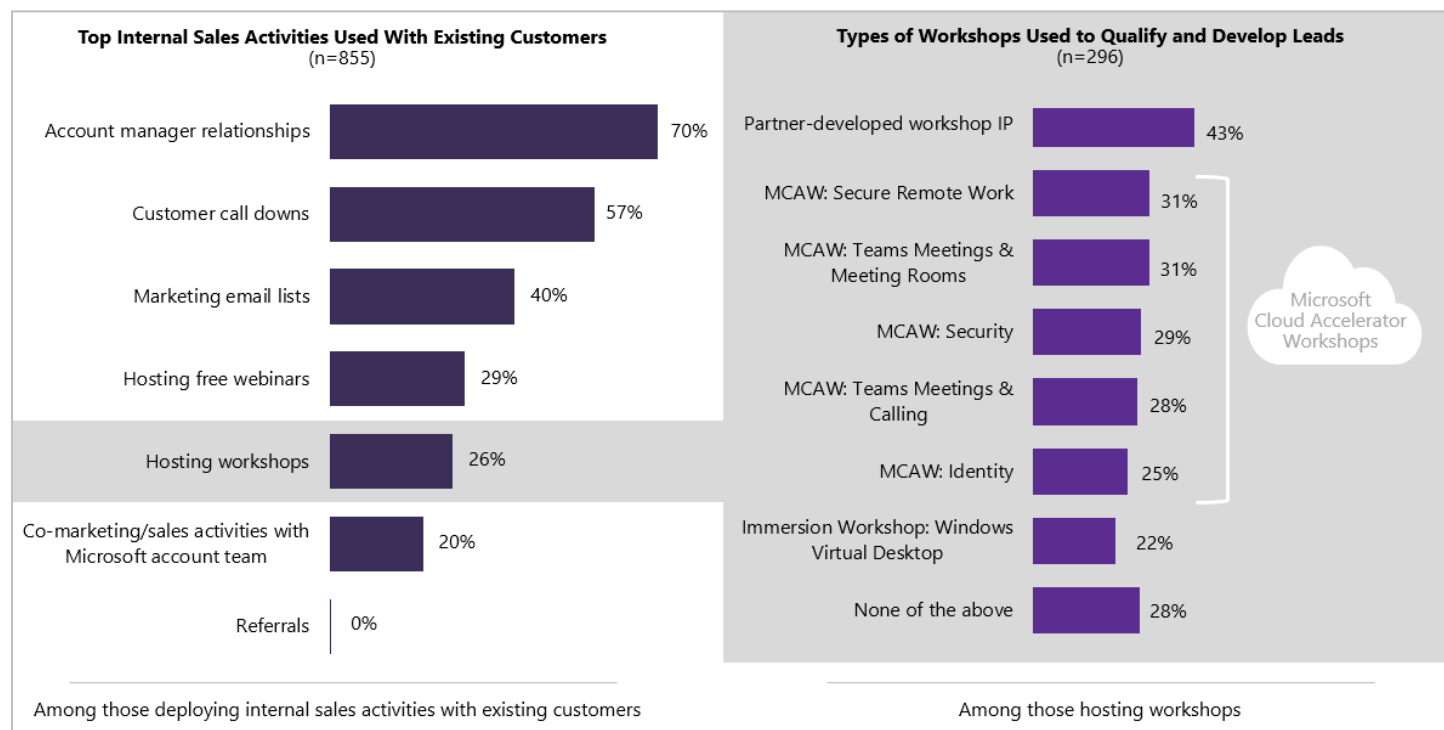
Adding managed support services to offerings increases their value and profitability. Learn more in this article: [Four ways owning the customer life cycle makes you more profitable](#).

Microsoft

Understanding Intellectual Property

The idea of coming up with "productized" IP may sound daunting. But many partners found that they already had IP, it just was not packaged that way. A custom project that was successful for one client, may be adapted as an IP solution if more customers would benefit from solving the same problem.

The transition of users to a secure remote work environment poses challenges in adoption and change management. The ability for a partner to provide resources to the user environment is key to successful adoption and the on-going use of secure remote work and tools.

The chart below provides additional partner survey data on how partners have utilized various areas of their own intellectual property to provide customers with support through workshops and feedback for proper user adoption.

Top Internal Sales Activities Used With Existing Customers
(n=855)

Activity	Percentage
Account manager relationships	70%
Customer call downs	57%
Marketing email lists	40%
Hosting free webinars	29%
Hosting workshops	26%
Co-marketing/sales activities with Microsoft account team	20%
Referrals	0%

Among those deploying internal sales activities with existing customers

Types of Workshops Used to Qualify and Develop Leads
(n=296)

Workshop	Percentage
Partner-developed workshop IP	43%
MCAW: Secure Remote Work	31%
MCAW: Teams Meetings & Meeting Rooms	31%
MCAW: Security	29%
MCAW: Teams Meetings & Calling	28%
MCAW: Identity	25%
Immersion Workshop: Windows Virtual Desktop	22%
None of the above	28%

Microsoft Cloud Accelerator Workshops

Among those hosting workshops

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Microsoft

The importance of developing intellectual property

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

DEFINE THE SOLUTION

When partners were asked how they determined what IP to build, the answer was largely the same. 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. They bring together sales, marketing, technical, and delivery teams to brainstorm and define what their solution will look like. For secure remote work, a key area of IP is within the consultative services of adoption and change management for the users.

DETERMINE WHAT WILL DIFFERENTIATE THE SOLUTION FROM OTHERS IN THE MARKET

It is important that partners think about their differentiation strategy. How is their solution uniquely better than similar solutions in the industry?

MARKET THE SOLUTION

As IP becomes a differentiator, it can be packaged, marketed, and sold to customers or other partners as part of their solutions. Partners can also form a [co-sell relationship with Microsoft](#) to extend their reach and drive shared business success.

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 to maintain the IP rights to the solutions.

ESTABLISH A RECURRING REVENUE MODEL

The beauty of deploying IP in the cloud is that partners can light up the recurring revenue model, which will have a positive impact on the valuation of their business and even help cash flows in the future. Microsoft is helping partners that build repeatable solutions to promote their services via commercial marketplaces, such as [AppSource](#), which makes their solution available to 100 million users worldwide.

CONSIDER A CHANNEL STRATEGY

One of the advantages of productizing IP is that it opens to sell the solution through channel partners. As a partner practice scales, it may want to set up a partner program to ensure partners are adequately supported and delivering the agreed upon quality of service.

CONSIDER A SOURCING STRATEGY

To create IP, it is not necessary for partners to have their own development organization. There are thousands of companies in the world that do software development as a service. But remember to secure rights to any IP in this case.

SELLING AND SUPPORTING IP

As with the managed service model, selling IP requires a support staff, but it is different than typical service deployment in that support becomes less costly as the IP service scales. Ensure that existing contracts can support this move and that a software licensing agreement is created and amended to contracts.

Microsoft

Top intellectual property services

When thinking about intellectual property for secure remote work, the value that a partner brings to a company is the ability to assist them with the adoption of new technologies and policies. It may be difficult for an employee to adapt and adopt new technologies but having them do so protects the organization. Below are some ways that find differentiation within people, process, and technology for value added intellectual property services.

HIGH VALUE CONSULTING

Providing a company with people that understand how to move organizations to a remote work environment and determining the best path to begin that migration while avoiding disruption to the business is extremely important. The partner should be able to architect the migration in a manner that provides value and return on investment to the organization. This includes adoption and change management services to users.

REPEATABLE CAPABILITIES

The partner should have repeatable capabilities and consistency in deployments that provide a level of confidence to the organization that they have chosen wisely. A partner should have a documented process with referenceable accounts that show how their capabilities will provide value and minimize disruption to the organization.

ASSESSMENT TOOLS AND DEPLOYMENT SCRIPTS

To differentiate from competitors and provide additional value, partners should think about how to develop automated assessment tools and deployment scripts that allow them to complete repeatable tasks and orchestrate deployments. Having these tools will show additional value to clients and differentiate themselves from other partners. Many partners have developed their own IP for assessing the user environment for their level of adoption.

DOCUMENTATION AND TRAINING

Providing full documentation, end user education, training workshops, and user guides for continued reinforcement of the new environment will allow the client to put processes and procedures in place to streamline adoption. Recorded training videos and workshops can become a part of the client's new hire orientation so that users understand the technology and why it is important. This could include secure remote work workshops and providing plans for adoption.

Microsoft

Define Vertical Offerings

Research shows that a key best practice among top performing partners is to target industries or verticals as a part of their go-to-market strategy. The following are examples of these types of specialization:
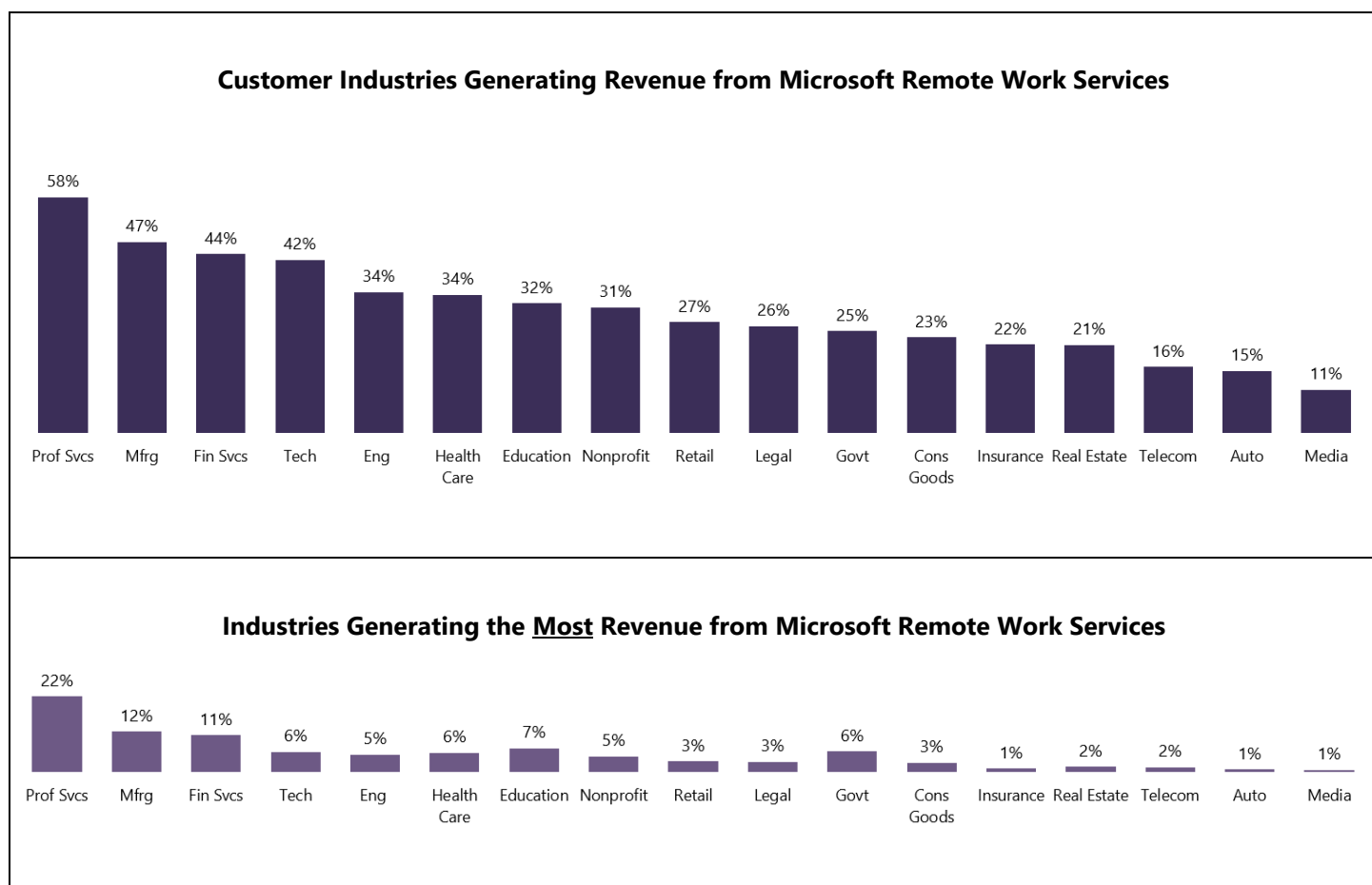
- Vertical specialization: manufacturing, financial services, retail, education, healthcare, government
- Functional process specialization: accounting, human resources, marketing campaign management
- Technology specialization: systems management, analytics, company resource planning

If there is lack of differentiation in the market, then price becomes the primary differentiator. This can erode margins and trap partners in a business they cannot afford to invest in as prices fall.

Once a primary vertical or set of verticals have been identified, it will be important to establish the practice as an expert in these selected areas. This can be achieved through the hiring of subject matter experts, attendance and participation in industry events and online forums, blogging about the chosen topic, sharing customers stories oriented to each vertical and creating content that speaks to the specific needs of customers in each vertical.

Partners also focus on a specific technology and become known as early adopters and technology leaders. But the real value comes from IP and 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.

CUSTOMER INDUSTRIES GENERATING REVENUE (n=1173)

Customer Industries Generating Revenue from Microsoft Remote Work Services

Prof Svcs	Mfrg	Fin Svcs	Tech	Eng	Health Care	Education	Nonprofit	Retail	Legal	Govt	Cons Goods	Insurance	Real Estate	Telecom	Auto	Media
58%	47%	44%	42%	34%	34%	32%	31%	27%	26%	25%	23%	22%	21%	16%	15%	11%

Industries Generating the <u>Most</u> Revenue from Microsoft Remote Work Services

Prof Svcs	Mfrg	Fin Svcs	Tech	Eng	Health Care	Education	Nonprofit	Retail	Legal	Govt	Cons Goods	Insurance	Real Estate	Telecom	Auto	Media
22%	12%	11%	6%	5%	6%	7%	5%	3%	3%	6%	3%	1%	2%	2%	1%	1%

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Microsoft

The research with partners suggests mastering one specialization before adding additional ones. 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 the focus. Partners have shown benefit from having a strict focus on one key solution and growing by expanding one vertical at a time.

To learn more about the advantages of a vertical industry strategy, view the [Ten Steps to Getting Started on an Industry Focused Strategy](#) webinar.

Microsoft

Product Licensing and Strategy Options

Ways to Purchase Microsoft Services

ENTERPRISE AGREEMENTS

One option is to purchase a 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 a company agreement for Azure usage or adding Azure to an existing EA, visit: https://www.microsoft.com/licensing/licensing-programs/enterprise.

PAY AS-YOU-GO AND TRIAL ACCOUNTS

Another option is to create a free trial with Azure and allow it to bill directly 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 a credit card. Start a free trial by browsing http://azure.microsoft.com and clicking the free trial link. Trial subscriptions are also available for Microsoft 365 and Teams. In addition, Azure Active Directory Premium P2 licensing, and Defender licenses can also be activated for a trial period to view and test the features for a group of users.

OPEN LICENSE

Azure can also be purchased through a reseller using the Microsoft Open License Program. Open Value is the recommended program for small to midsize organizations with five or more desktop PCs who want to simplify license management, manage software costs, and get better control over their investment. It also includes Software Assurance, providing access to benefits such as training, deployment planning, software upgrades, and product support. For more information on the Microsoft Open Licensing program, visit: https://www.microsoft.com/licensing/licensing-programs/open-license.aspx.

Microsoft

Microsoft Programs

MICROSOFT CLOUD ACCELERATOR PROGRAM

Microsoft Cloud Accelerators provide a set of pre-made workshops that enable partners to accelerate the customer journey, including a rapid deployment program to address customers' current needs for business continuity. Leveraging these accelerators enables partners to facilitate more productive customer conversations, help customers envision the possibilities, and more efficiently realize customer opportunities. http://aka.ms/cloudaccelerators

SECURE WORK FROM ANYWHERE WORKSHOP

The Secure Work from Anywhere Workshop was released in October 2020 as an evolution of the secure remote work conversation. This workshop is designed to introduce the value of Microsoft 365 to new customers, highlighting scenarios that enable their employees to be more productive and securely work from anywhere. The Secure Work from Anywhere Workshop is intended to be delivered as two-day engagement that includes:

- Understanding customer objectives and envisioning priority scenarios to enable secure work from anywhere
- Developing a plan for implementation of secure work from anywhere, including Microsoft Teams, securing mobile access, and foundational identity and security
- Defining activation plans, along with risks and mitigations, for a successful deployment and adoption plan

FASTTRACK

FastTrack helps customers deploy Microsoft cloud solutions. Customers with eligible subscriptions to Microsoft 365, Azure, or Dynamics 365 can use FastTrack at no additional cost for the life of their subscription. https://www.microsoft.com/en-us/fasttrack

AMP

Azure Migration Program (AMP) is a program that can be used by Microsoft partners to migrate customers to Azure, Windows Virtual Desktop, and other workloads. AMP is enabled for partners that do Windows Virtual Desktop Native, Citrix Cloud on Azure, and VMware Horizon Cloud on Azure deployments. AMP is the lead partner offer for Windows Virtual Desktop, and the Advanced Specialization for Windows Virtual Desktop is now launched. Learn more at https://www.microsoft.com/azure/partners/amp

Azure Immersion Workshop for Windows Virtual Desktop

This Windows Virtual Desktop workshop (Azure Immersion Workshop: Windows Virtual Desktop (microsoft.com) is a one-day hands-on workshop for IT Pros (TDM, IT implementor). It provides participants with both the knowledge and skills to accelerate designing and implementing a virtual desktop infrastructure on Azure. The workshop covers product overview, design and architecture, best practices, deployment and management plane options, user profiles and data storage, along with third party tools and licensing considerations. The hands-on labs will enable participants to create their first Windows Virtual Desktop architecture, Active Directory groups, assign users, create a master image. and then connect to a virtual desktop while also delving into operationalizing the virtual desktop infrastructure with monitoring, scaling, and image management. Partners can onboard as a delivery partner by achieving their Windows Virtual Desktop Advanced Specialization and then contacting aiwwvd@microsoft.com.

Advanced Specialization – Windows Virtual Desktop

The Windows Virtual Desktop advanced specialization allows partners with an active Gold Cloud Platform competency to further differentiate, validate their capabilities, and build stronger connections with customers. Partners who meet the comprehensive requirements receive a customer-facing label they can display on their business profile in the Microsoft solution provider finder, gain access to specific Microsoft go-to-market programs, are prioritized in customer searches to drive new business, and can generate a certified letter from Microsoft that verifies the advanced specialization that they have earned. Advanced Specialization (microsoft.com)

Microsoft

Calculate Azure practice costs

A practice relies on Azure services to deliver customer success, so understanding the Azure-related expenses incurred in delivering a customer solution is critical.

Using the Azure Pricing Calculator to estimate Azure costs, build an estimate online and then export it to Excel for further refinement and analysis. This tool provides the retail rates (also known as the pay-as-you-go option) for the Azure services, so treat it like the high end of any consumption estimate.

Become familiar with discounted pricing and Azure credits:

- **Graduated Pricing:** Services like Azure Blob storage have tiered pricing based upon the volume used.
- **Company Agreement:** By making a three-year monetary commitment, Azure services are available at a discount off retail rates. To learn more, see Company 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 that are used elastically versus items that have a fixed monthly cost. Significant savings can be achieved via elastic use of resources because they can be turned off (or paused) when they are not in use.

For example:

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

If it is unclear how much of a given resource will be used, consider building a scaled-down proof-of-concept to get an initial estimate.

COST MANAGEMENT

Manage cloud spend with transparency and accuracy.

Cost Management licensed by Cloudyn, a Microsoft subsidiary, helps make the most of Azure and other clouds by providing the tools to monitor, allocate, and optimize cloud costs and accelerate future investment with confidence.

- Monitor and visualize cloud usage and costs
- Gain rich operational and financial insights
- Improve organizational accountability
- Optimize cloud efficiency

Also check out the Windows Virtual Desktop Pricing Calculator: https://azure.microsoft.com/en-us/pricing/calculator/

Microsoft

Define a Pricing Strategy

Pricing is very dependent upon the types of solutions being offered, and standard pricing practices are still evolving. In general, both flat rate and consumption- or subscription-based pricing models are the most predominant.

PROJECT SERVICES

Project services are often billed using the time and materials methodology and based on fixed hourly pricing of resources. For example, a partner may have a Project Manager, Developer, and Architect working on the same project and each earning a different hourly rate. Many partners are beginning to adopt a "bucket of hours" approach to pricing low-code project services. Often apps can quickly be developed, and this approach allows for continuous engagement with customers without having to create new agreements and invoices. This approach is ideal for 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 for customers, where each sale encourages the next sale within the customer organization. It fosters product adoption and proliferation.

MANAGED SERVICES

Few customers have the time, resources, or the capabilities and staff required to monitor every aspect of their solution and deployment. Customers are increasingly searching for and demanding additional strategic support services that are consumed on a subscription basis. They want to ensure their business application solutions will continue to deliver the value and performance that compelled them to implement them in the first place. When a customer accepts a Managed Service offer, they are then able to onboard resources for Microsoft 365, Microsoft Teams, and Azure delegated resource management. Consider browsing managed services listed in the Commercial Marketplace to ensure services are competitively priced.

INTELLECTUAL PROPERTY

The most common approach to obtaining an income stream based on intellectual property is by providing a subscription fee service to access the benefits of a solution. The subscription can be charged on a per-user, per-app, per-request, or some type of flat subscription fee. Proprietary Automations, Virtual Assistants, AI models, and Power Apps are great candidates for the subscription model. One downside to this is that customers are not tied to the service, and they can easily switch out to a competitor service. It is imperative to ensure customer satisfaction, quality software, and quality data. This model works well for companies that can accept not having upfront revenue and can accept a variable income. This is often the case when companies are switching from predominantly selling products to selling an equivalent service. Enhancement and supporting labor is a variable cost driven by demand for the service.

For more detail on pricing strategies, see the Pricing Guide found here: https://partner.microsoft.com/solutions/build-a-practice.

Microsoft

Maintaining the solution

In addition to providing the customer support, maintenance and on-going feature requests should become a lucrative part of the practice.
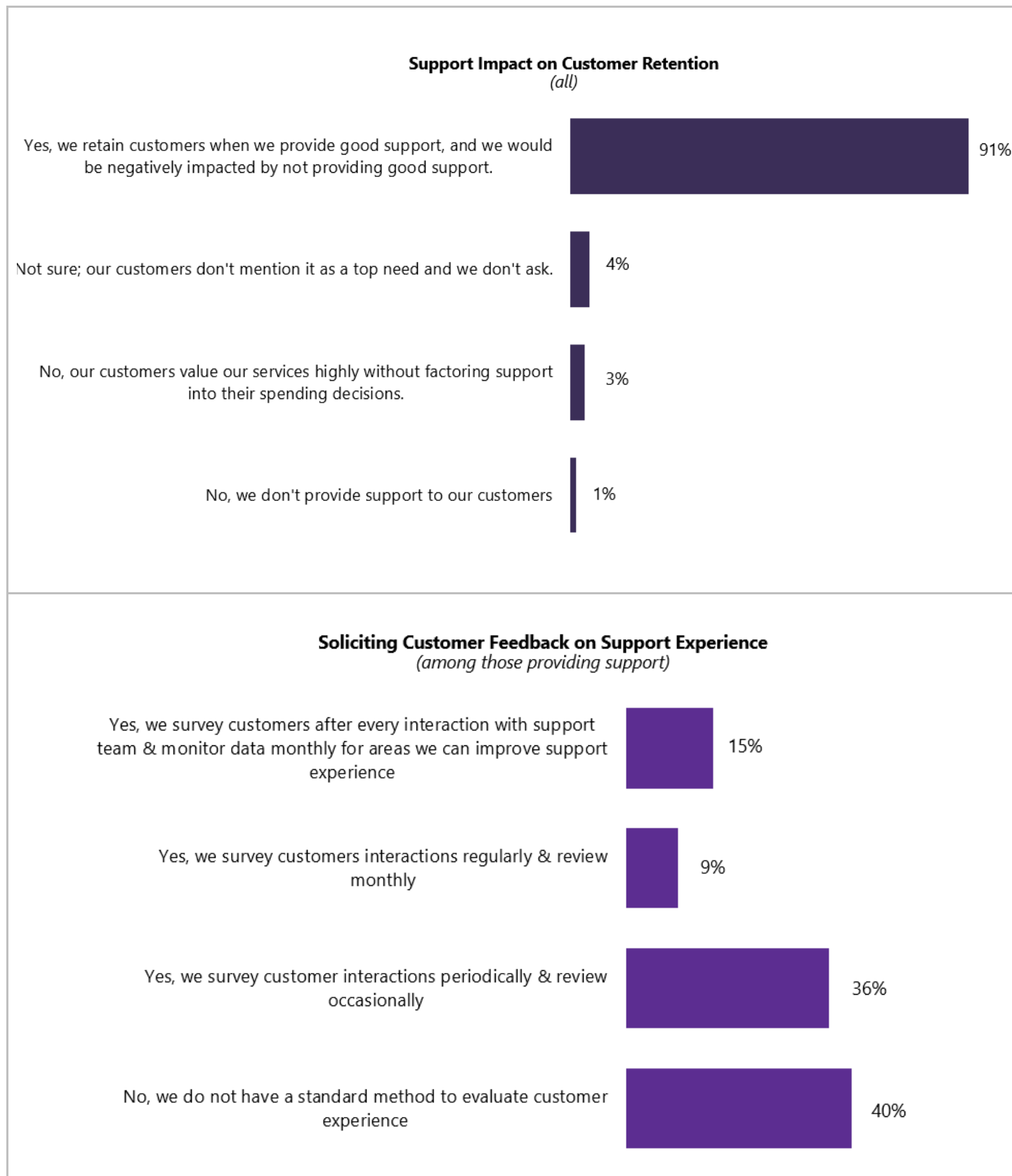
MAINTENANCE CONTRACTS

Before any effort with the customer begins, include a maintenance contract, which defines how issues discovered within the application get fixed and how the application is kept up to date.

There are two approaches a maintenance contract can take:

- **Recurring maintenance fee:** In this approach, a maintenance contract is written to provide up to a certain number of hours of maintenance for a recurring price. For example, it might cost the customer $4,000 per month for up to 40 hours of maintenance each month. This maintenance would be used to address either break/fix issues or could be applied to new feature requests.
- **Time and materials fee:** Alternately, the customer could have the option of paying for break/fix and new feature work on a time and materials basis. This creates new projects for each set of new work items which are billed accordingly. Another approach to a time and materials fee could also be a "block of time" retainer approach, where a company purchases a set number of hours to utilize on an "as needed" basis.

In either situation, the goal is to keep a satisfied customer using the solution and both approaches provide additional revenue. However, a recurring fee model provides an increased likelihood that the fee is paid but not always fully consumed by maintenance efforts - thus increasing practice profits.

When maintenance contracts expire, companies face the risk of disruptions to their critical application services. Therefore, they are incented to ensure they receive timely notification of any pending contract expirations and respond to them accordingly. Ideally, this leads to timely renewals and perpetual fees for the practice.

Microsoft

CUSTOMER SUPPORT IMPORTANCE AND FEEDBACK FORMALIZATION (n=1155)

Support Impact on Customer Retention
(all)

Yes, we retain customers when we provide good support, and we would be negatively impacted by not providing good support.	91%
Not sure; our customers don't mention it as a top need and we don't ask.	4%
No, our customers value our services highly without factoring support into their spending decisions.	3%
No, we don't provide support to our customers	1%

Soliciting Customer Feedback on Support Experience
(among those providing support)

Yes, we survey customers after every interaction with support team & monitor data monthly for areas we can improve support experience	15%
Yes, we survey customers interactions regularly & review monthly	9%
Yes, we survey customer interactions periodically & review occasionally	36%
No, we do not have a standard method to evaluate customer experience	40%

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Microsoft

Pre-Sales, Post-Sales, and Support

Define the technical effort required before the sale (pre-sales), after the sale (post-sales), and in support of the sale.

PRE-SALES

- Discuss the customer requirements and address their objections
- Develop technical pitch decks (leverage the Cloud Adoption Framework)
- Provide assessments to determine secure remote work, security and IAM, and workload readiness to move to cloud services such as Microsoft 365, Teams, Microsoft Defender, Windows Virtual Desktop, and Azure
- Deliver a technical demo, such as the Windows Virtual Desktop Guided Simulation to inspire confidence by demonstrating feasibility
- Become a delivery partner and invite customers to workshops such as Secure Work from Anywhere and Azure Immersion Workshop for Windows Virtual Desktop

POST SALES

- 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

For guidance with sales efforts, consider the learning paths available https://aka.ms/trainingcenter in the Microsoft Partner Network Training Center.

SUPPORT

Define the customer support program and processes. This includes:

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

See the section Supporting your Customers for more information on available resources and using Partner Advisory Hours.

SECURE REMOTE WORK

Top Methods of Generating Leads for Remote Work Business
(n=1173)

Method	Percentage
Internal sales activities (existing)	73%
Internal sales activities (new)	63%
Your website	48%
Digital marketing - social media ads	30%
Digital marketing - search engine ads	24%
Partner channel	26%
Hosting workshops	18%
Microsoft field sales team	12%
Word of mouth	1%
Referrals	1%
Business to business networking	0%
Other	7%
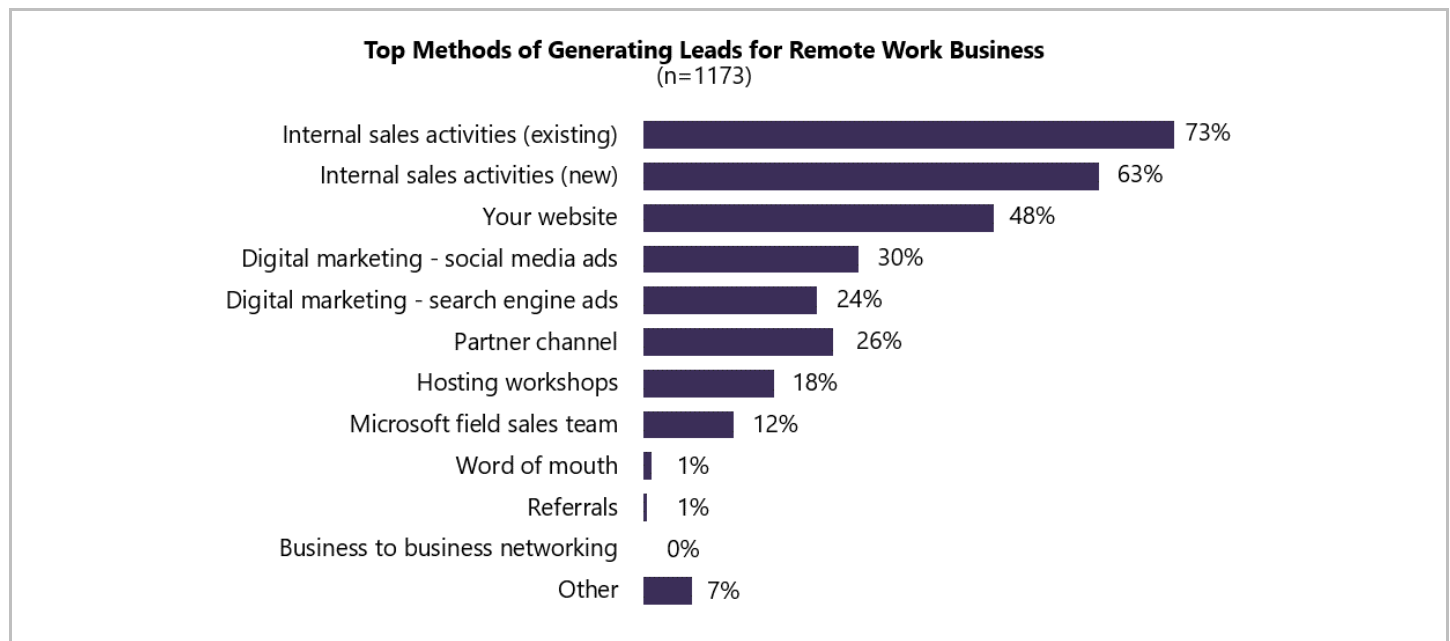
Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Agile as a presales tool

For secure remote work projects, agile methodologies are not only a means for executing project delivery, but also a pre-sales tool. Consider taking the following approach:

- Qualify the customer to ensure there is budget, interest, and involvement of the appropriate stakeholders. This is not something to do for every lead as it incurs costs. Focus on potential customers who are further along in their purchasing evaluation.

- For qualified customers, consider performing rapid prototyping envision with the customer what the results could be.

- Take an agile approach to developing the prototype. Leverage short sprints during prototype development by implementing the minimal set of requirements that will help clarify the vision with the customer, collecting feedback from the customer and refining the prototype.

- The tangible outcome of a prototype or proof-of-concept demonstrates an understanding of their requirements.

- The ability to quickly deliver tangible results builds trust in the ability to execute. It is a great opportunity to highlight the practice's unique capabilities and identify potential follow-on projects to assist the customer.

- The process of iterating on the prototype with the customer is a great way for the customer to experience what it would be like to work on the larger project.

- Once a customer has the sense of a tangible, working prototype in hand, it becomes more difficult for them to select competitors who have only provided written proposals.

Microsoft

Sales Compensation Planning

Compensation for sales executives is an area all partners grapple with. Our research revealed three core principles of sales compensation.

REWARDING SALES ACTION

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. Consider the effort put in when setting up a compensation model. Reward the right behavior that gets the result. Do not over-compensate for routine activities that require less effort and expertise. 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. Salespeople are brought on for their ability to communicate, engage and educate customers, and the always-important act of closing. Do not overly complicate the sales actions required for compensation. Drive the behavior that leads to closing business. Reward that behavior and get sales reps to see it through.

Remember that everyone is a seller in most companies. 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 the sales incentives, consider the variables that help describe the magnitude of the benefit to the customer 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 the practice, it may require different incentives to encourage the sale. This table illustrates a decision-making process to finetune incentives based on how the offer's incentives compete with other company incentives.

1	2	3
The new offer directly competes with existing solutions: • Sell through existing sales force • Increase level of compensation vs. compensation on existing offerings	The offer complements existing solutions to the same customers: • Sell through extended sales • Double book compensation (1/3 to existing sales force, 2/3 to extended sales)	The new offer addresses new customers: • Sell through extended sales • Specific compensation to extended sales team

Microsoft

Microsoft

Hire & Train

Secure Remote Work

aka.ms/practiceplaybooks

Introduction

The previous section looked at the various services that partners can pursue as they set up or build their cloud practice. With avenues of partner success identified, the next step is building and training a team.

This section will offer role definitions and guidance on the skills needed for a remote work-focused practice. It will cover the necessary technical, sales, and marketing training, which starts with an assessment of current skills, and a plan for filling the gaps, whether through new hires, contractors, partnering or training.

To start the hiring processes, there are detailed job descriptions, tips on where to look for resources, the factors to consider in a candidate's skillset, and what to expect to pay by role and region.

A big focus of this section is ensuring all practice resources are trained and continue to receive ongoing training.

RECRUIT, HIRE, ONBOARD, AND RETAIN TALENT PLAYBOOK AND HIRE AND TRAIN GUIDE

Leverage the Microsoft resources available in the Recruit, Hire, Onboard, and Retain Talent playbook and the Hire and Train guide for comprehensive job descriptions and to learn best practices to find the right people, grow their skills, and retain talent.

Hire, Build, and Train the Team

Starting a new practice means evaluating existing team members (if any) and then deciding whether to hire for needed expertise or train the existing team.

Assess current capability

Before hiring for a secure remote work practice, it is a good idea to start with an assessment of current skills capability to determine where to invest in new hires versus training or hiring vendors to fill any role gaps.

All partners are encouraged to take the Partner Transformation Readiness Assessment when creating a hiring plan. It is a great tool for determining current business and technical capability and which areas of the practice require attention. Upon completion, partners receive a Partner Transformation Index score that shows their current cloud maturity level, and how they ranked compared with other Microsoft partners. Partners also receive recommendations on next steps to grow their capability.

Leverage this self-serve online tool to assess a practice's business and technical capability: https://aka.ms/PTI

BUSINESS CAPABILITIES	TECHNICAL CAPABILITIES
• Cloud strategy • Sales and marketing • Business model	• Cloud solutions and services • Solution area focus • Cloud tooling

Microsoft

Create a hiring and development plan

Successful practices begin with people, so it is essential to have the right people in the right roles. For a secure remote work practice, the following roles are recommended across technical, sales, and support functions. Practices that are just getting started may not be able to fill all roles. In this situation, one person will likely be required to fulfill the duties of multiple roles.

ENGAGEMENT RESOURCES
- Cloud Solutions Architect
- Cloud Infrastructure Engineer

THE TECHNICAL TEAM
- Cloud Infrastructure Engineer
- Identity Solution Engineer
- Security Engineer
- Teams Administrator
- Microsoft 365 Administrator
- Telephony and Voice Engineer

SALES AND MARKETING
- Solutions Sales Manager (SSM)
- Cloud Solutions Sales Manager
- Technical Sales Manager

Comprehensive job descriptions for these and other key roles in the Recruit, Hire, Onboard, and Retain Talent Playbook or the Hire and Train Guide.

Microsoft

Technical roles

The skills needed for delivering modern cloud solutions are evolving are evolving as fast as the technology. Hiring the right technical talent requires a constant skills assessment. Consider the following job descriptions for the technical roles of cloud practice. Keep in mind that no candidate is likely to have all the skills and capabilities listed for each role.

ROLE	DESCRIPTION
Cloud Solutions Architect	The 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 and Microsoft 365 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.
Cloud Infrastructure Engineer	The Cloud Infrastructure Engineer is responsible for the design, implementation, integration, support, and monitoring customer deployments in Azure. This individual is responsible for setting up and configuration the Azure infrastructure, including virtual machines, virtual networks, and storage. This engineer will for be a crucial component to building out reusable IP as they engage customers and work with them to onboard new workloads to Azure. For those customers who are migrating to Azure, this resource will also be responsible for assisting with the creation of migration plans.
Identity Solutions Engineer	The Identity Solution Engineer is responsible for the design, implementation, integration, support, and monitoring of company 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, understanding of identity and access controls across varied environments, applications, and protocols, as well as a deep skill set with Windows Server Active Directory and industry security solutions.
Security Engineer	The first line of defense in the prevention of hackers, malware, viruses, and other malicious activities. Security Engineers are responsible for setting up policies, procedures, and guidelines for system access and ensuring that SIEM systems are monitoring all business-critical applications. They interact with the compliance officer and legal team to provide technical guidance on security incidents.
Teams Administrator	Microsoft Teams Administrators configure, deploy, and manage Office 365 workloads for Microsoft Teams that focus on efficient and effective collaboration and communication in an enterprise environment. Administrators in this role must be able to plan, deploy, and manage Teams: chat, apps, channels, meetings, audio conferences, live events, and calls.
Microsoft 365 Administrator	Microsoft 365 Administrators evaluate, plan, design, migrate, deploy, and manage Microsoft 365 services. Skills include managing Microsoft 365 governance and compliance, implementing security and threat management, managing access and authentication with identity and roles, and plan Office 365 workloads and applications.

Microsoft

Leadership roles

Consider the following management positions if the development effort will involve eight or more technical staff. However, in smaller teams, senior-level employees sometimes take on management duties along with their other responsibilities, removing the need for dedicated managers.
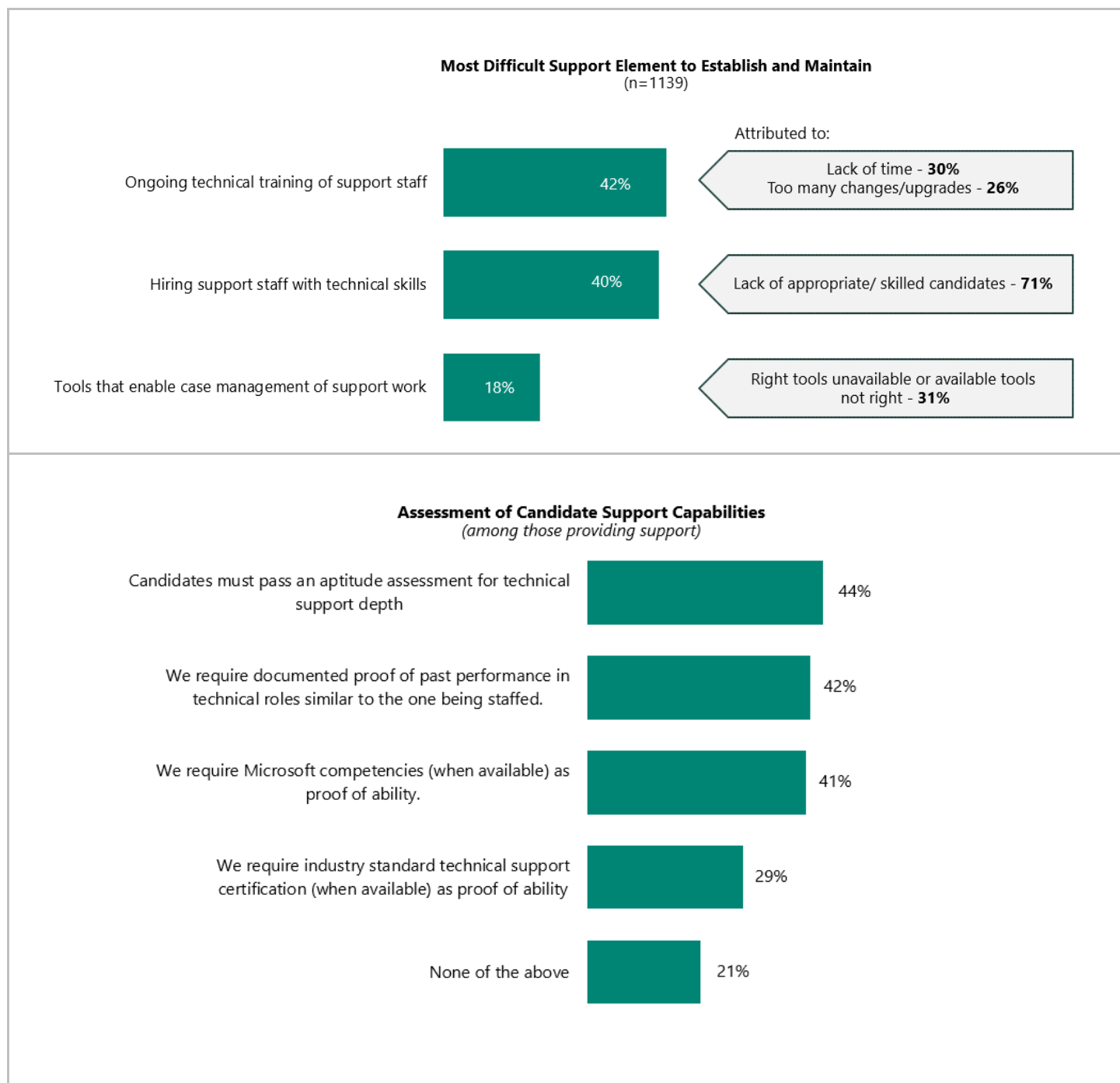
ROLE	DESCRIPTION
Product Manager, Cloud Services	The Product Manager (or Product Management team) establishes and sustains the business case for the project and plays a key role in identifying and setting priorities across the target audience. This includes ensuring that business expectations are clearly 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.
Program Manager, Cloud Services	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.

Support roles

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

ROLE	DESCRIPTION
Reliability Manager	The Reliability Manager is accountable for the supply and demand of within the Azure fabric for the organization and customers, including the elastic use of customer resources and shared resources. The Reliability Manger will also align customer implementations to the right security and compliance policies. These individuals will also manage relations with third parties regarding supporting and demand, including Microsoft. Finally, the Reliability Manager will also manage and monitor the thresholds regarding availability, capacity, security, and compliancy.
Service Delivery Manager	The Service Delivery Manager is account for service delivery to one or more customers and is the primary contact for the customers they manage that consume resources in Azure. The Service Manager will manage and communicate the service description and service level agreements to customers as well as monitor service levels. The Service Manager will also monitor costs across one or more clients and ensure they are clearly communicated. The Service Manager will also function as the primary contact point for non-technical or non-standard requests from customers.
Operations Manager	The Operations Manager is accountable for the service operations for customers, including being the face of the operations team for incidents and problems which customers raise. The Operations Manager is responsible for managing environmental runbooks and coordinating the testing of new runbooks, service requests, and scripts. As the owner of the operations team, the Operations Manager is also responsible for monitoring and reporting on the state of the operations team and their performance in resolving customer issues.

Microsoft

Customer Success Manager	A Customer Success Manager is passionate about engaging 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 the security business by establishing a trusted and strategic advisor relationship with each assigned client, driving continued value of the 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.
Quality Assurance (QA) / Test Technician	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 the 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.
Information Security Analyst	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.
Site Reliability Engineer	A Site Reliability Engineer is responsible for improving the reliability of a partner's solutions across the stack. The Reliability Engineer will follow a problem from start to finish and will provide the expertise to not only identify the root cause of an issue, but also fix it. They will participate in the full incident management lifecycle, including escalation, debugging, communication of resolution, and problem management.
User Support Specialist	A User Support Specialist assists customers who are having technical issues with a product/service, or who need help realizing the full benefit of the solution to help them deliver their cloud-based workloads. They will likely be able to help customers navigate the operational challenges of cloud computing, so thoroughly training them on both the product — and the infrastructure on which it is built — is paramount to their success, and ultimately, the customers' satisfaction. Qualifications include technical support experience and great communication and interpersonal skills (soft skills). Experience with cloud technologies is a major plus.

Microsoft

CHALLENGES IN ESTABLISHING AND MAINTAINING CUSTOMER SUPPORT (n=1139)

Most Difficult Support Element to Establish and Maintain
(n=1139)

Attributed to:

Ongoing technical training of support staff — 42%

Lack of time - **30%**
Too many changes/upgrades - **26%**

Hiring support staff with technical skills — 40%

Lack of appropriate/ skilled candidates - **71%**

Tools that enable case management of support work — 18%

Right tools unavailable or available tools not right - **31%**

Assessment of Candidate Support Capabilities
(among those providing support)

Candidates must pass an aptitude assessment for technical support depth — 44%

We require documented proof of past performance in technical roles similar to the one being staffed. — 42%

We require Microsoft competencies (when available) as proof of ability. — 41%

We require industry standard technical support certification (when available) as proof of ability — 29%

None of the above — 21%

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Microsoft

Recruiting Resources

Top 10 sources to find skilled labor and what to look for.

Sourcing skilled labor can be a challenge. In the Microsoft Hiring and Onboarding Playbook Study, referrals (68%), LinkedIn (60%) and website (55%) were reported as the top approaches for generating leads.

TOP CANDIDATE LEAD SOURCES	TOTAL (N=520)
Referrals from employees or partnerships	68%
LinkedIn	60%
Posting on website	55%
Social media	45%
External recruiting vendor	39%
University recruiting	33%
Former employees	28%
Local technical communities	26%
Recruit from competitors	17%
Meetups	14%

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, July 2020

With an understanding of where to look, what are the most important factors to look for in a potential hire's skillset? In the Microsoft Hiring and Onboarding Playbook Study, work history remains the most important consideration for new hires.

	TOTAL (n=472)	SMB (n=257)	ENTERPRISE (n=206)
Work history	71%	71%	71%
Cultural fit	43%	37%	49%
Years of experience	39%	41%	37%
Referrals	31%	30%	33%
Professional certifications	28%	24%	33%
Professional training received	18%	18%	18%
Contract to hire or other means to test skills "hands-on"	17%	22%	12%
Reputation through community	13%	13%	14%
Formal education	12%	12%	12%
Publications	3%	4%	2%
Awards received	2%	2%	3%
Other	3%	4%	2%

Source: Cloud Application Development and Modernization Playbook Survey, MDC Research, May 2020

Microsoft

Preparing and Training Technical Staff

Whether filling a skills gap or are looking to improve the overall skill surface area, technical training is critical to partner success.

For technical 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.

The following resources are available for new and existing staff to build and enhance their skills:

- Learning Path: Implementing Windows Virtual Desktop provides online courses to learn how to plan virtual desktop infrastructure on Azure, learn and the tools and assessments available from Microsoft help you plan WVD implementation on Azure.
- Microsoft Learn offers a wide variety of official curriculum on-demand, Microsoft Azure and Power Platform certification preparation courses and helps them learn through hands-on experiences with a broad reach of Microsoft technologies.
- The Microsoft Partner Network (MPN) Partner Training Center provides a centralized interface with in-person, virtual and online training opportunities and certification options organized by products, competencies, certifications, and job role.
- Microsoft Virtual Training Series enhance technical skills with interactive webinars for core customer technical scenarios. These training opportunities provide chat-based instructors with targeted information delivered in a consolidated time frame to enhance expertise.
- Microsoft Learning Partners are available worldwide to help train partners via live instructor-led training. This can be scheduled as a dedicated delivery at a partner's location or virtually using remote learning technologies. Many courses are scheduled as open-enrollment courses, which does not require a dedicated class.
- Opsgility is a key Microsoft partner that offers Azure and Microsoft 365 training. Find more than 200+ online classes at www.skillmeup.com focused on Microsoft 365 and Azure with full learning paths for Microsoft 365 and Azure certification. Opsgility also offers a full set of instructor-led Microsoft 365 and Azure trainings that focus on architects, administrators, security engineers, developers, DevOps, operations, sales, and decision makers.
- Pluralsight is a key Microsoft partner that offers Azure training. Gain the know-how and confidence the job demands through these free online courses, delivered in partnership with Pluralsight.
- Technical Presales and Deployment consultations offer proactive 1:1 pre-deployment guidance and developer assistance from Microsoft technical consultants to help ensure a successful implementation.

Certifications

Increase readiness and marketability with certifications.

Certifications offer a professional edge by providing globally recognized, industry endorsed, evidence of skills mastery. Partners can demonstrate their secure remote work abilities and technical team members can set themselves up for career advancement. Team members can showcase their team's technical achievements with certification badges, which are digital representations of their achievements consisting of an image and metadata uniquely linked to each team member.

There are numerous certifications to consider as motivation for advancing technical skills, creating proof points for expertise, and achieving Microsoft Partner Network Competencies. Competencies help partners highlight their expertise in several areas of secure remote work deployment. For more on Microsoft competencies, see the Go to Market and Close Deals chapter of this playbook.

MICROSOFT CERTIFICATIONS	
Microsoft 365 Administrator Expert	Candidates for the Microsoft 365 Company Administrator Expert certification evaluate, plan, migrate, deploy, and manage Microsoft 365 services. Obtaining this exam requires having a prerequisite certification, and then passing two (2) exams: MS-100: Microsoft 365 Identity and Services, and MS101: Microsoft 365 Mobility and Security. For more information about the exam objectives and prerequisites, visit the certification page on Microsoft Learn. https://docs.microsoft.com/learn/certifications/m365-company-administrator
Microsoft 365 Security Administrator Associate	Candidates for the Microsoft 365 Security Administrator certification proactively secure Microsoft 365 company and hybrid environments, implement and manage security and compliance solutions, respond to threats, and enforce data governance. Obtaining this certification requires passing the MS-500: Microsoft 365 Security Administrator exam. https://docs.microsoft.com/learn/certifications/m365-security-administrator
Microsoft 365 Teams Administrator Associate	Candidates for the Microsoft Teams Administrator certification configure, deploy, and manage Office 365 workloads for Microsoft Teams that focus on efficient and effective collaboration and communication in a company environment. Microsoft Teams Administrators must be able to plan, deploy, and manage Teams: chat, apps, channels, meetings, audio conferences, live events, and calls. Obtaining this certification requires passing the MS-700: Managing Microsoft Teams exam. https://docs.microsoft.com/learn/certifications/m365-teams-administrator-associate
Azure Security Engineer Associate	Candidates for the Azure Security Engineer certification should have subject matter expertise implementing security controls and threat protection, managing identity and access, and protecting data, applications, and networks in cloud and hybrid environments as part of an end-to-end infrastructure. Responsibilities for this role include maintaining the security posture, identifying, and remediating vulnerabilities by using a variety of security tools, implementing threat protection, and responding to security incident escalations. Azure Security Engineers often serve as part of a larger team dedicated to cloud-based management and security or hybrid environments as part of an end-to-end infrastructure. Obtaining this certification requires passing the AZ-500: Microsoft Azure Security Technologies exam. https://docs.microsoft.com/learn/certifications/azure-security-engineer

Microsoft

Azure Administrator Associate	Candidates for the Azure Administrator Associate certification should have subject matter expertise implementing, managing, and monitoring an organization's Microsoft Azure environment. Responsibilities for this role include implementing, managing, and monitoring identity, governance, storage, compute, and virtual networks in a cloud environment, plus provision, size, monitor, and adjust resources, when needed. An Azure Administrator often serves as part of a larger team dedicated to implementing an organization's cloud infrastructure. Obtaining this certification requires passing the AZ-104: Microsoft Azure Administrator exam. https://docs.microsoft.com/en-us/learn/certifications/azure-administrator
Azure Solutions Architect Expert	Candidates for the Azure Solutions Architect Expert certification should have subject matter expertise in designing and implementing solutions that run on Microsoft Azure, including aspects like compute, network, storage, and security. Responsibilities for this role include advising stakeholders and translating business requirements into secure, scalable, and reliable cloud solutions. An Azure Solution Architect partners with cloud administrators, cloud DBAs, and clients to implement solutions. Obtaining this certification requires passing two exams: AZ-303: Microsoft Azure Architect Technologies and AZ-304: Microsoft Azure Architect Design. https://docs.microsoft.com/en-us/learn/certifications/azure-solutions-architect

Microsoft

Microsoft

Operationalize

Secure Remote Work

aka.ms/practiceplaybooks

Introduction

This section covers the steps to operationalize the business plan and engage with customers. It starts with building the solution delivery process, and the tools and systems to support that process, from customer relationship management to building a customer support program and processes.

Learn how to deepen relationships with customers by packaging intellectual property with custom software, creating a new revenue stream for the business.

It covers the Microsoft-provided support options, partner advisory hours, Azure Security Center, support ticket tracking, and publishing a partner offer in the Azure Marketplace.

The section concludes with checklists and templates to use to standardize the customer engagement process.

Operationalize Guide

Leverage the Microsoft resources available in the Operationalize guide, for details on preparing for launch with systems, tools, and processes in place. The guide contains the following additional sections:

LEVERAGE INTERNAL USE BENEFITS

Internal use benefits provide complimentary software licenses and subscriptions for use within a partner organization and resell it as well as part of an overall package along with custom software, creating a new revenue stream for the business.

PREPARE KEY CONTRACTS

Support the sales and marketing efforts with guidance on how to operate the business, from how to build materials to the key contracts to put in place.

SET UP SUPPORT PROCESSES AND SYSTEMS

Implement tools and systems with this guidance. Whether a partner is building products, providing managed services, or performing project work for customers, success may be impacted by their ability to manage customer records, projects, and support trouble tickets.

SET UP SOCIAL OFFERINGS

Increase visibility for a practice by reviewing the Microsoft marketplaces. Learn how to get listed and receive guidance on the social offerings to set up.

STANDARDIZE ENGAGEMENTS USING CHECKLISTS

Leverage checklists and templates to standardize the customer engagement process.

Microsoft

Implement a Solution Delivery Process

The process partners follow in delivering their solution to customers is just as important as the technologies they use to deliver it.

When a project fails, it is most often due to basics such as a lack of technical skills, inadequate fit/gap analysis, poor project governance, or team churn. These issues are associated with not having the right people on the team and an underdeveloped methodology for delivery.

Many project failures are also driven by poor alignment of strategy, executive sponsors, stakeholders, or business processes. Solution delivery processes that include modern change management best practices reduce these risks and accelerate value to customers.

Investing in proper time estimation methods and delivery processes is critical for success, partner profitability, and customer satisfaction. Independent of the methodology choices, partners must always drive a short time to value, which translates to fewer customizations, better use of standardized business processes, and fast delivery of solution modules to users.

SCRUM PROCESS

The Scrum process works well if they want to track product backlog items (PBIs) and bugs on the Kanban board or break PBIs and bugs down into tasks on a task board. This process supports the Scrum methodology as defined by the Scrum organization. Tasks in this process support tracking remaining work only.

AGILE PROCESS

Choose Agile when their team uses Agile planning methods, including Scrum, and tracks development and test activities separately. This process works well if they want to track user stories and bugs on the Kanban board or track bugs and tasks on the task board. They can learn more about Agile methodologies at the Agile Alliance.

Create repeatable processes

Repeatable processes make for profitable practices. Use the following example checklist to build a checklist to use when executing a new engagement.

- Hold initial requirements meeting
- Identify product owner/manager(s)
- Identify executive sponsors of the project
- Ensure the project has clear strategic goals and success metrics
- Identify key business process owners/stakeholders
- Ensure that business processes are aligned with business strategy and stakeholder needs
- Bind customer's organization and their business processes owners into the QA process
- Reduce the volume of customizations, as they have a high impact on mobile extensibility
- Follow-up meeting to clarify/establish next steps
- Discuss MVP (minimal viable product) criteria
- Establish development process (Agile, Scrum, etc.)
- Identify milestones and tasks, share with the customer
- Identify Mobile usage scenarios and mobile devices requirements as early as possible
- 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/customer (e.g. VSTS)
- Provide customer with status/demos on a regular basis (e.g. 2-week sprint)
- Ensure customer has communications and readiness plan to address the needs of each stakeholder team
- Coordinate a final handoff to the customer
- Conduct project debrief with the customer
- Organize internal project post-mortem
- Customer conducts acceptance test
- Execute a progressive deployment strategy, i.e. one region, several regions, one country, two countries, several countries
- Ensure customer has a plan to track progress against success metrics and adoption targets

Accessibility and Digital Inclusion

As people and organizations around the world navigate the transition to digital, customers are looking to partners to help them optimize remote work to drive meaningful collaboration and engagement with their employees and end-customers. Driving this experience internally also builds confidence for organizations looking to serve customers with diverse needs. Partners offering secure remote work services have an opportunity to enable a business culture that is built around delivering these services with accessibility and digital inclusion in mind.

Microsoft's accessibility features recognize the diverse needs of the modern workforce. These capabilities need to be at the forefront of a partner's planning, design, architecture, migration, and adoption and change management strategies for the enterprise. Bringing accessibility into client discussions at an early stage creates shared commitment, an inclusive mindset and demonstrates added value to be leveraged.

As organizations continue to migrate to remote and hybrid work strategies, the newfound worksite flexibility creates new opportunities for inclusive hiring and for disability to be more confidently included in a culture change strategy. There are also additional benefits realized through the adoption of remote working tools. Employees with disabilities who face unique challenges in a traditional workplace may choose to work from home. Other employees with significant obligations outside of work, such as parents or caregivers, may value the flexibility of hybrid work. Below are six key areas to consider for a practice that supports customers in unlocking the accessibility and digital inclusion opportunity.

OPPORTUNITY FOR ACCESSIBILITY AND DIGITAL INCLUSION

Globally, more than a billion individuals with disabilities translates to USD8 trillion in disposable income, and according to Accenture research, organizations that hire and retain people with disabilities make 28% more revenue than their counterparts.

Disabilities can become more apparent in new work circumstances such as remote work. With an increase in demand for accessibility features such as live captions in Microsoft Teams, there are more requests through Microsoft's enterprise Disability Answer Desk, where customers get support with questions on accessibility of Microsoft products and product compliance. Critically, this is also where partners can proactively guide customers to Microsoft's conformance statements on accessibility per product. Bringing accessibility into procurement discussions further supports this culture change across an organization.

With an accelerated move to digital, it is even more critical to harness the power of Microsoft's platform and tools to ensure accessibility for everyone. As organizations consider their digital presence, partners incorporating accessibility to their design deliverables will be differentiated by demonstrating deeper understanding of both market opportunity and growing customer expectation on this front. Early understanding of accessibility leads to long-term and organization-wide cost savings.

UNDERSTAND THE CURRENT CULTURE

When building a practice that addresses accessibility and digital inclusion, it's important to review and understand the current culture of the customer organization. To be successful in providing clients with guidance toward accessibility and digital inclusion, the partner will want to demonstrate commitment to their own culture of disability inclusion. Partners will want to consider their existing approach, model the best practices, and take stock of their own expertise to deliver accessible experiences. Accessibility is a journey and partners can measure their own progress and support customers' by leveraging best practices in maturity models.

Microsoft

REVIEW THE BUSINESS NEED AND RESULTS

Business needs and expected results play a key role in how the organization views accessibility and inclusion. This relates directly back to the culture of the company. A company's culture that does not support accessibility and digital inclusion may lead to gaps in providing for their workforce's accessibility needs. Partners can help guide customers to build a secure remote work culture that leverages the value of accessibility and digital inclusion and meets expected business needs and results. For instance, organizations can consider the business impact of enabling more inclusive hiring or improved workforce retention when employees are empowered with the right tools in flexible hybrid work environments.

DETERMINE THE CURRENT CHALLENGES TO ADDRESS

Partners will want to assess where challenges within the business and workforce culture exist that may be potential barriers to accessibility and digital inclusion adoption as part of a secure remote work strategy. For instance, common roadblocks include a low awareness of disabilities beyond assistive technology, diversity, and inclusion, IT and HR tools not integrated, etc. Building the practice with a plan toward enhancing accessibility capabilities and how that will be adopted and utilized will provide value in addressing current and future challenges.

Organizations will also be considering their own digital footprint and accessibility. Microsoft offers an open source set of testing tools enabling organizations to take a baseline assessment and fix accessibility issues in their apps, websites and software. These deliver a fantastic value add and help augment the relationship being built with customers.

FOCUS ON ADOPTION AND CHANGE MANAGEMENT

As partners build their practice for secure remote work, there needs to be a focus on adoption and change management (ACM). Accessibility can be included in all ACM programs, whether as a standalone module or embedded into existing modules. As these plans and strategies are formulated with organizations, they can provide guidance on how adoption will evolve to a culture of accessibility and inclusion. Education of both the organization and the user environment leads to successful adoption of accessibility to the new secure remote work environment. Partners can leverage measurable training adoption through Microsoft Learn, and learning officers, HR leaders and Accessibility teams can build these resources into their own strategies with more organizational confidence.

ACCESSIBILITY AND DIGITAL INCLUSION IN SUPPORT

In addition to providing adoption and change steps to accessibility and digital inclusion with secure remote work, partner support teams will need to be trained on assistive technology and develop competence in fielding disability-tech related questions. Many organizations will be considering their own services to end-customers with disabilities. Microsoft's own experience in setting up both consumer support and enterprise support services will be valuable to leverage, as well as additional support capabilities such as integration of chat and voice bots within the user support process.

RESOURCES

- Microsoft Disability Inclusion Journey
- Microsoft Enterprise Disability Answer Desk
- Microsoft Accessibility Features
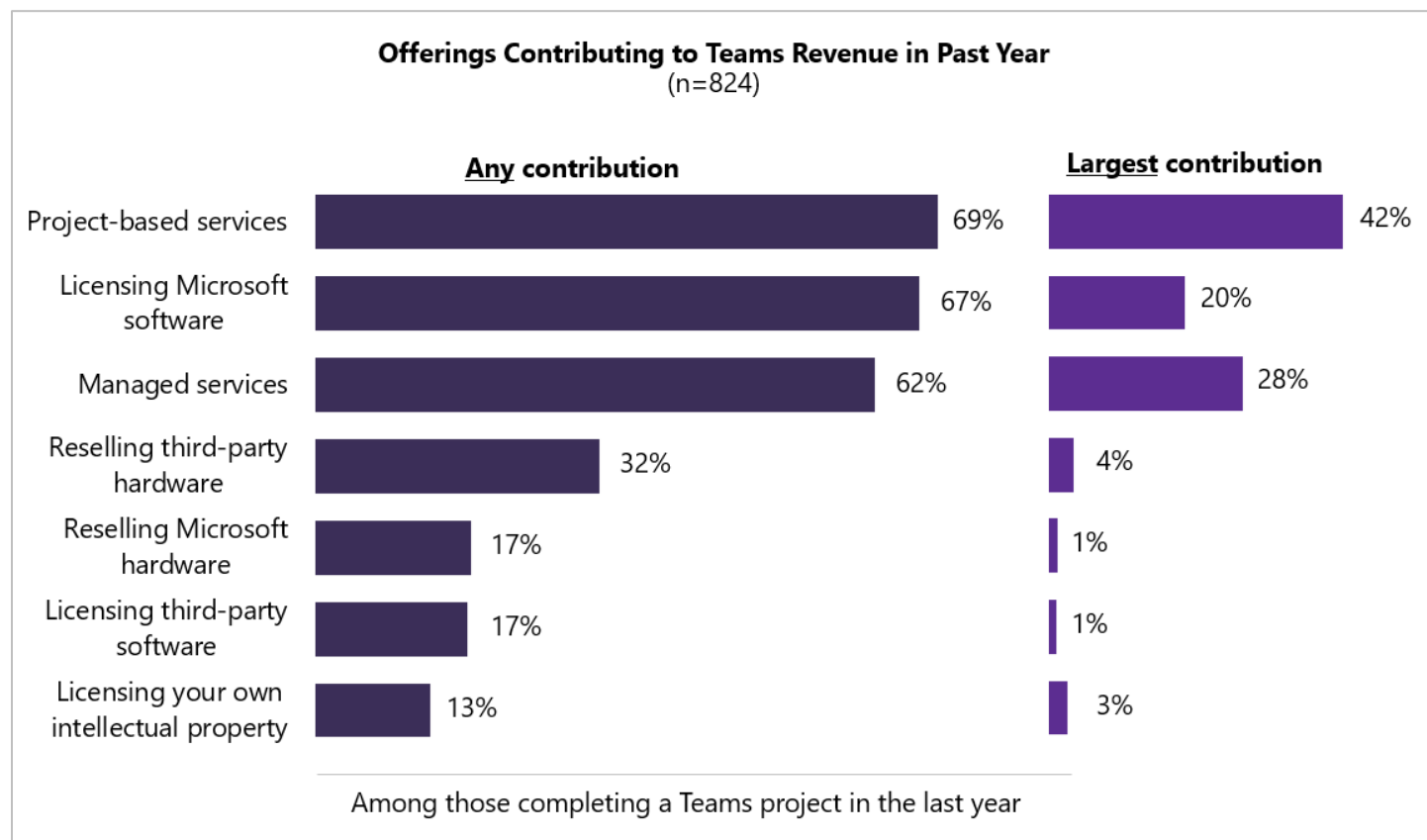- Accessibility Fundamentals Training

Microsoft

Building a Teams Practice

Microsoft Teams is a hub for teamwork, which brings together everything a team needs: chat and threaded conversations, meetings & video conferencing, PSTN calling, content collaboration with the power of Office 365 applications, and the ability to create and integrate apps and workflows that businesses rely on.

When considering where to focus the practice, almost all practices will have an opportunity to deploy Teams. Some examples include device implementation, offering configuration and management services to help customers better secure and govern their Teams environment as well as surrounding workloads such as Exchange and SharePoint.

However, the practice does not end with planning and deployment. Deployment is an on-ramp to architecture and security planning along with services such as migration from existing collaboration solutions to Microsoft 365.

The partner survey data shows that within the past year, partners have seen a more significant increase in project services, licensing, and managed services as part of their remote work offerings.

Offerings Contributing to Teams Revenue in Past Year
(n=824)

	Any contribution	Largest contribution
Project-based services	69%	42%
Licensing Microsoft software	67%	20%
Managed services	62%	28%
Reselling third-party hardware	32%	4%
Reselling Microsoft hardware	17%	1%
Licensing third-party software	17%	1%
Licensing your own intellectual property	13%	3%

Among those completing a Teams project in the last year

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

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PROJECT SERVICES

There are multiple services to offer as a part of the practice, including:

- Build strategy and roadmap assessment for Teams
- Deployment of Microsoft Teams
- Network and Active Directory readiness assessment
- Security and Compliance evaluation and configuration
- Project Management

These types of services build the foundation of the practice and lead to stronger relationships with customers. As a follow on, continue to expand the practice into pull-through project services such as change management or specialized industry-specific offers.

One will also find that post-deployment managed services become an opportunity to not only forge a lasting relationship with customers but also become an integral part of their business. Examples of managed services include:

- Modular technical and end-user support
- On-demand content creation customization
- Ongoing adoption engagements
- IT service management processes
- Phone System with Direct Routing as service
- Calling and Meetings, monitoring and optimization
- Devices as a Service (DaaS)
- End-to-end network quality monitoring
- Proactive quality management and administration
- Repeatable tools for simplified administration and front-end access
- Organizational change management and reporting
- Adoption measurement and organizational analytics

Microsoft 365 cross-workload offering (Security, Compliance, Modern desktop)

RESOURCES:

Microsoft Teams Playbook

Microsoft

Identity and Access Management (IAM)

Subscriptions provide the first layer of isolation in the virtual datacenter and robust role-based access controls (RBAC) provide the next with Azure Active Directory (Azure AD). Azure AD helps manage user identities and the creation of intelligence-driven access policies to secure Azure resources within an Azure subscription. The roles created in Azure AD are used to control management access to resources in Azure, including services, virtual machines, storage, and databases.

Identity and access management services are key to a secure remote work practice. This points out that partners have seen an increase in the areas of identity and access management, mobile device management, and device deployment and management.

Areas Included in Secure Remote Work Practice
(n=693)

Identity and access management	76%
Remote network access	75%
Mobile device management	61%
Device deployment and management	60%
Remote application access (Azure AD Application Proxy)	38%
Other service	4%

Among those with secure remote services in their Microsoft Remote Work practice

Identity and Access Management Services Offered
(n=527)

Core onboarding to Office 365 / Microsoft 365	92%
Configuration and implementation of OneDrive for Business	82%
Configuration and implementation of Exchange Online	79%
Configuration and implementation of Microsoft Teams governance	74%
Configuration and implementation of SharePoint Online	71%
Skype for Business to Microsoft Teams transition	50%
Slack (or other teamwork collaboration tools) to Microsoft Teams migration	17%

Among those with identity and access management practice areas

Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Microsoft

IAM resources

ROLE-BASED ACCESS CONTROL

Access to manage resources can be delegated to individual users, groups, service principals, and managed identities - or a combination of all of them. It is important to remember that while RBAC can be used to control the access to the top-level resource, the internal configuration of a resource is not controlled through Azure AD and RBAC. For instance, access to a virtual machines' configuration in Azure can be delegated with RBAC, however, the access to the underlying guest operating system is configured within the operating system itself.

Access to resources in Azure should always be explicitly granted to specific users, groups, or applications performing a function. The users and groups that are assigned to roles and resources can be created on-premises and synchronized to Azure AD with Azure AD Connect or created as cloud-only objects in Azure AD and managed exclusively in the cloud.

If a customer has existing security policies in place, including well-defined security groups in an on-premises environment, they can absolutely be repurposed in Azure. By leveraging Azure AD Connect, group membership can be managed on-premises and surfaced in Azure through the application of a role assignment. This allows for a distributed approach to give customers access to specific workloads without impacting the services provided.

When planning roles in Azure, it is important to note that roles are comprised of two components:

- **Role definitions** describe the set of permissions allowed within a role. For instance, a role definition may include the Contributor permission, which allows one to manage everything related to a resource except access to the resource.
- **Role assignments** allow users, groups, and service principals to be associated with role definitions at a scope. For instance, an application administrator can be granted contributor rights to a resource group, allowing that user to manage all the resources within the group while the delegation of access control can remain with another group.

One must also consider role-inheritance in the design of the roles. ARM provides a very granular RBAC model where management rights are assigned at a scope level. A scope is the boundary that access applies to.

There are four RBAC scopes in ARM:

- **Management group** level which grants permissions to all management groups, subscriptions, and resources under the management group where a role assignment is made.
- **Subscription level** which grants permissions to all resources in a subscription
- **Resource group level** which grants permissions to all resources in the resource group
- **Resource level** which grants permissions to a specific resource

When planning roles, the goal should always be to follow the principles of least privileged access. By following this model, users will be able to do the tasks their job requires, but no more than that. For example, an IT operations manager may require access to read an activity log and view reports but will not need access to update the permissions for a networking component. By granting them access to only the resources they need, it can ensure that resources are properly isolated and that proper controls have been implemented.

BUILT-IN ROLES

Azure RBAC has many built-in role definitions that can be assigned to users, groups, and service principals. As a best practice, always try to leverage built-in roles whenever possible. There are 40+ built-in roles today, and more are added all the time.

When considering built-in roles, there are four primary roles:

- **Owner** can perform all management operations for a resource and its child resources including access management and granting access to others
- **Contributor** can perform all management operations for a resource including creating and deleting child resources but cannot grant access to others
- **Reader** has read-only access to a resource and its child resources but cannot read secrets
- **User Access Administrator** can manage user access to resources

Beyond the primary roles, there are 99+ resource-specific roles. These roles are permissions scoped to resources and actions that are commonly required by consumers of Azure. One example of this would be the Virtual Machine Contributor role. This role lets assignees manage virtual machines, but not access to them or the virtual network or storage account they are connected to.

CUSTOM ROLES

It is recommended to leverage the built-in roles whenever possible. However, if the built-in roles do not meet the needs of the customers, custom roles can be created. Just as with built-in roles, custom roles can be assigned to users, groups, and service principals at the subscription, resource group, and resource scopes. Custom roles are stored in Azure AD and can be shared across subscriptions.

To create a custom role, start with a built-in role, edit it, and then finalize it as a custom role. It is important to note that a built-in role can be used as a template for a custom role, and if that built-in role is even updated, no updates will be made to the custom role. This is the primary driver behind the recommendation to use as few custom roles as possible. The more custom roles that are implemented, the more operational overhead is incurred to maintain them moving forward as new actions are introduced.

ACTIVITY LOGS AND AUDIT

Even with a well-planned access management strategy in place, regular audits should be performed to ensure the integrity of the subscriptions. The Azure Activity logs capture common operations related to RBAC changes and maintains the history of those operations for 90 days. For longer-term retention, the Activity Log can also be sent to a Log Analytics workspace, sent to an Azure storage account, or streamed to an Azure Event Hub and exported to the preferred destination.

The entire lifecycle of RBAC is included in the Activity Log under the Administrative event category. This includes the creation and deletion of role assessments as well as the creation, updates, and deletion of custom role definitions.

The Activity Logs also capture all write operations performed by the resources in a subscription. Read operations are not included in the log today. Use the activity logs to determine:

- **Who** initiated the operation (although operations initiated by a backend service do not return a user as the caller)?
- **What** operations were taken on the resources in the subscription
- **When** the operation occurred
- The **status** of the operation
- The **values** of other properties that might help research the operation

The activity logs are a crucial resource for understanding the actions and operations that are occurring in the subscriptions, whether they are used for audit controls or even basic troubleshooting.

Microsoft

The Activity Log can be queried through Azure Monitor and operational alerts and automation can be triggered by events that are written to the Activity Log as well. For example, if a virtual machine always needs to be allocated, create an alert that automatically starts the VM even if another user stops the virtual machine.

IAM tools

With the resources available to implement identity and access management, next up are the tools and licensing features of Azure Active Directory which allow for the implementation of hybrid identity management and additional security controls to better control access to the resources hosted in Azure subscriptions or other applications that use Azure AD as an identity provider.

AZURE AD CONNECT

Azure AD Connect allows for the integration of an existing Active Directory with Azure Active Directory and performs hybrid identity management. This allows customers to leverage their existing AD investments in Azure, including the use of on-premises users and groups in RBAC assignments.

Azure AD Connect also allows customers to use features such as single sign-on (SSO) to access resources in Azure with the same identities they use on-premises today. Azure AD Connect provides capabilities to support identity synchronization needs and replaces older versions of identity integration tools such as DirSync and Azure AD Sync.

With Azure AD Connect, identity management and synchronization between on-premises and Azure AD is enabled through:

- **Synchronization** – This component is responsible for creating users, groups, and other objects. It is also responsible for making sure identity information for on-premises users and groups is matching the cloud. Password write-back can also be enabled to keep on-premises directories in sync when a user updates their password in Azure AD.
- **AD FS** – Federation is an optional capability provided by Azure AD Connect that can be used to configure a hybrid environment using an on-premises AD FS infrastructure. Federation can be used by organizations to address complex deployments, such as single sign-on, enforcement of AD sign-in policy, and smart card or third-party MFA.
- **Health Monitoring** – Azure AD Connect Health can provide robust monitoring and provide a central location in the Azure portal to view this activity.

MULTI-FACTOR AUTHENTICATION AND CONDITIONAL ACCESS

Azure AD can also enable additional levels of validation such as multi-factor authentication and conditional access policies. Monitoring suspicious activities through advanced security reporting, auditing, and alerting help mitigate potential security issues.

In the public cloud, one's identity is the control plane, and protecting the identity of the users that consume Azure resources, especially one's own administrators and operators is critical. One of the easiest steps to take to protect these and other privileged accounts is enabling multi-factor authentication (MFA). Azure offers multiple verification options, including phone call, text message, or mobile app notification through the Microsoft Authenticator app.

Conditional access policies, a feature available through Azure AD Premium licensing, gives users the ability to create policy-based access rules for any Azure AD-connected application (SaaS apps, custom apps running in the cloud, or on-premises web applications). Azure AD evaluates these policies in real-time and enforces them whenever a user attempts to access an application. Azure identity protection policies enable the user to automatically act if suspicious activity is discovered. These actions can include blocking access to users at high risk, enforcing multi-factor authentication, and resetting user passwords if it looks like credentials have been compromised.

Microsoft

PRIVILEGED IDENTITY MANAGEMENT

Privileged Identity Management, included with the Azure Active Directory Premium P2 offering, allows the user to discover, restrict, and monitor administrative accounts and their access to resources in the Azure Active Directory and other Microsoft online services. It also helps to administer on-demand administrative access for the exact time needed.

Privileged Identity Management can enforce on-demand administrator rights so that administrators can request multi-factor authenticated, temporary elevation of their privileges for pre-configured periods of time before their accounts return to a normal user state, not only to privileged roles in Azure AD but also, to role assignments in Azure.

AZURE ACTIVE DIRECTORY IDENTITY GOVERNANCE

Azure Active Directory (Azure AD) Identity Governance allows organizations to balance the need for security and employee productivity with the right processes and visibility. It provides capabilities to ensure that the right people have the right access to the right resources. These and related Azure AD and Enterprise Mobility + Security features help mitigate access risk by protecting, monitoring, and auditing access to critical assets while ensuring employee and business partner productivity.

Microsoft

Device Deployment and Management

When building a practice for device deployment and management, consider whether reselling the devices or simply deploying the client's devices makes the most sense. Understand the minimum requirements for devices and the level of managed services that will be provided.

Device deployment

When determining a practice and process for device deployment for remote users, there are several additional areas that need to be considered. Deployment can be handled in multiple scenarios:

RESALE AND DEPLOYMENT OF DEVICES

If the partner is going to resell the devices to the company, then they could include the deployment as part of that resell service. This could include creating a standard image that follows the client's corporate guidelines or creating an image based on the partner's best practice standards. The latter may be favorable to the partner if they are also going to manage these devices once deployed.

When the partner resells these devices to the company, they can stage and ship these devices directly to the users or provide them to the client to maintain the inventory and ship the device. Either way, they are pre-configured prior to shipping to the user to limit the need for the user to contact support for the need to configure their device.

DEPLOYMENT OF CLIENT PROVIDED DEVICES

Often, a partner may be required to deploy devices that were already purchased by the client or re-deploy a device that was used by a previous user. In these cases, the deployment process becomes more difficult because it is very likely that the partner will not have physical access to these devices. They may be shipped directly to the users from the client's distributor or from the inventory of existing devices.

In this case, the partner should have certain requirements outlined within their scope regarding the operating system, performance specifications, connecting the device to the Internet, and user login and access procedures. In addition, the partner is most likely going to require a conversation with users to get them properly configured. This is where deployment tools such as Autopilot and Intune Endpoint Management are very helpful to decrease the number of touchpoints required by the partner to each user device.

BRING-YOUR-OWN-DEVICE (BYOD) DEPLOYMENTS

Another scenario to device deployment could be for user's personal mobile devices. In this situation, the company is either allowing the users to continue to maintain a personal device to perform their work duties, or they simply have a secondary device that they are going to use when they are on the move. In either case, the partner should work with the client on what their policies and procedures are for BYOD, and if they do not have policies, that is an opportunity for the partner to provide value by creating them for the client.

Much like the previous section, there will be additional touchpoints for the partner to configure a personal device to adhere to the policies of the company. These policies can be implemented through Intune Endpoint Management tools on Windows, iOS, macOS, and Android devices.

Device management

In addition to creating a device deployment practice, providing additional managed services such as device management has become another opportunity for the partner. This continues to build trust with the client and expand the partner management footprint.

ENDPOINT MANAGEMENT

Microsoft Intune Endpoint Management provides both a deployment and management tool that a partner can use to patch, monitor, and manage user devices as a service to a customer. Endpoint Management can be used to enforce policies on devices such as what applications they can access, multi-factor authentication, and BitLocker encryption on devices. Endpoint Management can also provide Microsoft Defender services that can be managed from a central point by the partner. Security services such as Microsoft Defender, are covered in the Secure Remote Access section.

IT AND HARDWARE ASSET MANAGEMENT

When a partner is managing endpoint devices with Microsoft tools, they can also build a practice for maintaining inventory and managing those assets. Enrolling in Microsoft Intune Endpoint Management will create an inventory of all devices that can then be tracked and managed as a service. This can be a valuable service for keeping track of capital assets, which can be difficult within a remote work environment.

Microsoft

Virtual Desktop Solutions

As more companies are embracing remote work, Windows Virtual Desktop has become an increasingly viable option for securing that remote workforce. Where companies mobilize and enable their workforce to access resources from a home office or on a personal device, they need to maintain the security of the information that others in the organization are also able to access. Windows Virtual Desktop helps to address these challenges while providing a flexible way for users to access their business applications.

This chart shows significant contributions to the partner business for virtual desktop services.

Offerings Contributing to Virtual Desktop Services Revenue in Past Year
(n=402)

	Any contribution	Largest contribution
Project-based services	73%	41%
Managed services	71%	35%
Licensing Microsoft software	64%	17%
Licensing third-party software	26%	1%
Licensing your own intellectual property	14%	1%
Other virtual desktop services offerings	1%	1%

Among those completing a virtual desktop services project in past year
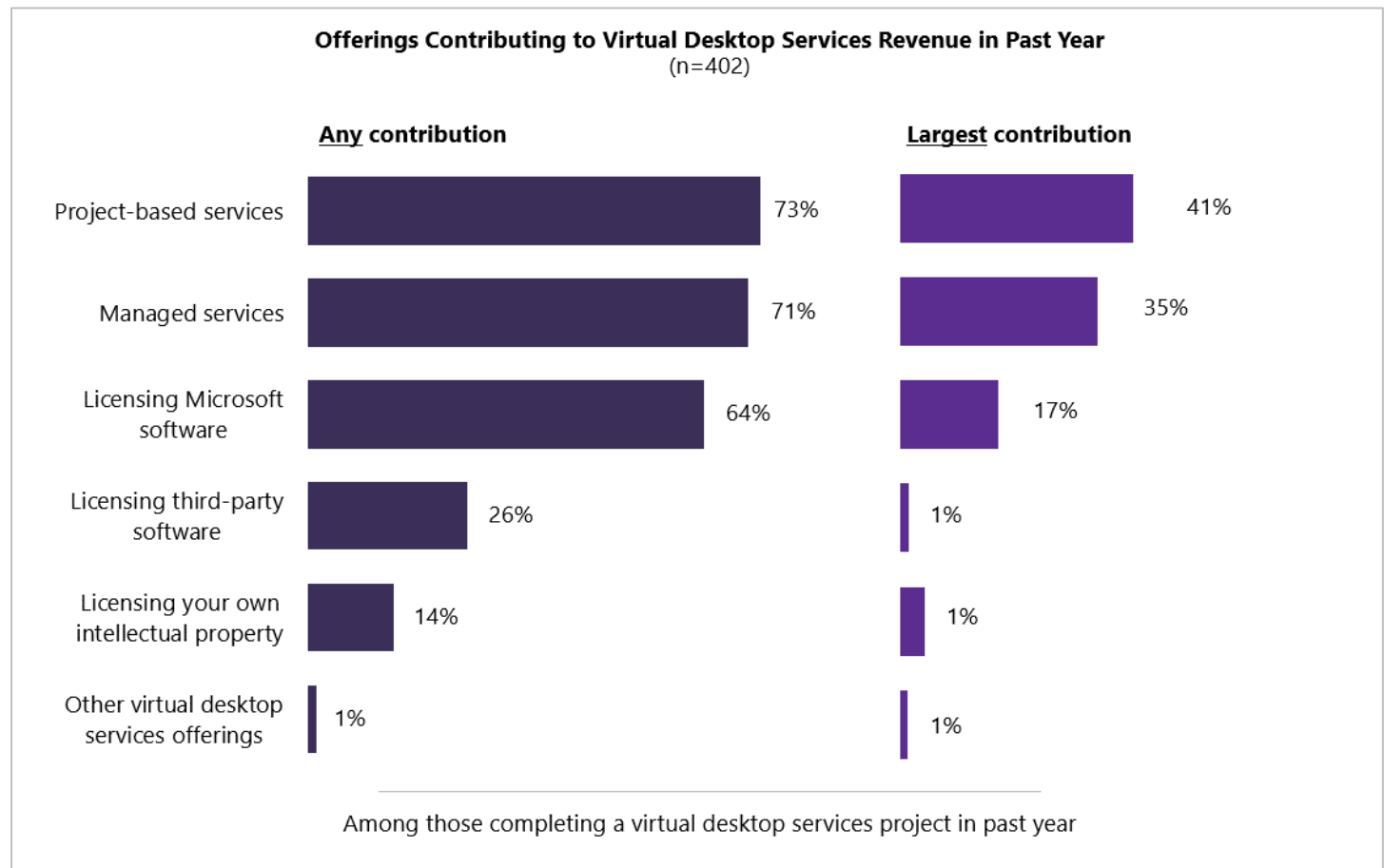
Source: Microsoft Remote Work Services Playbook, MDC Research, December 2020

Windows Virtual Desktop deployments

Deploying devices for remote uses presents challenges since there would be limited IT access to that device. Windows Virtual Desktop deployments may eliminate that challenge entirely. A Windows Virtual Desktop deployment is done within the cloud infrastructure and could have a hybrid connection to an existing client data center for local applications and Active Directory Domain Services. Remote users can then access their company desktops through a web browser or other client, making it zero-touch on the user device. A Windows Virtual Desktop deployment is highly secure; when a Windows Virtual Desktop session is closed, no company data resides or is cached on the local device.

There are multiple options for rolling out a Windows Virtual Desktop infrastructure across a company. One would be a simple proof-of-concept to a select group of users. This allows that group to test and evaluate their experience before a

Microsoft

broader group is deployed. Departmental rollouts are another option, where there could be a use case for a single department, or perhaps a contractor or company purchase where the customer needs to provide a company desktop image to a group of users on short notice. Finally, the short deployment timelines for Windows Virtual Desktop make it an intriguing option where a full organizational deployment isn't called for, but rather a sudden need to move the majority or the entire workforce to a remote work environment.

Microsoft has three options for Windows Virtual Desktop: deployment via Microsoft control plane, Citrix Cloud on Azure, or VMware Horizon Cloud on Azure. Microsoft control plane deployments can be a good fit for organizations that don't currently have any type of virtual desktop footprint or are using Remote Desktop Services. For companies or partners that may already use a virtual desktop infrastructure from Citrix or VMware, those control planes can be extended to Windows Virtual Desktop on the Azure infrastructure to increase the scalability and elasticity of the virtual desktop deployment.

Windows Virtual Desktop management

Once a virtual desktop environment is deployed, it also needs to be monitored and managed. This is where the partner can continue to expand the number of desktops within the client environment, providing feedback on the performance and availability provided within the Windows Virtual Desktop infrastructure. There are a number of ISV solutions that help with assessment, management, and monitoring.

In addition, the partner should also be sure to maintain the image to current security standards and baselines to avoid potential security breaches. Windows Virtual Desktop can utilize all security services that are available within the Azure and Microsoft 365 cloud ecosystem to provide services to clients.

RESOURCES

Microsoft Cloud Workshop – Implementing Windows Virtual Desktop in the company

Connecting to Virtual Desktop through a web client

Citrix Virtual Apps and Desktops for Azure | Microsoft Azure

VMware Horizon Cloud - Windows Virtual Desktop | Microsoft Azure

Microsoft

Key Contracts and Practice Tools

Partners will require a complete set of legal documents to drive compliance, protect their IP, and produce consistent engagement deliverables. They also need a documented process to monitor project progress, in terms of both the project plan and budget.

KEY CONTRACTS

Leverage the Key Contracts for Practice guide to learn more about developing service level agreements, master services agreements, a statement of work, and a mutual non-disclosure agreement.

MICROSOFT TEAMS

Microsoft Teams should be used for every project for collaboration. Create a team for each project and invite the customer in as a guest user to collaborate and track the project. Build as much as possible into that team to demonstrate the value and expandability of Teams. The lifecycle of a project or duration of a managed services agreement is critical, especially when leveraging the technology and services they are selling them.

MICROSOFT PROJECT ONLINE

Microsoft Project Online is a flexible online solution for project portfolio management (PPM) and everyday work. 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.

AZURE DEVOPS

Azure DevOps 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 Azure DevOps helps to manage the technical aspects of a project, cost-containment requires a different set of tools.

GITHUB

GitHub provides the hosted environment for the business application implementation team to version control and share their source code, notebooks, and other artifacts both privately (e.g., internally to a team) and publicly (e.g., an open-source project), and collaborate on development projects.

OTHER COLLABORATION TOOLS AND FILE SHARING

Yammer is a company social network collaboration offering to help teams collaborate and share files.

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

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 practice, as it is designed for professionals who manage projects and the associated customer engagement process end-to-end.

Microsoft Surface Hub is a Teams-integrated collaborations device, or "meeting room in a box." In addition to the built-in team experiences like Teams, 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. They can also connect apps from their personal device and drive them from Microsoft Surface Hub.

Microsoft

Use CRM to Grow the Business

Streamline processes and increase profitability in the sales, marketing, and service divisions.

A strong customer relationship management (CRM) solution is a multifaceted platform where everything crucial to developing, improving, and retaining the customer relationship is stored. Without the support of an integrated CRM solution, partners may miss growth opportunities and lose revenue because they are not maximizing their business relationships. Imagine misplacing customer contact information, only to learn the delay pushed the client into the arms of a competitor. Or picture the top two salespeople pursuing the same prospect, resulting in an annoyed potential customer and some unfriendly, in-house competition.

Without a centralized program where salespeople can log and track customer interactions, they will lose out on valuable opportunities.

THE FUNDAMENTALS OF CUSTOMER RELATIONSHIP MANAGEMENT

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

- 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 not a simple task. When marketing campaigns, data analysis, meetings, customer care, and more, all happen simultaneously, a powerful CRM solution can bring all these functions together in one place. Using Microsoft Dynamics 365 for Sales and Marketing, partners can seamlessly integrate all their communications with prospects and clients and their LinkedIn contacts, all in one place. Dynamics 365 can also be integrated into Teams.

THE SALES TEAM WILL WORK WITH THE FOLLOWING TYPES OF RECORDS:

- **Accounts** – Account records contain information about the companies they do business with.
- **Contacts** – Contact records contain information about the people they 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 they work with at the company.
- **Leads** – Leads are potential sales, and they or their company can get leads from many different sources. For example, they can generate sales leads from marketing campaigns, inquiries from their website, mailing lists, social media posts, or in person at a conference or trade convention.
- **Opportunities** – When they qualify a lead, it becomes an opportunity, or a deal that they are getting ready to close.

Microsoft Dynamics 365 can be customized, so they can also work with records relevant to their team and the way their organization does business, including sales, customer service, field service, project service, automation, and marketing.

Commercial Marketplace

Connect with more than 3 million users monthly, including Microsoft's partner ecosystem.

Microsoft's commercial marketplace provides partners with opportunities to reach millions of customers and other partners in more than 140 countries, as well as access to joint go-to-market activities with Microsoft and helps organizations find, try, buy, and deploy partner apps or services. The commercial marketplace comprises the product catalog, offer information, Microsoft AppSource, Azure Marketplace, in-product purchase experiences, Partner Center, and Quote Center. Microsoft will determine the most effective marketplace for the app or service so that it reaches the right customers. The two primary customer storefronts in the marketplace are AppSource and Azure Marketplace.

- AppSource provides line-of-business managers and business professionals with applications and professional services that support key workflows and maximize productivity. It is intended as a showcase for apps and services that work with Azure, Dynamics 365, Office 365, Power BI, and Power Apps.

- Azure Marketplace provides IT professionals and cloud developers with leading IT management, support, and development tools that work on Microsoft Azure.

Each marketplace supports three publishing options and several offer types. All publishing options provide access to lead sharing.

PUBLISHING OPTIONS	OFFER TYPE
List	Contact me, consulting service, SaaS applications
Trial	Free trial, SaaS trial, interactive demo, test drive, SaaS applications
Transact	Virtual machine, solution template, managed application, container, SaaS applications

Refer to the commercial marketplace guide to learn how to create an offer, manage and track offers, activate benefits, and collect payment.

Partners also can request an engagement with the Microsoft Cloud Enablement Desk to help in publishing their solutions or services. For on the Cloud Enablement Desk, see Grow and accelerate your cloud business with the Cloud Enablement Desk - US Partner Community Blog - Microsoft.

ISV STUDIO

Once an app is listed on AppSource, partners can monitor it using ISV Studio. ISV Studio is designed to become the go-to Power Platform destination for Independent Software Vendors (ISV) to monitor and manage their applications. ISV Studio provides a consolidated cross tenant view of all the applications an ISV is distributing to customers. Using ISV studio allows partners to track installs and other valuable metrics.

Microsoft

Source: https://docs.microsoft.com/powerapps/developer/common-data-service/isv-app-management
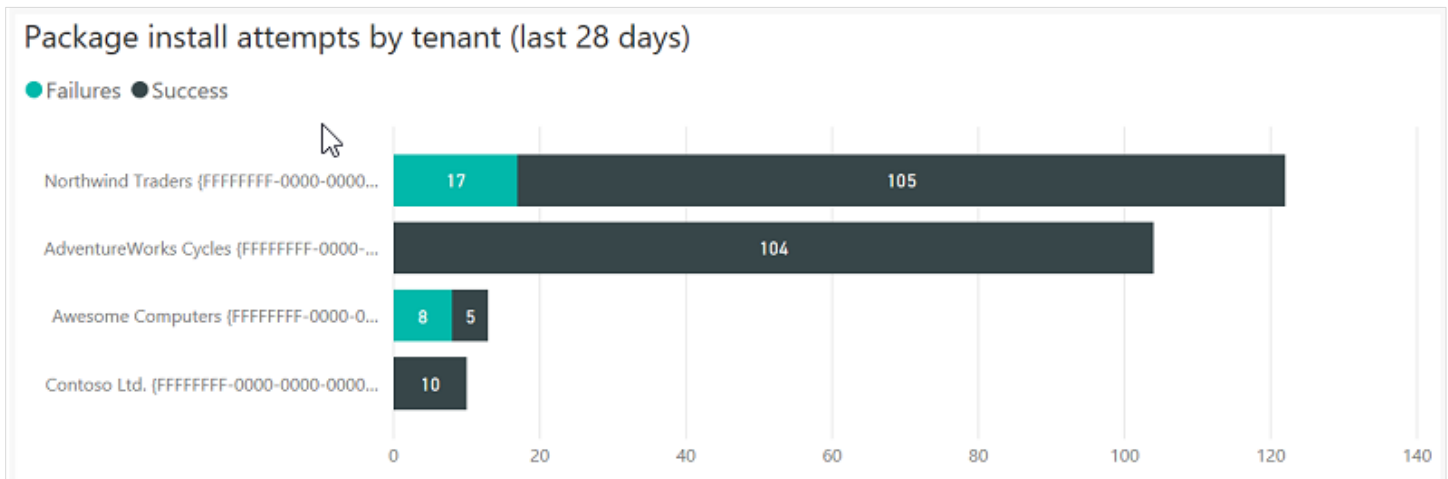
Customer Support

Implement a customer support program and process.

It has been said that an unhappy customer represents an opportunity to make a customer for life.

When it comes to support, there are two perspectives a partner should consider. First, how will they support their customers when they have engaged them for project services, are using their software, or are utilizing their intellectual property? Second, where do they go for support for a solution they are building or because they need assistance on behalf of their customer?

Partners will need to:

- Define their support model
- Provision their support infrastructure
- Define and implement their escalation process
- Select and enable their support options

SUPPORT MODEL

The typical options for packaging support into a service are to provide it 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 customers pay a fee each time they use support). Partners should also define their support availability so customers have a realistic expectation of when they can access the service.

ESCALATION PROCESS

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 common issues have been ruled out. Two to three levels of tiered support are most common. When defining the escalation process, describe how customers get in contact for support, whether it is a dedicated support line, forum or chat room, Twitter, email, etc.

Then define how to 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.

LEVEL OF SUPPORT

Determine what level of support expertise you provide in your service offerings

LEVEL 1	LEVEL 2	LEVEL 3
Customer service	Advanced trouble shooting	Specialized architects

Microsoft

Support Options from Microsoft

How do partners receive support for their implementation efforts or on behalf of their customers?

For full details of the benefits available at each Partner level, see Partner Network – Compare Offers. Also, review the Microsoft Partner Benefits Usage Guide.

PARTNER ADVISORY HOURS

Engage with Microsoft technical consultants and get proactive, personalized assistance for multiple technical roles to help with presales deployment and development scenarios by utilizing the Partner advisory hours benefit offered through the Microsoft Partner Network. Organizations receive advisory hours for attaining a Microsoft competency or subscribing to Microsoft Action Pack.

PARTNER LEVEL	ADVISORY HOURS INCLUDED
Network Member	0 hours
Action Pack	5 hours (after the first cloud sale)
Silver	20 hours
Gold	50 hours

These hours can be used for:

- 1:1 pre-deployment best practice consultation, based on their implementation scenario
- 1:1 developer consultation for ISVs

Explore the suite of consultation offerings and learn how to request a consultation on the Technical Presales and Deployment page on the Microsoft Partner Network website.

SIGNATURE CLOUD SUPPORT

Microsoft Signature Cloud Support provides partners with cloud support to help their customers' services operating smoothly. SCS handles technical support scenarios for Microsoft Office 365, Microsoft Dynamics CRM Online, and Microsoft Azure.

Microsoft

MICROSOFT SUPPORT

Microsoft Advanced Support for Partners is the ideal solution for partners growing their cloud business (not quite ready for Premier Support but needs a higher level of service than the Microsoft Partner Network core benefits).

The Advanced Support program delivers the right level of support to meet them in the middle while their business is growing. With Advanced Support for Partners, they get cloud support at an accessible price point, which helps them be a great ally to their customers and grow their 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 them to provide support on behalf of their end customers, in addition to providing support on subscriptions they own directly.

Microsoft Premier Support for Partners delivers a managed support offering for them and their 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 a competitive advantage in the marketplace.

Microsoft offers a range of paid Azure support plan options for customers — from developers starting their journey in the cloud to companies 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 by those who are not Microsoft Partners. In addition to these paid plans, Azure offers core support, which is free. It provides support via forums and help with account billing or management questions.

Microsoft

Support resources

AZURE SECURITY CENTER

Azure Security Center provides integrated security monitoring and policy management across Azure subscriptions, helps detect threats that might otherwise go unnoticed, and works with a broad ecosystem of security solutions. It should be part of any managed service practice to assist with monitoring and support.

Some of its key capabilities are:

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

AZURE ADVISOR

Azure Advisor analyzes resource configuration and usage telemetry to detect risks and potential issues. It then draws on Azure best practices to recommend solutions that will reduce cost and improve the security, performance, and reliability of applications.

AZURE SENTINEL AND LOG ANALYTICS

Azure Sentinel utilizes Log Analytics to protect workloads within Azure, M365, 3rd party clouds, and on-premises. Azure Sentinel utilizes Log Analytics as the central log repository. Log Analytics collects and analyzes the data generated by resources in the cloud and on-premises environments. It provides real-time insights using integrated search and custom dashboards to readily analyze millions of records across all workloads and servers regardless of their physical location.
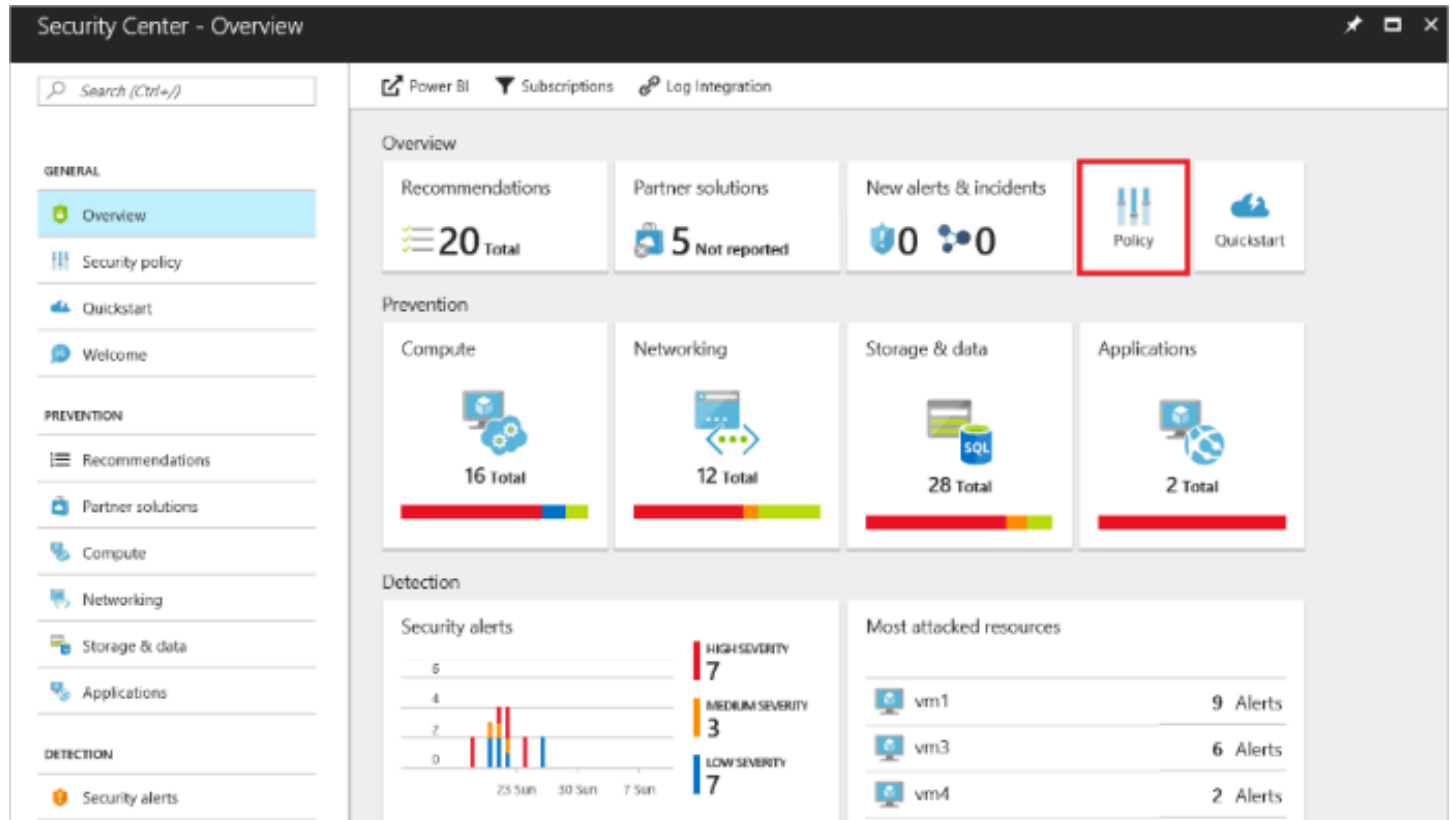
DevOps at Microsoft Center

DevOps at Microsoft Center is the main Microsoft online resource center that contains the latest and greatest videos and how-to guidance for working with DevOps and Visual Studio.

THE DEVOPS AT MICROSOFT SITE PROVIDES

- How Microsoft has evolved their DevOps strategy to support a single engineering organization where development and testing are a unified part of the building process rather than separate roles
- Information on how to incorporate Agile principles in a DevOps practice
- How security (DevSecOps) is an important and key part of any DevOps strategy
- Information and research knowledge on what Microsoft is doing to improve and enhance the DevOps journey

Support Ticket Setup and Tracking

Setting up tickets, tracking issue resolution, and managing customer success are fundamental to a practice.

MONITORING DEPLOYED MODELS WITH AZURE MACHINE LEARNING

Use the model data collection feature in Azure Machine Learning to archive model inputs and predictions from a web service. For deeper insights into performance, capture model telemetry using the Azure Machine Learning SDK. The model telemetry can be used later for analyzing model performance, retraining, and gaining insights for the business.

MICROSOFT DYNAMICS 365 FOR CUSTOMER SERVICE

Providing support to customers from their practice is a non-trivial, omni-channel effort. Microsoft Dynamics 365 for Customer Service is designed to manage the efforts of customer support teams. It provides access to core customer service capabilities for a significantly lower price than comparable offerings from other vendors, including company 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 that 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 THE AGENTS' JOBS EASIER

Give support 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 functionality through a single interface
- Rely on advanced analytics and a trusted cloud platform

Microsoft

Troubleshooting Resources

To assist the support team, several resources have been compiled to assist with troubleshooting the related services the team may use as part of delivering services in this 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 Azure forums:

- Azure Active Directory
- Azure Storage
- Azure Networking
- Azure Virtual Machines
- Azure Automation
- Azure Scripting and Command Line Tools
- Azure Log Analytics
- Azure Security Center

STACK OVERFLOW

Stack Overflow is the largest online community for programmers to learn, share their knowledge, and advance their careers. This is a great community-based resource for assisting developers with troubleshooting code-related issues in 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 Azure AD Connectivity	Troubleshooting Password Management
Troubleshooting Azure AD Domain Services	Troubleshooting Azure AD Connect Synchronization Issues

Microsoft

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](#)	

TROUBLESHOOTING AZURE AUTOMATION

[Authentication Errors Working with Runbooks](#)	[Common Runbook Errors](#)
[Common Errors Importing Modules](#)	[Common Errors with DSC](#)
[Common Errors Onboarding Solutions](#)	[Troubleshooting the Log Analytics VM Extension](#)

TROUBLESHOOTING AZURE BACKUP

[Troubleshooting Azure VM Backup](#)	[Troubleshooting Azure Backup Failure](#)
[Troubleshooting Azure Backup Server](#)	[Troubleshooting Slow Backup](#)
[Troubleshooting Azure Backup Agent](#)	

TROUBLESHOOTING AZURE SITE RECOVERY

[Troubleshooting Azure Site Recovery](#)	[Troubleshooting VMware to Azure Replication](#)
[Troubleshooting Failover to Azure](#)	[Troubleshooting Hyper-V Replication](#)
[Troubleshooting Azure-to-Azure Replication](#)	[Troubleshooting Azure Site Recovery Agent](#)

Microsoft

Microsoft

Go to Market and Close Deals

Secure Remote Work

aka.ms/practiceplaybooks

Introduction

Discover strategies to compel potential customers that may be sitting on the fence to buy, from creating a good value proposition to building marketing and sales materials that tell the story.

Get started by building foundational marketing materials such as marketing personas, points of differentiation, value propositions, and customer business needs. Then learn how to put those materials to work.

Discover the best practices for attracting new customers and see how successful partners put it all together? Learn why integrated marketing campaigns work the best, and the tools needed to run them, such as a CRM system and marketing automation.

See how the marketing and sales teams 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 their 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 the product or service offering, which could help a prospect understand the offering or solidify their vision of what is possible. Microsoft is committed to helping partners' businesses grow and provides both co-selling and co-marketing opportunities.

Go-to-Market and Close Deals Guide

Leverage the Microsoft resources available in the Go-to-Market and Close Deals guide, these additional sections:

MARKETING TO THE CLOUD BUYER

Technology buyers buy differently than in the past. By the time they engage with sales, they have already made some decisions.

ALIGN MARKETING GOALS WITH BUSINESS GOALS

What should the marketing efforts try to accomplish?

CREATING MARKETING FOR EVERY PHASE OF THE JOURNEY

Messaging and content should be available at each stage of the customer journey.

MARKETING TACTICS

Understand strategies for websites, SEO and SEM, social media, email, blogs, and webinars.

SALES

Find selling tips, sales training materials, best practices, sales incentives, and sales compensation advice.

CLOSING THE SALE

Write winning proposals and negotiate the offer.

Go to
Market
& Close
Deals

Microsoft
Partner
Network

This content is a subset of the broader Cloud Practice Development Playbooks. For more information on these playbooks or to download the full versions, please visit aka.ms/practiceplaybooks.

Microsoft

Buyer Engagement

With all the information on the internet, buyers tend to research and self-educate long before they engage with salespeople. By the time they do engage with sales, they have already made some decisions.

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 know what they want and how much they are willing to pay for that car. This poses a challenge for sellers to get prospects to engage earlier in the process through marketing.

Managed services are also changing the way partners sell cloud-based solutions. Recurring revenues provide business stability and confidence, allowing partners 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 large capital expenditures, a higher volume of transactions can adjust for this. A higher volume of high-quality sales leads is needed to create larger sales pipelines. Clients who are buying on a recurring basis represent great opportunities to upsell and cross-sell additional products and services.

Marketing is not an option anymore. Marketing helps educate, identify, and engage with prospects earlier in the sales process. By identifying prospects who indicate interest 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 a partner. Outbound marketing techniques, such as e-mail and telemarketing, make it easier to tell prospects about a partner'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 is not to say that more traditional, non-digital marketing is ineffective. But to be found by prospective buyers with no prior relationship, employ digital marketing techniques. Modern marketing is focused on the prospects' and clients' views of the world.

REMOTE WORK MARKETING RESOURCES

From the Partner Center Dashboard, partner sellers can download propensity data from the [CloudAscent Program](#) showing customers' propensity to purchase Microsoft products. The reports allow for filtering on key remote work-related fields.

[Digital Marketing Content OnDemand](#) is helping partners increase productivity and generate demand online. Available at no cost to Microsoft partners, the service can become a personal digital marketing assistant, delivering fresh, relevant content to customize and share on social, email, website, or blog.

Identify potential customers

Build the list of prospects that could potentially turn into customers with an awareness campaign and use past deployment success to earn additional business. Use these awareness activities to help generate new customers:

WEBINARS AND PODCASTS

A great way to transfer knowledge, establish a practice 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 similar services.

WHITE PAPERS

These are a great way to build credibility with decision-makers with thought leadership and technical information. Technical staff often expect a white paper to help them understand underlying architecture and technology.

NEWS ARTICLES

Leverage public relations efforts to drive publicity around technology, market activities, 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.

REVISIT EXISTING CUSTOMERS

When offering a new practice within an existing business, the easiest way to acquire new customers is to introduce the practice to existing customers.

Engage existing customers

As always, the best potential customers are existing customers. When relationships are good, customers are more open to ideas for helping improve their business processes. To start, dig deep into their needs, challenges, business objectives, and priorities. Then work with them to create a vision that combines tactical projects with strategic initiatives that include a clear definition of customer experience goals.

Partners that have done this recommend starting this conversation with a planning engagement that builds confidence that there is a way forward and what it might look like. Ask big picture questions. For example, ask the customer *"If one of your staff wanted to go into competition with you, what could they do to disrupt your business?"* Help executive-level leadership realize the vision and its potential, and how it can help fill their technical and business gaps.

PROVIDE CUSTOMER LIFETIME VALUE

Lifetime value does not happen without a plan. Map out the cloud journey in collaboration with the customer. What should they do first? Where will they be in two, three, or five years? With a plan in hand, work with the customer to make potential business benefits a reality. Everything does not need to happen at once, but it does need to happen in a thoughtful and logical way. Always be thinking about what is next. Would complementary or incremental functionality be a good fit at the customer's stage in cloud maturity?

The digital partner of record on the customer's Microsoft subscriptions has access to their cloud solution usage and consumption data via the Cloud Services Partner Dashboard. Use it to identify where to encourage deeper and wider usage, as well as areas where the customer may benefit from the incremental project or advisory services. For example, if SharePoint usage is low, try launching an outreach campaign about best practices in organizing projects and teams.

Microsoft

Consultative Selling and Technical Pre-Sales

Discovering the art of the possible

More than ever before, technical staff are a part of the decision-making process as they help envision a solution to solve a customer need.

The technical pre-sales staff should be very experienced users of the products and services. For that reason, former support employees often make good technical pre-sales staff. The technical pre-sales staff is in place to explain the technology, how it works, how it meets a business need, and to answer any other questions. They should excel at the more complex issues that come from prospects, and be focused on pre-sales, working together with sales and marketing, who address the business benefits. One without the other cannot be effective.

Examples of technical probing questions to ask during pre-sales conversations supporting a secure remote work:

- What are the short- and long-term strategies regarding the remote workforce?
- How would you describe how you manage, maintain, and secure applications and mobile devices?
- What are some examples of how you are currently using your technology to support remote workers?

BEST PRACTICES – CONSULTATIVE SELLING

- **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.
- **Ask good questions.** The successful solutions seller remains sensitive to the buyer's needs and asks important questions at the right moment.
- **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.
- **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.

Microsoft

Microsoft Technology Centers

With more than 40 locations around the globe, the Microsoft Technology Centers (MTC) bring together the right resources to help accelerate a 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 partners in finding solutions.
- **Partners:** The MTCs have formed alliances with industry leaders who provide comprehensive resources, including hardware, software, and services.
- **Place:** The MTC environment provides rich interactive and immersive experiences to learn first-hand Microsoft and partner technologies.

The MTC can help close sales with these engagement offerings:

- **Strategy Briefing:** This one-day briefing starts by examining the current IT environment and business objectives. Then it moves into the Envisioning Center, showcasing Microsoft solutions in action through powerful demos and customized scenarios. 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 reach business goals.
- **Architecture Design Session:** This custom session aligns business objectives with specific applications of Microsoft software. It provides architectural guidance, consultation on preferred practices, and risk analysis to chief technology officers, architects, and senior members of the development team.
- **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 to experience the vision of Microsoft's platform and solutions firsthand.

Architecture Design Session (ADS)

An architecture design session is a working session that follows the envisioning session and builds on the customer's already established vision.

This intensive, one to two-day session delivers in-depth technical information on integrating data from across a customer's entire organization and delivering it in an analysis-ready form. Presentations, demonstrations, and whiteboard discussions are customized to address the 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 a customer's business productivity solution, it is 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 company security requirements.
- **Virtualization and cloud computing:** Extending a customer's company 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

Note that an architecture design session is not always an appropriate engagement with the customer. They may have very little to no knowledge about Azure or cloud technologies in general. If this is the case, then they are not ready for an ADS. A technical briefing or hands-on-labs may be needed to build the customer's confidence in cloud technologies. The Azure Immersion Workshop: Windows Virtual Desktop includes hands-on-labs that provide a deeper technical understanding of Windows Virtual Desktop.

Microsoft

Phases of a successful ADS

BEFORE THE ARCHITECTURE DESIGN SESSION

Before 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.

- **Schedule a time for the design session:** Normally 1-2 days
- **Schedule a location:** Ensure there are whiteboards and a projector
- **Schedule resources:** Experts from the 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 does not get consumed discussing a single topic
- **Prepare preliminary documentation and architectural diagrams:** Even with only the basic building blocks, it is good to come prepared with something to modify during or after the session

DURING THE ARCHITECTURE DESIGN SESSION

Begin by reviewing requirements with the customer. Whiteboard the requirements, proposed solutions, and arrive at a consensus for each major topic. Be sure to capture photos of the whiteboard.

There are typically the following phases during an architecture design session: Discovery, Envisioning, and Planning.

DISCOVERY

- Review the 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

In addition to a summary of the engagement, deliver information about:

- Special areas of concern to the 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 different technology options
- The capabilities to deliver business performance on-premises or in the cloud

The outcome should be polished architecture diagrams that can be reviewed and signed off by the customer. If one or more proof of concepts is desired, provide a plan and a timeline to deliver.

Microsoft

Implement a secure remote work proof-of-concept (PoC)

If one of the outcomes of the ADS is a PoC, there are some basic guidelines to keep in mind.

The key to developing a successful PoC is to avoid common traps, such as premature optimization, and spending too much time hardening the application for rock-solid performance and stability. The proof of concept is a level of complexity and usability below a minimum viable product (MVP), as it is used to validate the customer requirements and the proposed solution. Try to start a PoC from an available template, such as a Visual Studio project template, or from pre-existing code from other projects. This is a great way to jump-start a development process. Bear in mind that the PoC lacks a lot of the functionality of the final delivered software. User interface elements, for instance, maybe they're just for illustrative purposes and lacks functionality. APIs may have desired endpoints stubbed out that define the methods and functionality that it will provide, but the implementations are missing. Resist the urge to develop the final product atop the PoC, as it could alter the use of technology and the requirements could change. Start from a more stable development foundation. The key in a secure remote work scenario PoC might be a Windows Virtual Desktop deployment where partners migrate a set of users in a single department to Windows Virtual Desktop, test that setup and move additional users in the actual deployment.

The benefits of developing the PoC are twofold: it helps the development team fully understand the customer requirements, instead of just reading through the documents, and it also helps the customer truly understand what they want. Oftentimes, customers will have a concept in mind of what they want, but they are not aware of what they do not know, which can influence their concept later in the development process. The PoC helps identify these issues early on. Having a PoC on hand provides the opportunity to communicate to the user the look and feel of the final product much more vividly than using design documents and design reviews. Seeing the PoC allows the customer to adjust their requirements to match exactly what they want, and to better define their expectations for the final deliverable.

Microsoft

Set Up Social Offerings

Contributing to the technical community can help increase credibility and strengthen the technical acumen of the delivery team. Here are some suggested options:

BLOGGING

Technical blogging is a great way to grow stature in the community at large. 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, USER GROUPS & ASSOCATIONS

Speaking at user groups and association events is another valuable tool to increase skills and recognition. Similar to blog posts, it's great practice for honing vital communication skills and a great opportunity to dig deeper into a specific subject.

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 the local organizer to help) or learn how to host a bootcamp. For more information, visit http://global.azurebootcamp.net/.

SECURE REMOTE WORK COMMUNITIES

There are numerous tech communities for gaining insight and knowledge. These communities can also help answer questions about Microsoft products and services. With over 500,000 members, Microsoft Tech Community has technical, product, and training forums. For more information, visit https://techcommunity.microsoft.com/. In addition, the TechTalk channel Desktops in the Cloud https://desktopsinthecloud.com/ connects people from Microsoft engineering and the worldwide virtual desktop community. Partners who are members of the Microsoft Partner Network can also Join the Windows Virtual Desktop partner forum to share learnings, get updates and join community calls.

WINDOWS VIRTUAL DESKTOP PARTNER GUIDE

Download the WVD Partner Guide to review the steps in becoming an approved WVD partner.

WEBINARS

Webinars are another resource to extend a team's 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 has been a way of saying thanks 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 an 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 build the reputation of the practice but can also hone much-needed skills for the delivery team.

Microsoft

Competencies

Build and verify technical expertise

Microsoft Partner Network competency demonstrates to customers a company's expertise with a specific product or a platform. Among the first steps to achieving a competency is to meet technical skills requirements and pass any associated exams. One of the next steps is to align the technical team to the MPN competency for the practice.

The competencies most applicable to secure remote work are:

COMPETENCY	DESCRIPTION
Cloud Productivity	The cloud productivity competency is for partners who specialize in company deployments of Office 365. Differentiate the practice with this competency as a proven cloud solution provider for customers searching for qualified cloud solution partners. The gold level requires partners to have two (2) individuals that have passed the Exam MS-100: Microsoft 365 Identity and Services exam and have deployed 4000 active entitlements (active users). The deployments can be either any Microsoft Office 365 workload (Exchange Online, SharePoint Online, Skype for Business, Teams, or Yammer). Trial SKUs are not included. For these customers, partners need to be associated as Office 365 Delegated Administrator, CSP direct-bill partner, CSP indirect reseller, Transacting Partner, or Digital Partner of Record or Claiming Partner of Record (CPOR). Learn more about these associations. Click here to know the qualified SKUs.
Communications	The Communications competency recognizes partners delivering innovative and customized Skype for Business solutions. The Gold level requires that four (4) individuals obtain the Microsoft 365 Certified: Teams Administrator Associate certification and 2 of the 4 individuals must pass the following assessment: Practical Guidance Assessment for Voice within Partner University.
Collaboration and Content	The Collaboration and Content competency recognizes partners delivering SharePoint solutions that help companies share, collaborate, and improve productivity. The Gold level requires partners to have four (4) individuals must each pass both of these exams and certifications: Exam MS-100: Microsoft 365 Identity and Services and Microsoft 365 Certified: Teams Administrator Associate.
Company Mobility Management	The Company Mobility Management competency is for partners who stand out as experts in powerful, secure mobility management solutions for large businesses. Gold level requires partners to have four (4) individuals obtain the Microsoft 365 Certified: Company Administrator Expert certification by passing Exam MS-100: Microsoft 365 Identity and Services and Exam MS-101: Microsoft 365 Mobility and Security. The partner must also have added five (5) new Company Mobility + Security (EMS) customers within the last 12 months and deploy 4000 active entitlements. Individuals must have deployed Microsoft Intune, Azure Information Protection, or Azure Active Directory Premium (AADP).
Windows and Devices	The Windows and Devices competency is ideal for individuals who help customers deploy and manage Windows 10. Complete all the steps within the option to attain the Windows and Devices competency. The Gold level requires four (4) individuals to obtain the Microsoft 365 Modern Desktop Administrator Associate Certification.

Microsoft

Advanced specializations

An advanced specialization is a validation of a partner's capability to deliver high-fidelity services in a specific solution area. Advanced specializations are customer-facing labels displayed on a partner's business profile in the Partner Directory, enabling partners to showcase their differentiated skills.

Partners who attain an advanced specialization receive a customer-facing label that communicates their in-depth knowledge in a specific area and verifies their extensive experience and proven success in implementing Microsoft services or solutions. Advanced specializations are for partners who already have an active and relevant gold competency.

- The Microsoft Windows Virtual Desktop advanced specialization validates a partner's deep expertise in deploying and scaling virtualized desktops and applications on Azure using Windows Virtual Desktop.
- Identity and Access Management Advanced Specialization differentiates the technical capabilities in partnering with customers to evaluate and deliver Microsoft Identity workloads with Azure Active Directory by earning an advanced specialization.
- The Teamwork Deployment Advanced Specialization provides a means for partners to showcase proven expertise leveraging Microsoft engineering approved methodologies for deploying Office 365. Customers will be able to see both the partner's Gold Cloud Productivity competency and advanced specialization in the partner business profile on the partner directory.
- Meetings and Meeting Rooms for Microsoft Teams is a designation for experience and proven success delivering Meetings and Meeting Rooms services and solutions for Microsoft Teams.

Microsoft

Microsoft

Optimize and Grow

Secure Remote Work

aka.ms/practiceplaybooks

Introduction

This section will focus on how to optimize a secure emote work, strengthen relationships with customers and evaluate performance to continue to delight prospects and customers.

One of the first steps is to partner with Microsoft and join the Microsoft Partner Network. Partners gain access to resources like training, whitepapers, and marketing materials.

Then browse the detailed list of best practice resources for growing Secure Remote Work projects.

Optimize and Grow Guide

Leverage the Microsoft resources available in the Optimize and Grow guide, for details on optimization strategies, engaging customers for life, and monitoring and measuring results. The guide contains the following additional sections:

OPTIMIZE THROUGH BOTTOM-LINE EFFICIENCIES

Optimize for operational excellence, using bottom-line levers.

MEASURE RESULTS

Benchmark and create a scorecard to measure improvement against key performance indicators.

UNDERSTANDING CUSTOMER LIFETIME VALUE

A lifelong customer is of far greater value than any one-off transaction. And not all customers are equal in value.

CUSTOMER EXPERIENCE AND SATISFACTION

Continually improve the customer experience by establishing CX related metrics.

COLLECT FEEDBACK

Solicit feedback from customers on a regular basis and act on that feedback.

PERFORM A POST-MORTEM

Establish a formal process for evaluating a project.

GROWTH THROUGH TOP-LINE STRATEGIES

Without a strategic plan for growth and revenue generation, the impact will be felt on the bottom line.

POST-SALE ACTIVITIES

Building and nurturing positive customer outcomes post-deployment is critical to secure recurring and renewal-based revenue.

GROW PARTNERSHIPS

Identify partnership opportunities, assess readiness, and grow relationships to differentiate offers, expand markets, or enter verticals.

Partnering with Microsoft

One of the first steps to partnering with Microsoft is to join the [Microsoft Partner Network](#). Partners gain access to resources like training, whitepapers, and marketing material described in this playbook. It is also where partners set up their users to gain Microsoft Partner competencies and access to other partner benefits.

TO BECOME A MICROSOFT PARTNER

The Microsoft Partner Network provides three types of memberships. Partners can participate in the program at the level that suits their unique needs.

- **Network Member:** Receive a set of no-cost introductory benefits to help save time and money. Use our resources to help build business and discover the next steps.
- **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:** Demonstrate the capability with a specific product or solutions and receive increased support, software, and training.

What is the Microsoft Partner Network?

The Microsoft Network is a hub of people, resources, and offerings brought together to give you everything you need to build and deliver successful solutions for your customers

The power of partnership

Together, we can accomplish more. When you join the network, you become part of a community with a shared goal to do more for our customer

Investing in you

The resources, programs, and tools we offer help you train your team, build innovative solutions, differentiate in the marketplace, and connect with customer

Your launchpad for growth

With access to a board range of products and services, our partners are empowered to build and deliver solutions that can address any customer scenario

Best Practices

Ensure that the team is aware of and takes advantage of established best practices from Microsoft where possible.

Here is a list of best practice resources as it relates to developing remote work solutions:

DOCUMENT	OVERVIEW
Remote Work Customer Immersion Experience	Conduct a Customer Immersion Experience (CIE) to showcase how Microsoft 365 can enable remote work scenarios.
Envision, Onboard, and Drive Value with Microsoft 365 Adoption Tools	Use the resources to simplify and accelerate time to value. These guides use the best practices gathered from Microsoft and industry experts, partners, and customers. Get started, experiment with the services, and onboard employees at scale with confidence.
Windows Virtual Desktop on Microsoft Docs	Windows Virtual Desktop comprises the Windows desktops and apps delivered to users and the management solution hosted as a service on Azure.
Device Management	Device management enables organizations to protect and secure their resources and data, and from different devices.
Identity Management Best Practices	Azure identity management and access control security best practices derived from Microsoft's experience with Azure AD and the experiences of customers.

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Playbook Summary

Thank you for taking the time to review this playbook. The research, guidance, and best practices outlined in this playbook provide insights from successful partners on how to build a secure remote workplace.

The goal was to organize resources and provide insight on business strategies and technical topics to capitalize on the cloud application development opportunity.

- The first section, Define the Strategy, helped partners define the practice strategy by identifying the unique value proposition and building a business plan.
- The second section, Hire & Train, focused on the importance of hiring the right team and providing appropriate and ongoing training.
- The third section, Operationalize, detailed the solution delivery process, the Microsoft-provided support options, and tips for implementing IP in a security offering. It ended with a customer engagement checklist to use for creating repeatable processes.
- The fourth section, Go to Market & Close Deals, covered the sales and marketing process, finding new customers, and then nurturing and investing in them to build lasting relationships.
- The final section, Optimize & Grow the practice, stressed the importance of building customer lifetime value and the key elements of a customer adoption approach.

FEEDBACK

Share feedback on how to improve this and other playbooks by emailing playbookfeedback@microsoft.com.

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