



The Managed Intelligence Guide

Navigating the Pax8 Ecosystem

Chapter 1: Why This Guide Exists	6
1.1 How to Use This Guide	7
1.2 The World Has Shifted	8
1.3 Three Kinds of Debt, None of Which Appear on a Balance Sheet	9
1.4 What SMBs Are Doing, and What It Is Costing Them	10
1.5 What Vendors Are Building, and What Keeps It From Reaching SMBs	13
1.6 Partners Sit at the Center	15
1.7 The Six Plays	16
1.8 The Managed Intelligence Provider Program	19
Chapter 2: The Language of Managed Intelligence	21
2.1 Why the Words Matter	22
2.2 The Core Concepts	23
2.3 The Strategic Frame	24
2.4 What This Means for You	25
2.5 8os	26
2.6 The Pax8 Marketplace	27
2.7 Vendor Experience	27
2.8 Technology Services Distribution	27
Chapter 3: Play 1 – Discover	28
3.1 Why This Play Comes First	29
3.2 Client Signals	29
3.3 Categories in Play	29
3.4 Before You Assess: Readiness Is Not the Same as Intent	30
3.5 Running Discover with TDAA	32
3.6 The Initial Prioritization Exercise: The Human/System Value 2×2	34
3.7 Grow Your Business	36
3.8 Increase Your Efficiency	37
3.9 Manage Your Risk	38
3.10 Building the Capability: Enablement by Region	39
3.11 Microsoft in This Play	41
3.12 Vendor Angle	43
3.13 Proof and Handoff	44

Chapter 4: Play 2 – Sell	45
4.1 When to Run This Play	46
4.2 Client Signals	46
4.3 Categories in Play	46
4.4 What You Sell	47
4.5 From Findings to Business Case	48
4.6 Building a Repeatable Sales Function	49
4.7 Grow Your Business	50
4.8 Increase Your Efficiency	51
4.9 Manage Your Risk	52
4.10 Delivering the Capability	53
4.11 Microsoft in This Play	54
4.12 Vendor Angle	55
4.13 Proof and Related Work	57

Chapter 5: Play 3 – Buy	58
5.1 When to Run This Play	59
5.2 Client Signals	59
5.3 Solution Categories in Play	59
5.4 The Pax8 Agent Store	60
5.5 Turning Agents Into a Service	64
5.6 Grow Your Business	65
5.7 Increase Your Efficiency	66
5.8 Manage Your Risk	67
5.9 Building the Capability	68
5.10 Microsoft in This Play	70
5.11 Vendor Angle	71
5.12 Proof and Other Work This Play Surfaces	72

Chapter 6: Play 4 – Build	73
6.1 When to Run This Play	74
6.2 Client Signals	74
6.3 Categories in Play	74
6.4 Building Is Different From Configuring	75
6.5 Horizontal and Vertical Agents	76
6.6 Build Capability Areas	77
6.7 The Agent Factory	78
6.8 Data Readiness as a Build Multiplier	79
6.9 Grow Your Business	80
6.10 Increase Your Efficiency	81
6.11 Manage Your Risk	82
6.12 Building the Capability	83
6.13 Microsoft in This Play	84
6.14 Vendor Angle	85
6.15 Proof and Related Work	86

Chapter 7: Play 5 – Implement	87
7.1 When to Run This Play	88
7.2 Client Signals	88
7.3 Categories in Play	88
7.4 Why This Play Decides Whether the Investment Was Worth Making	89
7.5 Three Pillars	90
7.6 Three Ways to Productize This Play	91
7.7 Grow Your Business	92
7.8 Increase Your Efficiency	93
7.9 Manage Your Risk	94
7.10 Building the Capability	95
7.11 Microsoft in This Play	96
7.12 Vendor Angle	97
7.13 Proof of Success	98

Chapter 8: Play 6 – Manage	99
8.1 When to Run This Play	100
8.2 Client Signals	100
8.3 Categories in Play	100
8.4 Why Agents Degrade	101
8.5 Managing Agents: The Technical Layer	101
8.6 Managing Agents: Governance	102
8.7 Four Ways to Productize This Play	103
8.8 Grow Your Business	104
8.9 Increase Your Efficiency	105
8.10 Manage Your Risk	106
8.11 Building the Capability	107
8.11 Microsoft in This Play	108
8.12 Vendor Angle	109
8.13 Proof and Related Work	110

Chapter 9: Conclusion	111
9.1 Start With One	112
9.2 Your CTAs	114

Appendix A: By Solution Category	115
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Appendix B: By Outcome	118
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CHAPTER 1

Why This Guide Exists

How to Use This Guide

This guide is organized as a matrix. You can read it front to back, and it is built to be entered wherever a client's situation places you.

A single client will usually occupy more than one place at once. The same business might need Discover for a workflow nobody has mapped, Implement for the Copilot deployment that stalled last quarter and Manage for the agents already running in its finance team. Treat each issue as its own entry point and expect to be working in several chapters for the same client at the same time.

You are not expected to read this guide front to back, though you can. You are expected to find your, and your client's, place in it.

Three coordinates get you there. Before you open a chapter, answer three questions about a specific client.

1. **Where are they on the journey?** That is the **Play**: Discover, Sell, Buy, Build, Implement or Manage. It is the chapter.
2. **What are they focused on?** That is the **value pillar**: grow your business, increase your efficiency or manage your risk. It is the section within the chapter.
3. **What discipline does the work fall under?** That is the **solution category**: Security, Productivity, IT Operations and the nine others drawn from the Pax8 Marketplace. It tells you which offers in that section are the relevant ones.

Answer the above questions and you land on a short list of offerings, each with a note on what it is and what it unlocks for you.

Two Worked Examples.

A client has told you their team is drowning in manual work, and they have no idea where the hours go. They are not ready to buy anything; they cannot yet describe the problem. That is Discover, increase your efficiency, IT Operations and Productivity.

A different client has approved an agent; it is live, and nobody is using it. That is Implement, grow your business, Productivity.

Two ways in. Front to back by Play, if you are building a practice and want the whole journey. Or from Appendix C by category, if you already know you are having a security conversation and want to see where security appears across all six Plays. The appendix should be considered a full second entry point.

Every offer carries two markers. A region marker (AMER, EMEA, APAC or Global), because not everything in this guide is available everywhere yet, and a status marker (Live, Limited or Coming), so you know what you can sell today and what is on the way.

Each chapter ends by naming other work that Play commonly surfaces. There is no prescribed next stop. Manage may inform a new Discover engagement, and a client may equally remain in Manage or move to Sell, Implement, Buy or Build, depending on the work in front of them. Follow those threads when a client's situation calls for them.

1.2 The World Has Shifted

For most of modern economic history, a small business grew the same way: more revenue required more people. Headcount and output moved in rough proportion, and the cost and scarcity of human labor set the ceiling on what any small business could achieve.

That relationship is breaking. AI agents, automated workflows and intelligent software have introduced a new category of labor into the SMB economy: one that operates continuously, scales without hiring and performs cognitive work once reserved for people.¹

Agentic AI has arrived. And this guide serves to equip managed service providers (MSPs) and emerging managed intelligence providers (MIPs) with the services, solutions and support to lead this transition.

But leading it requires knowing which conversation to have with which client, at which point in their journey and which part of the Pax8 ecosystem to reach for when you get there. That is what the rest of this guide is organized to give you.

¹ Pax8. [The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers](#). Pax8, 2026.

1.3 Three Kinds of Debt, None of Which Appear on a Balance Sheet

Every client is carrying debt that no accountant has recorded. It takes three forms, and the order in which most technology conversations address them is the reverse of the order in which they matter.

Culture debt is the accumulated resistance to changing how work gets done. It shows up whenever a change is agreed and then fails to happen: workarounds reappearing weeks after a fix, a process reverting because the people running it had done it the other way for a decade, a meeting where everyone agrees and nothing follows. It is made of habits, role identities and the unspoken agreement that this is simply how work gets done here. It is the most expensive of the three and the hardest to see, because it only becomes visible the moment someone tries to change something.

Process debt is work that exists because it has always existed. The report nobody reads and everyone still produces every Friday. The approval step guarding against a risk that disappeared four years ago. Data re-entered by hand between two systems that could be connected. Nobody decided to keep any of it; nobody decided to stop.

Process debt is difficult to surface because it does not feel like a problem. It feels like work, and like people doing their jobs. Its scale only becomes apparent when someone maps it and finds how many hours a year are consumed by process that has become its own purpose. [Chapter 3](#) covers how to run that exercise.

Tech debt is the familiar one: aging systems, integrations held together by habit, a platform chosen

years ago for reasons nobody at the company now remembers. Most clients already know it is there and have known for years. It persists because addressing it means pausing, and pausing feels like falling behind, so the business keeps running on infrastructure that was never meant to scale this far.

What has changed is the forcing function. Tech debt used to be resolved by a crisis: a breach, a failure, a competitor pulling ahead. Agentic AI has replaced that, because agents cannot automate what is not standardized, and intelligence cannot move through systems that do not connect. The cost of tech debt used to be inefficiency. It is now a barrier to entry.

Why the order matters. Most technology conversations begin at tech debt, because it is the easiest to see and the easiest to quote. Any MSP can walk into a client and find something to fix at the infrastructure layer, and most have built their businesses on precisely that.

The evidence points elsewhere. Research across 1,000 senior executives in 59 countries found that roughly 70% of AI implementation challenges stem from people and process issues, with 20% attributable to technology and 10% to the algorithms themselves, despite the algorithms consuming a disproportionate share of attention and budget.² Clients are directing their effort at the 10% and wondering why nothing changes.

Naming all three debts is what earns the conversation about the first two, and the first two are where AI transformations succeed or fail.

2 Pax8. [From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era](#). Pax8, 2026.

1.4 What SMBs Are Doing, and What It Is Costing Them

Adoption Is No Longer the Story. Integration Is.

Small businesses have crossed the adoption threshold in large numbers. What almost none of them have done is restructure anything around it. Across the SMB economy, 92% report using digital tools while only 10% have fully integrated them across their operations; this is a market defined not by the absence of investment but by the absence of architecture.³

The distinction between *using* AI and *operationalizing* it is the defining competitive variable of the coming decade.⁴

92%

report using digital tools

10%

have fully integrated them across their operations

The Returns are Back-Loaded, Which Is Why Early Adopters Feel Underwhelmed

Modelling by Deloitte Access Economics finds that SMBs moving from basic to intermediate AI adoption see profitability uplifts of approximately 45%, while those reaching full integration see uplifts of approximately 111%. The modelling draws on a study of 1,000

Australian SMBs, a market whose firm-size distribution, digital infrastructure and labor cost dynamics make the directional findings applicable more broadly.⁵

The steepest part of the return is the second half of the journey, and it is the half most SMBs have not begun. Workflow redesign, role restructuring, data cleanup and governance are the work of the second phase, and they are exactly the capabilities a partner supplies. That is the opening, and it is available now.

The mechanism matters more than the numbers. In the first phase, AI tools are applied to individual tasks inside workflows that have not changed. The gains are real but isolated: they show up in individual productivity and never reach the margin, because the organization around the tools was never rebuilt to capture them. In the second phase, workflows are redesigned around AI rather than adapted to accommodate it, roles are restructured, data environments are cleaned and governance is established. Those changes have to happen together, because each amplifies the others.⁶

This is the single most useful point you can land with a client who has bought AI tools and found them disappointing. They have not encountered a technology that overpromised, but instead have measured a back-loaded return curve at the wrong point on it.

Most SMBs Believe None of This Applies to Them

One of the most significant obstacles in the market is that, among the smallest US firms, those with fewer than five employees, 82% cite unsuitability to their business as the primary reason they have not adopted AI (Epiphany Dynamics). Across a seven-country survey of more than 5,000 SMEs, unsuitability to

3.1 hr/day

Time savings by line-of-business workers using AI tools

3.6 hr/day

Time savings by IT workers using AI tools

the work ranked as the most cited barrier among non-adopters at 57%, ahead of cost, regulatory concern and skills gaps.⁷

The illusion is self-reinforcing. Businesses that have not tried AI believe it does not apply to them, so they do not try it, so they never encounter the evidence that would change their mind.

It is also demonstrably wrong. Businesses in the same size categories and the same sectors that crossed the threshold report average first-year productivity gains of 29% and a return of \$1.60 for every dollar invested. They are not structurally different from the businesses sitting it out, as frequently, they are competitors in the same local market.⁸

Ratios like that persuade in a report and land thinly in a room, because the dollar spent is certain and the return is not. An owner deciding whether to spend at all wants the answer in terms they can check against their own week, which is what the next section supplies.

The practical consequence for a partner is that general capability arguments do not work on this market. Only peer evidence does: specific proof from a business the prospect recognizes as being like their own.

The Dividend Is Being Generated and Thrown Away

Line-of-business workers using AI tools save approximately 3.1 hours per day, close to 39% of the standard workday. IT workers save more: approximately 3.6 hours, or 45% of their working hours.⁹

That is the cost conversation, answered. If a staff member's time is worth \$50 an hour and the tooling costs \$50 a month, break-even is one hour saved in a month. The figures above describe roughly sixty. For most SMBs the question is no longer whether the tooling pays for itself.

Three hours a day is not an abstraction to the person who has them. It is leaving at a reasonable hour rather than a late one. It is the part of the job they were hired to do, which most weeks they never reach. For an owner who has been covering four or five roles since the business started, it is the first realistic prospect of putting one of them down.

Fewer than one in five SMBs have any deliberate plan for where that time goes.¹⁰ Time that is not deliberately reallocated is absorbed by the ambient demands of the day: the inbox that refills, the calls that expand to fill the space. The productivity gain is real at the individual level and invisible at the business level, because nobody made a structural decision about where the recaptured capacity went.

There is a reason that conversation does not happen on its own, and it is worth understanding before you walk into it. When Pax8 interviewed SMB owners about their relationship with AI, the most consistently named concern was not cost or data quality. It was the fear that deploying AI aggressively meant training the technology to replace the people currently running the business. The concern was sharpest among small, labor-intensive operators (trades, family services, owner-led practices) where a recaptured

hour reads more easily as a threat to a livelihood than as capacity to redirect.¹¹

An owner who is uncertain whether the recovered time is meant to grow the business or eliminate roles inside it tends to leave the question unanswered. Unanswered time becomes absorbed time. The reinvestment plan is missing partly because the conversation it requires has not happened.

The Channel Is Being Asked for Something It Has Not Built

AI services in the managed services sector are growing at 59% annually, against 13% for traditional managed services.¹²

What counts as an AI service. Broadly, work where AI capability is what the client is buying rather than something running underneath. Assessments of where AI applies in a business, deployment and adoption work for tools like Copilot, agents sourced, configured or built for a specific process. The governance and monitoring that keeps them working. Reselling a license with AI features built in does not count, and neither does using AI to run your own service desk more efficiently.

Those two numbers describe two different businesses, and most MSPs are running the second while being asked for the first. Take a moment on where yours sits. What share of last quarter's revenue came from AI services? If the honest answer is none, or one pilot you have not repeated, you are in the majority, and the 59% is being captured by someone.

Meanwhile, MSP confidence in the ability to guide clients on AI deployment has fallen from 90% to roughly 50% in a single year.¹³ Over the same period, the tools became more capable and more accessible across every relevant category.

What changed was the demand. When clients started asking for AI work rather than asking about it, the distance between what providers had been saying they could deliver and what they had built became visible. The conversation had been running for years. The deployment playbooks, governance frameworks, trained practitioners and proven use cases had been building far more slowly.

That gap is the reason this guide exists.

59%

Annual growth of AI services in the managed services sector

13%

Annual growth of traditional managed services

3 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

4 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

5 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

6 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

7 Pax8. *From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era*. Pax8, 2026.

8 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

9 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

10 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

11 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

12 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

13 Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

1.5

What Vendors Are Building, and What Keeps It From Reaching SMBs

Vendors are building agents: voice agents, compliance bots, financial reconciliation tools, service desk automation and AI layered directly into software small businesses already run. The Agent Store launched with thirty vendors spanning security, operations, productivity and commerce.¹⁴ The capability is arriving quickly, but getting it into the hands of small businesses is the problem.

The Prize Is Roughly Ten Times the Size of Cloud

The digital labor market forming at the intersection of agentic AI and the global economy is estimated at \$6 trillion. The global cloud computing market was valued at approximately \$752 billion in 2024.¹⁵

Capability Does Not Convert on Its Own

Only 26% of companies globally have developed the capabilities required to move beyond proof of concept and generate tangible value from AI, despite years of investment, hiring and pilot programs.¹⁶ More than 40% of agentic AI projects are projected to be cancelled before the end of 2027, driven by escalat-

ing costs, unclear business value and inadequate risk controls.¹⁷

The enablement gap compounds it. While 68% of organizations report using generative AI in deployed production applications, only 51% offer AI training for non-technical employees, and only 23% offer training in prompt engineering: a basic skill for anyone using an AI-enabled workplace tool.¹⁸

Every Deployment Widens the Attack Surface, and for an SMB That Is Existential

Eighty-eight percent of SMB breaches involve ransomware, against 39% at larger organizations; a more than twofold gap reflecting the systematic targeting of businesses that hold real data and real money but lack the infrastructure to defend it.¹⁹ Average SMB ransomware recovery cost, excluding the ransom itself, reached \$1.53 million in 2025, and 40% of SMBs say an attack costing \$100,000 or less could end the business.²⁰

The same agents that drive the efficiency are the ones opening the exposure. An agentic workforce is both the opportunity and the risk, and it demands a unified response rather than a piecemeal one.

68%

of organizations report using generative AI in deployed production applications

51%

offer AI training for non-technical employees

23%

offer training in prompt engineering

Which Is Why Vendors Need MSPs and MIPs

No vendor has, or can afford to build, the last-mile deployment capability, the local trust, the change management expertise and the ongoing support that SMB agentic deployment requires in every context for every client. SMB churn runs at approximately 8.2 times the enterprise rate, and average SaaS customer acquisition payback has stretched to 39 months. Against smaller deal sizes and higher churn, direct sales to SMBs does not work at scale.²¹ The channel exists because the economics of reaching this market directly do not.

Read that as a description of your position. The relationships you already hold, the local presence, the years of knowing which of your clients will adopt something and which will quietly ignore it, that is the capability vendors cannot buy and cannot replicate. It is the reason they route through you.

¹⁴ Pax8. "Pax8 Unveils Transformational Agent Store." Pax8 Newsroom, 7 Oct. 2025.

¹⁵ Pax8. *From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era*. Pax8, 2026.

¹⁶ Pax8. *From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era*. Pax8, 2026.

¹⁷ Pax8. *From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era*. Pax8, 2026.

¹⁸ Pax8. *From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era*. Pax8, 2026.

¹⁹ Pax8. *The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers*. Pax8, 2026.

²⁰ Pax8. *From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era*. Pax8, 2026.

²¹ Pax8. *From Customer Zero to Customer One: The Vendor's Playbook for the Agentic Workforce Era*. Pax8, 2026.

1.6

Partners Sit at the Center

Put the two sides together and the position becomes clear. On one side: a large, fast-moving, underserved market that wants help, cannot self-serve and will not respond to capability arguments. Eighty-four percent of SMBs would trust an outside technology advisor to guide their AI implementation, and 70% agree that outside partnerships are necessary to fully benefit from AI.²²

On the other: a vendor ecosystem with capital, capability and no viable route to that market on its own.

The IT provider partner is the only party that touches both. That is the flywheel: SMB pull and vendor push meeting at the same point, and it compounds in two

directions at once. Every client success makes the next client easier to win, because peer evidence is what dissolves the applicability illusion. Every deployment makes the next vendor relationship easier to earn, because vendors route investment toward partners who can demonstrate outcomes.

This is what makes the lead difficult to catch. A partner who starts now accumulates client proof and vendor standing at the same time, and neither can be bought later at speed. A competitor starting eighteen months from now can buy the same tooling on day one. What they cannot buy is 18 months of client proof and vendor standing, and that is the real constraint.

84%

of SMBs would trust an outside technology advisor to guide their AI implementation

70%

agree that outside partnerships are necessary to fully benefit from AI

²² Pax8. [The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers](#). Pax8, 2026.

1.7 The Six Plays

Knowing where the opportunity sits is not the same as being equipped to take it. The rest of this guide is the equipment, and it is organized around the six Plays found within the **Managed Intelligence Provider Playbook**.

Think of the six Plays as six distinct kinds of work. Each has its own client conversation, its own skills and its own economics, and each answers a different situation a client can be in. You run whichever one the client in front of you needs, and the client's situation decides which.

That is why the Plays are not sequential, which is important to bear in mind because there is no required starting point and no finish line.

A client who already knows what they want does not need Discover. A client who bought Copilot last year and cannot get anyone to use it needs Implement and might reach Discover months later once trust is established. A partner with forty agents running across a dozen clients and no visibility into any of them needs Manage first, urgently, and can worry about the rest afterwards.

Most partners are running several Plays at once across different clients. A single client relationship will return to the same Play repeatedly over years. The numbering below is for reference only.

Most partners are running several Plays at once across different clients. A single client relationship will return to the same Play repeatedly over years.



Discover



Sell



Buy



Build



Implement



Manage

Play	What You Are Doing	What the Client Experiences	What You Charge For
 Discover	Surfacing culture, process and tech debt, and finding where the hours and money go	A structured assessment that tells them something about their own business they did not know	The assessment, the workshops, and the roadmap that comes out of them
 Sell	Translating findings into a business case priced on the work delivered rather than seats	A proposal about their business, not about technology	Advisory work, and the shift away from per-seat pricing
 Buy	Curating agents and workflows that already exist, from a vetted catalog	Working capability in weeks	Margin on what you source, plus the bundling and configuration around it
 Build	Creating agents and IP that do not yet exist, yourself, through another partner or with Pax8 Professional Services	Something proprietary that competitors cannot buy	Build fees or margin on outsourced builds, plus recurring revenue on IP you can resell
 Implement	Deploying, integrating and driving actual adoption	A capability people use, rather than one they were given	Training, deployment, integration and change management
 Manage	Governing, optimizing and expanding a live agent estate	Agents that keep working, stay compliant, and improve	A recurring subscription against continuous performance

Where partners commonly enter. The situation a client describes usually tells you which Play to start with:

- *"We bought AI tools and nothing changed."*
→ **Implement.**
The capability exists; adoption does not.
- *"Our client asked for something that does not exist."*
→ **Build.**
No assessment required to know a marketplace has nothing for you.
- *"We have agents running and no idea what they are doing."*
→ **Manage.**
Governance first, everything else after.
- *"We know exactly what we need and cannot get it funded."*
→ **Sell.**
The problem is the business case, not the diagnosis.
- *"A client keeps asking about AI and we keep changing the subject."*
→ **Discover.**
This is the one Discover is for.

How they connect. Any Play can surface work belonging to another, which is why each chapter ends by naming where that Play commonly leads rather than what comes next. Manage produces the data that makes the next Discover sharper. Discover produces findings that need selling. Build produces

something that has to be implemented. Follow those threads when they appear and ignore them when the client does not need them.

How you package the work is your decision. Every Play can be sold as one-off revenue, as a recurring subscription, or as a mix. Implementation and customization can be charged up front or amortized across a term so the whole engagement becomes monthly recurring revenue. An assessment can be a fixed fee or the first month of an advisory retainer. All of these are valid, and the right answer depends on your cash position, your client's buying preference and how much ongoing responsibility you want to hold.

What changes as you move into managed intelligence is the range of choices available. Reselling licenses gives you margin on someone else's product. Packaging capability into offers of your own, whether sourced, built or delivered as a service, means you set the price. [Chapter 4.4](#) covers the units you can price on, and each Play chapter names what is billable within it.

Manage is the clearest case for recurring revenue, since it is sold against continuous performance rather than a delivered outcome. That does not make it the only one.

That is the commercial argument for building a managed intelligence practice. A meaningful share of this work is recurring by nature, and recurring revenue compounds. A partner running only Discover and Sell has a consultancy. A partner running Manage has annuity.

1.8 The Managed Intelligence Provider Program

This guide is a map. [The MIP Program](#) is the guided route through it.

The MIP Program is Pax8's structured enablement and activation program for building managed intelligence capabilities and commercial motions. It is built on the same six Plays this guide is organized around, and it takes a partner from understanding the framework to executing and scaling against it.

Most partners use it to add managed intelligence capability and revenue to an existing managed services practice. You keep the business you have and build the new capability alongside it, at whatever pace your clients and your team can support.

What the MIP Program does that this guide cannot.

This guide shows you what Pax8 puts behind each Play: the offers, enablement, vendors and Microsoft solutions, organized so you can find what fits the client in front of you. The program sequences the learning and gives you the support to build the capability for real.

How it works. An entry assessment identifies your current managed intelligence capabilities and gaps and helps identify where focus will pay off most. From there, role-based learning runs across three tracks, strategy, sales and technical, so each person gets enablement matched to their role. Building a managed intelligence practice involves commercial and operational work as much as technical work, which is why the program reaches well beyond your engineers. Each Play has its own module, and some Pax8 services require the relevant one: the Transformation Discovery Assessment Agent in [Chapter 3](#) requires completion of the Discover Play module, because the tool is only as good as your ability to run the conversation around it. The program provides role-based

learning and connects you to applicable regional enablement, coaching, labs and support.

Five Questions Partners Ask Before Enrolling

How long does it take?

Each Play takes two to four hours per person, which puts the full six at roughly twelve to twenty-four hours. There is no fixed schedule. After the assessment a path is suggested, and you take as much or as little as you want, in whatever order suits you.

How do I want to learn it?

Three ways to engage, and partners mix them:

- **Self-guided:** [On-Demand learning in the Academy](#) platform, continually expanding. The flexible route for building foundational understanding of what being a Managed Intelligence Provider involves.
- **Facilitated:** [Instructor-Led Training](#), [Managed Intelligence Masterclasses](#) and [Community Groups](#), for partners who learn better through live interaction and alongside peers.
- **Accountability-driven:** [Peer Groups](#), [Consulting](#) and [Coaching](#), built around structured commitments and applying the learning to measurable business outcomes.

All three are available regardless of region.

What does it cost?

The self-guided path is included for every partner at no additional cost. Facilitated and accountability-driven options carry a cost that depends on which you choose.

Who else on my team should go through it?

At least three people, one for each track.

- **Strategy:** someone who can commit the business to a direction.
- **Sales:** someone who will carry the commercial conversation.
- **Technical:** someone who will deliver the work. Sending only your technical lead is the most common mistake, and it produces a practice that can build but cannot sell what it builds.

How do I progress through it?

Start with the entry assessment, then work the Play modules relevant to the gaps it surfaces. Take as much or as little as you want, in whatever order suits you.

There is no single finish line, and three definitions of “done” are worth knowing:

Enough to start earning. Whatever gets you to the point of supporting clients, generating revenue from managed intelligence and consuming managed intelligence SKUs from the Marketplace. In practice that is usually at least the Discover and Sell Plays.

Enough to access what you need. If you want to use Matchmaker or Managed Intelligence Services, complete the Plays that unlock them. Usually Discover, and Manage or Build as well if you intend to act as a delivery partner in Matchmaker.

The full path. All six Plays, for partners building complete capability across sourcing and creating solutions.

What it is for, commercially. The program’s purpose is to turn agentic opportunity into recurring revenue.

Every Play module is oriented toward something you can package, price and sell.

If you are not ready to enroll yet. The program is the fastest route, and some partners want to test the direction before committing to it. Two smaller entry points do that, and both feed into the program rather than substituting for it.

MicroLearning: BXT Framework: Deciding What Deserves Your Attention First*

addresses the problem most partners have at this stage. You are past deciding whether AI matters. You are working out where to begin, which is difficult when every opportunity inside the business has a champion and the loudest idea is rarely the strongest. BXT gives you a structured way to evaluate opportunities against Business, Experience and Technology criteria. It is the same framework used to prioritize assessment findings in [Chapter 3](#), so the course doubles as preparation for the Discover Play.

*Note: You must be logged in as a partner to gain access to this material.

Data & AI Guided Growth is the wider on-ramp: a self-guided path for partners exploring the MIP direction, with no prerequisite.

Partners who take either route typically enroll once they have decided where to start. If you already know, go straight to the MIP program. Enrollment is available via the [Agent Store](#) in the Pax8 Marketplace.

Throughout this guide, each Play chapter closes with an enablement section naming the MIP Program module and the regional Academy offerings that build the capability that Play requires. Those sections are how the guide and the program connect chapter-by-chapter.

CHAPTER 2

The Language of Managed Intelligence

2.1

Why the Words Matter

This chapter defines the vocabulary the rest of the guide uses. It is short, and it is worth reading properly, because the terms are not interchangeable, and the distinctions between them carry commercial weight.

There is a second reason to be careful here. The language a partner uses in front of a client determines which conversation follows. Talk about AI as a replacement for people and you will spend the meeting managing anxiety about job losses. Talk about it as workflows, outcomes, capability and governance and you will spend the meeting on the work. The vocabulary below is chosen for the second conversation.

The Core Concepts

Concept	What It Means
Managed Intelligence	The category and the process of work required to deliver on the outcome it promises. It covers everything from deciding which work should be automated through to governing it once it is running.
Managed Intelligence Channel	The ecosystem that delivers and consumes the category: vendors who build the capability, providers who deploy and govern it and the SMBs who buy the outcome.
Managed Intelligence Provider (MIP)	The provider accountable for the service. Where an MSP was accountable for systems being available, a MIP takes ongoing responsibility for delivering, governing, measuring and improving intelligent services against agreed performance and business measures. Where digital labor is the right answer, a MIP is also accountable for that labor behaving as intended. Often it is not the right answer, and recommending automation, a process change or no technology at all is part of the job.
Agentic Workforce	The managed set of AI agents that perform tasks, automate processes, and support decision-making alongside human employees. It is a workforce in the sense that it has to be deployed, supervised, measured and retired, not in the sense that it replaces headcount.
Agentic Labor (also: digital labor)	The measurable business output that workforce produces: completed tasks, decisions, content, executed workflows and automated actions. Always qualified as agentic or digital, never as “labor” alone.
Skills, Context and Memory	One useful way to think about why an agent’s value grows or plateaus. Skills are what an agent can do, context is what it knows about the business it works in and memory is what it retains between sessions. An agent with all three tends to compound in value; an agent with only the first behaves like a tool.
8os	The agentic workforce operating system through which MIPs deploy, govern, secure, measure and monetize agents, their activity and their outcomes.

A note on “workforce.” The term is used here because it captures something a partner needs their client to understand: agents are not licenses that sit dormant until someone opens them. They act, they consume, they can be wrong, and somebody has to

own them. That is workforce-shaped, and treating it as a software purchase is precisely the mistake that produces ungoverned agent estates. It is not a claim about substituting for employees, and it should never be presented as one.

The Strategic Frame

Five Sentences, in Order. Each Depends on the One Before It.

1. **Model providers sell intelligence as a capability.** OpenAI, Microsoft, Anthropic, Google and others supply reasoning, language and judgment as a service. Used directly, a model is a capable thinking partner: it can draft, analyze and reason alongside a person. Acting on the business, inside its systems and workflows, is a separate step.
2. **Agents apply that intelligence to work.** An agent is intelligence pointed at a defined task with the tools and permissions to complete it.
3. **Work performed by agents is digital labor.** It has volume, cost, quality and failure modes, in the way any other form of production does.
4. **Digital labor without management is exposure, not value.** Ungoverned agents drift, consume unpredictably, and act on data nobody scoped. The productivity and the risk arrive in the same deployment.
5. **Managing it so it produces outcomes is managed intelligence.** The provider accountable for that is the MIP. The operating system they run on is 8os.

The shift this describes is a change in what a provider is accountable for. Software licenses are a stock: you count them, renew them and their value is the same on the last day of the term as the first. Agentic labor is a flow: it produces something, that something has a measurable value, and the provider's job is to keep the flow productive, governed and improving.

That is why the commercial models in [Chapter 5](#) price on actions, workflows and outcomes rather than seats. You cannot bill a flow like a stock.

2.4

What This Means for You

A partner moving into managed intelligence is taking on four components they did not previously own:

- **Workflow.** Deciding which work should be automated, which should be augmented and which should be left alone or removed entirely. [Chapter 4](#) gives you the instrument for this.
- **Capability.** Building or sourcing the agents that do the work and knowing which of those two is correct for a given client need. [Chapters 6](#) and [7](#) are the two answers.

- **Governance.** Knowing what every agent is permitted to do, what data it can reach, what actions need human approval and what the audit trail looks like. This is the difference between a practice that scales and one that accumulates unowned risk.
- **Ownership.** Somebody has to be accountable when an agent is wrong. In most SMBs that will not be the client. It is the reason the relationship deepens rather than commoditizes.

None of those four are license management. All four are chargeable.



Workflow



Capability



Governance



Ownership

8os

8os is the operating system layer. It presents as two halves: what a partner sells, and what the partner runs it on.

Managed Intelligence Offerings: What a Partner Sells

These are designed to be adopted in sequence, and the sequence is the point. Each one widens the surface from a person to a process to the whole organization.

- **8bot.**

Start with a person.

8bot, the managed AI coworker from Pax8, working alongside an employee, holding ongoing context and memory rather than starting cold each session. The entry point, because a single named person seeing a daily benefit is the cheapest possible proof.

- **Built-from-Scratch Agents.**

Move to a process.

Recurring workflow automation, deployable and billable repeatably across many clients. This is where a partner's margin stops being project-shaped and starts being product-shaped.

- **Agent Gateway.**

Expand to the broader workforce.

Governs, secures, meters and monetizes AI consumption arriving from anywhere: employee tools, third-party apps and custom agents. This is how a partner gets paid for the AI already in a client's business that nobody sanctioned.

The Agentic Workforce Operating System: What It Runs On

- The offerings above are what a client buys. 8os is what makes them operable at scale: the agentic

workforce operating system underneath, doing for agents what an operating system does for software: allocating resources, enforcing permissions, tracking usage and keeping many things running at once without collision.

Four components, and each answers a question that arrives the moment a partner runs more than a handful of agents.

- **Agent Gateway.** *Who is this agent and what is it allowed to do? Who is this agent, what is it allowed to do and who is watching?* Identity, security, routing, policy and metering on every agent interaction, applied across customers, users and environments from a single control plane. Every agent action passes through it, which is what makes governance a property of the system rather than a policy document, and what lets one partner operate hundreds of agents across dozens of clients. The capability behind the third offering above, and the control plane for everything running on 8os. (Live)
- **Agentic Capabilities Marketplace.** *How do agents find and use each other's capabilities?* The machine-consumable layer for agent-to-agent commerce, where agents discover and transact with capabilities without a human doing it on their behalf. (Coming)
- **Shared Capabilities.** *Where do the models, tools and memory live?* Models, tools, memory, integrations and runtime services that agents draw on, held once rather than rebuilt per deployment. (Limited)
- **Managed Intelligence Credits.** *How do I bill for any of this?* The standardized commercial unit for packaging, measuring, billing and monetizing agentic labor. (Coming)

2.6

The Pax8 Marketplace

The commerce layer for cloud, security and SaaS: a single procurement, billing and provisioning surface across every Play, so a partner is not stitching vendors together per client.

Where 8os is how agentic labor is run, the Marketplace is how everything, including the agents through the Pax8 Agent Store, is bought, provisioned and billed.

2.7

Vendor Experience

Vendors enter the ecosystem through **Evaluation**, which assesses fit and determines the engagement model. From there they join the [Vendor Accelerate Program](#):

- **Silver.** Foundational presence; early Marketplace engagement and enablement activity.
- **Gold.** Established foundation with growing partner adoption and increased engagement
- **Platinum.** Strong traction with sustained revenue growth and accelerated Marketplace integration

- **Galactic.** High performing, strategically aligned vendors driving global scale and impact

Two Pax8 roles recur throughout this guide. **Vendor Product Manager (VPM)** owns product onboarding, technical configuration, pricing, provisioning and billing. **Vendor Alliances Manager (VAM)** owns relationship governance, strategic planning, escalation and business performance. **Silver Vendor Community** is where they land post-launch.

Each Play chapter closes its sections with a **vendor angle box**, naming what a vendor should bring to that moment and which of these routes is the way in.

2.8

Technology Services Distribution

TSD is a separate commercial model, and it is worth stating that it is not part of the vendor ladder above.

Under TSD, trusted technology advisors originate or influence customer opportunities while Pax8 provides the commerce, fulfilment, platform, provisioning, billing and operational support behind them. It typically serves a larger customer segment than the SMB market this guide is otherwise addressed to.

It appears here because partners encounter the term and should know what it means. It is not a motion most MSPs moving toward managed intelligence will run, and it should not be read as an alternative route into the six Plays.



CHAPTER 3

Play 1 – Discover

Surface the Debt, Find the Opportunity.

The MIP evolves from trusted advisor to strategic partner by uncovering what stands between a business and the value it wants, across people, process, data, governance and technology, then identifying the opportunities worth pursuing.

3.1 Why This Play Comes First

Discover is the recommended starting point when a client's problem or opportunity has not yet been defined. If they cannot describe what is wrong, or they know AI matters and cannot say where it applies, Discover is how you find out.

It is not always first. A client with a solution nobody uses may start in Implement. A client with agents already running and nobody watching them may start

in Manage. A client who knows exactly what they want may never need Discover at all.

When it does apply, Discover is where you become the person who advises on what the business should change, stop doing or rebuild. It is also the Play with the highest ratio of revenue to delivery cost, because its output is both the deliverable the client pays for and the evidence behind whatever work follows.

3.2 Client Signals

You are in this Play when:

- Nobody can say where the hours go.
- Processes live in people's heads or were never really defined at all: ask how something gets done and three people give three different answers.
- Someone has said "we should probably do something with AI," and nobody has said what.
- Renewals arrive as surprises rather than decisions.
- No one owns the stack inventory.
- Staff are already using AI tools that nobody sanctioned, and leadership either does not know or has decided not to look.

3.3 Categories in Play

Discover is the one Play that touches all twelve Marketplace categories, because the assessment does not know in advance what it will find. The instrument in 3.6 is what narrows it.

Browse the full category list at the [Pax8 Marketplace](#).

3.4 Before You Assess: Readiness Is Not the Same as Intent

A client knowing they need to change and a client acting on it are two different things, and the gap between them is where most transformation engagements quietly die.

Before an assessment is worth running, six pieces need to be in place:

1. **Owner alignment.** The people who own the business agree on the direction. Without this, everything downstream is negotiable and will be renegotiated.
2. **Awareness.** Everyone understands *why* the business needs to change, in terms of the business rather than the technology.
3. **Desire.** Colleagues can answer, “what’s in it for me?” with something specific to their own role: fewer hours on the work they find tedious, more on the work they were hired to do and a clear view of how their job grows as AI takes on the repetitive parts.
4. **Knowledge.** People understand what specifically has to change and how.
5. **Ability.** The skills exist, including the harder ability to unlearn habits that have worked for years.
6. **Reinforcement.** Rewards and recognition make the new way stick.

Anyone who has run formal change management will recognize this as the [ADKAR sequence](#) with an ownership step in front of it. That framing is intentional: AI transformation is business change wearing technology clothes, and partners who treat it as a deployment will receive deployment-grade results.

Notice which debt these address. The conditions above are culture work, and they are deliberately placed before the assessment. Most of the instruments in this Play measure process: TDAA’s process problem survey, Business Process Mapping, the 2x2. Process is the easiest of the three debts to quantify, which is why it dominates the tooling, and [1.2](#) argues culture is the most expensive and the hardest to see.

The assessment will tell you what a business does inefficiently. It will not tell you whether that business can change, and a roadmap built without that answer describes work that will not happen.

Recognizing the pattern is one thing; running it with a client is another. What follows is the method for making the change happen once it is.

Pax8 Academy: **The 5 Phases: How to Plan & Implement** **Change in Your Business***

E-learning On-Demand

The five phases in order:

Understand.

Train yourself on the new concepts and best practice.

Document.

Customize templates and processes to the business.

Train.

Train the staff and win buy-in on the new policies and procedures.

Implement.

Put the operational change into effect.

Inspect.

Follow up to check that what you expected is what happened.

Worth noting here: Phases 1 and 2 happen before anyone at the client sees anything, which is the step partners most often skip. Frequently, Phases 3 and 4 are mistakenly flipped. Oftentimes referred to as "Ready, Fire, Aim." And Phase 5 is where Discover quietly becomes Manage; inspecting what you expected is the same discipline that [Chapter 8](#) turns into a recurring service.

*Note: You must be logged in as a partner to gain access to this material.

Where Pax8 helps. In EMEA, the [Pax8 Academy](#) Owner Alignment Workshop addresses owner friction, establishes priorities and restores collaboration. Run it before the assessment, while alignment is still cheap to build.

The [Pax8 Academy](#) Identity Workshop uses Simon Sinek's Golden Circle to establish a business's values, mission and vision. [The Golden Circle](#) is three concentric rings: *why* an organization exists, *how* it does *what* it does and what it delivers. Most businesses explain themselves from the outside in, starting with what they sell. The Golden Circle reverses that and starts from purpose, which gives staff a reason for a change before they are asked to accept its detail. That is the Awareness and Desire work in the list above.

[Coaching](#) is available in AMER and APAC, and AMER delivers it to a small number of EMEA partners where EMEA Academy does not offer it directly. Owner Peer Groups are AMER-only today.

3.5 Running Discover with TDAA

This section covers the Transformation Discovery Assessment Agent, Pax8's discovery tool. It is one way to run this Play, and it is the one Pax8 supports directly. Partners run Discover through workshops, their own assessment frameworks, and adaptations of TDAA carrying their own branding and services, as 3.5.2 describes.

Four steps with TDAA. The surveys collect the inputs and the agent analyzes them, producing a Transformation Assessment Report. You and the client supply the context the data cannot. You then refine and price that report. The refined version becomes the basis for whatever work follows.

3.5.1 Transformation Discovery Assessment Agent (TDAA):

Marketplace SKU: *Amer, EMEA and APAC, Pax8 Professional Services, Global*

An AI-augmented discovery tool that captures technical, leadership and process inputs. It scores the client organization's AI readiness against a maturity framework and identifies where the opportunity sits, then generates a Transformation Assessment Report containing maturity results and observations, analysis of process challenges, recommended outcomes and a roadmap prioritized High / Medium / Backlog.

TDAA assesses your client's business. The MIP Program assessment in 1.7 looks at your own managed intelligence capabilities, so the two measure different organizations for different purposes.

It is a Marketplace SKU delivered by **Pax8 Professional Services**, with a defined cycle rather than an open-ended engagement. That is what makes it sellable.

Eleven Business Days, Checkout to Report.

Day	Milestone
0	TDAA SKU checked out of the Pax8 Marketplace for Amer, EMEA or APAC
1	Pax8 Professional Services validates partner-supplied data and sends survey links to the partner, who forwards them to the client
5	Leadership Discovery Survey (client leader) and SMB Technical Assessment (partner's technical resource)
10	Process Problem Identification Survey, completed by nominated users
Gate	All three surveys complete before the agent runs
11	Agent builds the report; Pax8 Professional Services reviews and sends it to the partner's project lead, same day

Three surveys, three different respondents.

- **Technical:** completed by the partner's own technical resource, someone with deep knowledge of the client's configuration. Not the client.
- **Leadership:** completed by a client leader with authority over strategic intent.
- **Process problems:** completed by two to ten individuals nominated by the leadership respondent at the end of their own survey. This is the mechanism that gets a partner in front of the people who know where the hours go, with the client's own leadership having opened the door.

What the agent brings to the report. Alongside the three survey inputs, the agent identifies the client's industry from public sources such as their website and brings in sector context: where AI is likely to have an impact, use cases already established in that sector, and relevant practice. The report therefore combines what the client told you with what is true of businesses like theirs.

Partner-led by design. Pax8 sends survey links to the partner, never directly to the end client, so the partner keeps control of the relationship and the contact data. Progress reminders go to the partner; Pax8 does not communicate with the client.

The fourth step is where the engagement is won or lost. The report is a catalyst rather than a deliverable. In a structured validation workshop, you bring the assessment findings together with the client's own experience of their business: findings get refined, priorities clarified and a shared understanding of the transformation opportunity established.

The quality of that conversation determines whether the client treats the assessment as an interesting report or as the foundation for a practical roadmap. See 3.10 for the enablement that builds these facilitation skills.

3.5.2 The Report Is the Raw Material

The generated report is a starting point, and the margin lives in what a partner does with it before the client sees it.

Of importance to note: The TDAA output is yours to make your own. Brand the report, fold in services you already sell and adapt the recommendations to the offers you take to market. An unrefined report recommends generic outcomes. A refined one carries your branding, your services and your pricing, at which point the roadmap becomes the scoping document for the next engagement.

Report Section	What the Partner Does
Executive Summary	Add value points identified through your own engagement
Company Context	Customize
Current Maturity	Leave alone; framework-derived scoring
Observations	Add from your knowledge of the client
Risk and Change Management	Add context for what could happen, what is the likelihood of it happening and what is the impact should it happen
Process Problem Identification Review	Update if deeper process mapping was run
Recommended Outcomes	Replace generic recommendations with your own packaged service offerings
Transformation Roadmap	Align to your solutions, add estimated effort and costings
Next Steps	Reflect your actual planned next steps

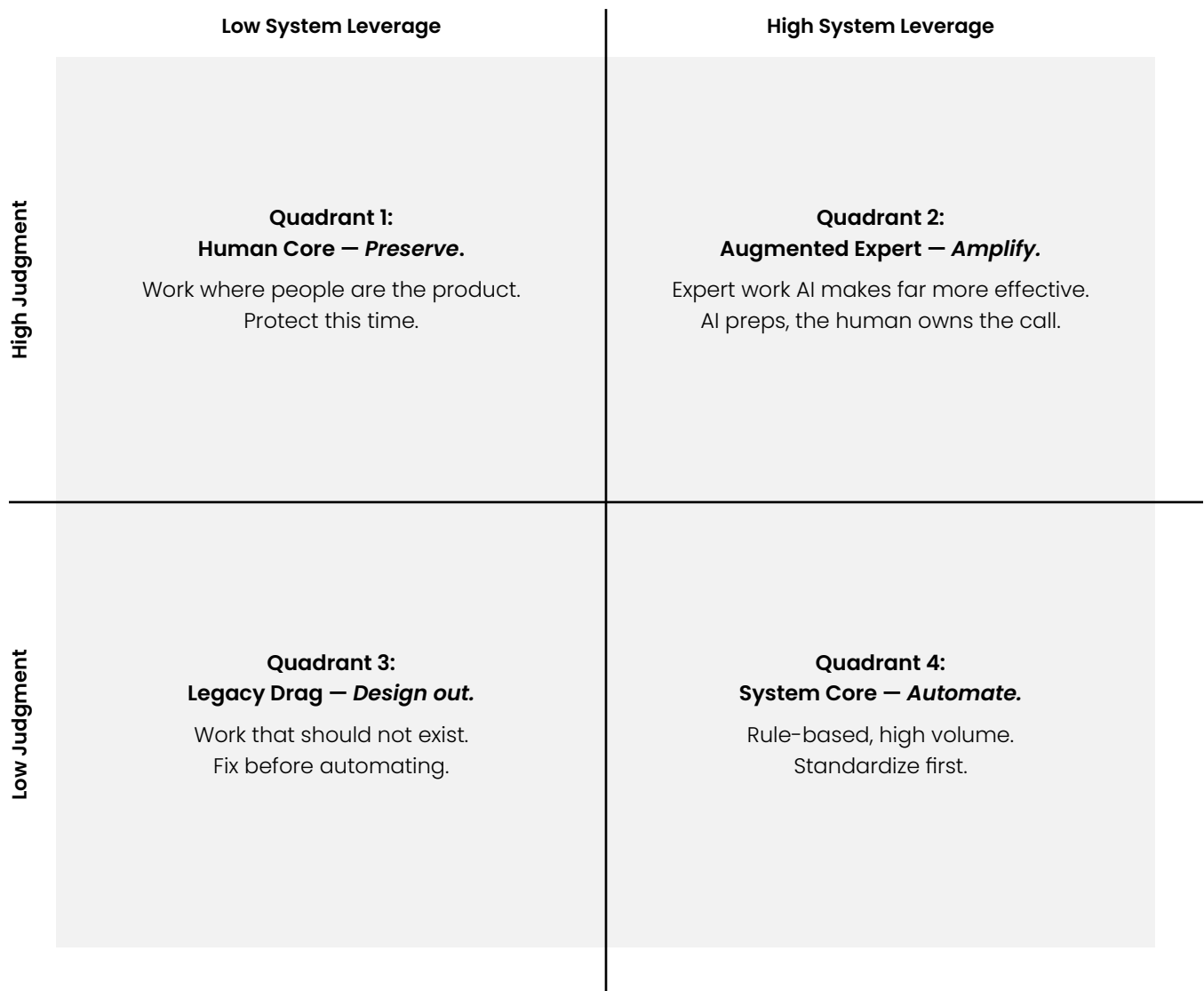
3.5.3 Why the Human Layer Is Not an Upsell

Pax8's own TDAA guidance states that technology and available data alone cannot capture the full picture for SMB clients, and recommends supplementing the assessment with leadership alignment, process mapping or envisioning workshops.

The workshops in this chapter are therefore not add-ons sold on top of the agent. They are what makes the agent's output valid.

3.6 The Initial Prioritization Exercise: The Human/System Value 2x2

From the [Outcome Operational Leverage and Efficiency Workbook](#). Every role, process and service sits in one of four quadrants, plotted on judgment required against system leverage available.



The quadrant suggests a likely direction for deeper investigation. The appropriate intervention and Play are confirmed through further process, data, value, risk and solution analysis.

- **Quadrant 1** → usually no intervention. Protect this time rather than looking for something to sell against it.
- **Quadrant 2** → often points toward Build, where judgment-heavy work needs custom orchestration. An existing agent may cover part of it, and most Q2 work needs Implement before it reaches real use.
- **Quadrant 3** → redesign the process before considering any automation. Automating a broken process makes the mess move faster.
- **Quadrant 4** → often points toward Buy. Standardize, then look at whether a pre-built agent fits. Expect Implement, adoption and governance work alongside it, since a bought agent pays off only once people use it and someone oversees it.
- **Treat what follows as common routes.** The final recommendation depends on the capability you have available and on the client's context.

How to run it. A 45-minute leadership exercise: build the list, place each item, then review. Most of the value comes from the debate the exercise provokes, so give the review time.

Customer zero, customer one. Run it on your own business and your client's. Same instrument, twice. It is the cleanest answer to a partner asking where to start, and it means your first proof point is your own.

The handoff to Sell. Q2 and Q4 items become evaluation candidates, scored 1-5 on Business (is it worth doing), Experience (will anyone care) and Technology (can we build it). The composite sets phasing: Quick Win, Core Build or Advanced. The full rubric sits inside the MIP Program.

3.7

Grow Your Business

Client problem: *they know they are leaving money on the table but cannot locate it.*

Categories: Artificial Intelligence and Analytics · Productivity · Sales and Marketing

Transformation Discovery Assessment

Agent (TDAA):

Marketplace SKU: *Amer, EMEA and APAC,*

Pax8 Professional Services, Global

- An AI-augmented, partner-led assessment. It combines client leadership input, your own technical input and employee process input; the agent accelerates the analysis and drafts the report, Pax8 Professional Services reviews it, and you refine it before it becomes a client recommendation. Eleven business days from checkout to report.
- Shows the client agentic capability at work inside their own assessment, which is a stronger opening than a slide deck. The recommendation that reaches them still carries your judgment, because you refine it before they see it.

Opportunity Explorer:

Pax8 Marketplace feature

- Surfaces whitespace across the existing client base by comparing current subscriptions against comparable stacks.
- Turns a QBR from a status update into a sourced expansion conversation, and gives Discover a starting list rather than a blank page.

Business Vision Workshop:

Partner-delivered; MIP Playbook methodology

- Maps assessment findings to the client's strategic goals and identifies where the ROI is hiding.
- Vision → Strategic Goals → Objectives → KPIs → Actions, so the output is measurable rather than aspirational.
- Billable advisory revenue up front, and the foundation for the transformation engagement that follows.

Data & AI Guided Growth:

Academy, Global Partner Experience

(PX); available AMER, APAC, EMEA

- The entry step for partners exploring the MIP path, aimed at the AI-curious.
- The optional on-ramp for a partner not ready to enroll in the MIP Program

3.8 Increase Your Efficiency

Client problem: *process debt nobody has measured.*

Categories: IT Operations · Integrations · Productivity

Managed Intelligence Services:

Business Process Prioritization and Mapping; Professional Services; Global; Professional Services; Global

- Structured workflow excavation: stakeholder interviews, process capture, exception mapping and readiness scoring.
- No workflow, no automation. This is the gate on every downstream agent engagement, and it is billable in its own right.

Subscription Insights:

Marketplace

- Renewal, subscription and lifecycle intelligence across the partner's book.
- Converts an assessment into a defensible number you can put in front of a client in week one.

Analytics Hub and Reports:

Marketplace

- Revenue, business and performance insight across the Marketplace estate.
- Lets you prioritize which clients to run Discover against first, rather than working the list alphabetically.

3.9 Manage Your Risk

Client problem: *exposure they can neither see nor quantify.*

Categories: Security · Continuity · Network

Copilot Readiness Assessment:

Microsoft enablement

- Assesses whether a client's data estate and permissions model can safely support Copilot before deployment.
- Catches the oversharing problem before it becomes an incident and reliably opens a data-protection conversation you would not otherwise have earned..

Security Coverage:

Pax8 Marketplace feature

- Visualizes security posture and gaps across the client base against the current stack.
- Produces the findings document that becomes the sales asset for the Sell Play.
- One artifact, two Plays.

Security Guided Growth:

Academy, Global Partner Experience (PX); available AMER, APAC, EMEA

- Structured path to building a modern cybersecurity practice and launching security offerings.
- For partners whose Discover findings outrun their delivery capability.

3.10

Building the Capability: Enablement by Region

Discover is a skill before it is a SKU. What follows is how a partner builds it, and the answer differs by region because AMER and EMEA Academy are built on opposite models: AMER for scale, EMEA for depth.

The MIP Program: Discover Play

The [Discover Play module](#) sits inside the [MIP Program](#), with role-based learning paths across strategy, sales and technical functions. TDAA requires this module, which makes it the one gated dependency in the chapter.

Learn more about the MIP Program below:

[MIP Program overview](#)

[Download the MIP Playbook](#)

AMER

- **Owner Peer Groups** and **Owner Flight Plan Peer Groups**: for the business-owner conversation that has to happen before an assessment.
- **AI Community Group**: open to partners engaged with any paid Academy offer, focused on AI adoption and practice.
- **Value Creation Coaching**: 1:1 on leadership and long-term business transformation.
- **Bootcamps**: AI, Security, Azure, Copilot and Modern Workplace.
- **Mission Briefings** and **Community Roadshows**: field enablement.
- **Results Selling Framework: The Seller Listening Dysfunction Guide**:* a short course that belongs in Discover as much as it does in Sell.

On that last one. It is filed under the [Results Selling Framework](#), which makes it look like Sell-only material. Read the premise and you'll find that it contends with a Discover problem as well. Ask a buyer what frustrates them most about salespeople and you get one of two answers: *you don't understand my business*, or *you aren't listening*. That means your first impression is already shaped by everyone who came before you; the client walks in assuming you do not understand their business and that you have a talk track you intend to run at them.

*Note: You must be logged in as a partner to gain access to this material.

EMEA

- **Discovery Workshop**: a full day mapping a partner's challenges, opportunities and blockers, closing with a discovery observation report. Run it on yourself first.
- **Identity Workshop**: Golden Circle work to establish values, mission and vision.
- **Owner Alignment Workshop**: Addresses owner friction and restores collaboration.
- **Accelerator Programme**: 90 days, four full-day workshops, closing with a strategy report and roadmap.
- **Strategic Consultancy**: one-to-one for selected partners, focused on business change and practical execution.
- **Masterclasses, Launch Briefings and Mission Briefings**: covering sales, data and AI, business growth, cybersecurity and more. Designed for all stages of business maturity.

APAC

- **Guided Growth:** [Data & AI](#), [Security](#) and [Microsoft OneCloud](#). All available.
- **Standard Role-Based Peer Groups:** currently active.
- **Flight Plan Peer Groups** and **Community Groups:** piloting and launching Q4.
- **Live Virtual Training:** currently leveraging AMER resources.

Partner Experience: **Guided Growth**

Available in all three regions.

- [Data & AI](#)
- [Security](#)
- [Microsoft OneCloud](#)

3.11

Microsoft in This Play

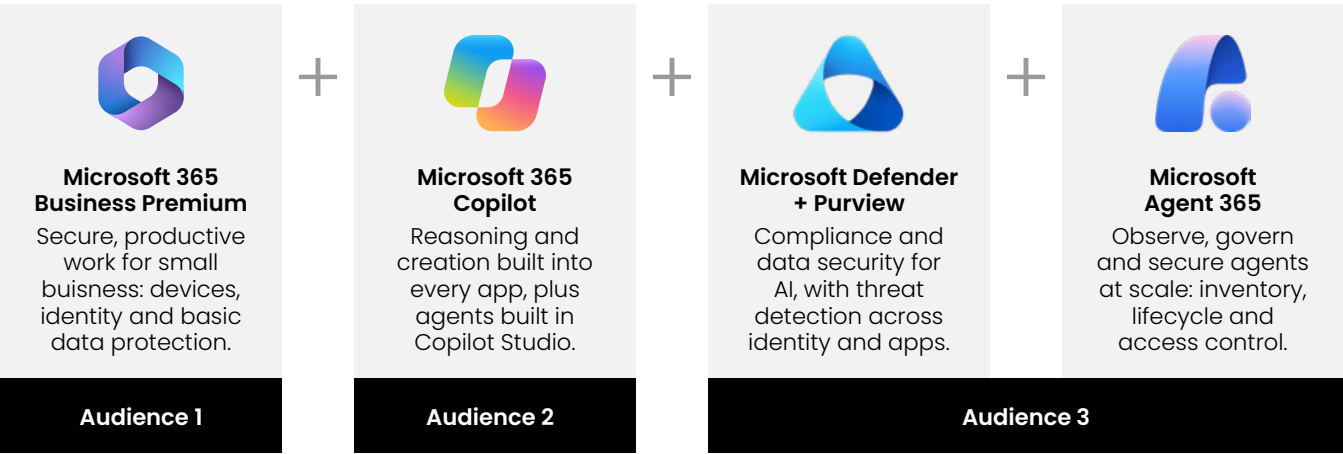
Microsoft products appear across all six Plays, and their role changes depending on where the client sits. In Discover, the lens is uncovering business problems, process inefficiencies, risk and readiness gaps before prescribing any technology.

The managed intelligence stack for SMBs. Microsoft positions the SMB stack in three tiers, which is a useful way to frame where a client is today against where the assessment says they – need to be.

Tier	Stack	What It Establishes
Good Secure the foundation	 +  Business Premium Copilot	AI-ready productivity on a secured base
Better Govern data and agents	 +  +  Business Premium Copilot Purview Suite	Data governance underneath AI use
Best Protect the AI layer	 +  +  +  Business Premium Copilot Purview Suite Agent 365	Observability and control over the agents themselves

Best Is the Fastest Path to AI-Ready Customers

Microsoft 365 Business Premium with Copilot, plus Defender and Purview Suites and Agent 365, sold and managed as one stack.



Use the tiers diagnostically rather than as a price ladder. A client sitting at Good with agents already running is carrying exactly the exposure [3.9](#) is looking for.

Solution Area	Product	Why It Maps to Discover
AI Business Solutions	Microsoft 365 Business Premium	Surfaces fragmented productivity, identity, device and security foundations that limit AI readiness
AI Business Solutions	Microsoft 365 Copilot	Identifies where employees spend time on repetitive work and where AI creates measurable productivity gains
Cloud and AI Platforms	Microsoft Azure	Uncovers aging infrastructure, data silos and cloud readiness gaps slowing growth
AI Business Solutions	Dynamics 365	Assesses where finance, sales, service and operations processes are struggling, and where manual workflows could be integrated
Security	Microsoft Purview	Assesses data risk, governance and readiness, which secure AI adoption depends on
Security	Microsoft Agent 365	Surfaces agent sprawl and shadow agents already running, with the access and data exposure they carry

Agent 365 and Purview connect most directly to [3.9](#). Both produce findings a client has not seen before, which is the strongest way into this Play.

Vendor Angle

Vendors earn their way into this Play by supplying evidence. Three kinds carry weight at the assessment stage.

Benchmark data. What good looks like for a business of this size in this sector. A partner running an assessment can tell a client what their own numbers are; a vendor can tell them how those numbers compare to their peers, which is what turns a finding into a reason to act.

Findings a client has not seen. Posture scans, license utilization, data exposure, agent inventory. Anything that surfaces a problem the client did not know they had, and that the partner can put in front of them in week one.

Outcomes from businesses like theirs. Specific results from a named sector and size band: hours recovered on a given process, time to resolution, cost avoided. [Chapter 1](#) establishes that peer evidence is what dissolves the applicability illusion, and general capability claims do not work on this market.

What to bring. Install-base and benchmark data that helps a partner locate opportunity inside a book they already own. Usage and consumption telemetry a partner can turn into a quantified waste number — exposing utilization data makes a vendor the evidence in someone else's assessment, which is uncomfortable and the fastest route to being trusted. And free or low-cost posture scans that produce a findings document, because the output is the next Play's sales asset.

Route in. Opportunity Explorer as the surface and [Vendor Accelerate](#) to scale once fit is proven.

Vendor	What It Does Here
Bumblebee	Reporting and intelligence for MSPs
ConnectSecure	Vulnerability and posture assessment across the client base
CloudRadial	Client portal and vCIO tooling; makes findings visible to the client continuously
Cynomi	AI-powered automated vCISO; turns a scan into a governance narrative
Horizon3	Autonomous pen testing
RoboShadow	Cyber platform with a low-friction assessment entry point (APAC)
ThreatMate	VulnOps and pen testing built for MSPs

From Pax8's vendor research, David Meister, VP of MSP at Check Point, makes the demand-side case for why Discover moves faster in this market than in enterprise: SMBs can change business processes overnight, and MSPs are creating agents on behalf of their customers substantially quicker than enterprise organizations are able to.

3.13

Proof and Handoff

Proof. Gratopp-it ran a Transformation Discovery Assessment Agent (TDAA) engagement for Container Rent Petri GmbH, a family-owned modular building and container rental business in Herdorf, Germany, with 50 to 99 staff.

The engagement followed the full process: a technical assessment completed by Gratopp-it, a leadership survey establishing strategic intent and process problems captured from the people doing the work. The leadership respondent nominated eight colleagues across sales, materials management, operations, construction and service and each described one process that was costing them time.

Together those eight processes accounted for roughly **1,370 hours a year of manual effort, of which about 850 were recoverable**: half a full-time role, surfaced from eight people in a business of fewer than a hundred.

One salesperson spent around **520 hours a year searching Teams for documents**. Behind it, emails whose subject lines carried no project reference, forcing a service coordinator to reconstruct context by hand, and a manager re-keying service specifications into proposals. None of these had been raised as problems, because none of them felt like problems. They felt like work.

The engagement produced a prioritized roadmap across seven outcomes, running from executive sponsorship and agreed success measures through to accountability for every agent the business runs; giving Gratopp-it a sequenced program of work and Container Rent Petri a view of its own operations it had never had.

Where this leads. Discover ends with quadrant-placed opportunities, a maturity score and a roadmap. What it lacks is a client who has agreed to fund any of it.

Most often the next conversation is [Sell \(Chapter 4\)](#), where the roadmap becomes a business case priced on outcomes. The quadrant decides the route. Quadrant 4 work with an obvious pre-built answer and a client already convinced can go straight to **Buy**. Quadrant 2 work where the budget and the appetite already exist goes to **Build**. Quadrant 3 work waits until the process is redesigned, and saying so plainly is frequently the most valuable sentence in the report.

A refined report is already most of a proposal. Getting it funded is the Sell Play, in [Chapter 4](#).



CHAPTER 4

Play 2 – Sell

Price on Actions, Workflows and Outcomes.

Selling measurable business improvement rather than seats and support hours, and selling to other partners, not only to SMB clients.

4.1 When to Run This Play

Sell is the Play where a partner's economics change. Everything else in this guide is deliverable work. This is the Play that decides what that work is worth.

It is also the Play most often run badly, for a structural reason: most MSPs have mature service operations and immature go-to-market functions. The delivery side has been built over a decade. The commercial

side is frequently still whatever the founder was doing in year two.

Run this Play when the client believes the findings and has not agreed to fund them, when procurement wants a per-seat comparison for something that is not sold per seat, or when your champion cannot get budget past the owner.

4.2 Client Signals

- They agree with the assessment and have not moved.
- Someone asks what the license cost is for an outcome you have quoted.
- The conversation keeps returning to what a competitor charges for something different.
- Your champion is convinced and has no authority.
- You are being asked to justify a price against last year's managed services line item.

4.3 Categories in Play

Sales and Marketing carries the partner's own capability here. The client's category, whatever Discover surfaced, is what the proposal is actually about. Sell is where your discipline and theirs meet.

4.4

What You Sell

A license is priced per seat, and the client pays the same whether anyone uses it or not. Digital labor produces work, so it can be priced on what it produces: the agents doing the work, the actions they take, the workflows they complete or the outcomes they deliver. The [MIP Playbook](#) sets out the pricing model for each:

Model	Unit	Fits When
Per agent	An agent, priced like an FTE	The client thinks in headcount and the agent maps to a role
Per action	Consumption	Volume is variable and attributable
Per workflow	A process, end to end	The client owns the process and can see it working
Per outcome	Value delivered	You can measure the result, the client accepts the measurement, and both of you will still accept it in twelve months

Most partners combine models, for example a monthly fee per agent plus a bonus tied to an agreed outcome. Most also start with the simpler models at the top of the table, per agent or per action, and move toward outcome pricing as they get better at measuring results. That progression is normal, and most partners are still early in it. Outcome pricing carries the highest margin in theory, and very few partners are running it today. The closest most get is pricing against an estimated percentage of the savings delivered, which is a reasonable intermediate step and easier to agree on than a hard outcome guarantee. Treat outcome pricing as a direction rather than a near-term target and get per-action and per-workflow working first.

The prerequisite everyone skips. You cannot price on outcomes without agreeing beforehand what will be measured and who measures it. Gaidar Magdanurov, President of Acronis, puts the sequence plainly in Pax8's [vendor research](#): define the pain, define the efficiency metrics, then build a model showing the impact on EBITDA. The model is what converts a

technical proposal into a board conversation, and the agreed metric is what bounds your responsibility once the work is running. [Chapter 2](#) defines a MIP as accountable against agreed performance and business measures; this is the conversation where those measures get set.

Academy: MicroLearning: How to Raise Your Rates* *E-learning On-Demand*

Adjacent to this and worth taking first, because many partners try to introduce outcome pricing on top of rates that were already too low. The course makes the argument that staying underpriced carries more risk than raising prices does, that an MSP's real value is the stability, security and strategic insight it brings, and that knowing when and how to adjust pricing is what makes a business sustainable. It covers communicating an increase clearly and retaining clients through it.

*Note: You must be logged in as a partner to gain access to this material.

4.5 From Findings to Business Case

If you ran a Transformation Discovery Assessment Agent engagement, you start this Play with strong raw material. The Transformation Assessment Report covers the client's current readiness, the process challenges their staff identified and a set of recommended outcomes, closing with a roadmap prioritized High, Medium and Backlog.

That report is a starting point, and you turn it into a proposal in three steps. First, refine it into recommendations: replace the generic outcomes with your own packaged services, and add estimated effort and costings to the roadmap. Second, build the business case, tying each recommendation to a result the client cares about and agreeing how it will be measured. Third, put the proposal in front of the client and get it funded, which is the work of this Play.

The BXT scoring from Discover sets the sequence. Quick Win, Core Build, Advanced. Lead with a Quick Win that can be delivered and measured inside a quarter, because the second proposal is far easier to win than the first, and the evidence for it comes from the first.

Sell to the owner, on the owner's terms. The recurring failure in this Play is a technically correct proposal

aimed at the wrong person. [Chapter 1.3](#) covers why SMB owners hesitate: the fear that deploying AI aggressively means training the technology to replace the people currently running the business. A proposal that does not address where the recaptured time goes leaves that fear unanswered, and unanswered fear reads as "no decision."

Academy:
[Results Selling Framework | The Seller Listening Dysfunction Guide*](#)
E-learning On-Demand

Introduced in [Chapter 3.5.1](#), where it applies to the assessment conversation. It applies again here, to the proposal.

Ask a buyer what frustrates them most about salespeople and you get one of two answers: that you do not understand their business, or that you are not listening. The guide calls this the Seller Listening Dysfunction, and argues that your chances collapse unless you ask the questions that reveal how the prospect's business works, then use those answers to frame the conversation.

*Note: You must be logged in as a partner to gain access to this material.

4.6 Building a Repeatable Sales Function

A single good proposal is a transaction. A repeatable commercial motion is a business, and the gap between them is the reason this Play is the hardest to scale.

Academy:

MSP Go-To-Market (GTM) Progression Framework: From Founder-Led to Scalable Revenue Engine*

E-learning On-Demand

This framework covers four things: which capabilities have to exist at each stage, which foundations enable progression to the next one, how to sequence the build and where MSPs typically fail, which is almost always by trying to skip a stage.

*Note: You must be logged in as a partner to gain access to this material.

Read it as a diagnostic before it is a curriculum. If your AI proposals are winning when the founder presents them and stalling when anyone else does, you have a GTM stage problem rather than a proposition problem, and no amount of better collateral will fix it.

This matters more in managed intelligence than it did in managed services. Outcome-based pricing requires a salesperson who can hold a business conversation, agree on metrics and defend a model.

4.7

Grow Your Business

Client problem: the partner can describe the technology and not the business case.

Categories: Sales and Marketing · Artificial Intelligence and Analytics

Results Selling Framework:

Academy; Global in English only

- A sales methodology built for MSPs that moves conversations from product features to business outcomes.
- Available by region as follows:
 - **AMER:** Results Selling Framework as a stand-alone program, available in On-Demand course, Instructor-Led Training, Sales Peer Groups and Sales Coaching
 - **EMEA:** Results Selling Framework, available in On-Demand course in English, or applied in practice through the **Sales Accelerator**, which combines sales discovery, commercial strategy and RSF application, with optional follow-on coaching.
 - **APAC:** Results Selling Framework, available in On-Demand course and Instructor-Led Training in English.

Public Storefronts:

Pax8 Marketplace feature

- A publicly accessible storefront presenting curated products and offerings without enabling purchasing. Doubles as a lead generation surface, which the MIP Playbook identifies as a prospecting motion.
- Currently the most practical way to put your own agentic offerings in front of buyers. Package each one as a Custom Product (4.8) and list it on your storefront. Custom Products triggers a notification when one is taken up, so you can start the automation or delivery work behind it.

Sales Coaching:

Academy; AMER, EMEA (Live), APAC (available)

- One-to-one coaching on sales motion, pipeline and execution.
- For partners whose gap is execution rather than methodology.

4.8

Increase Your Efficiency

Client problem: every proposal is bespoke and takes a week.

Categories: Productivity · IT Operations

Quoting:

Marketplace commerce layer

- Creates pricing and quoting information for Marketplace transactions.
- Collapses proposal turnaround, which matters most when you are running many small AI pilots rather than a few large projects.

Storefronts and Custom Products:

Pax8 Marketplace features

- Configurable purchasing environments, plus the ability to create and sell your own services and offerings alongside vendor products.
- This is where your own IP becomes sellable through the same billing surface as everything else; the commercial bridge between Build and Sell.

Salesbuilder:

Marketplace vendor; Sales and Marketing

- A sales and revenue operations platform built for MSPs on Autotask, ConnectWise or HaloPSA. Standardizes the product and services portfolio, produces modern proposals at scale, and streamlines post-sale workflow.
- Pax8 reports it saves sales teams up to 50% of time spent on admin and drives 20–50% more services revenue.
- Worth pairing with **Opportunity Explorer**.

Revscale:

Marketplace vendor; Sales and Marketing → CRM

- An AI relationship intelligence platform. Predictive analytics identify prospective customers from public social data and engagement signals and AI agents handle the outreach: outbound and inbound sales agents, a voice agent and a web pixel for tracking engagement.
- Covers the stage before Salesbuilder. Revscale finds and engages prospects, and Salesbuilder turns them into proposals. Together they cover much of the sales cycle a small commercial team would otherwise run by hand.

Request a Demo:

Pax8 Marketplace feature

- Let's partners request vendor demonstrations directly from Marketplace experiences.
- Removes vendor coordination overhead from an evaluation cycle.

4.9

Manage Your Risk

Client problem: *the buyer wants AI and the board wants assurance.*

Categories: Security · Continuity

Security Coverage:

Pax8 Marketplace feature; also found in Discover

The gap analysis produced in 3.9, reframed as the risk narrative in the proposal.

Say so explicitly to partners so they do not rebuild it.

CIS Controls Handbook:

Pax8 resource; free with registration

- Built by Pax8 with the Center for Internet Security and more than 30 contributors, it gives a visual breakdown of each of the 18 CIS Controls and their 153 safeguards, showing how they connect and which solutions cover them. Many of those solutions are available in the Pax8 Marketplace. [Read how it was made.](#)
- Gives a security proposal an external, auditable frame, which moves the conversation off your opinion. “Trust us, you need this” sounds identical to every other pitch the owner has heard. Pair it with Opportunity Explorer, which uses CIS Controls version 8 to show which of your clients have security gaps.

White-Label Security Resources:

Marketplace; brandable

- Ready-to-use decks, fact sheets, talk tracks, presentation resources and security checklists you can put your own brand on.

Compliance and Governance Vendors:

Marketplace: GRC, data protection, security assessment

- [Compliance Scorecard](#), [Ostendio](#), [Cynomi](#) and [Apptega](#) can be attached to a proposal to close the assurance gap.
- Turns “we will figure out governance later” into a priced line item.

4.10

Delivering the Capability

The MIP Program: Sell Play

The [Sell Play module](#) sits inside the [MIP Program](#). Role-based learning runs across strategy, sales and technical tracks; the sales track carries the weight in this Play, and it is the track partners most often under-resource.

Learn more about the MIP Program below:

[MIP Program overview](#)

[Download the MIP Playbook](#)

AMER

- **Results Selling Framework:** the standalone program ([see 4.7](#)).
- **MSP Go-To-Market Progression Framework:** [see 4.6](#).
- **MicroLearning: How to Raise Your Rates:** [see 4.4](#).
- **RSF | The Seller Listening Dysfunction Guide:** [see 4.5](#).
- **Sales Flight Plan Peer Groups** and **Sales & Marketing Peer Groups**.
- **Sales Coaching:** One-to-one.
- **Security Coaching:** six milestones toward a scalable security practice, including how to sell security with confidence. [See 4.9](#) for the CIS Controls Handbook and white-label resources. (*Also available APAC.*)
- **Pax8 Beyond Flagship:** Identify the Sales & Marketing track to gain knowledge from industry leaders and peers alike.

EMEA

- **Results Selling Framework:** In English: the stand-alone program ([see 4.7](#)).
- **Sales Accelerator:** interviews, sales discovery, commercial strategy and practical RSF application, with optional follow-on coaching. This is where the RSF methodology reaches EMEA partners.
- **Commercial Workshop:** proposition, target client and commercial strategy.
- **Technical Enablement Workshop:** translates technical offers such as Copilot into customer benefits before applying RSF.
- **Sales Coaching:** One-to-one.
- **Masterclasses** covering sales, data and AI and cybersecurity.
- **Pax8 Beyond EMEA:** Identify the Sales & Marketing track to gain knowledge from industry leaders and peers alike.

APAC

- **Results Selling Framework:** In English: the stand-alone program ([see 4.7](#)).
- **Sales Coaching and ILT:** available, currently leveraging AMER resources.
- **Security Coaching:** six milestones toward a scalable security practice, including how to sell security with confidence. [See 4.9](#) for the CIS Controls Handbook and white-label resources. (*Also available APAC.*)
- **Standard Role-Based Peer Groups:** active.
- **Pax8 Beyond APAC:** Identify the Sales & Marketing track to gain knowledge from industry leaders and peers alike.

4.11

Microsoft in This Play

In Sell, the lens is translating [Microsoft](#) capability into measurable business outcomes and building the case for investment.

Solution Area	Product	Why It Maps to Sell
AI Business Solutions	Microsoft 365 Copilot	Connects AI to outcomes the buyer already cares about: time saved, employee capacity, faster execution. Framed as an outcome-led business case.
AI Business Solutions	Microsoft Copilot Studio	Agents built beyond the use rights included with a Copilot license, or as standalone agents, which is where per-agent and per-workflow pricing applies.
Cloud and AI Platforms	Microsoft Azure	Connects infrastructure to resilience, scalability and cost efficiency. Instead of hardware refreshes and maintenance, the customer pays for what they use and redirects the difference toward growth.
AI Business Solutions	Dynamics 365	Positions against specific outcomes: better sales follow-up, fewer manual handoffs, stronger customer engagement, clearer visibility. Workflow gaps become a modernization business case when tied to measurable improvement.

Microsoft 365 Copilot is licensed per user, and that license carries some use rights for Copilot Studio agents. Agents built beyond those rights, or as standalone agents, are where the per-agent and per-workflow models in [4.4](#) apply. Azure suits per-action consumption pricing, and Dynamics suits outcome pricing once the process metric is agreed.

4.12

Vendor Angle

What to bring. Co-branded collateral, case studies and ROI proof. The MIP Playbook records this as partners' single most-requested item and the one vendors most consistently under-supply. Vendors who arrive with a deck and no proof are asking the partner to do the persuasion twice.

Listing quality is a sales-cycle variable rather than a content chore. A Marketplace Listing with thin descriptions, unclear commercial terms or no activation pathway adds days to every deal a partner runs.

Route in. Start at [Marketplace for vendors](#). Pax8 has a route for each part of this:

- **To fund the collateral: Market Development Funds (MDF)**, which you allocate to approved marketing, enablement and partner engagement activity through Pax8.
- **To produce and deliver it: the Vendor Ambassador Program**, where you fund dedicated Pax8 resources to work on partner readiness, product education and go-to-market execution for your product.
- **To get it in front of partners: Marketing Center**, where partners pick up campaign assets, and Highspot, Pax8's sales enablement platform for distributing sales content.
- **To keep your listing sharp: Pax8 Marketplace Content Management** maintains listing quality, and Vendor Product Management (VPM) keeps your pricing and provisioning accurate.

Framework Navigator:

vendor offering, surfaces partner-side

- Maps offerings against recognized compliance frameworks.
- Lets you answer the governance question inside the sales cycle rather than deferring it to legal.

Named vendors partners are using in this Play.

Two groups, doing different jobs.

Sharpening your own commercial motion — these you buy for yourself.

Vendor	What It Does Here
Crewhu	CSAT, NPS and customer feedback. Converts satisfied existing clients into the peer proof Chapter 1 identifies as what shifts a skeptical SMB.
Exclaimer	Email signature management that turns every email your team sends into a campaign channel, with promotional banners and feedback collection built in.
MSPCFO	Profitability analytics by client and service line. Tells you where your margin actually is before you reprice anything; the prerequisite for 4.4 .
Revscale	AI-assisted revenue and pipeline growth.
Salesbuilder	Proposal generation at scale and whitespace selling inside your PSA. See 4.8 .
VertiX	Customer and employee experience monitoring, so satisfaction trends are visible before a renewal conversation.

Attaching to the proposal; these close the assurance gap:

Vendor	What It Does Here
Apptega	Framework mapping and compliance management.
Compliance Scorecard	Compliance posture and reporting a client's board will accept.
Cynomi	AI-powered vCISO. Turns governance from an objection into a service line.

The vendors in the proposal depend on how you arrived at Sell. If you came from Discover, they are whatever the assessment surfaced, and the vendor angle in [Chapter 3](#) lists the assessment-stage set. If you arrived with a known product, an existing renewal or a solution the client has already defined, the proposal starts from that instead. Either way, [Chapters 5](#) and [6](#) cover the capability itself, whether it already exists or you create it. This Play covers the commercial wrapper around it.

4.13

Proof and Related Work

Proof. Fit Secure, a Dutch MSP, took the Transformation Discovery Assessment Agent and turned it into a product of their own.

Their **Intelligence Readiness & Transformation**

Assessment carries their name, their framing and a fixed price of €3,750. The scope is set out plainly for a client who is not technical: organizational readiness and appetite for change, technical foundations, data governance, AI governance, applied intelligence, and the daily process problems that cost time or cause errors.

The deliverable is equally concrete: a maturity score, observations, prioritized recommendations, a transformation roadmap and a joint review session.

Two decisions make it work commercially:

They set the boundary explicitly. The assessment delivers insight, priorities and a roadmap. Technical

improvements, implementation, automation and training are scoped and quoted separately. That protects the fixed price and makes the follow-on work a decision rather than an assumption.

They named what comes next. Three defined services sit behind the assessment: Intelligent Security Optimization for permissions, data and policy; Managed Intelligence Workflows for automation and digital assistants; and an Intelligence Enablement Program for training and new ways of working. A client finishing the assessment is looking at a menu rather than a blank page.

This is section 4.6 in practice. The assessment is the repeatable offer, priced and scoped, with a path from it into larger engagements, and it started as a Pax8 tool that Fit Secure refined into something of their own.



CHAPTER 5

Play 3 – Buy

Curate Agents and Prebuilt Workflows.

The MIP becomes a curator of digital labor, sourcing trusted third-party agents, prebuilt workflows and AI-enhanced SaaS.

5.1 When to Run This Play

Buy is the Play for needs that other businesses share. A client who needs a voice agent, a compliance bot, a reconciliation tool or a customer service assistant is often describing something that already exists, has been built well by someone, and can be deployed in days. When that is true, building it yourself would be slower and more expensive, with no gain in quality.

Run this Play when the client wants results in weeks, when the use case is common rather than proprietary and when the budget exists but the appetite for a build project does not.

5.2 Client Signals

- They have described a problem you have solved before, for someone else.
- Staff are already using AI tools nobody sanctioned, and the shadow stack is growing.
- They want to see something working before committing to anything larger.
- A competitor has done something visible and they want the equivalent.
- Your own team is quoting build hours for something that sounds familiar.

5.3 Solution Categories in Play

All twelve, and breadth is the point. Buy is the Play where catalog range translates directly into how much of a client's stack you can consolidate onto one bill.



5.4

The Pax8 Agent Store

The Agent Store* is the starting point for this Play: the place to find, evaluate and source agents that already exist.

*Note: You must be logged in as a partner to gain access to this material.

What it is. A curated marketplace inside the Pax8 Marketplace, built specifically for AI agents and agentic workflows. The distinction from a conventional app store is as follows: a traditional app store sells static software, while agentic solutions act autonomously and execute multistep workflows on their own. It carries voice agents, compliance bots, financial reconciliation tools and customer service assistants.

It runs on infrastructure you already use. The Agent Store sits on the same Marketplace that more than 47,000 MSPs and MIPs use to serve over 800,000 SMBs worldwide. Agents are procured, provisioned and billed through the same surface as the rest of a client’s stack, with no separate vendor relationship to manage.

Everything in it has been vetted. All Agent Store solutions pass a review confirming they are legitimate, secure and compatible with SMB environments. Most of these agents can be found elsewhere. What the Agent Store adds is the review itself. Pax8 has already done that vetting, so you can put your name behind a recommendation to a client without running your own due diligence on every vendor.

The launch roster. Pax8 named a curated group of AI companies whose agentic products would be in the Agent Store at launch, and has continued expanding since. Grouped by what you would reach for them to do. Where Pax8 has publicly named the specific agent, it appears in bold; the rest are listed by what the vendor brings.

Platforms	
Vendor	What It Brings
Microsoft	Microsoft 365 Copilot: enterprise-grade AI across Microsoft apps, available to SMBs
AWS	Cloud infrastructure and AI services underneath custom and third-party agents
Google	Chrome Enterprise Premium, a managed browser with AI-powered security and zero trust access for the place staff increasingly reach AI tools and web-based agents. Also Cameyo by Google, which delivers individual applications securely to any device

MSP Operations and Automation	
Vendor	What It Brings
Rewst	RoboRewsty: in-platform assistant for building, modifying and troubleshooting automations in the Workflow Builder
SuperOps	Monica AI: MSP practice automation that scales from assisted to autonomous
Pia	AI automation for IT help desks, targeting the tickets that consume technician time
Lemhi ²³	AI adoption and governance platform to turn AI consulting into a repeatable managed service
HelpGhost ²³	A knowledge layer for MSPs, making documentation usable by agents and technicians

Security	
Vendor	What It Brings
SentinelOne	Purple AI: an AI security analyst that runs continuously
CrowdStrike	Agentic capability across endpoint detection and threat response
Check Point	AI-powered threat prevention across email, endpoint, SASE and MDR, managed from one multi-tenant platform with flexible pricing.
Ironscales	Email security and phishing defense
Acronis	Backup, recovery and cyber protection
DefensX	Browser and web-layer security
RoboShadow	Vulnerability and posture assessment with a low-friction entry point
ContraForce	Security operations automation built for MSP delivery

²³ Coming online Q1, 2027.

Productivity and Collaboration	
Vendor	What It Brings
Egnyte	Content collaboration and data governance, which agents depend on for clean inputs
Zoom	Meetings and communications, with AI assistance layered in

Commerce, Finance and Revenue	
Vendor	What It Brings
Revscale	Outbound and Inbound Sales Agents, Voice Agent: AI prospecting and outreach that finds and engages new clients
FlexPoint	Accounts receivable and payments automation built for MSPs, covering invoicing, billing, payment, collection and reconciliation

Agent Platforms and Storage	
Vendor	What It Brings
Synthreo ²³	AI infrastructure and agent development for technology services
Wasabi	Cloud storage underneath data-heavy agent workloads
Netsmartz ²³	AI development, data and digital engineering services, with a Microsoft Solutions Partner practice

²³ Coming online Q1, 2027.

Browse the current catalog at [All vendors](#) or [All tools](#).

Three points to emphasize: Security and MSP operations are the largest groups, which reflects where agentic value has been easiest to prove. Several vendors here also appear in [Chapters 3](#) and [8](#) under their non-agentic products, so you are frequently deepening an existing relationship rather than opening a new one. And a meaningful share of the roster: Sidekick, RoboRewsty, Monica AI, Purple AI, Pia, Cyft, HelpGhost, are agents you would run inside your own business rather than sell to a client. [5.5](#) explains why that matters.

Vertical bundles. Pax8 has committed to delivering bundled agentic solutions for specific sectors including financial services, healthcare, legal and retail. For a partner with a vertical concentration, this is the shortest path from Buy to a differentiated offering, because the bundling work in [5.5](#) is partly done for you.

There is a chat agent built into the store. It matches client needs to solutions and provides guided next steps as you work. Use it as a scoping tool during a client conversation rather than a search box afterward.

You do not need to be in the MIP Program to use it.

The Agent Store supports all partners, including those who intend to remain traditional MSPs. An MSP can use it to add high-value automations to existing services; a MIP-track partner uses it as the foundation for outcome-driven offerings. Enrollment is not a gate.

To Schedule a Demo or to Learn More About Pax8's AI Vision, Click on the Links Below:

[Schedule an Agent Store demo](#)

[Explore the AI and Managed Intelligence Hub](#)

5.5 Turning Agents Into a Service

Discovering the right agent is the beginning. The revenue is in what you wrap around it.

A deployed agent is a transaction. A packaged service is a business, and the difference is entirely in the work you do that the vendor cannot:

Price the work, rather than the seats. [Chapter 1](#) made the case that digital labor is paid for by what it produces. This is where that becomes a price list. Count actions completed, workflows automated, tickets resolved, hours returned to the business or the outcome the client wanted. A seat count tells you how many people could use an agent. None of those units cares about seats, and all of them move when the agent does more work. [Chapter 4.4](#) sets out the four models; this Play is where you attach them to something specific.

Map agents to outcomes, not features. Connect agentic capability to the specific workflows your client already cares about: faster threat response, automated customer service, reconciliation, among others. The client is buying the outcome; the agent is how you deliver it.

Build repeatable offerings. Packaged deployments with defined scope and pricing, so you are not rebuilding the commercial model for every client. This is the single highest-leverage habit in this Play.

Show up as the advisor they are already looking for. Seventy percent of SMBs agree that outside partnerships are necessary to benefit fully from AI, and 84% would trust an outside technology advisor to guide their implementation.²⁴ Most clients will not raise the subject themselves, so the opening has to come from you.

Anchor recurring revenue to measurable results. Average ticket resolution time. Technician hours saved. Whatever you agreed to measure in the Sell Play ([4.4](#)) becomes the number that justifies the subscription.

Start with yourself. Purple AI, Monica AI and RoboRe-wsty are agents for your own operation. Running them internally gives you a demonstration that is genuinely yours and a set of numbers you can quote without a vendor's slide. The MIP Playbook calls this Customer Zero, and in this Play it is also the cheapest sales asset available.

70%

of SMBs agree that outside partnerships are necessary to benefit fully from AI

84%

would trust an outside technology advisor to guide their implementation

²⁴ Pax8. [The Agentic Workforce Economy: How Digital Labor Is Reshaping SMB Growth and Redefining the Role of IT Providers](#). Pax8, 2026.

5.6

Grow Your Business

Client problem: *they need capability faster than anyone can build it.*

Categories: all twelve, as bundle components

Pax8 Agent Store:

Experience; Global

- Curated, vetted agents and agentic workflows, procured and billed through the Marketplace you already use.
- The speed play: ship a proven agent in days and earn the trust that funds everything after it.

Third-Party Agents:

Offering / SKU

- Vendor-developed agents distributed through Pax8. To sell agents you have built yourself, list them as Custom Products on your Public Storefront (4.7).
- Breadth without build cost, and the raw material for the bundling motion in 5.5.

Agent Gateway:

80s capability

- Identity, security, routing, policy and metering on every agent interaction, applied across customers, users and environments from one control plane.
- Turns a single configured agent into something you can sell repeatedly. Without it, every client is a fresh deployment and your revenue stays tied to delivery hours.
- Sell governance as part of the offer. It is what lets you quote regulated clients (legal, health-care, financial services) that you would otherwise have to decline, and those are the accounts with budget.

Value-Added Bundles:

partner motion; MIP Playbook methodology

- Agents wrapped with compliance configuration, workflow tuning and industry context.
- Bundling is what elevates the transaction from an agent download to a business solution, and it is where the margin lives.

Voyager Alliance Rewards:

Global; Ignite tier and above, opt-in

- **Points-based loyalty earning** on Marketplace spend, redeemable against future invoice credits.
- Makes consolidating spend through Pax8 a measurable economic decision.

5.7 Increase Your Efficiency

Client problem: *procurement and provisioning overhead is eating the margin on small deals.*

Categories: Integrations · IT Operations

Agent Gateway:

8os capability

- A single point where identity, policy and metering are applied across every client you run agents for, rather than configured per client per agent. Multi-tenant deployment, monitoring and lifecycle management from one console rather than one login per tenant.
- Removes the setup work that otherwise repeats on every deployment and gives you consumption data you can bill against without assembling it by hand. The difference between an agent practice that scales and one that adds a technician per twenty clients.

8bot:

The managed AI coworker from Pax8

- Run it inside your own business before you sell it: service desk, documentation, ticket triage.
- Customer Zero with a margin attached. You reduce your own cost to serve and produce numbers from your own operation, which is a stronger demonstration than a vendor's slide.

Integrations Hub:

Pax8 Marketplace feature

- Centralized experience for discovering, connecting and managing integrations and API connections.
- Partner feedback in the MIP Playbook names data integration as the single biggest barrier. This is the answer.

Subscription Management:

Marketplace

- Manages renewals, subscription changes and lifecycle; updates partner pricing automatically when supported vendor pricing changes.
- Removes the silent margin leak from stale pricing across a large subscription base.

Migrations Feature:

Marketplace

- Moves customers and subscriptions between environments.
- Removes the main friction in consolidating a client's stack onto your own commerce surface.

Model Context Protocol (MCP):

Marketplace / platform

- MCP-first architecture connecting agents to existing SaaS stacks without custom code.
- The technical reason buying does not turn into a six-week integration project.

5.8

Manage Your Risk

Client problem: shadow AI and unvetted tools are already in the building.

Categories: Security · Integrations

Curated and Vetted Agent Catalog:

Agent Store property

- Every agent is reviewed for legitimacy, security and SMB compatibility before listing.
- Answers the governance objection at the point of purchase rather than after it.

Agent Gateway:

80s capability

- Governs, monitors and monetizes AI consumption arriving from anywhere: employee tools, third-party apps and custom agents.
- Makes shadow AI visible and billable at the same time, which is what converts an ungoverned problem into a service line.

Microsoft Agent 365:

Marketplace; launched 1 May, 2026;

\$15 per user per month

- Microsoft's central control plane for AI agents, giving you one view across a client's agent estate: observing and monitoring agent activity, governing agents across their full lifecycle, and securing agent access and behavior across the organization.
- Sell it with the first agent rather than after the fifth. The governance conversation is far easier while a client has one agent to govern, and it establishes the recurring line that [Chapter 8](#) builds on.

5.9 Building the Capability

The MIP Program: Buy Play

[The MIP Program](#) is Pax8's structured enablement and activation program for building managed intelligence capabilities and commercial motions. It is built around the six Plays, and the [Buy Play module](#) is the relevant one here.

How enrollment works. An entry assessment identifies your current managed intelligence capabilities and where the gaps are. It covers the options open to you, sourcing and packaging capability that already exists, designing and delivering custom solutions, or a mix of both, and points you toward the work most likely to close those gaps. Many partners do both, and the balance shifts as capability grows. From there, role-based learning paths across strategy, sales and technical functions give each person on your team enablement matched to what they do. The program is self-serve, with Pax8 experts and [Pax8 Academy](#) behind it. There is no minimum technical requirement, and it is open to any partner.

Learn more about the MIP Program below:

[MIP Program overview](#)

[Download the MIP Playbook](#)

Managed Intelligence Services

[MIS](#) is a portfolio of outcome-led, productized offerings delivered by Pax8 Professional Services, added to your team so you can sell AI transformation before your own bench is built. You can lean on it as much or as little as you need and take delivery in-house as your team matures.

MIS at launch: **Copilot Readiness Assessment**, **Transformation Discovery Assessment Agent** ([Chapter 3](#)), **Workflow Automation and Agent Builds** ([Chapter 6](#)) and **Microsoft 365 Data Protection** ([Chapter 7](#)).

MIP Program enrollment is not required for MIS generally, though some MIS offerings are exclusive to MIP Program partners.

Enablement, by Region

AMER

- Vendor-focused content
- [Bootcamps](#) covering AI, Security, Azure, Copilot and Modern Workplace
- [Mission Briefings](#)
- [AI Community Group](#)
- [Pax8 Beyond Flagship](#): Self-select the Sales & Marketing and the AI tracks to discover new ways to Buy and take advantage of an AI future successfully

EMEA

- [Master Classes covering sales, data and AI, and cybersecurity](#)
- [Launch Briefings and Mission Briefings](#)
- [Channel Events](#)
- [Kickstart Promotions](#): The Business Applications Kickstart Programme is designed to help you understand the full potential of the Microsoft Business Applications ecosystem.
- [Pax8 Beyond EMEA](#): Self-select the Sales & Marketing and the AI tracks to discover new ways to Buy and take advantage of an AI future successfully

APAC

- [Instructor-Led and Live Virtual Training](#), currently leveraging AMER resources
- [Standard Role-Based Peer Groups](#)
- [Pax8 Beyond APAC](#): Self-select the Sales & Marketing and the AI tracks to discover new ways to Buy and take advantage of an AI future successfully

Partner Experience: [Guided Growth](#)

Available in all three regions.

[Data & AI](#)

[Security](#)

[Microsoft OneCloud](#)

5.10 Microsoft in This Play

In Buy, the lens is determining when a proven, ready-to-deploy [Microsoft](#) capability is the fastest practical route to an outcome.

Solution Area	Product	Why It Maps to Buy
Copilot	Microsoft 365 Copilot	A packaged AI capability sourced and deployed without building anything
AI Business Solutions	Dynamics 365 Business Central	Ready-to-deploy business management with built-in agents, including the Payables Agent and Sales Order Agent, automating invoice processing and sales order capture with no custom build
Security	Microsoft Agent 365	A ready-made way to identify, observe and govern agents rather than assembling that process by hand

Business Central's built-in agents are worth singling out. They are among the few agents in this Play that arrive already attached to a system of record, which removes most of the integration work described in [5.7](#).

Vendor Angle

What to bring. Third-Party SKUs and Third-Party Agents (vendor-owned and vendor-priced) retaining product identity while gaining Pax8 distribution, commerce and partner reach. That exchange is the whole bargain of this Play.

Provisioning, billing and API- or MCP-readiness decide whether a partner can sell you at volume. A vendor whose integration is clean disappears into the partner's workflow; one whose integration not, becomes a support ticket per client.

Route in. Pax8 has a route for each stage:

- To get listed: Evaluation where Pax8 assesses your fit and sets your engagement model, followed by Marketplace Onboarding, which configures your product and its commercial terms for sale.
- To negotiate larger deals: Marketplace onboarding for extending negotiated pricing to specific partners or clients.

- To keep your listing working: Vendor Product Management (VPM) owns technical configuration, pricing, provisioning and billing.

Named vendors in this Play. The agents in 5.4, plus the wider agentic and automation set: Pia for AI help desk automation, Rewst and ElectroNeek for workflow automation and NeoAgent for agent platforms, Acronis for continuity, SuperOps and ConnectWise for operations.

From Pax8's vendor research. Justin Bradley of CrowdStrike names the deployment-trust barrier this Play has to clear: the SMB question is rarely whether the technology works, it is how the client puts a moat around it. Steve Stone of SentinelOne offers the counterweight worth quoting to a nervous client; this is the first technology cycle where defenders benefit more than attackers.

5.12

Proof and Other Work This Play Surfaces

Proof. [Kaine Mathrick Tech](#), an Australian MSP, kept hitting the same wall: previous platforms and distributors could not deliver the billing efficiency needed to scale, and managing Microsoft CSP licensing across a growing client base had become a drag.

Consolidating onto the Pax8 Marketplace gave them centralized licensing and CSP management, automated billing and a ConnectWise integration that removed duplicate entry between systems. “What used to take days, or even a full day every single month, is now accomplished in just an hour,” said Bradley Kaine, KMT’s Managing Director and co-founder.

Over the following twelve months KMT saw what Kaine calls remarkable growth in agreement and monthly recurring services. Time recovered from procurement and billing became time available for client work, and they reinvested it deliberately rather than letting it be absorbed.

[Simpatico Systems](#) made the MSP-to-MIP shift with Pax8. Its president, Cory Ruthardt, frames the naming problem clearly: everyone is looking for the next evolution of the MSP, and the term “MSP” no longer conveys the intelligence being built into the technology and the processes.

Other work this Play commonly surfaces. A working agent in a client environment often leads to Implement ([Chapter 7](#)), because deployment and adoption are where bought capability either produces results or quietly stops being used. Where an agent covers most of what a client needs and leaves a gap, that gap may be work for Build ([Chapter 6](#)). Where it works and the client wants more, Manage ([Chapter 8](#)) keeps the estate visible as it grows. Follow whichever the client’s situation calls for.



CHAPTER 6

Play 4 – Build

Package Horizontal and Vertical Agents Plus IP.

Every business has something proprietary that off-the-shelf agents cannot solve. In the Build Play you evolve from curator into creator, developing custom agents, proprietary workflows and intellectual property that competitors cannot replicate.

Before You Build, Rule Out the Simpler Answers.

A sourced product not fitting does not by itself establish that a custom agent is required. Confirm that configuration, process redesign, conventional automation, integration or a sourced service cannot adequately address the need.

6.1 When to Run This Play

Build is the Play for capability that does not yet exist. When a client's requirement is specific enough that nothing on the market answers it, the work moves from sourcing to creating.

Partners arrive here by several routes. One is the sequence: you discovered the opportunity, sold the vision, curated agents from the Agent Store and then the client asked for something none of them delivers. Just as often it is a requirement you already know about from a long-standing client, an agent that covers most of a need and leaves a gap, or work you started on your own business and realized would sell.

That request is the trigger for this Play. Standard marketplace agents solve the common cases well, and they cannot reach the deeply proprietary process-

es that live inside every business; legacy systems, manual workarounds, undocumented institutional knowledge, and processes that run a particular way because a former employee set them up that way and nobody has risked changing them since.

Be honest about capacity before you open this chapter. The [MIP Playbook](#) records development bandwidth as partners' most-cited gap. Build earns its place when the work is genuinely proprietary and the client will pay for that. Where an existing agent would do the job, Buy is the faster and cheaper answer.

If the capability is missing rather than the opportunity, [6.12](#) covers sourcing it through Matchmaker instead of declining the engagement.

6.2 Client Signals

- The workflow they are describing is their competitive advantage.
- You have looked in the Agent Store and found nothing that fits.
- They have asked for the same exception twice and been told no twice.
- A bought agent does 70% of what they need and stops.
- They operate in a vertical with regulatory steps no general-purpose agent covers.

6.3 Categories in Play

Artificial Intelligence and Analytics, plus whichever vertical discipline the proprietary workflow sits in. Integrations matters more here than in any other Play, because a custom agent earns its value from what it can reach.

6.4

Building Is Different From Configuring

71%

of small businesses plan to increase AI investment over the next year

Under SaaS, customization meant adjusting settings and connecting integrations. Build is broader than that, and broader than writing code.

It covers creating a solution, configuring or customizing one substantially or overseeing its construction by someone else. What defines the Play is accountability: you own the architecture, the controls, the testing and the acceptance criteria. The work may be done by your own developers, by another partner through Matchmaker or by Pax8 Professional Services, and it remains a Build engagement in each case.

The output varies too. Sometimes it is an agent that reasons and acts inside a workflow with permissions to complete work on its own. Often it is a customized solution, a set of linked automations or a configured platform assembled around a client's process.

The barrier to a prototype is lower than most partners assume, and production delivery is a different matter. Low-code and no-code platforms can cut the effort required to prototype a solution, and something demonstrable can be running in days. Getting it into production still requires the technical capability, data integration, architecture, testing, security, governance and lifecycle ownership that any managed service depends on. Building the demonstration and running it for a client are separate pieces of work, and the second is where the cost sits.

Seventy-one percent of small businesses plan to increase AI investment over the next year (Salesforce, via Pax8, *MIP Playbook*). The demand for bespoke work is already funded; the constraint is supply.

6.5 Horizontal and Vertical Agents

Partners who build well think in two dimensions.

Horizontal agents are general-purpose building blocks: customer support bots, scheduling agents, finance reconciliation tools, compliance monitors. They apply across industries and scale efficiently.

Vertical agents are tailored to one industry: patient intake automation in healthcare, regulatory reporting in financial services. They command higher margins and deeper client loyalty, because specialization in a regulated task is difficult to replicate and expensive to get wrong.

Stacking both is where the leverage appears. Combine a patient intake agent with claims validation and compliance reporting and you have a turnkey healthcare workflow you can reconfigure for the next healthcare client. Do that three times and you have a packaged vertical solution: a set of agents built around one industry's workflows, which you can list on your storefront and sell across that sector.

That progression: horizontal building blocks, vertical specialization, stacked into layered workflows, is the shortest path from one custom build to a repeatable product line.

6.6 Build Capability Areas

These are the capabilities that make Build repeatable. Not every partner needs all six, and they do not have to arrive in this order. Treat them as areas to develop rather than a sequence to complete.

1. **Build horizontal and vertical agents.** Start where your expertise already lives. Healthcare clients, build patient intake or compliance reporting. Retail, try predictive inventory or POS-integrated customer service. Horizontal gives breadth and reusability; vertical gives depth and differentiation.
2. **Create custom agents for proprietary workflows.** Map the processes standard agents will not touch. Automating undocumented institutional knowledge is what moves you from supplier to strategic advisor, because nobody else can do it without doing the mapping first.
3. **Stack agents into custom workflows.** Linking agents unlocks automation the client has not imagined, and it compounds the switching cost.
4. **Build agent factories and deployment pipelines.** Reusable templates, prompt libraries and API connector frameworks. [See 6.7.](#)
5. **Invest in data infrastructure as the foundation.** Agents are only as good as the data they reach. [See 6.8.](#)
6. **Package agents as offerings you can resell.** Once an agent is proven, list it as a Custom Product on your Public Storefront so you can sell it across your client base. [See 6.9.](#)

Develop these as capability rather than delivering them as a project. Start with what today's technology supports and what your current engagements require and invest toward the rest.

6.7 The Agent Factory

Building each agent from scratch keeps your revenue tied to delivery hours. A factory breaks that link.

What it consists of. Prompt and component templates. API connectors for CRM, ERP and PSA systems. Evaluation harnesses and security patterns. Orchestration tools for workflow sequencing, and real-time monitoring dashboards for ongoing performance tuning.

Why it works. Reusable frameworks accelerate development while improving reliability and compliance. Adding orchestration and monitoring creates

transparency for the client and opens a revenue layer beyond the build itself.

How to monetize it. Sell factory time in tiered builds (bronze, silver, gold, for example) with an optional managed orchestration package on top. The tiers price the build; the orchestration package produces the recurring line.

Frank Price, CPO of Rewst, supplies the warning worth putting next to this in Pax8's vendor research: without an operational foundation underneath, building quickly only makes a mess move faster.

6.8 Data Readiness as a Build Multiplier

Agents fail on data more often than on logic, and the fix is narrower than most partners assume.

What it looks like. Before deploying anything, run a focused data readiness engagement against a single high-value process (ticket triage, quote-to-cash, invoice processing). Examine the datasets tied to that one workflow, then clean and structure them so the agent performs accurately from day one.

Resist the urge to overhaul the data architecture. Narrow scope makes the project faster and cheaper, and it produces an early win you can point at. A full

data governance program at the outset is how build engagements die before the agent exists.

How to monetize it. Productize data readiness as a prerequisite for every agent build and bundle it into the solution design phase. Once the client sees results, broader data governance becomes a credible standalone upsell.

The supporting evidence. McKinsey finds that companies with highly structured data governance report a 40% increase in AI success rates (via Pax8, *MIP Playbook*).

6.9

Grow Your Business

Client problem: *the differentiated capability does not exist yet.*

Categories: Artificial Intelligence and Analytics · Vertical-specific

Built-from-Scratch Agent:

Offering / SKU

- Agent configurations built from scratch designed to automate specific workflows or business processes.
- The starting point that makes a first build a matter of weeks. Also the template layer of your agent factory ([6.7](#)).

Custom Products and Public Storefronts:

Pax8 Marketplace features

- Package your proprietary agents as Custom Products and list them on your Public Storefront. Custom Products triggers a notification when one is taken up, so you can start the delivery work behind it.
- The current route for turning a one-off client build into an offer you can sell repeatedly across your own client base.

Managed Intelligence Services:

Pax8 Professional Services; Global

- Pax8-delivered automation and agent build capacity, working as an extension of your team. Includes builds on Microsoft Copilot Studio.
- Lets you sell a build you cannot yet staff, which is the practical answer to the bandwidth gap in [6.1](#).

6.10

Increase Your Efficiency

Client problem: every build is bespoke and nothing is reusable.

Categories: IT Operations · Integrations · Artificial Intelligence and Analytics

Transformation Discovery Assessment

Agent (TDAA):

Marketplace SKU: *Amer, EMEA and APAC, Pax8 Professional Services, Global*

- The assessment from [Chapter 3](#), used here for a different purpose. Its Process Problem Identification survey produces a per-client inventory of specific manual workflows, with hours attached and a High / Medium / Backlog priority against each.
- Run it across several clients in the same vertical and the repeated entries tell you what to build. A process problem that appears once is a bespoke job; the same problem appearing in five clients is a vertical agent with five buyers already identified. This is the cheapest way to stop building work you can only sell once.

Agent Gateway:

80s capability

- Multi-tenant deployment and governance across customers, users and environments.
- Lets one team operate agents across dozens of clients without adding headcount per tenant.

Model Context Protocol (MCP):

Marketplace / platform

- MCP-first architecture connecting agents to existing SaaS stacks without custom integration code.
- Removes the integration work that otherwise consumes most of a build budget.

Integrations Hub:

Pax8 Marketplace feature

- Centralized discovery and management of integrations and API connections.
- Feeds the API connector layer of your agent factory.

6.11

Manage Your Risk

Client problem: *a custom agent with real system access and no guardrails.*

Categories: Security · Integrations

Agent Gateway:

80s capability

- Purpose-built for MSPs: govern every agent a client runs through a single gateway, covering identity, model and tool calls, token consumption, policy enforcement and tenant boundary controls.
- Governance designed in rather than retrofitted. It turns “what is this agent allowed to do” from a design conversation into an enforced setting, and it is what makes a regulated-industry client approvable — those being the accounts that pay for vertical agents.

Data Readiness as a Prerequisite:

partner motion; see 6.8

- Process-specific data readiness scoped to the target workflow.
- Protects delivery margin, and it is billable in its own right.

Building the Capability

The MIP Program: Build Play

The [Build Play module](#) sits inside the [MIP Program](#), with role-based paths across strategy, sales and technical functions. It covers the foundational knowledge needed to operate as a Managed Intelligence Provider in this Play: how to scope a build, when building is the right answer, what production delivery requires and how to package and price what you create.

Development itself you learn from the platform. For the technical work of building on Copilot Studio, Foundry, Fabric or any other stack, the vendor documentation is the source, and the program points you to it rather than duplicating it.

Managed Intelligence Services

Workflow Automation and Agent Builds is one of the four MIS offerings available at launch, delivered by Pax8 Professional Services as an extension of your team. Use it to take on build engagements while your own capability matures, then bring delivery in-house as the team grows.

Partner to Partner

A matching motion between partners with capability and partners with demand. A partner without development bandwidth can source it rather than decline the engagement, and a partner who has built something can find others to sell it. Both directions matter, and the second is how a single build becomes a product.

Enablement, by Region

AMER

- [AI Community Group](#), open to partners engaged with any paid Academy offer
- Managed Intelligence Bootcamp: How to Sell, Deliver and Monetize AI (Coming)
- [Azure Kickstart Program](#) (Instructor-Led Session)
- [Pax8 Beyond Flagship](#): Hands-on labs and P&E breakout sessions

EMEA

- [Technical Consultancy](#), an emerging offer for formalizing previously delivered technical services into a defined menu; scope still firming up
- [Technical Enablement Workshop](#)
- [Master Classes covering data and AI](#)
- [Pax8 Beyond EMEA](#): Hands-on labs and P&E breakout sessions

APAC

- [Live Virtual Workshops, piloting](#)
- [Pax8 Beyond APAC](#): Hands-on labs and P&E breakout sessions

Partner Experience: Guided Growth

Available in all three regions.

- [Microsoft OneCloud](#)
- [Data & AI Guided Growth](#)



6.13

Microsoft in This Play

In Build, the lens is where [Microsoft](#) platforms let partners create differentiated solutions, agents, automations and reusable IP.

Solution Area	Product	Why It Maps to Buy
AI Business Solutions	Microsoft Copilot Studio	Create and customize agents and workflows around specific client processes and differentiated IP
Cloud and AI Platforms	Microsoft Foundry	Platform and AI services for more advanced custom applications, agents and solutions, supporting work that goes beyond packaged capability
Cloud and AI Platforms	Microsoft Fabric	The data layer underneath an agent that needs one. Data models, semantic models and reporting packs built here are reusable IP in their own right

Copilot Studio is the practical starting point for most partners, since the Microsoft practice already exists. Foundry is where you go when the vertical agent in [6.5](#) outgrows what Copilot Studio can express.



6.14

Vendor Angle

What to bring. Extensibility. Vendors who let partners build on top of them get embedded in partner IP and travel with it. Vendors who lock down get designed around.

Four questions a partner will answer before building on you:

- Is there a documented API?
- Is there a software development kit (SDK) that wraps it for common languages?
- Is there an MCP endpoint so agents can connect without custom integration code?
- Is the documentation good enough to work from unaided?

If any of those requires one of your engineers on a call, you are not in this Play.

Governance hooks matter as much as capability: scoped permissions, audit logging, revocable credentials. An agent that cannot be governed at the gateway will not clear a regulated client.

Route in. Start at [Marketplace for vendors](#). Pax8 has a route for each part of this:

- **To make it buildable on: Vendor Product Management (VPM)** owns integration requirements and technical configuration, which is where your API, MCP endpoint and documentation get assessed.
- **To reach the partners doing the building: Marketing Center** and Highspot for technical enablement content, so a partner’s developers can work without calling your engineers.

Vendor	What It Does Here
Microsoft	Copilot Studio as the build surface most partners already have access to
Rewst	RPA and workflow automation built for MSPs; RoboRewsty assists inside the Workflow Builder
Pia	AI automation for IT help desks
Synthreo ²³	AI infrastructure and agent building for technology services
ElectroNeek	RPA and automation tooling
Inforcer ²³	M365 tenant baseline management, added to the Marketplace June 2026

From Pax8’s vendor research. David Schwartz, CEO of Pia, names the real constraint in this Play: the hardest part is encouraging people to experiment. Frank Price of Rewst supplies the counterweight in 6.7: operational foundation before speed of build.

23 Coming online Q1, 2027.

6.15

Proof and Related Work

Proof. **Mondria** is building an AI-first MSP, and it started by building for itself. Growth had made the operational work heavier. Every Marketplace interaction took manual effort, from validating licenses to reconciling billing across systems, and processes touching finance, sales, operations and support depended on people moving information between platforms.

Rather than buy a tool for each seam, Mondria built one agent across all of them. Using Pax8's MCP server as the connective layer, the team linked the Pax8 Marketplace, Autotask and their internal documentation to a custom agent built around their own workflows. Three teams now reach all of it through a single prompt.

The clearest result is a workflow they automated end to end. "Microsoft renewals were a painful point for the whole sales team, and now they're completely automated," said Samuel Nadeau, Mondria's president. The agent identifies upcoming renewals, drafts the client email, sends it and validates whether the client wants to renew.

Two points worth taking from this. **The integration layer did the heavy lifting.** MCP is what made con-

necting three systems a build rather than an integration project, which is the argument in 6.10. And **they built on themselves first.** The agent runs Mondria's own business, which means every claim they make about it is one they can demonstrate.

Nadeau's summary of the effect: "MCP was a turning point for us. It gave us the connectivity and automation capabilities we had been missing, allowing us to streamline processes across the business. The impact was significant enough that we ultimately consolidated our operations on Pax8."

A built agent creates no value until it is connected to systems and embedded in workflows. That points at **Implement** (Chapter 7), where it becomes a working capability rather than a demonstration.

Two other routes are common. An agent proven with one client can be documented and packaged as a repeatable service offering for future engagements. And a live agent estate, custom or bought, belongs in **Manage** (Chapter 8) before it grows past the point of visibility.



CHAPTER 7

Play 5 – Implement

Deploy, Integrate and Drive Adoption.

Implementation is the bridge between a good idea and a measurable outcome; the moment an agent moves from concept into the workflows people can use.

7.1 When to Run This Play

An agent that has been bought or built creates no value until someone uses it. Most AI initiatives fail somewhere between deployment and adoption. This Play covers the work of getting from one to the other.

Run it whenever an agent is about to go live, and run it again whenever one has gone live and stalled. It applies equally to agents sourced from the Agent Store

and agents you built yourself; the discipline does not change based on where the agent came from.

This is also the Play most often assumed to be someone else's job. A partner who sourced an agent may treat deployment as the vendor's responsibility; a partner who built one may treat it as the client's. Both assumptions produce the same result.

7.2 Client Signals

- The agent is approved, provisioned and nobody is using it.
- Staff have quietly gone back to the old process.
- Nobody owns the new workflow.
- The client cannot say whether the agent is working, because nothing was ever measured.
- Usage spiked in week one and collapsed by week four.

7.3 Categories in Play

IT Operations, Integrations and Security carry most of the work here, whatever category the agent itself came from.

7.4 Building the Capability: Enablement by Region

The failure rate is high and well documented, and the causes are consistent.

Three findings set the stakes:

- More than 40% of agentic AI projects will be canceled by the end of 2027, driven by governance gaps, unclear value and poor adoption.²⁵
- 74% of companies plan to deploy agentic AI within two years, while only 21% report a mature model for governing autonomous agents.²⁶
- PwC chairman Mohamed Kande told Davos in 2026 that 56% of companies are getting no measurable benefit from their AI investments.²⁷

Together they describe the same organization: one that bought the technology and skipped the process

design, training and governance around it. That surrounding work is what you sell in this Play.

When AI projects fail, the cause is rarely that the technology did not work. The organization was not ready for it.

Training is the single highest-leverage input. Zapier's research found that workers who received AI training report a 94% productivity gain, against 69% of those who did not.²⁸ The same research found that workers spend three or more hours a week cleaning up poor-quality AI output; a cost that falls hardest on untrained teams and is critical to bear in mind when you scope a training engagement. Training is what separates an agent that produces work from an agent that produces rework.

+40%

of agentic AI projects
will be canceled by
the end of 2027

74%

of companies plan
to deploy agentic
AI within two years

56%

of companies are getting
no measurable benefit
from their AI investments

²⁵ Gartner. "Gartner Predicts Over 40% of Agentic AI Projects Will Be Canceled by End of 2027." Gartner Newsroom, 25 June 2025.

²⁶ Deloitte. [State of AI 2026](#). Deloitte, 2026.

²⁷ "Davos 2026: PwC Chairman Mohamed Kande Says Over 50% Companies Getting Nothing from AI Adoption, Has a Tip for CEOs." The Economic Times, 2026.

²⁸ Zapier. "Most Workers Spend 3+ Hours per Week Cleaning up AI Workstop." Zapier, 14 Jan. 2026.

Three Pillars

Implementation in the agentic era is more involved than deploying software. It runs across technology, people and process at the same time, and skipping any one of the three produces the outcomes above.

Technical

Connect the agent to the client's real environment: identity and access controls, data sources, systems of record, API and MCP layers, logging, monitoring and version control.

Governance belongs in this stage rather than after it. Secure data handling, auditability, escalation paths, human override, and clearly defined boundaries for what each agent can and cannot do.

System design clarity is the most commonly skipped principle. The real risk in any deployment is putting agents into an environment without clear architectural thinking. Every agent needs a well-defined scope that end-users understand, so that agents complement workflows rather than create confusion inside them. Two agents with overlapping and undocumented remits will generate more support tickets than either saves.

Process

An agent operating on an undocumented process inherits every exception nobody mentioned. Map what happens day-to-day before anything goes live;

stakeholder interviews, process capture and exception mapping; so the agent has a foundation and boundaries to operate within.

Your clients probably do not have clean, documented workflows ready to automate. Before anything goes live, map what happens day-to-day; stakeholder interviews, process capture and exception mapping; so the agent has a foundation and boundaries to operate within.

Pilot in a controlled way. One workflow, one team and a defined rollback plan. A contained pilot builds trust with internal champions early and produces the proof of value that accelerates the wider rollout.

People

Employees will not use agents they neither trust nor understand. Implementation includes structured, role-based training for leadership, managers and front-line teams.

The training that works goes beyond how to operate a chatbot. It covers how workflows, expectations and responsibilities shift once agents are in play; which is a change management conversation rather than a technical one.

Skipping this step has three predictable costs. Fear of AI persists. Shadow AI behavior continues. And misuse and unclear prompting drive cost spikes that erode the ROI you promised in the Sell Play.

7.6 Three Ways to Productize This Play

Implementation is where a partner turns a disciplined lifecycle into a repeatable, high-margin service. Three packages, each with its own commercial model.

Agent Deployment and Adoption Sprint

What it looks like. A time-boxed motion, typically two to six weeks, taking an agent from approved to in-use. Technical setup covering identity, access, integrations and guardrails. Workflow mapping. A pilot rollout. Role-based training. It ends with go-live metrics and an operational handoff plan, so the agent becomes part of daily work rather than a short-lived experiment.

Why it works. Most AI initiatives fail here because workflows were never redesigned and teams were never trained. A structured sprint addresses both, which improves adoption and suppresses the misuse-driven cost spikes that erode return.

How to monetize it. A fixed-fee sprint with tiers: one workflow, three workflows or a full department rollout. Upsell into a subscription by bundling quarterly optimization and adoption reinforcement.

Workflow Discovery and Process Mapping

What it looks like. A lightweight excavation engagement identifying and documenting repeatable processes before any AI is deployed. Stakeholder interviews, process capture, exception mapping and readiness scoring, to determine what can be automated now and what waits. The output is the road-

map for implementation and the baseline for measuring outcomes.

Why it works. SMBs frequently cannot articulate their own workflows, which makes this business consultancy rather than technical work. Documented processes before deployment prevent the common failure pattern of deploying AI into organizational chaos.

How to monetize it. Sell it as the front door to every deployment: no workflow, no automation. Bundle it into the Sell and Buy Plays as a paid assessment, then credit the fee toward the full implementation sprint to accelerate commitment.

Integration and Guardrails Package

What it looks like. The full technical foundation for agents to operate safely inside systems of record. Integration with business applications, identity and role-based access configuration, escalation paths, logging, human override, and governance designed in.

Why it works. Agents need systematic connectivity to function and guardrails to function safely, particularly where they touch customer data or external-facing systems.

How to monetize it. Position it as the enablement layer that turns a purchased or built agent into an operational one. Charge per integration and per workflow, with a premium tier for regulated industries and high-risk processes where governance requirements are more stringent.

7.7

Grow Your Business

Client problem: *the pilot worked and nobody knows what happens next.*

Categories: Productivity · Artificial Intelligence and Analytics

Managed Intelligence Services (MIS):

delivered by Pax8 Professional Services; Global

- A portfolio of outcome-led, productized AI offerings you sell and Pax8 delivers as an extension of your team. Four at launch: the Copilot Readiness Assessment and Transformation Discovery Assessment Agent ([Chapter 3](#)), Workflow Automation and Agent Builds ([Chapter 6](#)), and Microsoft 365 Data Protection ([7.9](#)).
- Lets you sell AI delivery before your own bench exists, then bring it in-house as the team matures.

Pax8 Professional Services:

Global; tiered pricing through Voyager Alliance

- Fixed-price, fixed-scope delivery working as an extension of your team, covering migrations, deployments and repeatable projects.
- Lets you commit to a delivery date you could not otherwise staff, with fixed scope protecting the margin.

Practice-Specific Professional Services:

Security · Infrastructure · Modern Work · Managed Intelligence

- Delivery capacity aligned to the four practice areas.
- Where an AI engagement pulls through adjacent infrastructure or security work, which is the most common expansion path out of this Play.

Agent Deployment and Adoption Sprint:

partner motion; see [7.6](#)

- A productized two-to-six-week motion from approved to in-use.
- The clearest route from project revenue to a Manage subscription, because the handoff plan is the subscription's first agenda item.

7.8 Increase Your Efficiency

Client problem: *implementation cost is eating the project margin.*

Categories: IT Operations · Integrations · Infrastructure

Migrations Feature:

Marketplace

- Tooling for moving client data and workloads between environments.
- Removes the line item that breaks most implementation estimates.
- Moves customers and subscriptions between environments.
- Consolidates a client's stack onto your commerce surface while you are already in their systems.

PSA Implementation:

Academy and Professional Services *joint offer; Amer only*

- Combines Operations Coaching with PSA implementation services.
- The template for how Academy and Professional Services combine into a single offer.

7.9

Manage Your Risk

Client problem: *an agent now touches customer data and nobody scoped the blast radius.*

Categories: Security · Continuity · Integrations

Agent Gateway:

80s capability

- Identity and access management, sign-in governance, permissions and tenant boundaries applied at deployment.
- The technical spine of the Integration and Guardrails Package in 7.6, and what makes the premium regulated-industry tier defensible.

Managed Intelligence Services / Microsoft 365 Data Protection:

Pax8 Professional Services; Global

- Data protection configuration across the M365 estate ahead of agent deployment.
- Closes the oversharing exposure that Copilot deployments routinely surface.
- Pairs with the Copilot Readiness Assessment from Chapter 3.

Identity and Access Vendors:

Marketplace: IAM, PAM, ITDR, MFA, SSO

For credentials and privileged access:

- [CyberQP](#)
- [Keeper Security](#)
- [1Password](#)
- [Inforcer](#)²³
- [CyberFOX](#)
- [Avepoint](#)

Lets you assemble the guardrail stack from one catalog rather than piecemeal.

Human Override and Escalation Paths:

partner motion; see 7.5

- Defined boundaries for what each agent can do alone and where a person is required.
- The control a client's board asks about first, and the one most deployments lack.

²³ Coming online Q1, 2027.

7.10

Building the Capability

The MIP Program: Implement Play

The [Implement Play module](#) sits inside the [MIP Program](#). Role-based paths across strategy, sales and technical apply here more evenly than in any other Play, because implementation is where all three functions meet the client at once.

Learn more about the MIP Program below:

[MIP Program overview](#)

[Download the MIP Playbook](#)

Enablement, by Region

AMER

- [Operations Coaching](#)
- [PSA Implementation](#) (HaloPSA)
- [Project Manager, Service Manager and Dispatch Peer Groups](#)
- [Modern Workplace and Copilot Bootcamps](#)
- [Pax8 Beyond Flagship](#): For Service Manager and Engineer track sessions

EMEA

- [Technical Consultancy](#), formalizing previously delivered technical services into a defined menu
- [Strategic Consultancy for selected partners, focused on business change and practical execution](#)
- [Pax8 Beyond EMEA](#): For Service Manager and Engineer track sessions

APAC

- [Operations Coaching, available](#)
- [Instructor-Led Training and Live Virtual Training](#)
- [Pax8 Beyond APAC](#): For Service Manager and Engineer track sessions

Partner Experience

Available in all three regions.

- [MIP Program Implement module](#)
- [Guided Growth Microsoft OneCloud](#)

7.11

Microsoft in This Play

In Implement, the lens is turning purchased technology into a working business capability through deployment, integration, configuration, adoption and change management.

Solution Area	Product	Why It Maps to Implement
AI Business Solutions	Microsoft 365 Business Premium	Establishes the secure productivity foundation, identity and device management, needed before more advanced capability is layered on
AI Business Solutions	Microsoft 365 Copilot	Requires more than license activation: configure the environment, prioritize use cases, enable users and drive adoption
AI Business Solutions	Dynamics 365	Requires configuration, integration, migration and process alignment to become an operational capability
Cloud and AI Platforms	Microsoft Azure	Assess and prioritize which workloads to migrate, then configure cost management, security policy, disaster recovery, backup and monitoring

The Copilot row is this chapter's argument in miniature. "We bought Copilot and nobody uses it" is the most common client signal in [7.2](#), and it is an implementation failure rather than a product one.

7.12

Vendor Angle

For vendors. Deployment enablement and certification, so partners can deploy without one of your engineers on every call. Implementation tooling and self-onboarding that removes the partner from every provisioning step. And secure defaults, least privilege configured out of the box rather than documented in a hardening guide the partner is expected to apply.

A vendor whose agent cannot be scoped, logged and overridden will fail the system design clarity test in 7.5, regardless of how well it performs.

Route in. Vendor-focused **Academy** content for staff enablement and **Bootcamps** to deliver it. Vendor **Product Management (VPM)** owns technical configuration and integration requirements.

For Partners: Vendors Working in This Play:

Vendor	What It Does Here
Microsoft	Copilot deployment: environment configuration, use case prioritization and user enablement
Google	Chrome Enterprise Premium for browser-level control over how staff reach AI tools during rollout
Lemhi ²³	AI adoption and governance, turning a deployment into a repeatable managed service
Egnyte	Content governance, so agents reach clean, correctly permissioned data from day one
Check Point	Endpoint, email and network controls around newly deployed agents
DefensX	Browser and web-layer security at the point of use
Acronis	Backup and recovery in place before agents touch production systems
Rewst	Wiring agents into existing workflows during deployment
HelpGhost ²³	Documentation usable by agents and technicians, which is what makes the operational handoff stick
Netsmartz ²³	AI development and digital engineering capacity when deployment outruns your own bench

From Pax8’s vendor research. Peter Bretton, VP of Product Strategy at NinjaOne, makes the point this Play turns on: AI raises the importance of the people-centric approach to IT. The technical work is necessary, and on its own it has never been enough.

23 Coming online Q1, 2027.

7.13

Proof of Success

Proof. TCC, a Dutch MSP and one of twenty global winners of Microsoft's 2026 CSP Copilot Partner Council Contest, deployed AI across Vivantes, a non-profit care organization.

The adoption numbers are the point. 45 employees actively use Microsoft 365 Copilot, and a further 212 use Copilot Chat and AI agents for daily support, knowledge access and process automation. In a Play where the defining failure is capability nobody uses, 257 active users is the result worth quoting.

They got there by running all three pillars from section 7.5 rather than only the technical one.

Technical. A full implementation of Microsoft Purview Compliance Manager, supporting audits, monitoring compliance requirements and tracking remediation systematically, alongside an AI data security framework governing how sensitive information is handled.

Process. Governance, use-case development and continuous optimization built into the TCC AI Portfolio, rather than treated as follow-up work.

People. Adoption programs and training, delivered as part of the portfolio.

The deployment also solved a specific problem rather than introducing AI in general. AI Roomkits in the meeting rooms used by directors, management and care teams capture discussions and decisions automatically, and integration with Copilot and Facilitator generates minutes, action points and summaries into existing administrative processes. Administrative load fell for the secretariat, management and care professionals, which returned time to patient care.

Over one summer, every AI service in the portfolio was embedded in a **new five-year MSP contract**. The E5 Defender Suite and full Microsoft Purview Suite follow next month.

That progression is what this Play is for. Implementation done properly does not end the engagement. It converts a deployment into a managed service, which is where [Chapter 8](#) begins.



CHAPTER 8

Play 6 – Manage

Optimize, Govern and Expand.

Agents operate inside environments where workflows evolve and data changes constantly. Left unmanaged, even high-performing agents start producing inconsistent output. Manage is the discipline of keeping them effective, and of using what they produce to find the next opportunity.

8.1 When to Run This Play

Manage is the clearest recurring-service Play. A subscription billed against continuous performance behaves differently from a project billed against a deliverable, and this is where that difference is most visible. Partners also build recurring revenue elsewhere, around implementation, governance, optimization and packaged solutions, so treat this as the most direct route rather than the only one.

Run it from the moment an agent goes live. Run it urgently if a client already has agents operating that nobody is monitoring.

A partner who treats deployment as the finish line has sold a project. A partner who treats it as the transition into an operating phase has sold a service, and the responsibility shifts accordingly, from delivering a working system to keeping it performing against the measures you agreed.

8.2 Client Signals

- The agent works less well than it did at launch and nobody can say why.
- Nobody has reviewed its output in a quarter.
- The client is asking what else it could do.
- A system it depends on changed and nobody checked what broke.
- There are now several agents and no one can list them.

8.3 Categories in Play

Security and Continuity carry the governance layer. Artificial Intelligence and Analytics carries the expansion layer.

8.4 Why Agents Degrade

Pilots go underused and are eventually abandoned, and the cause is usually environmental rather than technical. Agents depend on data, integrations and workflows that change continuously. An ERP upgrade, a CRM field rename, a new approval step, any of these can degrade an agent that was performing

well the week before, and none of them will announce themselves.

You have delivered an agentic workforce. These agentic workers need managing the way any other workforce does, and that management is the service.

8.5 Managing Agents: The Technical Layer

Six disciplines, run continuously.

Model retraining cycles. Update agents on a regular cadence, quarterly or semi-annually, to reflect changing data and business conditions. As inputs evolve, retraining keeps outputs accurate.

Bias and drift audits. Automated checks validating whether outputs remain consistent and meet expectations.

Uptime and resiliency management. Error recovery and failover, so agents stay available under real conditions. This matters more as agents take on workflows the business depends on.

Integration monitoring. Track changes in ERP, CRM and API layers continuously and adjust workflows before they break. Small integration changes degrade performance quickly.

Cross-agent orchestration. Manage how multiple agents interact across workflows to prevent conflicts, duplicated effort and unintended outcomes. This is the discipline that scales worst if left until later. **Two tests worth applying in a quarterly review.**

Whether each agent's scope still matches its responsibilities, since narrow agents multiply governance and maintenance overhead while overloaded ones create bottlenecks. And whether any agent has accumulated access it no longer needs, which happens quietly as workflows change.

Performance dashboards. Real-time visibility for you and the client, covering response times and efficiency, so both parties can see whether agents are delivering.

8.6 Managing Agents: Governance

Governance is embedded in how agents operate rather than documented alongside them. Enforce role-based access and maintain full audit trails. Define clear boundaries for what each agent can and cannot do. Build escalation paths and human override for the moments agents reach those limits.

This is where the MIP earns its position. Most SMBs have no internal resource capable of running a governance framework at this level. Getting security and compliance right is also one of the most effective ways to expand AI across an organization, because the governance conversation is what unlocks the next department.

Seventy-four percent of AI's economic value is captured by just 20% of organizations. Those leaders are 1.7 times more likely than their peers to have a responsible AI framework and 1.5 times more likely to have a cross-functional AI governance board. Their employees are twice as likely to trust AI outputs, which is what lets adoption spread.²⁹

That sequence is the argument to put in front of a client who reads governance as overhead. Governance produces trust, trust produces adoption, and adoption is where the value sits.

By 2027, 40% of enterprises will demote or de-commission autonomous AI agents because of

governance gaps identified only after production incidents occur.³⁰ Chapter 7 cites Gartner's separate figure for projects canceled before they deliver. This is the same failure arriving later, after the agent is live and trusted, which makes it the more expensive version.

Gartner's diagnosis is worth passing on to a client: the cause is usually binary governance: treating every agent as either locked down or fully trusted. Over-restrict a simple agent and teams build outside approved channels. Under-restrict an autonomous one and you get the incident. Their recommendation is proportional governance matched to each agent's autonomy level, across four tiers: observe, advise, act with approval, and act autonomously.

Security teams using AI and automation extensively shortened breach lifecycles by 80 days and lowered average breach costs by \$1.9 million, against organizations that did not.³¹ The same report found 63% of breached organizations either have no AI governance policy or are still developing one, and that breaches involving shadow AI cost \$670,000 more than average and take 10 additional days to contain.

Those numbers sit either side of the service you are selling. Governed AI reduces breach cost; ungoverned AI increases it. Both are measurable, and the gap between them is the case for the subscription.

²⁹ PwC. [2026 AI Performance Study](#). PwC, 13 Apr. 2026.

³⁰ Gartner. "Gartner Says Applying Uniform Governance Across AI Agents Will Lead to Enterprise AI Agent Failure." Gartner Newsroom, 26 May 2026.

³¹ IBM. [Cost of a Data Breach Report 2025: The AI Oversight Gap](#). IBM Security and Ponemon Institute, 2025.

8.7 Four Ways to Productize this Play

Ongoing Optimization Subscriptions

What it looks like. Continuous prompt and agent tuning, retraining cycles, A/B testing, drift monitoring and version updates, with active oversight; the way a manager monitors and guides an employee. Define KPIs both parties track through dashboards.

Why it works. Agents need active management to hold peak performance, and results are measurably stronger than set-and-forget deployments.

How to monetize it. Tiered subscriptions, with higher-value packages carrying explicit performance targets. Some partners offer guarantees against those targets, which requires measurement both parties trust and a clear boundary around what you control.

Compliance and Risk Automation

What it looks like. A compliance and risk agent embedding policy checks, audit trails, PII protections and access controls directly into workflows, so compliance is enforced continuously.

Why it works. Compliance remains a major barrier to AI adoption, particularly for SMBs without internal governance and for anyone in a regulated industry.

How to monetize it. Package it standalone or bundle it into vertical-specific solutions for healthcare, finance and similar sectors.

Data Governance as a Service

What it looks like. A data governance agent continuously monitoring and enforcing data policies across all AI workflows, with its outputs feeding your performance dashboards.

Why it works. Data quality determines agent performance. Strong governance improves accuracy, reliability and compliance at the same time.

How to monetize it. Deliver it inside a managed intelligence subscription, positioned as a compliance layer and a performance multiplier across every deployed agent.

Data-Driven Expansion

What it looks like. Use usage data and outcome metrics from deployed agents to identify the next automation opportunity; expanding from one workflow into adjacent functions like marketing, finance or customer experience.

Why it works. The largest value from AI comes from layering agents across workflows, and usage data lets you show why a targeted expansion beats a broad one.

How to monetize it. Quarterly growth maps or road-map reviews recommending next-step deployments against projected ROI.

The compounding effect. Optimization improves performance. Performance drives ROI. ROI funds expansion. That loop is what turns a managed intelligence practice into a business that grows without new logos.

8.8

Grow Your Business

Client problem: *one agent works and nobody has mapped what comes next.*

Categories: Artificial Intelligence and Analytics · Productivity

Partner Analytics Hub:

Marketplace

- Revenue, business and performance insight across your book.
- Turns usage data into a prioritized expansion list, which is the quarterly growth map in [8.7](#).

Reports:

Pax8 Marketplace feature

- Configurable reporting, exporting and scheduled business intelligence.
- The artifact you put in front of a client to justify the renewal, and what makes outcome-based pricing defensible at the point it gets questioned.

Opportunity Explorer:

Pax8 Marketplace feature; [see 3.7](#)

- Whitespace analysis, run again against a now-larger footprint.
- Closes the loop. Manage feeds the next Discover conversation.

Managed Intelligence Services (MIS):

Pax8 Professional Services; Global

- Packaged AI offerings delivered as an extension of your team.
- Where an expansion opportunity outruns your delivery capacity, this is how you say yes to it this quarter.

8.9

Increase Your Efficiency

Client problem: *managing a growing agent estate by hand.*

Categories: IT Operations · Integrations

Agent Gateway:

8os capability

- Deploy, monitor and govern agents across customers, users and environments from one control plane, with observability, audit, registry, versioning, rollout and rollback.
- The reason one team can operate hundreds of agents across dozens of tenants, and what makes retraining and version updates a routine operation rather than a project. Without it, headcount scales with client count.

8bot:

8os capability

- A managed AI coworker supporting opportunity and productivity across your own business.
- Applies the model to your own operation, which is both a cost reduction and a demonstration you own.

Marketplace Agent:

Pax8 Marketplace feature

- In-product conversational assistance within Marketplace experiences.
- Reduces the admin overhead that otherwise scales linearly with client count.

Support Tiers:

Standard, Elevated and Premium, by Voyager Alliance tier

- Standard for Alliance, Ignite and Velocity; Elevated for Titan; Premium for Galactic, with dedicated specialists.
- Sets your own escalation path, which becomes material once you carry client SLAs on agent uptime.

8.10

Manage Your Risk

Client problem: *an agent estate with no audit trail and drifting output.*

Categories: Security · Continuity

Agent Gateway:

80s capability

- Governs, monitors and monetizes AI consumption arriving from anywhere: employee tools, third-party apps and custom agents.
- Prevents the runaway-consumption scenario that ends renewal conversations, and bills for the oversight at the same time.
- Continuous observability, audit trails and policy enforcement across deployed agents.
- The evidence base for a compliance briefing, which the MIP Playbook recommends selling as a recurring advisory item.

Microsoft Agent 365:

Marketplace; \$15 per user per month; see 5.8

- One control plane across a client's agent estate: observing activity, governing lifecycle, securing access and behavior.
- Sell it with the first agent. Governance is an easy conversation when there is one agent to govern.

Security Coverage:

Pax8 Marketplace feature; see 3.9

- Ongoing posture monitoring across the client base.
- The Manage version of the Discover artifact. Same tool, recurring revenue.

Agent Liability and Insurance

- Coverage for automated and agent-initiated actions, which most cyber policies predate, plus addressing multi-tenant aggregation and automation liability.
- A client running autonomous agents carries exposure their existing policy was not written for. This is a question their board will ask, and one most partners currently cannot answer.

8.11

Building the Capability

The MIP Program: Manage Play

The [Manage Play module](#) sits inside the [MIP Program](#).

Learn more about the MIP Program below:

[MIP Program overview](#)

[Download the MIP Playbook](#)

Further Reading

Three Pax8 posts sit directly on this Play's commercial argument:

- [Turning Intelligence into Income: How MSPs Can Create Recurring Revenue with Usage, FinOps and Autonomous AI](#)
- [Operationalizing AI Governance: How MSPs Can Turn Compliance into a Recurring Revenue Engine in 2026](#)
- [Your Next Offering: AI Governance as a Managed Service](#)

Enablement, by Region

AMER

- [COO Peer Groups](#)
- [Account Manager Peer Groups](#), for vCIOs and client success managers
- [Security Peer Groups](#)
- [Operations Coaching](#)
- [Security Coaching](#), including the [Château CIS Controls Guide](#)
- [Pax8 Beyond Flagship](#): For Service Manager track sessions

EMEA

- Performance Workshop, covering Traction practices, accountability mapping, OKRs and KPIs: the measurement discipline this Play runs on
- [OKR Workshop as an optional add-on](#)
- [Leadership Accelerator](#)
- [Leadership Coaching](#)
- [Pax8 Beyond EMEA](#): For Service Manager track sessions

APAC

- [Security Coaching](#) and [Operations Coaching](#): *Coaching available through Amer*
- Community Groups launching
- [Pax8 Beyond APAC](#): For Service Manager track sessions

Partner Experience

Available in all three regions.

- [Security Guided Growth](#)
- [MIP Program Manage](#) module

8.11

Microsoft in This Play

In Manage, the lens is positioning [Microsoft](#) technology as an ongoing managed-services opportunity built on governance, optimization, adoption, performance, security, consumption and expansion.

Solution Area	Product	Why It Maps to Manage
AI Business Solutions	Microsoft 365 Copilot	An ongoing services opportunity around adoption, governance, usage optimization and new use cases
AI Business Solutions	Microsoft Copilot Studio	Agents and automations need ongoing governance, maintenance and optimization as processes change
Security	Microsoft Defender	Continuous threat protection, monitoring, investigation and posture improvement delivered as a managed service
Security	Microsoft Purview	Data governance, classification, labeling, retention and lifecycle management. Purview governs the data while Defender protects access, identity, endpoint and application activity
Security	Microsoft Agent 365	The control plane for observing, governing and securing client agents, including agents built outside Microsoft platforms
Cloud and AI Platforms	Microsoft Azure	Ongoing optimization around consumption, performance, cost, security and workload expansion
AI Business Solutions	Dynamics 365	An ongoing opportunity as processes, reporting needs and headcount change

Agent 365 governing agents built outside Microsoft platforms is the detail that matters most here. The Microsoft control plane covers the Agent Store purchases from [Chapter 5](#) and the custom builds from [Chapter 6](#), rather than only Microsoft's own agents.

8.12

Vendor Angle

For vendors. Consumption and outcome data flowing back to the partner, so they can find the next expansion. A vendor who helps a partner sell more of someone else’s product first tends to stay in the account longest.

Multi-tenant management and version discipline matter here more than anywhere. At a hundred clients, your release cadence becomes the partner’s

operational risk. SLA, incident communication and roadmap transparency are the baseline; for agents, add behavior and drift reporting the partner can put in front of a client.

Route in. VAM owns relationship governance and escalation. [Silver Vendor Community](#) post-launch. **Vendor Insights (CRM)** for the data relationship.

For Partners: Vendors Working in This Play:

Vendor	What It Does Here
SentinelOne	Purple AI as a continuously running security analyst
CrowdStrike	Endpoint detection and managed threat response
Liongard	Configuration change detection across client environments
Auvik	Network monitoring and estate visibility
Cynomi	AI-powered vCISO for continuous governance reporting

From Pax8’s vendor research. Steve Stone, Chief Customer Officer at SentinelOne, offers the line worth carrying into a nervous client conversation: this is the first technology cycle where defenders benefit more than attackers.

8.13

Proof and Related Work

Proof. [Unicorne](#), a Canadian MSP and AWS Canada Rising Star Consulting Partner of the Year for 2025, had clients running production workflows on Anthropic’s Claude 4.5 model through Amazon Bedrock. Then access to the model disappeared.

Nothing Unicorne had built broke. The dependency underneath it moved. The impact was immediate. Plume AI, a healthcare client, had more than 10,000 active users on Claude-powered workflows: AI-assisted clinical documentation and automated triage call centers. “Any time a model change happens, it creates a lot of chaos, especially with medical applications, where you want a strict, predictive outcome,” said Benoit Maheux, Unicorne’s VP of Growth.

Unicorne could have migrated its clients to a different model. It decided not to, on the grounds that changing models would have damaged the outcomes those clients depended on; a judgment only a partner close to the workflows could make.

Instead they escalated. “We knew we had to have a big brother in the room to help advocate in our corner,” Maheux said. Pax8 took the aggregate SMB demand to Anthropic. Unicorne expected months of negotiation. “In a matter of days, the table was flipped.” Anthropic agreed to provide Claude 4.5 to SMBs working through the Pax8 Marketplace on

AWS accounts enabled via Bedrock, and healthcare professionals went back to patient care rather than paperwork.

The point for this Play. [Section 8.5](#) covers monitoring the integrations, data and workflows your agents depend on. This case adds one more: the models themselves. A client’s agentic workflow can rest on a commercial decision made by a company the client has never dealt with, and no amount of governance inside their environment will surface that. Watching for it, and having a route to escalate when it happens, is part of what the Manage subscription buys.

Where this leads. Pax8’s own Play 6 material treats Manage as the destination, and for a partner’s transformation that reading is fair. For a client relationship it is the opposite.

Usage data from a managed estate is the sharpest possible input to a new Discover conversation, because it replaces what a client thinks their problems are with what their agents demonstrate. The quarterly growth map in [8.7](#) is a Discover output produced by a Manage subscription.

That is the flywheel the guide opened with. Manage feeds Discover, Discover feeds Sell, and the partner who stays embedded compounds while competitors restart the cycle from cold every time.

CHAPTER 9

Conclusion



Start With One

This guide is a reference. Reading it end to end changes nothing about your business, and it was never built for that. It was built to be opened at the point where a specific client is stuck.

The useful question at this point is narrow. Not which Play to master, and not how quickly to move through all six. Which single client conversation do you now know how to have differently on Monday?

The Smallest First Move

Run the Human/System Value 2x2 from 3.6 on your own business so you know how to run it on your clients'.

It takes a leadership session of about forty-five minutes. You will place your own work into four quadrants and discover that some of it should be preserved, some amplified, some automated and some stopped entirely. The last category is usually the largest and the most uncomfortable.

That exercise accomplishes four things at once:

1. It gives you a defensible view of your own operating costs
2. It produces numbers from your own business that you can quote in a client meeting without a vendor's slide behind you.
3. It tells you which of the Plays you personally need first.
4. It means that when you sit down with a client and ask them to expose their process debt to you, you have already done it yourself.

Pax8 calls this Customer Zero. It is the cheapest and most credible starting point available, and it requires nothing you have to buy.

Why the Timing Argument Is Real

[Chapter 1](#) made a claim worth repeating here, because it is the only part of this guide with a deadline attached.

A competitor who starts eighteen months from now will buy the same tooling on the same day they decide to. The Agent Store will still be there. The MIP Program will still enroll them. Microsoft will still sell them Copilot.

What they cannot buy is eighteen months of client proof and eighteen months of vendor standing. Peer evidence is what dissolves the applicability illusion that keeps most SMBs out of this market, and peer evidence only accumulates by doing the work with real clients. Vendors route investment toward partners who can demonstrate outcomes, and that demonstration takes time to build.

Both compound. Neither can be bought at speed later.

No Finish Line

The six Plays are six kinds of work rather than six stages, and nothing in this guide asks you to complete them in order or at all. Most partners run several at once across different clients and return to the same Play with the same client over years.

The connection worth protecting is the one back to the start. A managed agent estate produces usage

data, and usage data is among the sharpest inputs available to a new Discover conversation, because it replaces what a client believes about their problems with what their agents demonstrate. It can point just as easily toward Build, where an agent needs capability it lacks, or toward Sell, where results justify a wider engagement. Many clients stay in Manage for years, which is where the recurring value sits.

Partners who stay embedded accumulate that data. Those who deliver projects and move on start each conversation without it.

What This Guide Cannot Do

It cannot tell you which agent to deploy next quarter, because the catalog will have changed. It cannot promise that every offer named here is available in

your region today, which is why every entry carries a region and status marker. And it cannot make the first client conversation happen.

The ecosystem it describes is moving quickly enough that parts of this document will date within months. Treat it as a living reference rather than a finished artifact, and check the Marketplace and the MIP Program for what has changed since.

Where to Go Next

Before anything else, run the 2×2 on your own business. Forty-five minutes, no cost, no enrollment. It produces your first proof point and tells you which Play you need first.

Your CTAs

For MSPs and MIPs:

Join the [MIP Program](#). The guided enablement and activation program built around the six Plays, with an entry assessment that identifies your capabilities and gaps, and role-based paths for the people who must deliver the work. Self-serve, open to any Pax8 partner, with no minimum technical requirement.

Sign up for the chance to be among the first to run the agentic workforce.

Evaluating Pax8: [schedule a demo](#). The Agent Store, the Marketplace and 8os are easier to assess in twenty minutes with someone showing you than in any document.

For Vendors:

Contact your Vendor Alliance Manager.

Every Play chapter in this guide closes with what a partner needs from you at that moment and which route brings it to market. Your VAM is how that conversation starts.

For Everyone:

Connect this guide to your own AI tooling.

The section above admits that parts of this document will date. Catalogs change, regional availability moves, offers go from coming to live. The Managed Intelligence Guide MCP server is how you avoid working from a stale copy.

****This will be going live Q1, 2027, so check back for updates.****

MCP is the same protocol described in [Chapters 5 and 6](#): the standard that lets agents connect to systems without custom integration code. Connect the server to the AI tools your teams already use, and instead of searching a PDF you can ask what is available right now for the client in front of you. Which agents in the Agent Store fit a healthcare client. Whether an Academy offering is live in your region. What has been added since this guide was published.

The guide tells you how to think about the six Plays. The server tells you what is currently in them.

Then pick one client. The one whose problem you recognized in a chapter you just read.

That last step is the only part of this you cannot buy, enroll in or download. The businesses you serve are living through a change in how work gets done, and it will reach them with or without you. Most want help: 84% say they would trust an outside technology advisor to lead their AI implementation. Few will go looking.

You already hold the relationship they would go looking for. Everything in this guide is what Pax8 can put behind it. The rest is one conversation, with one client, about one process costing them more than they know.

APPENDIX A

By Solution Category

A.A Appendix A: By Solution Category

Twelve solution categories from the Pax8 Marketplace. Use this when you already know the discipline and want to see where it appears across the journey.

Artificial Intelligence and Analytics:

Discover [3.7](#)

Sell [4.7](#)

Buy [5.6](#)

Build [6.9](#), [6.10](#)

Implement [7.7](#)

Manage [8.8](#)

The only category appearing in all six Plays. TDAA and Opportunity Explorer in Discover; the outcome-based business case in Sell; the Agent Store in Buy; Agent Builder and built-from-scratch agents in Build; adoption in Implement; Partner Analytics Hub and Reports in Manage.

Security:

Discover [3.9](#)

Sell [4.9](#)

Buy [5.8](#)

Build [6.11](#)

Implement [7.9](#)

Manage [8.10](#)

The largest category in the Marketplace and present in every Play's risk section. Security Coverage and Copilot Readiness in Discover; CIS Controls Handbook and white-label resources in Sell; vetting and Governed Consumption in Buy; Agent Gateway and Gateway Governance in Build; identity and access in Implement; Agent 365 and agent liability in Manage.

IT Operations:

Discover [3.8](#)

Sell [4.8](#)

Buy [5.7](#)

Build [6.10](#)

Implement [7.8](#)

Manage [8.9](#)

Carries the efficiency argument throughout. Subscription Insights and Analytics in Discover; Sales-buildr and Revscale in Sell; Integrations Hub and Agent Gateway in Buy and Build; Migrations and PSA Implementation in Implement; Agent Gateway, 8bot and Marketplace Agent in Manage.

Integrations:

Discover [3.8](#)

Buy [5.7](#), [5.8](#)

Build [6.10](#), [6.11](#)

Implement [7.8](#), [7.9](#)

Manage [8.9](#)

MCP and Integrations Hub are the recurring answers. Named in the MIP Playbook as partners' single biggest barrier.

Productivity:

Discover [3.7](#), [3.8](#)

Sell [4.8](#)

Implement [7.7](#)

Manage [8.8](#)

Copilot deployment and adoption sit here, along with the quoting and proposal tooling in Sell.

Continuity:

Discover [3.9](#)

Sell [4.9](#)

Implement [7.9](#)

Manage [8.10](#)

Backup, recovery and data protection, including Microsoft 365 Data Protection ahead of a Copilot rollout.

Sales and Marketing:

Discover [3.7](#)

Sell [4.7](#), [4.8](#)

Concentrated in Sell, where it covers your own commercial capability rather than a client's.

Infrastructure:

Implement [7.8](#)

Thin in this guide. Azure modernization is the main route in, through the Microsoft sections.

Network:

Discover [3.9](#)

Appears once, in assessment-stage risk.

Communications:

No dedicated sections

Appears only as a bundle component in Buy [5.6](#), which is tagged all twelve. The Marketplace carries voice, contact center and messaging vendors that no Play chapter currently names.

Finance:

No dedicated sections; appears through vendors.

FlexPoint, Checkout and Nexi in the [Chapter 5](#) roster; FlexPoint, MSPCFO and Avalara in [Chapter 4](#)'s vendor tables. The category has real presence in the guide without being tagged to any pillar section.

Human resources:

Not covered

The sparsest of the twelve. No offers, vendors or sections in the guide reference it.

APPENDIX B

By Outcome

A.B

Appendix B: By Outcome

Use this when you know what you or your client is focused on and want to see the offers that serve it, wherever they sit.

Grow Your Business			
Play	Section	Client Problem	Principal Offers
Discover	3.7	They know they are leaving money on the table and cannot locate it	TDAA Opportunity Explorer Business Vision Workshop Data & AI Guided Growth
Sell	4.7	Can describe the technology and not the business case	Results Selling Framework Public Storefronts Sales Coaching
Buy	5.6	Need capability faster than anyone can build it	Agent Store Third-Party Agents Agent Gateway, Agent Gateway Value-added bundles Voyager Alliance Rewards
Build	6.9	The differentiated capability does not exist yet	Agent Builder Built-from-Scratch Agents Custom Products and Public Storefronts MIS
Implement	7.7	The pilot worked and nobody knows what happens next	MIS, Pax8 Professional Services Practice-specific Professional Services Agent Deployment and Adoption Sprint
Manage	8.8	One agent works and nobody has mapped what comes next	Partner Analytics Hub Reports, Opportunity Explorer

Increase Your Efficiency			
Play	Section	Client Problem	Principal Offers
Discover	3.8	Process debt nobody has measured	Business Process Mapping Subscription Insights Analytics Hub and Reports
Sell	4.8	Every proposal is bespoke and takes a week	Quoting Storefronts and Custom Products Salesbuilder Revscale Request a Demo
Buy	5.7	Procurement and provisioning overhead eats the margin	Agent Gateway Agent Gateway 8bot Integrations Hub Subscription Management Migrations MCP
Build	6.10	Every build is bespoke and nothing is reusable	TDAA Agent Gateway MCP Integrations Hub
Implement	7.8	Implementation cost eats the project margin	Migrations PSA Implementation
Manage	8.9	Managing a growing agent estate by hand	Agent Gateway 8bot Marketplace Agent Support tiers

Manage Your Risk			
Play	Section	Client Problem	Principal Offers
Discover	3.9	Exposure they can neither see nor quantify	Copilot Readiness Assessment Security Coverage Security Guided Growth
Sell	4.9	The buyer wants AI and the board wants assurance	CIS Controls Handbook White-label security resources Compliance and governance vendors
Buy	5.8	Shadow AI and unvetted tools already in the building	Curated agent catalog Agent Gateway Microsoft Agent 365 Vendor vetting
Build	6.11	A custom agent with real system access and no guardrails	Agent Gateway Data readiness as a prerequisite
Implement	7.9	An agent touches customer data and nobody scoped the blast radius	Agent Gateway identity MIS Microsoft 365 Data Protection Identity and access vendors Human override
Manage	8.10	An agent estate with no audit trail and drifting output	Agent Gateway Microsoft Agent 365 Security Coverage Agent liability and insurance



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