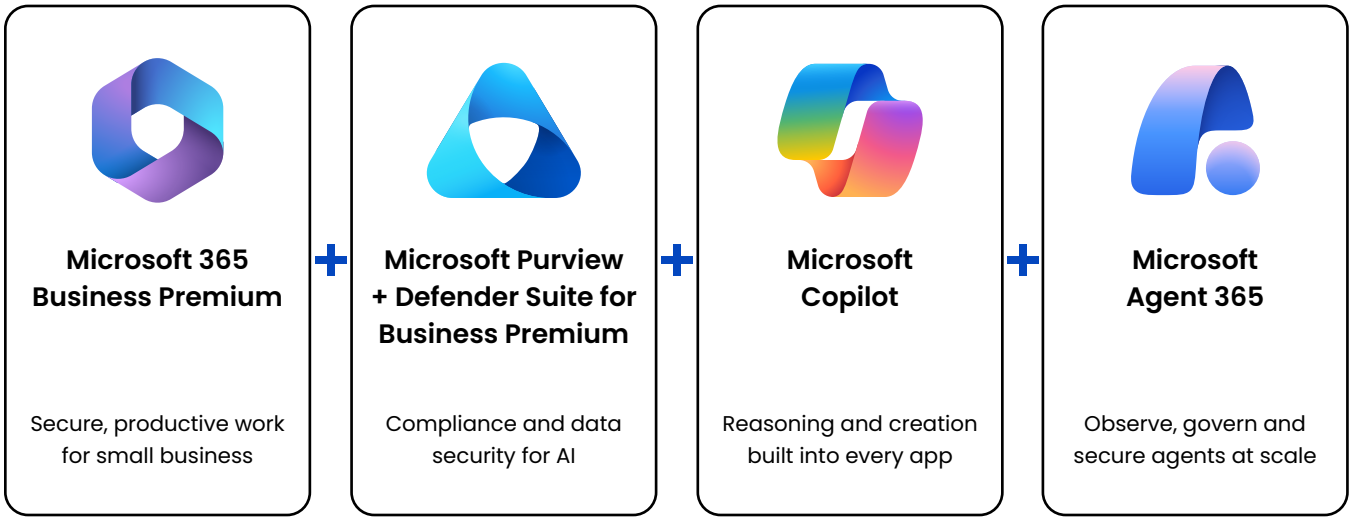
The Managed Intelligence Stack for SMBs

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SMB AI Success Stack



The fastest path to AI, ready for SMB customers.

The Managed Intelligence Stack for SMBs represents the ideal journey for partners helping customers adopt AI securely and strategically. Before businesses begin deploying and governing AI agents at scale, they first need a secure productivity foundation. From there, partners can add governance, security and operational controls as AI adoption matures.

The framework below outlines a Good, Better, Best progression that helps partners build a repeatable pathway from secure productivity to governed, enterprise-grade AI operations.

Good

Microsoft 365 Business Premium with Copilot

Microsoft 365 Business Premium is the optimal choice for most SMBs. It includes everything in Microsoft 365 Business Standard plus additional capabilities to help protect and manage devices and secure identities. It also provides some data security and governance to control sensitive information across emails and files, with Purview providing additional support.

This is great for companies with remote and hybrid workforces that need to manage devices in the cloud or support compliance requirements such as HIPAA, GDPR and CMMC. It also delivers strong value compared to purchasing individual security and management solutions separately.

When paired with Microsoft Copilot, businesses gain secure, AI-powered assistance embedded directly into the Microsoft applications employees already use every day. Customers can consolidate information, automate routine work, improve productivity and gain faster access to insights without leaving familiar Microsoft 365 experiences. They can also begin building custom chatbots and agents through
Copilot Studio.

Microsoft 365 Business Premium with Copilot provides a secure starting point, but as AI adoption grows, companies need greater observability, governance and control over agents, data and AI usage across the business.



Better

Purview Suite and Agent 365 for Microsoft 365 Business Premium with Copilot

Once companies have established a secure, AI-ready productivity foundation, they can begin deploying agentic solutions that streamline customer workflows and automate business processes.

Microsoft Purview Suite for Microsoft 365 Business Premium helps companies discover, classify, protect, govern and monitor sensitive data across Microsoft 365 environments. As an add-on to Business Premium, it strengthens data security, governance, compliance and AI-readiness by helping customers understand what information they have, where it exists and how it should be protected.

As employees begin creating and using autonomous agents, MSPs need a way to maintain visibility and control across the growing AI ecosystem.

Microsoft Agent 365 provides oversight for AI agents deployed throughout a company, giving Business Premium customers the governance foundation they do not have today. IT and security teams can observe, govern and secure agent usage at scale through capabilities such as:

- Agent inventory management
- Usage monitoring and visibility
- Lifecycle management (including activation, suspension and retirement)
- Conditional access controls
- Governance and compliance oversight

Together, Purview Suite and Agent 365 help businesses move beyond AI experimentation and establish the governance foundation needed for long-term AI adoption.

Businesses now have stronger governance and control, but as agent adoption accelerates, they also need broader security protections across identities, apps, cloud services, devices and AI interactions.



Best

Defender Suite and Purview Suite plus Agent 365 for Microsoft 365 Business Premium with Copilot

Agent 365 pairs naturally with the Defender Suite and Purview Suite add-ons, helping strengthen both governance and security as AI adoption expands.

Microsoft Defender and Purview Suites for Microsoft 365 Business Premium bring together the full power of Microsoft's security and compliance platforms, extending protections to agent interactions as well as traditional users, devices and workloads.

Where Purview strengthens data security, governance, compliance and information protection, Defender provides advanced security capabilities designed to help detect and respond to threats across identities, applications, cloud environments, email and devices. This includes visibility into emerging risks such as shadow AI (the use of unpermitted AI tools).

Whether companies are building agents in Copilot Studio, Microsoft Foundry or approved third-party platforms, it is critical that employees use AI tools that align with security, compliance and governance requirements.

Together, Defender Suite, Purview Suite and Agent 365 help MSPs:

- Enforce data loss prevention policies
- Protect sensitive information
- Strengthen security across customer environments
- Govern AI usage at scale
- Support secure growth of AI and agent adoption

This represents the full Managed Intelligence Stack for SMBs: a secure productivity foundation, governed AI ecosystem and comprehensive security posture designed to support long-term AI maturity.



The Managed Intelligence Stack for SMBs Is Available in the Pax8 Marketplace

Get Microsoft 365 Business Premium with Copilot

Get Microsoft Defender and Purview Suites for Microsoft 365 Business Premium

Get Microsoft Agent 365

Not a Pax8 partner yet? Get started.

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