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

### PAX8 CSP PROGRAM
- Expertise for Your Microsoft Business .......................................................... 1
- A Blueprint for Your Microsoft Journey .......................................................... 2

### SOLUTIONS
- M365: Remote Work + Security ................................................................. 3
- M365: Collaboration & Communication ......................................................... 4
- Keeping Up with M365: New Names, Same Features ...................................... 5
- Azure: Unlock the Power of IaaS ................................................................. 6
- Azure: Going Further with WVD, RIs, and DCO ............................................ 7
- Dynamics 365 / Power Platform: Business Apps .......................................... 8

### SERVICES
- Professional Services for Microsoft .......................................................... 9
- Everything MSPs Need to Start Marketing Microsoft ...................................... 10

### OPTIMIZE + ENHANCE
- Make the Most of Your Microsoft Program ............................................... 12
- Expand Your Team’s Microsoft Expertise ...................................................... 13
- Technology for Social Impact ...................................................................... 14

### YOUR MICROSOFT EXPERTS
- Why Pax8? ................................................................................................. 15
- Do It All in the Pax8 Platform ...................................................................... 16
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.

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.

---

1. 36% of organizations have dealt with a security incident due to an unsecured remote worker.  
2. 20% of remote workers say their biggest challenge is collaboration and communication.
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.

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.

How to Maximize Every Step of Your Microsoft Journey with Pax8

PAX8 CSP PROGRAM

Accelerate cloud migration & achieve digital transformation
Enable remote work collaboration
Secure remote workers & ensure business continuity
Power business apps to drive data-based decisions

STATEGICALLY 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
Over 30 billion collaboration minutes per day!  

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 Date, 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.
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.

wingman@pax8.com | +1 (855) 884-7298 | pax8.com
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

<table>
<thead>
<tr>
<th>Office 365 Business Essentials</th>
<th>Microsoft 365 Business Basic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud Services</td>
<td>Cloud Services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Office 365 Business Premium</th>
<th>Microsoft 365 Business Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud Services and Desktop Apps</td>
<td>Cloud Services and Desktop Apps</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Microsoft 365 Business</th>
<th>Microsoft 365 Business Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud Services, Desktop Apps, and Advanced Security</td>
<td>Cloud Services, Desktop Apps, and Advanced Security</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Office 365 Business</th>
<th>Microsoft 365 Apps for Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop Apps</td>
<td>Desktop Apps</td>
</tr>
</tbody>
</table>

What's Included in Each M365 Tier?

Microsoft 365 Business Basic

Microsoft 365 Business Standard

Microsoft 365 Business Premium

Microsoft 365 Apps for Business

wingman@pax8.com | +1 (855) 884-7298 | pax8.com
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 though 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
Everything MSPs Need to Start Marketing Microsoft

From selling guides to Microsoft Plays-in-a-Box, get the tools, strategies, and white-labeled resources you need to successfully go to market with a wide array of Microsoft solutions.

**Microsoft 365**

**Getting Started**

Pax8 MSP’s Guide to Selling M365: The general breakdown of the different Microsoft 365 plans, client targeting guidance, and white-labeled email template provided in this guide will give you the foundational knowledge needed to start selling M365.

**Modern Workplace and Surface**

Modernize Communications Play-in-a-Box: From cost-saving stats that are sure to get your clients’ attention to why they might need a specific feature over another, here’s the information and resources you need to get your clients to update their phone systems to match the needs of a modern workplace.

**Security**

Modern Security and Defend Against Threats Play-in-a-Box: These key marketing assets, sales messaging, supplemental security sales campaign, and more are what you need to ensure your clients are driving operational resiliency while strengthening cybersecurity and compliance.

**Microsoft Azure**

**Data and AI**

Win with Analytics Play-in-a-Box: All the necessary resources, including over one dozen pitch decks, analyst reports, and eBooks, to sell your clients on the clear need for business analytics solutions and the multitude of invaluable insights they provide.

**Infrastructure**

Modernize VDI to Azure Virtual Desktop Play-in-a-Box: Key sales messaging, probing questions, and an additional Windows Virtual Desktop campaign are just a few of the resources provided to ensure you can clearly convey the value of Microsoft’s virtualization service.

Migrate Windows Server and SQL Server Play-in-a-Box: Everything you need to get your clients to migrate on-prem servers to Azure virtual machines, including migration strategies and pathways, call scripts, and a plethora of pitch decks and white-labeled emails.
Microsoft Dynamics 365

**Business Applications**
**Personalize Customer Experience Play-in-a-Box:** Everything you need to pitch clients on key solutions that improve customer experience and increase engagement, including a couple pitch decks, a tele-sales guide, and target audience personas.

**Digital and App Innovation**
**Digital and App Innovation Play-in-a-Box:** Conversation frameworks, key audience personas, and everything else you need to target and speak to the right clients that need to overcome an aging infrastructure and lack of agility.

Want help getting Microsoft marketing off the ground?

Schedule a Call
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.
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
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.

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).
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
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
3 Microsoft, Microsoft Teams reaches 115 million DAU – plus, a new daily collaboration minutes metric for Microsoft 365, 2020