



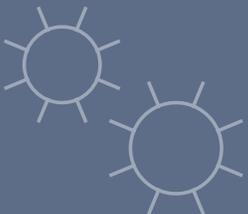
Microsoft Partner Network

# Operationalize

This content accompanies the broader Cloud Practice Development Playbooks.

For more information on these playbooks or to download the full versions, please visit [aka.ms/practiceplaybooks](https://aka.ms/practiceplaybooks).

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## About this Guide

As partners embrace modern cloud solutions and continue to bolster their digital maturity, they soon discover that the ways they operationalize their business plans are also transforming. From implementing a solution delivery process to setting up the marketing infrastructure and leveraging online marketplaces, the techniques, skills, and processes to build a practice for long-term success are changing with the cloud.

This guide is meant to accompany the broader set of [Cloud Practice Development Playbooks](#) with guidance on the processes, systems, and tools applicable to all types of cloud practices, such as the foundational decision of whether to insource or outsource the marketing functions or how implementing an intellectual property solution can change the support model.

The marketing teams now require tools and processes to continually improve their contribution to sales. Today, this requires a well-configured marketing technology stack and the right skillsets and processes to optimize those investments by closely analyzing and reporting the outcome metrics. By automating key marketing and support processes, like lead scoring and management, email marketing, support ticket tracking, and nurture campaigns, partners improve their activities across the customer lifecycle.

Partners also require documented processes and tools for monitoring a project's progress against plan and budget, and the important contracts and documents to produce consistent and successful engagements. Finally, this guide provides the Microsoft resources available to engage with the full partner ecosystem, and the support and security options and resources available for partners.

## Insource or Outsource?

A key operational decision is whether to insource or outsource part or all of the marketing functions. It is important to emphasize that there is no right or wrong model as much depends upon the organization's objectives, existing competencies, go-to-market timelines, and budget.

The advantages of in-house marketing resources include:

**Business, industry, and brand expertise:** With daily immersion into the practice, culture, and values of the organization, internal resources can ensure accurate and consistent brand messaging across all marketing deliverables.

**On-demand production:** As most practices are fast-paced, it can be challenging to efficiently, and effectively, communicate changes in positioning and strategy to an outsourced team. Internal marketers can quickly respond to time-sensitive projects, internal priorities, and market changes. They can also liaison easily with cross-functional resources within the business and key customers.

**Consistency:** Marketing messaging and deliverables require a consistent brand voice and clear definition. With activities that require constant monitoring and fluency (email marketing and nurture campaigns), it is almost always more cost-effective to assign these tasks to dedicated in-house resources.

Common in-house marketing responsibilities include strategy, workflow process development, inbound lead generation and nurturing, including campaign planning, data integration, analytics, and tracking. Strategy ownership is always an in-house function.

The advantages of outsourced marketing resources include:

**Flexibility:** When testing a new approach, experimenting with a "one-off" project, or need to scale quickly to meet a market opportunity, outsourcing can enable quick execution.

**Cost Efficiency:** It can be extremely costly to recruit and retain talent for in-demand marketing positions. Retaining an in-house resource may not be affordable, especially for smaller partner organizations.

**Specialized skills:** Often there is a lack of expertise or experience in key marketing activities that require special skills, such as SEO or video production. Typically, external agencies or specialists can provide resources with expertise across multiple clients, industries, and domains. Consequently, they often bring many best practices to the team.

Commonly outsourced marketing activities include website development, graphic design, video production, content development, copywriting, and marketing automation setup and consultation. SEO is a key capability that may require external assistance as SEO mistakes are often very costly. For this function, secure a resource that is aware of algorithm changes and knows the evolving best practices and most current techniques.

A hybrid approach may be the most effective and impactful in the early days of a practice. With internal marketing professionals who are focused daily on the outcomes, while simultaneously leveraging outsourced resources to fill in the gaps without a full-time investment, partners can efficiently cover their needs.

# Implement Intellectual Property Offerings

Consider these tips if developing IP and beginning to monetize domain expertise

## DEFINE THE SOLUTION

When we asked partners how they determined what IP they were going to build, we often got the same answer: they realized most of their customers were asking for the same thing or something very similar. Rather than continuing to do high-cost, custom work for every customer, they decided to productize what their customers were asking for. Bring their sales, marketing, technical, and delivery teams together to brainstorm and define what patterns of challenges they are seeing across their customer base.

## DIFFERENTIATE

It is important to think about their differentiation strategy. What is going to make their teams practice better than other similar practices in the industry?

## MAINTAIN RIGHTS TO THE IP

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

They should engage legal counsel to help them protect and maintain ownership of the IP they create. The key to success with IP is effectively defining licenses, contracts, and terms of use, and acquiring patents if applicable.

## CONSIDER A CHANNEL STRATEGY

One of the advantages of productizing their IP is it opens the possibility of selling their solution on AppSource or through the Microsoft channel of partners.

# 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 cloud 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 track 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](#).

These two processes both work for developing modern Teams applications as well as for deployment of Teams. Both processes are also supported in Azure DevOps (formerly Visual Studio Team Services) for tracking the project.

## CREATE REPEATABLE PROCESSES

Repeatable processes make for profitable practices. Use the following example checklist to build their own 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 a development process (Agile, Scrum, etc.)
- Identify milestones and tasks, share with 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 customer
- Conduct a project debrief with customer
- Organize internal project post-mortem
- Customer conducts an 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

# 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 in 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

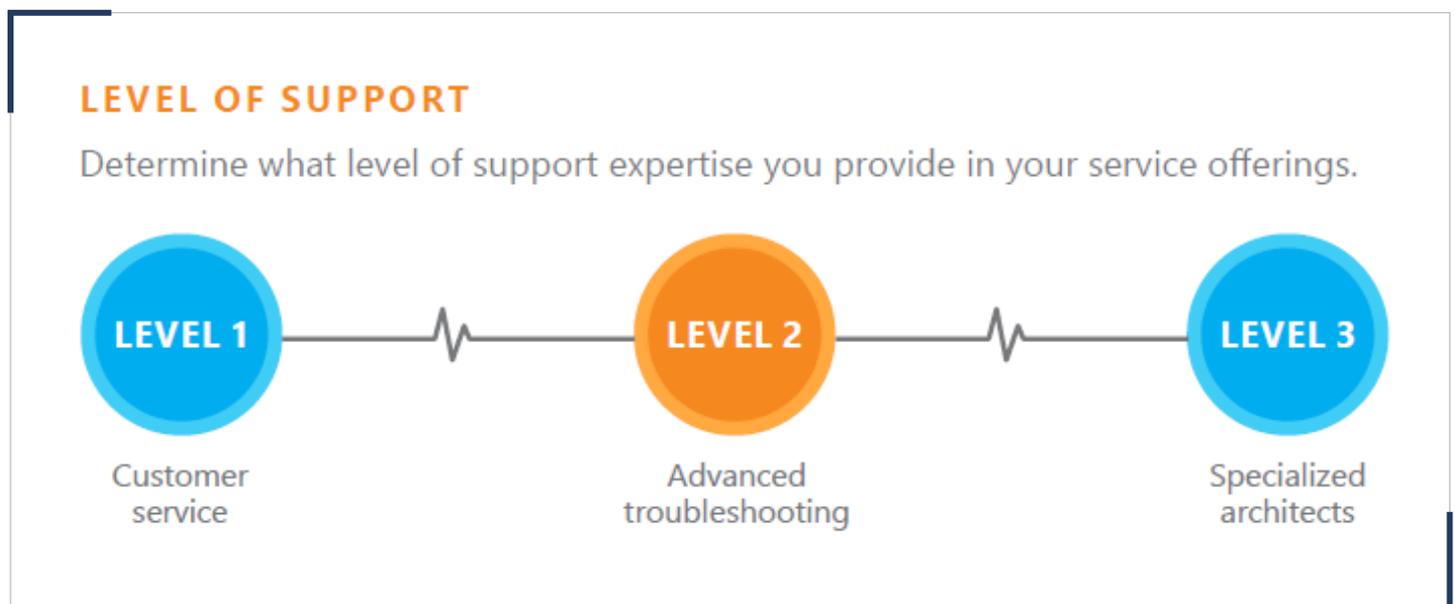
## SUPPORT MODEL

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 the customer pays a fee every time they utilize 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, 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 issues.



## Marketing Infrastructure

The marketing team will need supporting technology to execute, analyze, and improve their activities across the customer lifecycle.

Those activities include brand awareness, lead generation and management, prospect engagement and nurture, customer acquisition, and customer expansion. Marketing must also report outcome metrics and measure tactical efforts such as campaign performance and lead sourcing. These responsibilities require the right technologies to be in place, and the right people and processes to optimize these investments. No matter the practice size, consider building a well-configured marketing technology stack that can scale to the forecasted growth objectives.

Key tools to consider:

**CRM:** As the foundation of the marketing stack, the customer relationship management system will house the data and business processes required to develop, improve, and extend the prospect and customer relationships. It must be configured to track marketing's contribution to sales and provide insights into how campaigns influence the sales pipeline and customer growth.

**Marketing automation:** A single integrated solution that automates key marketing processes such as email marketing, drip and nurture campaigns, lead management, and lead scoring.

**Content management system:** Create, publish, store, edit, and collaborate on content across the website, blogs, and other web properties to market the business online.

**Social media:** Use these channels to accelerate audience growth, monitor activity, make social engagement easier, automate content distribution, and measure channel performance.

**SEO:** Drive organic (unpaid) traffic to the website. This category includes many tools that help with keyword research, content analysis, link and citation building, and keyword tracking.

**Web analytics:** Tools designed to measure digital marketing activity, as well as analyze web properties to identify both traffic sources, and their actions and behaviors to track engagement and conversion.

# Sales Infrastructure

The strategic sales plan describes the target market business environment, opportunities, strategic priorities, revenue goals, sales team structure, budget, and action plan.

## SALES TECHNOLOGY

**CRM:** Configuring and implementing a CRM system that reflects the core elements of the target prospect profile is critical to understanding buyer behavior, effectively facilitating deal reviews, coaching sales team members, and delivering an accurate forecast. At a minimum, the CRM system must support the collection of information regarding prospect and opportunity requirements, key stakeholders, project drivers, the selection process, key milestones, decision criteria, competitors, and close dates. The CRM must also support the execution of the defined accelerated, depth, disruptive, and existing customer sales motions.

**Social selling:** Equipping the sales team with a social selling “stack” is critical to driving impact, efficiency, and prospect engagement. The minimum stack should include [LinkedIn Navigator](#), a social scheduling tool like [Hootsuite](#), social listening tools, and personality profiling tools like [Crystal Knows](#).

**Industry content services:** Providing the sales team with access to industry content, insights, trends, and news events ensure they can facilitate domain-specific conversations with prospects and customers. Subscriptions to industry tools like [First Research](#), [D&B Hoovers](#), and [Industry Intelligence](#) helps sales professionals remain relevant and informed.

## ACCELERATE SALES WITH AUTOMATED MARKETING

In the new cloud world, the sales are not all happening up front. With subscription sales, the buying cycle is shorter with smaller upfront decisions. But the sales cycle continues throughout the post go-live period of the customer relationship with new workloads or other areas of the business to integrate. That means partners can no longer spend the bulk of their customer acquisition dollars up front but now spread the budget out throughout the life of the customer.

Marketing can help sales craft the right message for any stage in the buying cycle, and then leverage those assets by automating the packing and delivery of their delivery. For instance, proposal presentations can be templated and modularized for live, remote delivery. It is up to marketing to build those repeatable assets that cut costs and the time of acquisition. The result is also a more consistent message.

These repeatable sales assets, which underpin all three cloud sales motions, need to be updated and enhanced on an ongoing basis to ensure they accurately reflect the business environment and realities of the target market.

It is also important to ensure that sellers and customers clearly understand the differentiated services, such as change management or managed services that accelerate value realization and reduce project risk.

Examples of repeatable assets include:

- Engagement communication (e/v-mails)
- Alignment plan
- Engagement plan
- Credentialing meeting agenda
- Demonstration plan
- Selection service proposal
- Optimization workshop summary report
- Proposal presentation
- Solution proposal

## SALES OPERATIONS

**Management Rhythm:** Sales leadership must schedule and facilitate a consistent opportunity/deal pipeline and forecast reviews. This disciplined rhythm drives the sales process compliance, active coaching, and forecast accuracy.

**Proposal Management:** All estimates, proposals, NDAs, and contracts should be vetted by the appropriate leadership team members prior to release to prospects or customers.

**Compensation and Incentives:** The cloud, SaaS, and a focus on monthly recurring revenue have effectively rendered most traditional compensation models obsolete. Licensing revenue, which was historically collected upon contract execution and used to fund sales and marketing costs, is now recognized over a much longer period. Time and materials project services are increasingly being replaced with a third party and partner-developed IP or converted into recurring monthly fees.

Simultaneously, customer demand is shifting towards solution sets that include multiple Microsoft and partner developed components (ERP, CRM, ISV, Office 365, PowerBI, SharePoint, Azure, managed services, and IP). Combined, these changes are driving the need for new compensation models. Sales operations are responsible for designing balanced sales compensation plans that attract skilled talent, incent the right behaviors, and mitigate overall business risk.

## Create the Presales Environment

Defining the presales environment is necessary to drive repeatability, increase win-rates, and accelerate decision making.

There are several options for hosting the presales environment. Make an early investment in localized demo data and industry-oriented data to help reduce the cost of sales and accelerate the purchase cycle.

### SOLUTION DEMONSTRATION VS. TRIAL ENVIRONMENTS

Solution demonstrations and trials can both be leveraged during the sales cycle, but they each serve very different purposes. Trials are better suited to pre-configured solutions that are consumed with very little (if any) configuration. The trial must already contain the industry or vertical best practices, and these optimized business processes must be obvious to the prospect. Trials are ideally suited for marketing or self-serve driven buying cycles.

Solution demonstrations are best suited for sales scenarios in which the recommended solution set is significantly different from what the prospect is currently using, and/or there are multiple ways to configure the solution.

Trials can be an effective sales asset for driving a highly prescriptive sales cycle with a solution that has been developed for a very specific industry or vertical. Solution demonstrations are more effective for sales scenarios where partners need to limit or control what they want their prospects to see.

Microsoft's [Live Drive Application Launcher](#) simplifies the creation of complex demonstrations.

There are three licensing options for supporting the presale process: Trial environments, internal user rights, and commercial software.

### TRIAL ENVIRONMENTS

Trial can be set up for each unique presale engagement via the <https://trials.dynamics.com/> website.

PROS	CONS
<ul style="list-style-type: none"> <li>• No direct cost is associated in the environments.</li> <li>• Demo data and demo guidance embedded into each trial.</li> <li>• Environment comes with other relevant Microsoft technologies like Office 365 and Azure.</li> <li>• You can migrate a customer trial into their final instance if the customer decides to buy.</li> </ul>	<ul style="list-style-type: none"> <li>• Temporary solution. Trials expire in 30 days although they can be renewed by request.</li> <li>• Trials are not designed for repeatability in mind, usually requiring fake emails and credentials to be created all the time.</li> <li>• English only.</li> <li>• Not all features and functionalities are available in trials.</li> <li>• Labor costs. Each trial requires a considered amount of work to set up integrations, customize scenarios for each customer, and deploy your solution IP.</li> </ul>

**IUR (INTERNAL USER RIGHTS)**

Internal User Rights (IURs) are Office 365 licenses (including Teams) their partner organization has access to as part of the benefits of different competency levels in the Microsoft Partner Network. To be eligible, their organization needs to be at the Silver or Gold competency level. Each competency level has different IURs.

Some partners use their IURs for internal operations, but other partners use the IURs for presales. The IURs environments have full feature and functionality coverage, and they don't expire if they keep their competency requirements updated.

PROS	CONS
<ul style="list-style-type: none"> <li>• No direct cost associated to the environments.</li> <li>• Environments don't expire if they keep their competency level updated.</li> <li>• Integrated to their organization's tenant, so they can use business emails and credentials for access.</li> <li>• Interface can be localized.</li> </ul>	<ul style="list-style-type: none"> <li>• No demo data or demo guidance is embedded. They need to invest initially to build the data and demo scenarios.</li> <li>• Add-ons not included in most IURs.</li> <li>• Limited number of user licenses.</li> <li>• For global partners, the IURs can be already in use by other subsidiaries.</li> <li>• Other Microsoft technologies are not part of the environment.</li> </ul>

**COMMERCIAL SOFTWARE LICENSED ENVIRONMENT**

In this modality their organization will license the environment just like a customer would support presales. The environment access can be controlled in a granular way and all the labor involved in building demo data and customer scenarios can be reused from one customer to the next. Most industry-oriented partners prefer to license their own presales environments as a productive way to drive repeatability and manage their vertical IP.

PROS	CONS
<ul style="list-style-type: none"> <li>• Full features and functionality, the license what they need in alignment with their go-to-market strategy.</li> <li>• Environments do not expire if they keep the subscription.</li> <li>• Integrated to their organization's tenant, so they can use business emails and credentials for access.</li> <li>• Interface and data can be localized.</li> <li>• They can apply a different security model and restrict access to the environments.</li> <li>• They can host their IP and use the environment as part of their IP release process.</li> </ul>	<ul style="list-style-type: none"> <li>• Subscription costs.</li> <li>• Separated administrative process to manage instance, features, updates, security.</li> </ul>

## Setup Social Offerings

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

### **BLOGGING**

Technical blogging is a great way to increase the skills of a technical team, as well as 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, AND ASSOCIATIONS**

Speaking at user groups and association events is another valuable tool to increase the skills of your team. Like blog posts, it is great practice for honing vital communication skills with the team, and a great opportunity to dig deeper into a specific subject related to the practice.

### **WEBINARS**

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

### **MICROSOFT MVP COMMUNITY**

For more than two decades, the MVP Award has been Microsoft's way of saying thank you to outstanding community leaders. The contributions MVPs make to the community have an incredible impact, ranging from speaking engagements and social media posts, to writing books and helping others from online communities.

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, which are there to support and empower MVPs to address needs and opportunities in the local ecosystem.

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

# 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, omnichannel 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 enterprise case management, Interactive Service Hub, Unified Service Desk, SLAs and Entitlements, and other service group management functionality.

## CREATE CONSISTENCY AND LOYALTY

Provide the seamless service 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 Licensing Options

There are several ways to purchase the Microsoft cloud services needed.

## **MICROSOFT CLOUD AGREEMENT VIA THE CLOUD SERVICE PROVIDER PROGRAM**

Microsoft Cloud Agreement (MCA) is a transactional licensing agreement for commercial and government organizations seeking to fully outsource management of their cloud services through the Cloud Solution Provider (CSP) program.

In combination with the value-added services offered by a systems integrator, hosting partner, or born-in-the-cloud reseller partner, the CSP program offers an easy way to license the cloud services needed. On-premises software and Software Assurance are not available through CSP partners.

The CSP model keeps partners at the center of the customer relationship by providing direct management of billing, provisioning, and support.

## **MICROSOFT ISV ROYALTY LICENSING PROGRAM**

Microsoft ISV Royalty Licensing Program is for ISVs who want a convenient way to license Microsoft products and integrate them into a unified solution. ISVs can then replicate the business solution and distribute a fully licensed solution to their end users. ISV Royalty (ISVR) agreements are for a three-year term and payment is made monthly through an authorized ISV Royalty Licensing Program distributor.

## **MICROSOFT SERVICES PROVIDER LICENSE AGREEMENT**

Microsoft Services Provider License Agreement (SPLA) is for service providers and ISVs who want to license eligible Microsoft products to host software services and applications to end customers. SPLA provides the license rights to host specific Microsoft products monthly for a three-year term, as outlined in the Microsoft Service Provider Use Rights (SPUR) with pricing based on use rights.

## **MICROSOFT ONLINE SUBSCRIPTION AGREEMENT**

Microsoft Online Subscription Agreement (MOSA) is a transactional licensing agreement for commercial, government, and academic organizations with one or more users/devices. MOSA works best for organizations that want to subscribe to, activate, provision, and maintain cloud services seamlessly and directly via the web through the Microsoft Online Subscription Program (MOSP). On-premises software and Software Assurance are not available through MOSA.

For more details on these licensing programs, visit <https://partner.microsoft.com/licensing/licensing-agreements>.

# Ways to Purchase Azure

There are a few ways to purchase Azure and cloud service providers have a built-in usage for testing solutions.

## ENTERPRISE AGREEMENTS

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

## PAY AS YOU GO AND TRIAL ACCOUNTS

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

## OPEN LICENSE

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

## CSP SANDBOX

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

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

[OneDrive for Business](#) is an enterprise 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. Users can also connect apps from their personal device and drive them from Microsoft Surface Hub.

# Use CRM to Grow the Business

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

A strong CRM solution is a multifaceted platform where everything crucial to developing, improving, and retaining customer relationships is stored. Without the support of an integrated CRM solution, partners may miss growth opportunities and lose revenue because they were 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 their top two salespeople pursuing the same prospect, resulting in an annoyed potential customer and some unfriendly, in-house competition.

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

## THE FUNDAMENTALS OF CUSTOMER RELATIONSHIP MANAGEMENT

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

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

Running a successful business is no simple task. When marketing campaigns, data analysis, meetings, customer care, and more, all happen simultaneously, they need a powerful CRM solution to bring all these functions together in one place. Using Microsoft Dynamics 365 for Sales and Marketing they can keep with the “365 suite” and can seamlessly integrate all their outlook communications with prospects and clients and their LinkedIn contacts all in one place.

Dynamics 365 can also be integrated into Teams, once again practicing what they preach by tying in Teams to everything they do as a company.

## THEIR SALES TEAM WILL BE WORKING 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 trades 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](#).

# Support Options from Microsoft

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

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 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 operate smoothly. SCS handles technical support scenarios for Microsoft Office 365, Microsoft Dynamics CRM Online, and Microsoft Azure.

## MICROSOFT SUPPORT

[Microsoft Advanced Support for Partners](#) is the ideal solution for partners growing their cloud business (not quite ready for Premier Support, but need 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. 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 helps with account billing or management questions.

## 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:

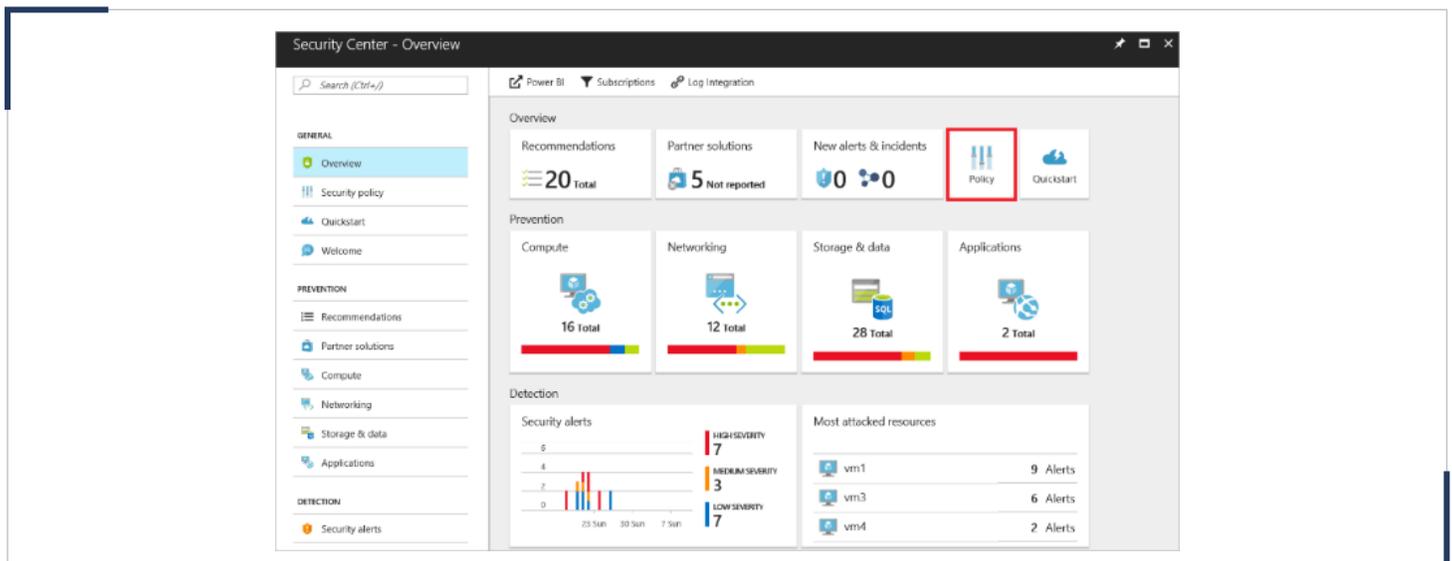
- Monitors the security state of Azure resources
- Defines policies for Azure subscriptions and resource groups based on security requirements, the types of applications in use, and the sensitivity of the data
- Uses policy-driven security recommendations to guide service owners through the process of 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.

## LOG ANALYTICS

[Log Analytics](#) can help collect and analyze data generated by resources in 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 its 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

The screenshot shows the Microsoft DevOps at Microsoft Center website. The top navigation bar includes the Microsoft logo and links to Microsoft 365, Azure, Office 365, Dynamics 365, SQL, and Windows 10. Below this, a secondary navigation bar features 'Visual Studio', 'Visual Studio Team Services', and 'Features', 'Pricing', and 'News' dropdown menus, along with a 'Sign in' button and a 'Free Account' button. The main content area is titled 'DevOps at Microsoft' by Sam Guckenheimer, with a 'Last Update: 11/09/2017' timestamp. A sidebar on the left lists several articles, with 'How We Work with Visual Studio Team Services (VSTS)' selected. The main article text discusses the center's purpose and mentions a 'journey to cloud cadence'. A 'Feedback' button is located in the bottom right corner of the content area.

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# 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 OPTION	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 [Introduction to the Microsoft commercial marketplace](#) learning path to:

- Develop a basic understanding of the Microsoft commercial marketplace
- Discover in-product and web experiences in the commercial marketplace
- Differentiate between two storefronts, Microsoft AppSource and Azure Marketplace
- Learn what kinds of solutions are sold in Microsoft AppSource and Azure Marketplace
- Learn how you can go-to-market with Microsoft by selling through the commercial marketplace

## 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.

