

# Technology Services **Guide**

## **Modern Indirect Provider Assessment**

Canada - One Commercial Partner // FY20

**Version:** January 2020



# purpose

This book has been created to provide clarity in a number of key areas with respect to the way Microsoft's One Commercial Partner (OCP) business in Canada works with CSP indirect providers ('indirect providers'); specifically:

- How your Partner Technology Strategist (PTS) will work with your business and your Partner Development Manager (PDM) through the fiscal year.
- Where indirect providers can build or enhance their service offerings in line with Microsoft's modern partner transformation agenda.
- What Microsoft considers to be a good, better, and best view of indirect providers in order to create a consistent and competitive market for current and future indirect resellers to do business with/through.



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**Mandatory**

- 1. Achieve and maintain a Gold competency
- 2. Have either ASfP or PSfP contracts in place
- 3. Maintain and up-to-date CSP platform
- 4. Comply with the enhanced partner security requirements

**Good**

- 5. Offer pre-sales solution architect support
- 6. Run a structured, repeatable partner lifecycle management methodology
- 7. In-house adoption of Microsoft cloud services
- 8. Run a structured, repeatable beginner technical enablement program
- 9. Run a Data Center Migration (DCM) program
- 10. In-depth, actionable insights and reporting on consumption, adoption, etc.
- 11. Distribute regular communications regarding technology developments
- 12. Proactively foster partner-to-partner opportunities
- 13. Nominated Learning & Development or HR BP owner for Continuing Professional Development
- 14. Budgetary allocation to support development plans
- 15. Commitment to drive consumption of Microsoft Learn content
- 16. Company targets for trained and certified technology professionals

**Better**

- 17. Achieve and maintain an Advanced Specialisation
- 18. Provide cloud managed services
- 19. Run a structured, repeatable advanced technical enablement program
- 20. Write and execute against technical business plans for top tier partners
- 21. Partnership with a learning provider
- 22. Soft skills development program
- 23. Channel targets for trained and certified technology professionals
- 24. Adoption of Microsoft Cloud Adoption Framework principles in channel activation

**Best**

- 25. Achieve and maintain Azure Expert MSP status
- 26. Provide 'click-to-run' style pre-packaged IP solutions
- 27. Technical Account Manager
- 28. Operation an Adoption and Change Management (ACM) practice
- 29. Insight-driven automation and integration into LOB tools (CRM, etc.)

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# services guide

# 1

To establish a consistent approach to providing services in the indirect CSP model, the table below describes the types of services deemed to be mandatory, good, better or best for an indirect provider to develop.

In doing so, it provides opportunities for new revenue streams, drives competition through differentiation and raises the bar for all providers.

Full definitions for each item are defined in the *service descriptions* section of this document.

#	Offering	Mandatory	Good	Better	Best
1	Achieve and maintain a Gold competency	•	•	•	•
2	Have either ASfP or PSfP contracts in place	•	•	•	•
3	Maintain an up-to-date CSP platform	•	•	•	•
4	Comply with the enhanced partner security requirements	•	•	•	•
5	Offer pre-sales solution architect support		•	•	•
6	Run a structured, repeatable partner lifecycle management methodology		•	•	•
7	In-house adoption of Microsoft cloud services (across Azure, MW and Business Applications)		•	•	•
8	Run a structured, repeatable beginner technical enablement program		•	•	•
9	Run a DCM program		•	•	•
10	In-depth, actionable insights and reporting on consumption, adoption, gap analysis.		•	•	•
11	Distribute regular communications regarding technology developments and opportunities		•	•	•
12	Proactively foster partner-to-partner opportunities		•	•	•
13	Nominated Learning & Development or HR Business Practice owner for Continuing Professional Development		•	•	•
14	Budgetary allocation to support development plan		•	•	•
15	Commitment to drive consumption of Microsoft Learn content across Microsoft practice		•	•	•
16	Company targets for trained and certified technology professionals		•	•	•

# services guide

#	Offering	Mandatory	Good	Better	Best
17	Achieve and maintain an Advanced Specialisation			•	•
18	Provide cloud managed services			•	•
19	Run a structured, repeatable advanced technical enablement program			•	•
20	Write and execute against technical business plans for top tier partners			•	•
21	Partnership with a learning provider			•	•
22	Soft skills development program			•	•
23	Channel targets for trained and certified technology professionals			•	•
24	Adoption of Microsoft Cloud Adoption Framework principles in channel activation			•	•
25	Achieve and maintain Azure Expert MSP status				•
26	Provide 'click-to-run' style pre-packaged IP solutions				•
27	Technical Account Manager				•
28	Operate an Adoption and Change Management (ACM) practice				•
29	Insight-driven automation and integration into LOB tools (CRM, etc.)				•

# baselining

# 2

It is often said that in order to know how to get to where you are going, it is a good idea to know where you are to begin with. Taking a baseline of where your business is today against the services in the matrix is useful in establishing a common benchmark from which you can work with your PTS to establish areas of strength and weakness and build a clear plan with SMART objectives to track throughout the year.

The responses from each indirect provider are confidential insofar as they are not shared with other providers.

It is recommended that you work with the technical services matrix spreadsheet and discuss each line in depth to establish a current position against the following scoring methodology:

1. No current capability
2. A plan has been put in place to achieve
3. Work is being undertaken to achieve
4. Item is in testing / pre-launch
5. Item is fully achieved and available

Once complete, your PTS can consult with you on which areas are a priority, what success should look like, timescales, commitment of resources, etc. This work will then inform the technical business plan which is submitted to Microsoft.

The baselining exercise is not designed to be a one-time activity. It is recommended to review the matrix at least one more time in the year to ensure it's kept up to date. This is important when it comes to understanding the indirect provider capability 'map' and helps Microsoft prioritise its resources to ensure the channel is being served adequately.



Fig 1. Sample radar chart output from baselining exercise

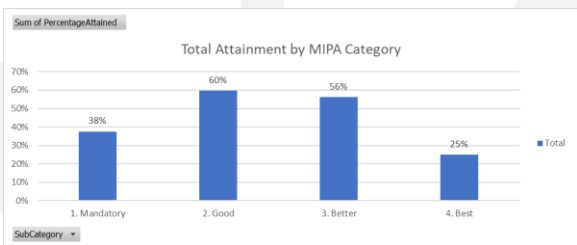


Fig 2. Sample column chart output from baselining exercise

# service descriptions

# 3

## 1. Achieve and maintain a gold cloud competency

Microsoft's competencies unlock benefits for partners and signal to customers a degree of trustworthiness. They're also an indication of capability which can lead to more opportunities, deeper relationships and repeat business. Competencies are typically achieved by hitting or exceeding key indicators such as Azure consumed revenue (ACR), exam certifications, etc.

As a baseline, we believe that every indirect provider should attain and retain at least one gold cloud competency.

Go to the [Microsoft Partner Competencies](#) pages to learn more.

## 2. Have either ASfP or PSfP contracts in place

Providing support to reseller partners might not be a key part of an indirect provider's business model. Advanced support for partners can alleviate some of this responsibility by enabling an indirect provider to access a tier of Microsoft Support which can service both the indirect provider directly and the reseller channel.

Having ASfP is a mandatory requirement for becoming a direct (1-tier) CSP partner, and we believe that indirect providers should have it too, as a matter of good service to resellers and their customers.

Go to the [Compare Partner Support Plans](#) page to learn more.

## 3. Maintain an up-to-date CSP platform

An up-to-date platform is critical to providing an excellent experience for reseller partners. Whether developed in-house, or bought from a third party, it's imperative that indirect providers use platforms which are enabled to take advantage of the developing capabilities of the CSP program. As new offers (such as the New Azure Plan) are added, resellers look immediately to use them. Opportunities can be won or lost by an indirect provider's ability to fulfil. If the platform is out of date, an indirect provider may lose business to the competition whose platform is not.

Go to the [Partner Center API and SDK early adopter program](#) pages to learn more.

## 4. Comply with the enhanced partner security requirements

In 2019, Microsoft announced details of enhanced security requirements partners must adhere to in order to participate in the CSP program. Indirect Providers must inform Indirect Resellers that they must also comply with the requirements.

Meeting these requirements is essential to being able to transact and manage customers on the platform.

Go to the [partner security requirements](#) pages to learn more.

## **5. Offer pre-sales solution architect support**

Resellers don't always have the in-house skills or bandwidth to manage opportunities that stretch their capabilities. As they learn and grow, it's important that the indirect provider can give them that 'helping hand'. The technical pre-sales role is critical in providing channel evangelism and technical enablement, not just about Microsoft technology but about your whole proposition. They're your front line to the technical audience in the channel. They should be delivering workshops, helping qualify opportunities and be a driving force behind your reseller community work.

## **6. Run a structured, repeatable partner lifecycle management methodology**

Increasingly, resellers look for more than a transactional relationship from their indirect provider. Having a robust lifecycle management program that applies the right resources to the right partners at the right time drives all the right behaviours across many forms of transformation: cultural, sales and technology. Investing time to educate, grow and listen to your resellers will see them invest further into your ecosystem and make it less tempting to move to a different provider.

## **7. In-house adoption of Microsoft cloud services (across Azure, modern workplace and business applications)**

It's important to have first-hand understanding of the software and services you sell. While there are many solutions you may use as part of your production operations, it's easier to position Microsoft solutions when you use them internally. Microsoft embodies this philosophy, regularly 'eating its own dog food' before releasing software and services to the market. Good practice would be to ensure that, at least as far as your Microsoft practice is concerned, you're actively using as many different offerings as possible; that way your teams will have the best knowledge and experience to help resellers.

## **8. Run a structured, repeatable technical enablement program**

Microsoft publishes cloud practice playbooks detailing how to build successful practices in areas such as AI, cloud migration, cloud infrastructure and many more. Indirect providers can add a huge amount of value by providing a structured enablement program to guide partners on their journey setting up their cloud practices. This could include pricing workshops, value proposition development, technical enablement and upskilling, IP development, or even just operational support navigating the various Microsoft programs available. Success from an enablement program should be measured through indicators including net customer adds, certified professionals, customer consumption and adoption (i.e. Azure consumed revenue, Teams active use, etc.).

Go to the [Microsoft cloud practice playbooks](#) pages to learn more.

## **9. Run a DCM program**

Microsoft has offered a data centre modernisation program for several years. The program's intent is to accelerate the move from SPLA to CSP through migration of workloads to Azure services. Whilst the formal program comes with terms, conditions, financial incentives, and other operational considerations, indirect providers who can't opt in should run versions of their own to achieve the same acceleration. These initiatives do not need to necessarily include a financial incentive; however, they should be specifically targeted at partners who have large bases of on-premises VM workloads to accelerate the migration and modernisation of those workloads. This type of program should include some specific technical enablement on technology like Azure Migrate, assistance with discovery and qualification or suitable customer workloads, and solution architect or service delivery support to enable the partner to act swiftly.



## **10. In-depth, actionable insights and reporting on consumption, adoption, gap analysis**

It's often said that the 'devil is in the detail', so having great insight into the health of your channel and their customers empowers people to make quicker, better decisions. How much information do your sales, operations, support and technical resources have at their fingertips when speaking with partners? What about your sales leadership? No doubt they can report on revenue, margin, profit, etc. but are they making good use of technology like Power BI to provide a lens on other measures like reach, frequency and yield? Can you spot trends in your channel such as the type of workloads that are being adopted more/less successfully? Who's adding the most customers, or driving the highest spend? Where are partners modernising vs. migrating, and how can you help accelerate that work?

## **11. Distribute regular communications regarding technology developments and opportunities**

As an indirect provider you have a unique opportunity to communicate with the channel. To share opportunities and good practices and to evangelise about ways to make adding value real through digital transformation and becoming a 'modern partner'. Whilst resellers can get some comms directly from Microsoft (i.e. the Ignite Book of News), indirect providers can add tremendous value by translating some of that material into the priorities that matter most and how to capitalise on them. How do you do that today? Is there a process for creating newsletters, videos, podcasts, other forms of social content? How do you track engagement with that content?

## **12. Proactively foster partner-to-partner opportunities**

Investing in building a practice, solution or developing IP can require significant focus, time and funds. It is beyond the reach of some resellers to have capabilities in every solution area which is why partnering for success is so important. Leveraging the strengths of complementary partners creates greater value for customers and allows for more transformational work to be undertaken. As an indirect provider, making the most of the wide view of the reseller channel to facilitate partnerships is a role of huge importance and value.

## **13. Nominated Learning & Development or HR Business Practice owner for Continuing Professional Development**

It's easy to say that learning and development is 'everybody's responsibility' as part of a growth mindset culture. However, accountability is not often clear. Working with your internal L&D or HR business partner contacts – if you have them – can be a way to ensure that there is accountability for owning, shaping and executing your skills and development plans. Of course, not every indirect provider has those roles in place and so it is crucial to ensure that someone has the accountability sit with them.

## **14. Budgetary allocation to support development plans**

Investing time to allow employees to develop their cloud skills is important, but often less impactful if there is no allocated budget to support things such as the purchase of/subscription to training materials, attending events and seminars, taking exams, etc. It's essential to have a dedicated L&D budget to empower employees to learn more, add increased value to your business, and to support your staff retention aims through continuous professional development.

## **15. Commitment to drive consumption of Microsoft Learn content across Microsoft practice**

Microsoft has launched the Microsoft Learn platform to provide free access to training materials across the three clouds; Azure, Dynamics 365 and Microsoft 365. Consumption of these materials can be tracked in Partner Center making it easy for you to track progress and ensure that members of your team are keeping up to date with their required learning. You will need to ensure that your team have correctly associated themselves with your MPN entity in order to track this.

Go to the [Microsoft Learn](#) and the [Associate your Microsoft Learn account in Partner Center](#) pages to learn more.

## **16. Company targets for trained and certified technology professionals**

Having [SMART](#) objectives for training and certifications helps to provide focus and action to support a wider learning and development plan. For example, you may choose to implement a policy that all members of your Microsoft practice must attain their fundamentals certifications across the three clouds (AZ-900, MS-900 and MB-900) within 9 months of either starting their role or implementing the policy. However you choose to set targets, it should be down to your nominated L&D owner to build and execute the plan to achieve the objectives.

## **17. Achieve and maintain an Advanced Specialisation**

There are several Advanced Specialisations partners can attain in addition to the standard gold or silver competencies. These specialisations endorse a partner's capability in a specific area (e.g. Data Warehouse Migration to Microsoft Azure). Partners with a specialisation will increase their visibility to customers through prioritised ranking in searches and assures potential customers that you meet the highest standards for service delivery and support. Many indirect providers operate a channel and a direct business and achieving an advanced specialisation helps both businesses.

Go to the [Advanced Specialisations](#) pages to learn more.

## **18. Provide cloud managed services**

In support of the aim to provide greater value to resellers, many indirect providers are launching managed services that can be re-sold with ease. These types of service (e.g. security and monitoring, patching, etc.) can attract greater margins, particularly where custom IP has been developed. By providing a portfolio of services for resellers to utilise with their customers you not only create 'stickiness' with those partners, but also lower the bar for them to get started building a cloud business.

## **19. Run a structured, repeatable advanced technical enablement program**

As per item #8, but focused on enabling advanced workloads such as AI and machine learning, Power Apps, SharePoint Online customisation, etc.

## **20. Write and execute against technical business plans for top tier partners**

In keeping with the [Pareto principle](#) 80/20 rule, writing a technical business plan for your top partners is important in establishing a mutual set of 'conditions of satisfaction' against which you'll measure their growth and your impact in accelerating it. A technical business plan should consider the reseller's strengths, weaknesses, desired state, market opportunity, capability to invest capital in talent, skills development, etc. A great plan makes it clear what joint work between the reseller, indirect provider and Microsoft will be undertaken during the year, what the expected outcomes will be, and will have an executive sponsor from the reseller to sign it off.

## 21. Partnership with a learning provider

Microsoft Learning Partners are an excellent way to scale the delivery of in-house training and enablement of your reseller channel. They provide world-class Microsoft Certified Trainers to help you skill-up in the way that makes most sense for your business. They also offer on-demand courses accessible anywhere, anytime. The Microsoft Learning Partner network delivers flexible, solutions-based, customised training across a wide range of Microsoft technologies.

Go to the [Microsoft Learning Partners & Providers](#) pages to learn more.

## 22. Soft skills development program

Investing in soft skills development allows you to maximise the return on investment made in gaining technical 'hard' skills. Focusing on soft skills development is often harder to justify as there's not always a clear link between them and hard outcomes such as increased revenues, customer adds or profit margins. However, skills such as critical thinking, listening, storytelling, conflict management, even basic skills such as using a whiteboard effectively can help you be more effective, professional and impactful with your resellers. Likewise, being able to offer training in these areas can, in turn, help resellers be more credible and win more business with their own clients.

## 23. Channel targets for trained and certified technology professionals

Like #17, targets can help focus efforts and demonstrate impact. Setting some goals for the training and certification of professionals in the channel is a great way to show how you have helped resellers learn and grow. This also quantifies the way in which you can help address the skills shortage there is in the sector. By tracking this metric you also gain a marketable statistic when acquiring new resellers – many wanting to accelerate their journey to a competency or advanced specialisation, where certification is essential.

## 24. Adoption of Microsoft Cloud Adoption Framework principles in channel activation

Microsoft has published guidance in the form of the Cloud Operating Model and most recently the Cloud Adoption Framework with the aim of helping customer and partners be successful with cloud deployment and adoption. Indirect providers should take this guidance and help resellers embed it into the way they take their cloud propositions to market. By following the *strategy -> plan -> ready -> adopt* methodology, partners will make better use of the technology and customers will be more successful and satisfied as a result.

Go to the [Cloud Adoption Framework](#) pages to learn more.

## 25. Achieve and maintain Azure Expert MSP status

Indirect providers often maintain a direct business as a secondary revenue stream to their traditional distribution operations. As many partner types in the market converge on managed services, recognising the very best and most capable through the Azure Expert MSP status is a way to show customers that you are committed to providing excellent services.

Go to the [Azure Expert MSP](#) pages to learn more.

## 26. Provide 'click-to-run' style pre-packaged IP solutions

Resellers sometimes need a helping-hand with selling their first Azure workloads. Many make the mistake of trying to sell the whole stack by leading with the all-up Azure message. Indirect providers can simplify this journey by creating bite-sized pre-packed solutions built on top of Azure functionality making it easier to sell and deploy.

For example, pre-canned ARM templates to provision 'standard' virtual machines as a Microsoft Small Business Server alternative.

## 27. Technical Account Manager

Having a named technical contact to build and execute a technical business plan, orchestrate workshops and resources to accelerate solution or practice development, taking to market new offerings, etc. is a powerful service to add to your portfolio as an indirect provider. People like to know they have a real person invested in their success and a dedicated TAM can ensure your resellers continue to grow their businesses with you versus the competition.

## 28. Operate an Adoption and Change Management (ACM) practice

Adoption and change management methodologies, such as those offered by ProSci®, can make the difference between a successful technology deployment and a total flop. Many resellers are engaged to deliver a Microsoft 365 project from a technology perspective; perhaps to migrate an Exchange server or deploy a cloud-hosted voice solution through Teams. By empowering those resellers to have the ACM conversation they can add greater value to their clients and ensure that they're getting the best lifetime value from their investments.

Go to the [Microsoft ProSci® case study](#) and [Change Management Framework](#) pages to learn more.

## 29. Insight-driven automation and integration into LOB tools (CRM, etc.)

Building on the intent of #10, imagine being able to automatically trigger workflows based on end-customer behaviour; for example, creating a task to speak to a customer when their Azure consumption spikes beyond a defined threshold directly in the reseller's own CRM system. Or, being able to identify trends in workload consumption based on multiple data sets such as those from multiple technology vendors. These types of insights and many more can help create more valuable engagements in a timelier manner and build customer loyalty and satisfaction.



# next steps

# 4

Once you've completed your first pass through the survey and have established your baseline position it's time to get planning! Who doesn't love a good plan?

When considering what you should plan to achieve, keep in mind some of the following ideas:

- **What strengths can you build upon that already exist in your business today?** Typically, it's harder to build something from scratch the further away it is from your current model and skill set. For example, if you have a history of building strong business productivity solutions it's going to be quite a leap to try and become an AI business overnight. Whereas, if you've been dealing in data for a while, taking your first steps into machine learning, big data and analytics isn't so difficult. *If the skills you need to grow aren't already in your business, why not consider a partnership with another company?*
- **Have you conducted a SWOT analysis of your competition to understand where there are gaps and opportunities in the market for you to differentiate your platform and services offerings?** There are some things every indirect provider should do, but there are still plenty of ways to stand out in the market. Whether it's building new levels of intelligence and insight into your platform, developing IP which your resellers can sell, or something nobody has yet thought of, it's always good to keep one eye on the competition!
- **Where does your Microsoft business rank in terms of the other vendors you carry, and where would you like it to be?** At Microsoft, we're mindful that we might not be your number 1 vendor in terms of wallet share today. The market is rapidly evolving, and the industry is seeing a huge shift towards public cloud solutions, annuity business models, and repeatable solutions and IP. We're here to help you secure your future success by building a strong, profitable and predictable business.
- **What does success look like for you and your business in 3-5 years time?** Agreeing on a plan requires a partnership of mutually beneficial outcomes. It's a good idea to be clear about what you think your business needs to look like over a period as the engagement from One Commercial Partner will be multi-year.

Your PTS will work with you to consider these things and many others to establish an achievable and challenging technical business plan. The radar chart output from the baseline will be one of the key foundations to include.

You should agree with your PTS on a date to review the plan and baseline and update with the progress made throughout the year. This will aid in the QBR process by sticking to a consistent set of KPIs to refer to over time, and across providers.