



Microsoft

CSP Program Guide

Learn how our Microsoft expertise can help you **optimize** and **enhance** your Microsoft experience.

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PAX8 CSP PROGRAM

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Expertise for Your Microsoft Business

Microsoft & the Shifting Landscape of Modern Work

Microsoft is the cornerstone of modern business technology. In 2020, the world shifted rapidly to remote work on a global scale, and businesses of all sizes had to quickly find ways to enable remote collaboration while keeping their workers and data secure. As Microsoft adapts their products and programs to support the new emphasis on remote work, the integrated nature of the Microsoft stack will only become more powerful and foundational to every business. To stay relevant, it's vital for IT providers and technology advisors to build a comprehensive Microsoft technology stack while getting the most out of their Microsoft program participation.

36%

of organizations have dealt with a security incident due to an unsecured remote worker ¹

20%

of remote workers say their biggest challenge is collaboration and communication ²

How Pax8 Enhances your Microsoft Experience

Growing your Microsoft practice is easier than ever with the Pax8 CSP Program. We simplify your Microsoft experience to make it easy to adopt in-demand Microsoft solutions, optimize your Microsoft program, and find opportunities to sell more – all while streamlining the management of your complete cloud tech stack.

- **Expertise** to help you earn more margins, optimize incentives and rebates, and keep up with program and product changes.
- **Modern platform** to easily manage your licenses with consolidated billing, instant provisioning, and integrations with your preferred PSA tool.
- **Education** to elevate your team's Microsoft knowledge, including Mission Briefing events and Bootcamps for Microsoft 365, Azure, and Dynamics.
- **24/7 technical support** to quickly resolve your Microsoft issues with in-house Pax8 engineers – reducing the need to escalate tickets to Microsoft.
- **Professional services** to help you deploy Azure, harden your Microsoft environment, roll-out remote work tools, and more.



A Blueprint for Your Microsoft Journey

Whether you're brand new to Microsoft or already purchasing through another distributor, Pax8 can effortlessly move your seats today. From expanding your existing Microsoft clients and migrating on-prem clients to landing net-new clients, Pax8 enhances your entire Microsoft experience so that you can make more possible for the modern workplace.

Accelerate cloud migration & achieve digital transformation

Enable remote work collaboration

Secure remote workers & ensure business continuity

Power business apps to drive data-based decisions

How to Maximize Every Step of Your Microsoft Journey with Pax8

1. Set up the foundation of your program participation by choosing a competency and learning to optimize your incentives and rebates.
2. Guide clients toward digital transformation with Azure and by migrating from on-prem to O365 or M365.
3. Standardize on integrated communication and collaboration solutions for remote work, such as Microsoft 365, Microsoft Teams, and M365 Business Voice.
4. Tell a story about reducing risk (especially in remote work environments) with the security and business continuity features of M365 and Azure
5. Power modern workflows and data visualization with custom business apps and dashboards through Dynamics 365 and Power Platform.
6. Margin up by offering managed services to harden Microsoft environments, secure remote workers, deploy Windows Virtual Desktop, and build custom apps – Pax8 Professional Services can augment your team on Microsoft projects and services!
7. Expand your team's expertise through education, skilling, and certifications.
8. Advance even further with Azure marketplace and optimize your Azure practice by leveraging Reserved Instances, Azure Hybrid Benefit, and Data Center Optimization.

MISSION BRIEFING

STRATEGICALLY EXPAND YOUR TECH STACK

Our newly revamped Mission Briefings help you build on your Microsoft foundations with solution-focused sales advice for adding in-demand productivity, infrastructure, communications, continuity, security, and network solutions to your stack.

[Register Now](#)

SOLUTIONS

M365: Remote Work + Security

Over 30 billion collaboration minutes per day!³

Designed for the needs of small to mid-sized businesses, Microsoft 365 Business Premium offers a single, integrated technology solution that combines the Office productivity apps users know and love with granular device management and best-in-class security features.

Empower Remote Teamwork: With Microsoft Teams as a collaboration hub, M365 empowers your clients to work from anywhere, while Windows Virtual Desktop (WVD) protects remote workers' data and devices by allowing them to work securely on a virtualized Windows 10 desktop.

Defend Data, Documents & the Inbox: Advanced security features add a layer of defense against cyber threats to protect business data, files, and emails.

Control & Protect Devices: The device management capabilities of M365 simplify device configuration and deployment, allow full control of company-owned mobile devices, and protect company data on personal devices.



MORE RESOURCES

ATTEND

Pax8 + Microsoft Bootcamp:
2-day M365 Bootcamp

DOWNLOAD

Guide: The MSP's Guide to Selling M365

DOWNLOAD

Guide: Pax8 Guide to Remote Work

USE

Teams Training Video: Free, white-labeled Teams end user training video



PRODUCTIVITY

Office Applications

Word, Excel, PowerPoint, Outlook, and more

Online Services

Exchange, OneDrive (1 TB), Teams, and more

Advanced Services

Exchange Online Archiving

Remote Enablement

Windows Virtual Desktop (WVD)



ADVANCED SECURITY

External Threat Protection

Microsoft Defender for O365
Multi-Factor Authentication
Enforce Windows Defender to be on
Enforce BitLocker to be on

Internal Data Leak Prevention

Data Loss Prevention
Azure Information Protection



DEVICE MANAGEMENT

Device Management

Microsoft Intune
Windows 10 Credential Guard
SSO > 10 Apps
Conditional Access
Shared Computer Activation

Deployment Assistance

Windows Autopilot
Azure Information Protection
Auto-Installation of Office Apps
AAD Auto-Enroll



Each time we've described what's included with Microsoft 365, clients want to move forward, recognizing immediately the value to their business, security, and success.



President | machineLOGIC



SOLUTIONS

M365: Collaboration & Communication

Microsoft Teams

Over 115 million daily active users!³

Microsoft Teams is the hub for collaboration and teamwork inside M365 – integrating chat, video meetings, calling, file sharing, screen sharing, document collaboration, presence, calendaring, and expanded capabilities through customizable app extensions.



Popular Teams third-party app extensions include:

Business Apps: Salesforce, ADP, Zoom, Google Analytics

Project Management: Wrike, Trello

Marketing: HubSpot, Mailchimp, Constant Contact

MSP Tools: GitHub, Zendesk, Jira

Microsoft 365 Business Voice

M365 Business Voice is a modern cloud-based telephony add-on to Microsoft Teams that enables you to make and receive calls from anywhere, on any device. Together, they deliver an all-in-one communication solution.

- **Cloud-based phone system** for reliable and secure calling across your computer, mobile device, and/or desk phone, with advanced features such as call transfer, auto-attendants, and call queues.
- **Built-in audio conferencing** with a dial-in number for up to 250 people per meeting.
- **Included domestic calling plan** – get a new number or migrate existing ones (or bring your own calling plan).

M365 Business Voice Target User Profile

M365 Business Voice is a great fit for employees that do a lot of external dialing, such as a sales reps or teams who often need to interface with external clients and partners.

SOLUTIONS

Keeping Up with M365: New Names, Same Features

Microsoft's new product names for Office 365 and Microsoft 365 went into effect on April 21, 2020. This changed product display names only; there are no pricing, feature, or SKU ID changes as of April 2021.

New Name, Same Great Value & Price

Office 365 Business Essentials

Cloud Services

Microsoft 365 Business Basic

Cloud Services

Office 365 Business Premium

Cloud Services and Desktop Apps

Microsoft 365 Business Standard

Cloud Services and Desktop Apps

Microsoft 365 Business

Cloud Services, Desktop Apps, and Advanced Security

Microsoft 365 Business Premium

Cloud Services, Desktop Apps, and Advanced Security

Office 365 Business

Desktop Apps

Microsoft 365 Apps for Business

Desktop Apps

What's Included in Each M365 Tier?

Microsoft 365 Business Basic

Cloud Services



Microsoft 365 Business Standard

Cloud Services and Desktop Apps



Microsoft 365 Business Premium

Cloud Services, Desktop Apps, and Advanced Security



Microsoft 365 Apps for Business

Desktop Apps



Azure: Unlock the Power of IaaS




MORE RESOURCES

ATTEND
Pax8 + Microsoft Bootcamp:
2-day Azure Bootcamp

EXPLORE
Resource Article: Selling guide, pricing calculator, training courses, and more

Microsoft Azure is a growing collection of integrated cloud services used to build, deploy, and manage data and applications through Microsoft’s global network of data centers. With more than 90 compliance certifications, including ISO, HIPAA, IRS, and ITAR, Azure also streamlines data compliance.

If your client stores data in a legacy system or if they need a better way to analyze data from current cloud applications, migrating those workloads to Azure creates a new revenue stream for you and a single source of truth for mission-critical business data. Unfortunately, data migrations can be costly without the right tools or expertise and Azure can seem daunting due to the complexity of its 20,000 SKUs and usage-based billing model.

Adopt & Unlock the Power of Azure through Pax8

Pax8 has the deep Azure expertise necessary to help you develop an Azure practice. Our two-day Azure Bootcamps help partners navigate the complexities of adopting and selling Azure, while the Pax8 Platform simplifies Azure management through:

- **Predictive cost analytics** calculates data to enable optimization of techniques and strategically lower costs
- **Threshold management** notifies you when approaching customized, consumption-based thresholds
- **Detailed billing** shows your clients’ granular billing data

Additionally, Pax8 Professional Services can assist you with any Azure deployment, WVD implementation, or data migration project! With the help of our team of cloud infrastructure architects, you can leverage the power of Microsoft Azure with your clients to ensure regulatory compliance and improve data governance.

- Extend on-premises Active Directory to cloud-based Active Directory
- Enable MFA & SSO through identity management
- Migrate existing or new services to Azure
- Leverage Azure for disaster recovery and backup
- Harden Azure with Azure Defender for Servers
- Design and architect Azure environments



SOLUTIONS

Azure: Going Further with WVD, RIs, and DCO

Windows Virtual Desktop (WVD) + Nerdio

WVD (which is included with M365) enables central management and security of users' desktops by creating Windows 10 virtual desktops in Azure, allowing end users to work remotely with a secure connection and securely store data in the cloud rather than on their local device. WVD separates the computer environment from user devices, greatly reducing the risk of confidential information being left on a personal device.



Pax8 works with industry leader Nerdio to help partners easily estimate costs, automate, manage, and optimize WVD deployments.

Azure Reserved VM Instances + Azure Hybrid Benefit

Partners can realize major discounts on virtual machines by moving from a pay-as-you-go model to 1-year or 3-year commitments on reserved VM instances (RIs). By reserving VMs in advance, you can better manage costs across predictable and variable workloads – improving your forecasting with a single upfront payment or lowering your upfront cash investment with monthly payment options. You'll still have the flexibility to exchange or cancel reservations should your needs evolve.

You can achieve even deeper discounts by stacking RIs with Azure Hybrid Benefit, which allows you to maximize license investments by utilizing existing on-prem Windows Server licenses or purchasing them through Pax8 for your Azure deployment.

Pax8 Infrastructure Solutions Consultants can help you select the right VM solution to achieve the greatest savings, determine when RIs and Azure Hybrid Benefit are relevant to your project, and build go-to-market strategies

Date Center Optimization (DCO) Program

Partners with a mature Azure practice and an upcoming data center migration project should look into Microsoft's Data Center Optimization program through Pax8. This program helps partners reduce cost and risk, and accelerate migrations to deliver client success. Participants commit to an Azure revenue spend to gain the benefits of:

- Significant offers and incentives
- Engineering escalation support
- Azure deal support and review
- Microsoft tools for building deals, aligning workloads, and planning migrations

**If you're interested in the DCO program,
reach out to your Pax8 account manager to qualify!**

SOLUTIONS

Dynamics 365 / Power Platform: Business Apps

With the process automation capabilities of the Microsoft Dynamics 365 Power Platform, you can now take direct control of workflows and customize solutions for your clients' business challenges. With pre-built templates, 275+ connectors, and "record, point, and click automation", Power Platform enables you to easily build apps, automate workflows, and analyze data to activate digital selling and drive data-based decision-making across all departments.

- **Power BI** creates dashboards for powerful data visualization.
- **Power Apps** makes it easy to modernize processes by building apps with little or no code, across any system (on-premises or cloud) on the platform they use today.
- **Power Automate** improves productivity and reduces manual processes with workflow automation.
- **Power Virtual Agents** helps businesses respond rapidly to customer and employee needs—at scale—using intelligent chatbots.

POWER PLATFORM



Power BI
Business analytics



Power Apps
Application
development



Power Virtual Agents
Process automation



Power Automate
Intelligent virtual agents



MORE RESOURCES

ATTEND

Pax8 + Microsoft Bootcamp:
2-day Dynamics Bootcamp

SERVICES

Professional Services for Microsoft

For Microsoft projects that are too time-consuming or complex to tackle alone, partners can take advantage of Pax8 Professional Services.

Our team of highly skilled Cloud Engineers help Pax8 partners plan, assess, design, migrate, customize, and optimize cloud solutions. All Pax8 Professional Services are white-labeled, so your clients never know we're involved. Plus, with partner-focused pricing, our Professional Services add capabilities and bandwidth to your team, which translates to increased margins on Microsoft projects.

M365 Enablement

M365 Hardening Bundle: Increase overall security posture by enabling Advanced Threat Protection and turning up auditing capabilities in M365. Configure security best practices and Azure AD MFA.

Azure Architecture & Enablement

- Azure Deployments
- Azure AD Connect Setup
- Hands-On Technical Training Labs

Security

- Intune Advisory & Implementation
- Hardening Office 365
- Maas360 Advisory & Implementation

Migration Services

- On-Prem Exchange to Office 365 or Microsoft 365
- Hosted Exchange to Office 365 or Microsoft 365
- G-Suite to Office 365 or Microsoft 365
- On-Prem to Azure
- Teams / SharePoint / OneDrive

Got a Microsoft project that could use a boost?

[Tell Us About Your Project](#)

OPTIMIZE + ENHANCE

Make the Most of Your Microsoft Program

We believe in rewarding Pax8 CSP partners for driving the activation and enablement of Microsoft clients. As your Microsoft experts, we'll show you how you can earn additional margins on net-new Microsoft clients and navigate the Microsoft incentives and rebates requirements. Here's your checklist:

1. Attain a [Silver or Gold membership](#) and select a competency area.
2. See the list of available [Microsoft incentives](#).
3. Actively sell with a valid Microsoft Cloud Reseller Agreement.
4. [Complete onboarding](#) to the CSP Incentive tool.

The Microsoft Incentives/Rebate structure changed on January 1, 2020. [Read this guide](#) to learn more.

Don't Leave Money On the Table From Microsoft!

Our Pax8 Microsoft experts created a guide to clear up the confusion around competencies, incentives, and rebates.

[Get the Guide](#)



OPTIMIZE + ENHANCE

Expand Your Team's Microsoft Expertise

Education and enablement are at the core of the Pax8 mission to support the growth of our partners' Microsoft business.

MISSION BRIEFING

Mission Briefings help you build on your Microsoft foundations with solution-focused sales advice for adding in-demand productivity, infrastructure, communications, continuity, security, and network solutions to your stack.

[Register to Attend](#)

BOOTCAMP

Azure Bootcamps teach you to navigate the complexities of building a Microsoft Azure practice with deep-dive technical learning, including how to enable remote work with WVD.

Microsoft 365 Bootcamps are designed to help MSPs successfully adopt and deploy M365 in the modern workplace.

Dynamics Bootcamps cover how to automate sales processes and build low-code apps with Business Central, Power Platform, and CRM.

[Register to Attend](#)



MICROSOFT FOR NON PROFITS

Technology for Social Impact

To help partners deliver affordable and innovative cloud solutions and drive digital transformation for eligible nonprofit organizations, Microsoft has donations and discounts available for M365, Azure, and Dynamics 365 licensing, as well as training and resources to help them succeed.



MORE RESOURCES

LEARN

Program Overview: Learn more about Microsoft's Partners for Social Impact program

LEARN

FAQ & Eligibility Info: Learn how to register your nonprofit clients

DOWNLOAD

eBook: Crash Course in M365 Business for Nonprofits

Move Your Nonprofit Clients to M365 Business- First 10 Users are Free!

To make the benefits of M365 Business more affordable to nonprofits of all sizes, Microsoft has a special offer that provides nonprofits with free M365 Business for up to 10 users, and discounted pricing of \$5 per additional user per month (M365 Business is typically \$20 MSRP).

[Get Started](#)



YOUR MICROSOFT EXPERTS

Why Pax8?

Pax8 enhances and simplifies your Microsoft experience with our modern platform, educational events and resources, in-house expertise, technical support, and Professional Services.

We've made Microsoft (and everything cloud) so straightforward that it's easy to see why thousands of MSPs and IT service providers in the US, Canada, and the UK are switching to Pax8.



A Modern Partner Experience

Pax8 simplifies the way organizations buy, sell, and manage cloud solutions, empowering our partners to achieve more with cloud technology. Our born-in-the-cloud platform modernizes the channel's cloud journey with consolidated billing, automated provisioning, and industry-leading PSA integrations. And our technology is backed by our world-class partner experience that provides responsive support alongside the education and resources you need to grow your cloud business.

Ranked in the Inc. 5000 for three consecutive years – #68 in 2018, #60 in 2019, and #111 in 2020 – as one of the fastest-growing private companies in the US, and ranked #1 on the Denver Business Journal's Fast50 list as the fastest-growing large business in Denver, Pax8 has displaced legacy distribution by connecting the channel ecosystem to our award-winning cloud marketplace. If you want to be successful with cloud, you want to work with Pax8.

YOUR MICROSOFT EXPERTS

Do It All in the Pax8 Platform

Our dynamic platform helps partners seamlessly deliver and manage cloud solutions. Quote, order, bill, and provision all of your cloud products in one place, with a single monthly invoice. And, with built-in data analytics and business intelligence, the Pax8 Platform provides the insights you need to optimize your margins and sell more.

Ordering

Buy Microsoft and other cloud products instantly from one place with the intuitive ordering workflow of the Pax8 Platform.

PSA Integrations

The Pax8 Platform integrates with Autotask, ConnectWise, Kaseya, Syncro, Tigerpaw, and RepairShopr – so you can manage everything from the convenience of your preferred PSA tool.

Instant Provisioning

Our platform integrates with Microsoft Partner Center – enabling automated, instant provisioning.

Managing Clients

Get a 10,000-foot view of your entire Microsoft client base and manage their overall cloud tech stack within the Pax8 Platform.

Channel- Focused Cloud Products

Build your complete tech stack, with leading vendors across productivity, infrastructure, continuity, security, network, and communications.

Business Intelligence

See targeted up-sell and cross-sell opportunities in your client base and identify gaps in your clients' technology stacks through data visualization.

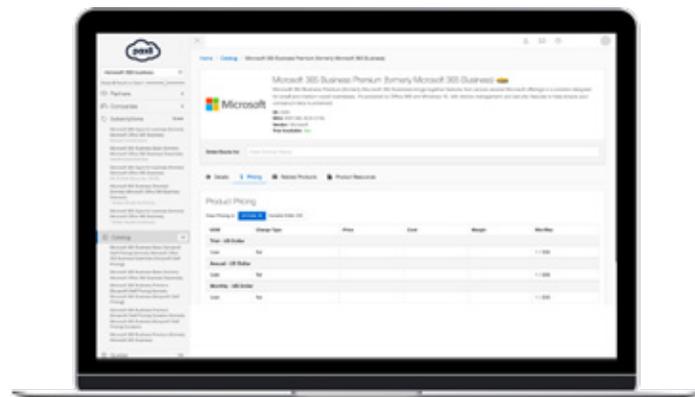


ACCELERATE YOUR CLOUD MANAGEMENT

Pax8 Pro adds premium features to the Pax8 Platform that save time and reduce human error with automated and standardized processes. Pax8 Pro helps you grow your business and optimize client security with the power of multitenant visibility.

- PSA service ticket integration
- PSA user contact creation
- Microsoft prospecting tool
- Microsoft security reporting with GAP analysis
- Onboarding/offboarding checklists

[Schedule a Call](#)





Microsoft

Want to enhance your Microsoft experience
to make more possible for your clients?

**Your Microsoft experts
are here to help.**

[Schedule a Call](#)

SOURCES

- 1 OpenVPN, Remote Work Is the Future — But Is Your Organization Ready for It?, 2
- 2 Buffer, The 2020 State of Remote Work, 2020
- 3 Microsoft, Microsoft Teams reaches 115 million DAU – plus, a new daily collaboration minutes metric for Microsoft 365, 2020