

Operationalize

Microsoft
Partner
Network

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



Table of Contents

Operationalize	3
Claim Your Internal Use Benefits	4
Ways to Purchase Azure	5
Key Contracts and Tools for Your Practice	6
Collaboration Tools and File Sharing	7
Using CRM to Grow Your Business	8
Manage and Support an AI solution deployed in Azure	9
Support Resources	9
Support Options from Microsoft	11
Support Ticket Setup and Tracking	13
Implement Intellectual Property Offerings	14
Setup Social Offerings	15
Create Engagement Checklists & Templates	16

Operationalize

Guidance to prepare for launch with systems, tools, and processes in place.

LEVERAGE YOUR INTERNAL USE BENEFITS

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

PREPARE YOUR KEY CONTRACTS

Support your sales and marketing efforts with this guidance on how to operate your business, from how to build materials to support your sales and marketing efforts to the key contracts you will want to put in place.

SET UP YOUR SUPPORT PROCESSES AND SYSTEMS

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

SET UP SOCIAL OFFERINGS

Increase visibility for your practice by reviewing the Microsoft marketplaces and how to get listed on them as well as provide guidance on the social offerings your practice should set up.

STANDARDIZE YOUR ENGAGEMENTS USING CHECKLISTS

Leverage checklists and templates to standardize your customer engagement process.

Claim Your Internal Use Benefits

A key benefit of being a Microsoft Partner is access to Internal Use Rights, providing your practice access to complimentary credits and licenses of Microsoft products and services, including Microsoft Azure, Office 365 and Visual Studio.

AZURE CREDITS

Providing access to Azure for your team is one of the key first steps to preparing for a successful cloud practice. Microsoft provides several ways for your organization to gain access to Microsoft Azure for the development of new services, testing workloads, delivering services, or learning in general. For example, use your credits to enable your team to use the Data Science Virtual Machines with GPU's or perform scale out model training using HDInsight and Spark.

Members of the [Microsoft Action Pack](#) program receive \$100 monthly Azure credits.

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

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

OFFICE 365 BENEFITS

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

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

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

VISUAL STUDIO

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

\$50 AZURE CREDIT	\$100 AZURE CREDIT	\$150 AZURE CREDIT
<ul style="list-style-type: none"> • Visual Studio Professional – annual • Visual Studio Professional with MSDN • Visual Studio Test Professional with MSDN 	<ul style="list-style-type: none"> • MSDN Platforms 	<ul style="list-style-type: none"> • Visual Studio Enterprise – annual • Visual Studio Enterprise with MSDN • Visual Studio Enterprise with MSDN (BizSpark) • Visual Studio Enterprise with MSDN (MPN)



Ways to Purchase Azure

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

ENTERPRISE AGREEMENTS

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

PAY AS YOU GO AND TRIAL ACCOUNTS

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

OPEN LICENSE

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

CSP SANDBOX

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



Key Contracts and Tools for Your Practice

Practices need to use a set of legal documents to ensure compliance and deliverables, and an implementation process, to track the progress of a project both in terms of progress against a project plan and project budget, as well as protect your IP.

KEY CONTRACTS

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

MICROSOFT PROJECT ONLINE

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

VISUAL STUDIO TEAM SERVICES

[Visual Studio Team Services](#) provides various tools for tasks like running agile teams, providing support for Kanban boards, handling work item backlogs, scrum boards, source control, continuous integration and release management. Source control functionality provides Git support, which enables integration with GitHub if such integration is desired.

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

MICROSOFT DYNAMICS 365 FOR PROJECT SERVICE AUTOMATION

[Microsoft Dynamics 365 for Project Service Automation](#) provides users with the capabilities required for setting up a project organization, engaging with customers, project scheduling and costing, managing and approving time and expenses, and closing projects. It is specially targeted to address the needs of a Project Services based practices, as it is designed for professionals who manage projects and the associated customer engagement process end to end.

GITHUB

[GitHub](#) provides the hosted environment for the 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.



Collaboration Tools and File Sharing

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

JUPYTER NOTEBOOKS

Jupyter Notebooks were introduced in the earlier section of the Team Data Science Process. These online, web-based notebooks enable the implementation team to share code and collaborate on data wrangling, data understanding, data preparation, model training and model evaluation. They also provide convenient mechanism to share results (in the form of notebooks that include rich text, tabular data and charts) with customers and other stakeholders in a read-only fashion.

MICROSOFT TEAMS

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

YAMMER

[Yammer](#) is an enterprise social network collaboration offering to help teams collaborate and share files with each other.

ONEDRIVE FOR BUSINESS

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

SKYPE FOR BUSINESS

[Skype for Business](#) is an enterprise online meeting and conference service designed for business communications.

SURFACE HUB

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

Using CRM to Grow Your Business

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

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

THE FUNDAMENTALS OF CUSTOMER RELATIONSHIP MANAGEMENT

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

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

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

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

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

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

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

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

[Microsoft Dynamics 365](#) can be customized, so you can also work with records relevant to your field and the way your organization does business, including [sales](#), [customer service](#), [field service](#), [project service automation](#), and [marketing](#).



Manage and Support a Solution Deployed in Azure

Support Resources

Supporting an Azure deployment involves transitioning from deployment focus to ongoing health and occasional troubleshooting. Microsoft Azure offers several services to help manage and monitor workloads running in Azure, documentation for troubleshooting the services for your practice, and the [Azure Community](#) where you can ask questions, get answers, and connect with Microsoft engineers and Azure community experts.

KEEPING AN EYE ON COSTS

If your solution is deployed to Azure, there are a lot of ways you can both forecast spend and keep track of your actual costs.

- You can get estimated costs before adding Azure services by using the [Azure Pricing Calculator](#). This calculator includes all Azure services, including those relevant to the practices like Cognitive Services, Azure Machine Learning and HDInsight.
- Once you have resources deployed to Azure, you should regularly check the Subscription blade in the [Azure Portal](#) for cost breakdown and burn rate. From here, you use the Cost analysis feature to analyze the cost breakdown by resource.
- You can also report on your Azure costs programmatically by using the [Azure Billing APIs](#). There are two APIs available that when used together enable you estimate your spend by resource: the Azure Resource Usage API enables you to get your Azure consumption data, and with the Azure Resource RateCard API you can get the pricing information for each Azure resource.
- There are other situations, such as for an EA, a sponsored Azure subscription, or subscriptions acquired thru a CSP provider. These have their own portals for analyzing consumption and costs. For details on how to monitor these, view [this Azure billing and cost management article](#).

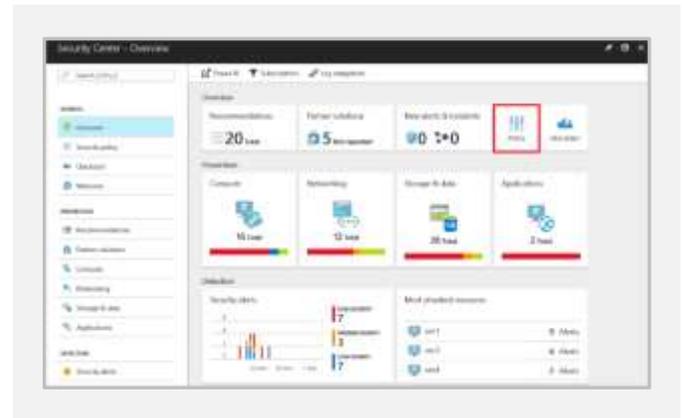


AZURE SECURITY CENTER

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

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

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



AZURE ADVISOR

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

OMS LOG ANALYTICS

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

ENGAGING MICROSOFT SUPPORT

If you are a CSP or have sold support as part of your managed services solution you are the front-line support for your customer. At some point, you may need to contact Microsoft to escalate an issue. Microsoft offers several options via forum support or via paid options as discussed in the preceding [Support Options from Microsoft](#) section.

Support Options from Microsoft

How do you receive support for your implementation efforts or on behalf of your customer?

SIGNATURE CLOUD SUPPORT

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

MICROSOFT ADVANCED SUPPORT FOR PARTNERS

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

MICROSOFT PREMIER SUPPORT FOR PARTNERS

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

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

SUBMITTING AZURE SUPPORT REQUESTS

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

PARTNER ADVISORY HOURS

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

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

PARTNER LEVEL	NETWORK MEMBER	ACTION PACK	SILVER	GOLD	THESE HOURS CAN BE USED TO
	0 hours	5 hours (after first cloud sale)	20 hours	50 hours	

SUPPORT OPTIONS

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

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

Support Ticket Setup and Tracking

Customer Support

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

Providing support to your customers from your practice is a non-trivial, omni-channel effort. Consider using Azure Machine Learning to monitor the performance of production deployed models. We suggest you implement [Microsoft Dynamics 365 for Customer Service](#) to help you quickly set up and start managing your overall customer support efforts.

MONITORING DEPLOYED MODELS WITH AZURE MACHINE LEARNING

You can 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, you can 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 your business.



MICROSOFT DYNAMICS 365 FOR CUSTOMER SERVICE

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

CREATE CONSISTENCY AND LOYALTY

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

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

MAKE YOUR AGENTS' JOBS EASIER

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

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

GET AN ADAPTIVE ENGINE

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

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

Implement Intellectual Property Offerings

Implementing IP in Your Practice Offerings

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

DEFINE YOUR SOLUTION

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



DETERMINE WHAT WILL DIFFERENTIATE YOUR SOLUTION FROM OTHERS IN THE MARKET

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

MAINTAIN RIGHTS TO THE IP

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

PROTECT YOUR IP

As we mentioned in Understanding Intellectual Property, you should engage legal counsel to help you protect and maintain ownership of the IP you create. Key to partner success with IP is taking care with licenses, contracts and terms of use and the acquisition of patents.

ESTABLISH A RECURRING REVENUE MODEL

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

CONSIDER YOUR CHANNEL STRATEGY

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

Resources

- [Building IP to Drive Margins](#)
- [Create Stickiness with IP](#)

Setup Social Offerings

Blogging, Meetups, and More

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

BLOGGING

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

MEETUPS, USER GROUPS & ASSOCIATIONS

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

GLOBAL AZURE BOOTCAMP

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

WEBINARS

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

MICROSOFT MVP COMMUNITY

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

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



Create Engagement Checklists & Templates

Standardize Customer Engagement

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

- Conduct envisioning session to capture vision for solution.
- Conduct initial requirements meeting.
- Identify product owner/manager(s).
- Conduct follow-up meeting to clarify and establish next steps.
- Discuss minimal viable product (MVP) criteria and decide on proceeding with a PoC or Pilot.
- Conduct an architecture design session to capture solution detailed solution architecture.
- Identify milestones, tasks, evaluation criteria and exit criteria; share with customer.
- Provide cost estimates for research, data collection and preparation, modeling, development, cloud services, and ongoing maintenance/support.
- Address customer objections to proposed technology and services.
- Establish project repository for code, models, and project issues, tasks and documentation artifacts (e.g., GitHub or Visual Studio Team Services).
- Deploy solution.
- Follow up with customer and provide reports/status/demos on a regular basis (e.g., two-week sprint).
- Conduct a final handoff to customer.
- Conduct project debrief with customer.
- Customer conducts acceptance tests.
- Conduct internal project post-mortem.