The Pax8 and Microsoft Playbook

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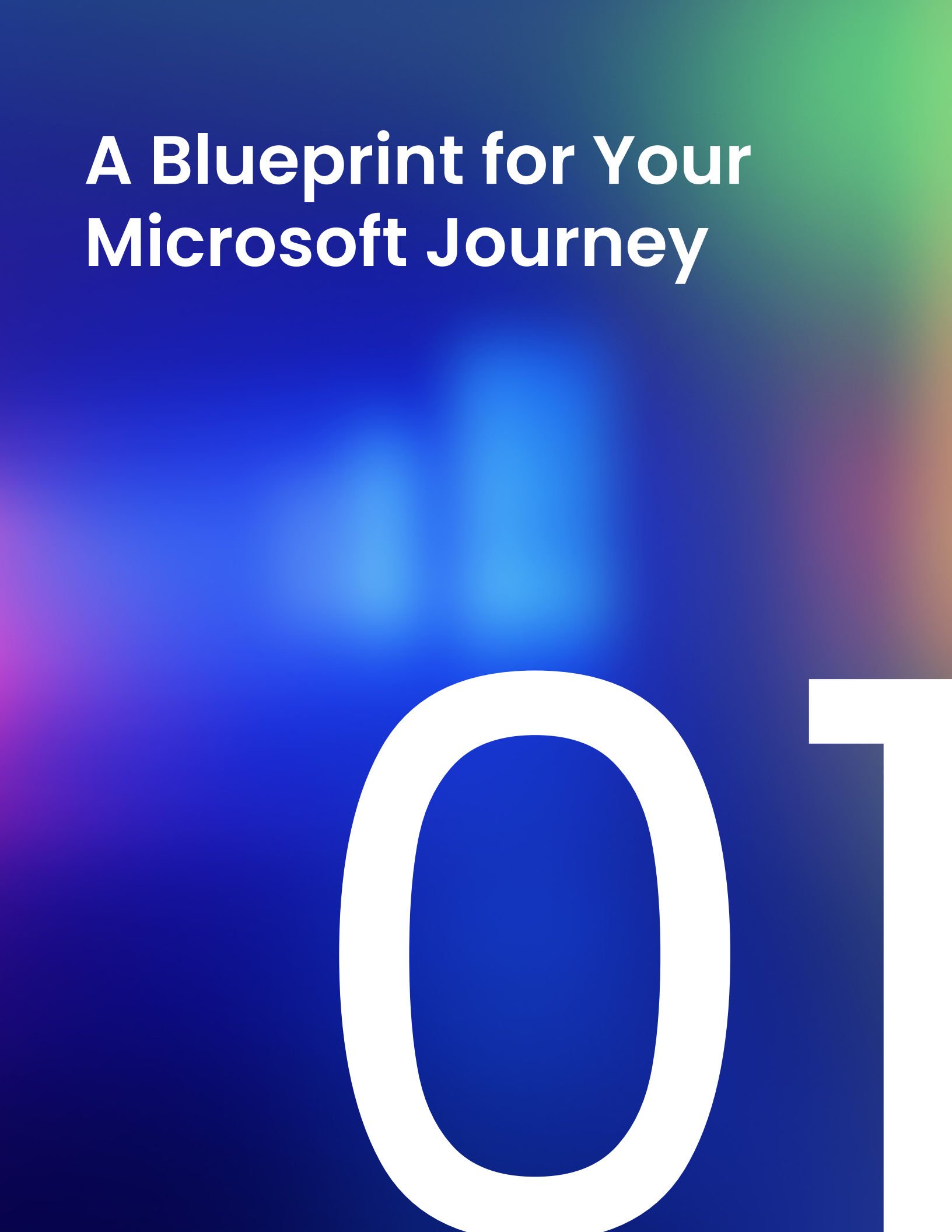
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A Blueprint for Your Microsoft Journey



Microsoft and the Shifting Landscape of Modern Work

Artificial intelligence is reshaping how businesses operate, collaborate and grow. As organizations look for practical ways to adopt AI, they need a secure, standardized technology foundation that allows productivity, security, data, infrastructure and AI to work together.

The urgency is clear. According to Microsoft's 2026 Work Trend Index:

58%
of AI users report producing work they couldn't have completed a year ago

65%
worry about falling behind if they don't adopt AI quickly

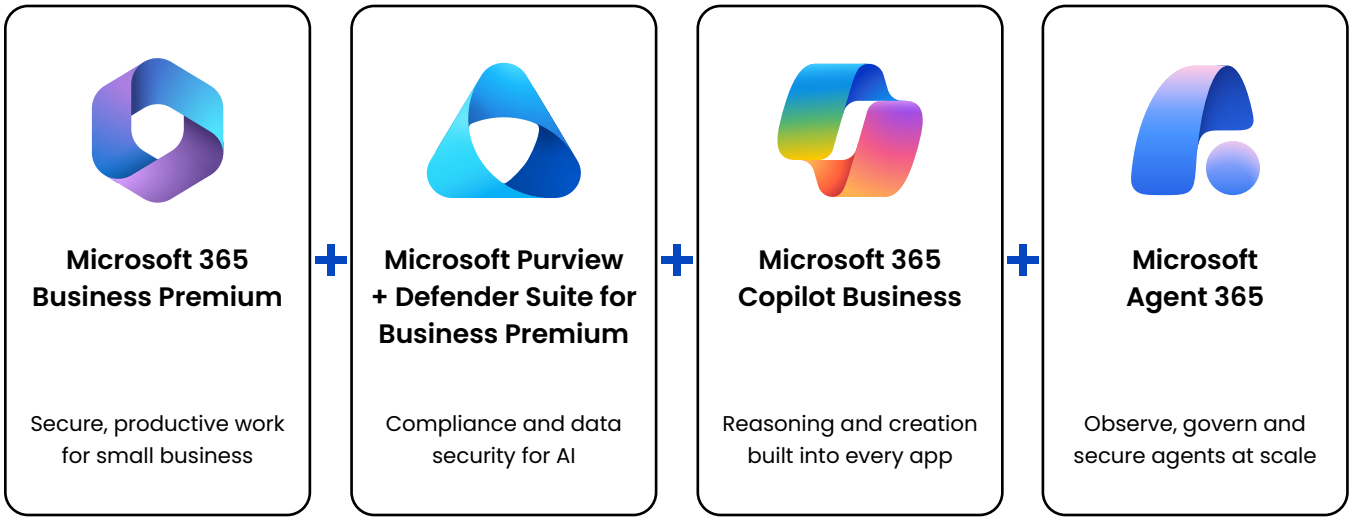
But many companies are struggling to keep pace, with Microsoft finding that factors such as culture, manager support and workplace development drive more than twice the AI impact of individual effort alone. As businesses rethink how work gets done, security remains foundational. Microsoft reports that AI-driven phishing attacks are now three times more effective than traditional phishing campaigns, highlighting the importance of building AI adoption on a secure foundation.

Microsoft is uniquely positioned to help organizations achieve this outcome through its connected OneCloud ecosystem. By bringing together Microsoft 365, Azure, Security, Business Applications, Data and AI solutions, Microsoft provides businesses with a unified platform that supports modern work while creating a clear path to AI adoption.

For small and midsize businesses, as well as enterprise organizations, AI success starts with a strong foundation. The MSP AI Stack is built on Microsoft 365 Business Premium, Microsoft's most complete productivity, security and device management offering. Business Premium provides the secure baseline, bringing together identity, device management, collaboration and core security capabilities in a single solution. From that foundation, Copilot is the natural next addition, helping organizations introduce AI into everyday work. As customers advance in their AI journey, Microsoft Defender, Microsoft Purview and Agent 365 extend the stack with enhanced security, governance, compliance and agent management capabilities. Together, these solutions help organizations adopt AI more securely, effectively and at scale.



The Managed Intelligence Stack for SMBs



The fastest path to AI, ready for SMB customers.

This shift is also creating new opportunities for managed service providers. Traditional MSPs focused on managing technology environments, while modern MSPs help customers modernize operations through cloud, security, productivity and business transformation. The next evolution is the Managed Intelligence Provider (MIP): a partner that helps customers adopt AI, operationalize intelligence and achieve measurable business outcomes.

As organizations look for guidance through this transition, Microsoft AI Business Solutions provide the tools needed to improve productivity, enhance decision-making, streamline operations and create an AI-enabled workforce.

How Pax8 Enhances Your Microsoft Experience

02

Whether you're new to Microsoft or looking to expand an existing practice, Pax8 helps simplify the journey and accelerate growth across the Microsoft ecosystem.

Microsoft Experts

Access Microsoft-focused specialists who can help you earn more margins, optimize incentives and rebates, identify growth opportunities and stay current with evolving Microsoft products, programs and partner requirements.

One Marketplace

Manage your Microsoft cloud stack from a single platform with consolidated billing, automated provisioning, simplified license management and integrations with your preferred PSA and business management tools.

Dedicated Support

Work with a Microsoft Solutions Consultant who understands your business and can help guide your Microsoft strategy. Behind every engagement is a team of experienced engineers who can help resolve technical issues quickly and reduce the need for escalations.

Professional Services

Extend your capabilities with expert assistance for Azure deployments, Copilot readiness assessments, migrations, remote work enablement, security initiatives and other Microsoft-focused projects.

Academy

Develop technical, sales and business expertise through Pax8 Academy. Access Microsoft-focused courses, certifications, skilling opportunities and enablement resources designed to help your team stay ahead of developments in AI, cloud, security and business applications.

Events and Hands-On Learning

Accelerate growth through Microsoft Bootcamps, training events, workshops, webinars and community-led learning opportunities designed to help partners deepen their Microsoft expertise and build new solution practices.

New to Pax8?

Start earning and growing from day one.

With Pax8, partners can begin growing immediately through streamlined Microsoft CSP migration support, a dedicated Microsoft Solutions Consultant, Academy skilling opportunities, funding programs and a global community of more than 47,000 partners.

Microsoft AI Business Solutions

03

Microsoft AI Business Solutions brings together Modern Work and Business Applications to help organizations grow, streamline operations and achieve measurable AI-driven outcomes. By embedding AI into everyday workflows, it helps teams work more efficiently, improve customer experiences and make better decisions.

Microsoft 365 Business Premium

Designed for the needs of small businesses and larger organizations, Microsoft 365 Business Premium offers a single, integrated technology solution that combines the industry-leading productivity apps users know and love with built-in security, identity and management capabilities. As the secure productivity foundation of the Microsoft ecosystem, it creates the starting point for future security, infrastructure and AI opportunities built on a Microsoft 365 Business Premium stack.

Build the Secure Productivity Baseline

Microsoft 365 Business Premium brings productivity together with identity protection, device management and data governance, creating a secure foundation for responsible AI adoption and establishing the anchor of The Managed Intelligence Stack for SMBs:

- Microsoft 365 Business Premium
- Microsoft Copilot
- Microsoft Purview and Defender
- Microsoft Agent 365

Give Your Customers Secure Intelligence

Microsoft delivers secure, work-ready AI built directly into the Microsoft 365 environments businesses already use every day. Rather than introducing another disconnected tool, Microsoft Copilot extends the value of the Microsoft ecosystem while maintaining security, identity, privacy and compliance controls.

Pax8 complements that foundation with the support, enablement and expertise MSPs need to confidently adopt AI as Customer Zero and begin their journey toward becoming an MIP. AI adoption starts with a trusted platform, and Pax8 helps partners turn AI curiosity into meaningful business opportunities.

Why Move to Microsoft 365 Business Premium?

For customers still using Office 365, Microsoft 365 Business Basic or Microsoft 365 Business Standard, Business Premium provides a stronger foundation for modern work, security and AI readiness.

Business Premium helps organizations:

- Consolidate productivity, security, identity and device management into a single platform.
- Establish the foundation required for Copilot adoption.
- Reduce reliance on disconnected point solutions.
- Improve governance and protection of business data.
- Support the Managed Intelligence Stack for SMBs.

Business Premium with Copilot

is our most complete offering, integrating advanced security and device management. Each of these plans serves as a foundation for Copilot, allowing you to add its AI capabilities when you're ready.

Cloud services included but not limited to



Teams Exchange OneDrive SharePoint Bookings

Desktop, web and mobile apps included but not limited to



Copilot Outlook Word Excel PowerPoint Loop Clipchamp

Comprehensive security



Intune Microsoft Purview Info Protection Entra ID Azure Virtual Desktop Microsoft Defender

Customer Spotlight

Migrating to Microsoft 365 in Two Weeks Flat

A healthcare organization needed to modernize its technology environment and migrate to Microsoft 365 while minimizing disruption to employees and day-to-day operations. Working with Pax8, the organization successfully completed its migration in just two weeks, gaining access to modern collaboration, productivity and security capabilities faster than expected.

More Resources

Attend:
Modern Workplace Bootcamp

Download:
CSP Renewals Toolkit

Read:
Migrating to Microsoft 365 in Two Weeks Flat

Stay on Top of Microsoft 365 Renewals with Pax8

Renewal cycles often take three or more months to complete, making planning and support essential throughout the process. Partners must balance multiple priorities at once: identifying and upselling high-propensity customers, ensuring on-time renewals across their entire customer base and helping customers navigate upcoming annual and monthly pricing changes.

Pax8 provides the resources, expertise and guidance needed to simplify renewal planning while helping partners uncover opportunities to expand customer adoption across the Microsoft ecosystem.

Turn Renewals into Full Stack Growth

Renewals represent more than a licensing event. They create opportunities to identify customers who are ready for conversations around AI, security, modernization and Microsoft platform expansion.

Throughout the year, partners can identify targeted opportunities using tools such as:

- CloudAscent
- CSP Renewals Toolkit
- Microsoft 365 Renewals Guide
- Partner Upsell Planner and Proposal (PUPP)
- AI Business and Security Partner Experience (ASPX)

These tools help partners identify high-potential customers, prioritize engagement efforts and build more strategic business conversations. Additional guidance, training and Microsoft-focused resources are available through the Microsoft Hub in Pax8 Academy.

Microsoft Copilot

AI adoption can feel complex without a trusted path forward, especially for businesses that need practical, secure solutions and MSPs that are expected to lead customers through change.

Microsoft Copilot helps partners guide customers from AI curiosity to real business outcomes by identifying high-value workflow opportunities, improving productivity, automating routine tasks and building outcome-driven plans on Microsoft AI Business Solutions. The result is a clearer path to AI transformation supported by secure technology, repeatable service motions and a partner-led approach to adoption.

Built for the Way SMBs Already Work

Microsoft Copilot brings AI directly into Microsoft 365 applications, data and workflows employees already use. By building AI into familiar tools and experiences, organizations can drive adoption in ways that feel practical, approachable and less disruptive to everyday work.

Secure, Business-Ready AI

Unlike standalone or consumer-focused AI tools, Copilot is built for business and grounded in your organization's work data across emails, documents, meetings, chats and calendars. It follows existing security, privacy and compliance settings, only surfacing information users already have permission to access. As companies expand AI adoption, Copilot helps protect sensitive information, reduce oversharing risks and support responsible AI use through built-in governance and data protection capabilities.

A Scalable AI Opportunity for MSPs

Copilot is often the first AI solution customers adopt, making it a natural entry point for MSPs to begin guiding AI conversations. Beyond immediate productivity gains, Copilot helps partners introduce broader discussions around process transformation, governance, security and business outcomes.

This approach aligns closely with the Managed Intelligence Provider (MIP) model, where partners evolve from managing technology to helping customers operationalize intelligence across their organizations. By creating repeatable service offerings around AI readiness, deployment, adoption, optimization and governance, MSPs can establish new recurring revenue streams while delivering measurable value.

With Pax8 enablement, Marketplace resources and the MIP framework, partners can confidently build a structured AI practice that grows alongside their customers. As AI adoption expands, Copilot often becomes the foundation for more advanced opportunities involving agents, automation and intelligent workflows.

Beyond Copilot: Expanding the AI Opportunity

As AI adoption continues to evolve, the focus often shifts from individual productivity to workflow automation and agent-powered execution. Rather than assisting with single tasks, AI can begin coordinating work across multiple systems, tools and business processes.

Copilot Cowork represents this next phase, enabling organizations to delegate multi-step work to AI agents that can plan, execute and deliver outcomes while keeping users in control. Its token-based consumption model also provides flexibility, allowing organizations to scale usage based on workload and business value rather than traditional per-user licensing.

Solutions such as Copilot Studio, Autopilot and Agent 365 help organizations build, manage and govern these increasingly sophisticated AI environments. Together, they provide the tools needed to move from AI-assisted work toward agent-powered business operations while maintaining visibility, governance and control.

The Pax8 Advantage

Build Agents with Copilot Studio and Agent Store

Copilot Studio gives organizations the ability to create and extend AI experiences for specific business scenarios. Partners can build standalone agents, extend Microsoft Copilot experiences and develop solutions tailored to customer workflows.

As agent adoption grows, Copilot Studio and Agent Store provide a foundation for creating differentiated AI solutions that align with customer needs.

AI Innovation with Pax8

Pax8 continues to invest in AI enablement, education and partner development programs to help MSPs build capabilities across Microsoft's AI ecosystem. Through training, guided growth opportunities and practical adoption resources, partners can accelerate their AI journey while helping customers realize value faster.

More Resources

Attend:
Copilot Bootcamp

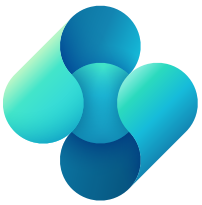
Read:
Copilot LeafTech Case Study Customer Zero: An MSP Takes on AI First

Download:
Copilot Sales Kit

Cowork Setup Guide

Train:
Copilot Studio Agent Building Hands-On Labs

Business Applications



Business Central



Copilot Studio



Power Platform

Scale Business Processes with Agent-Powered Finance in Business Central

Microsoft Dynamics 365 Business Central helps businesses replace disconnected finance systems, manual processes and spreadsheets with a unified business management platform that goes beyond basic bookkeeping.

By bringing together finance, operations, sales and inventory management in a single solution, Business Central provides real-time visibility into business performance, automates routine tasks and helps teams make faster, more informed decisions. With native Microsoft 365 integration and built-in AI capabilities through Copilot, Business Central enables growing businesses to improve efficiency, reduce manual work and scale with confidence.

Benefits of Adding Microsoft Dynamics 365 Business Central to Your MSP Business

- Earn higher margins through cloud ERP, Microsoft incentives and partner rebates.
- Reduce churn by becoming a strategic business advisor, not just an IT provider.
- Drive Azure consumption growth through storage, compute and AI workloads.

106%

for organizations using Microsoft Dynamics 365 ERP over a three-year period.*

Source: The Total Economic Impact™ of Microsoft Dynamics 365 ERP, Forrester Consulting and Microsoft, 2024.

More Resources

Learn:
Did You Say AI-Powered Accounting? On-demand course in Pax8 Academy

Get Certified:
Browse Microsoft Dynamics 365 Certification Training in Pax8 Academy

Level Up:
Business Central Sales Toolkit

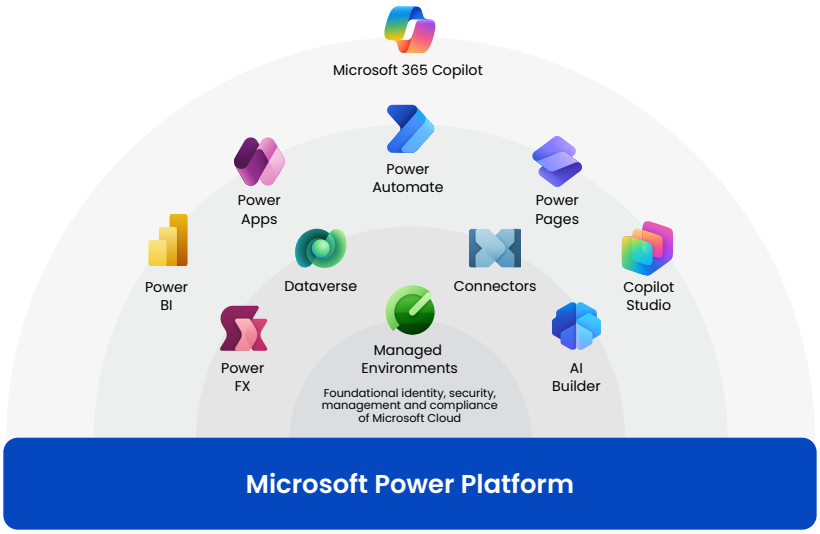
Create a Competitive Edge with AI in Copilot Studio and Power Platform

Microsoft Power Platform is an intuitive, collaborative and extensible low-code platform that helps organizations quickly build efficient, flexible solutions. Combining Power Apps, Power Automate, Power BI, Power Pages and Copilot Studio, Power Platform gives MSPs the ability to simplify processes and deliver measurable business outcomes.

Microsoft Copilot Studio is a cloud-based service used to create AI agents for a variety of business scenarios. With Copilot Studio, organizations can:

- Build standalone AI agents
- Extend Microsoft Copilot
- Develop autonomous agents that use AI and actions to perform long-running operations

These capabilities help partners create tailored AI experiences that align with customer workflows and business objectives



More Resources

Train:

Copilot Studio Agent Building Hands-On Labs

Microsoft Cloud and AI Platforms

04

Azure

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

For customers storing data in on-premises or legacy systems, looking for better ways to analyze cloud application data or preparing for AI adoption, Azure provides a path to modernization while creating a single source of truth for mission-critical business data. These projects can also create new revenue opportunities for MSPs.

Azure's breadth and complexity can be challenging to navigate at times, but Pax8 helps simplify Azure adoption, management and growth.

The Pax8 Marketplace simplifies Azure management through:

- **Predictive cost analytics** to help identify opportunities for optimization and cost reduction.
- **Threshold management** that alerts partners as customers approach customized consumption thresholds.
- **Detailed billing** that provides visibility into granular customer consumption and spending.

Modernize Without Moving

Not every customer is ready for a full migration. Azure Arc-enabled SQL allows businesses to gain cloud benefits while continuing to operate existing on-premises SQL environments.

With Azure Arc-enabled SQL, partners can help customers:

- Enhance security through SQL Extended Security Updates.
- Replace manual monthly SPLA reporting with hourly consumption-based billing.
- Manage SQL workloads across on-premises, hybrid and multi-cloud environments.
- Benefit from CSP margins, incentives and Azure program benefits while remaining on-prem.
- Create a natural pathway toward future Azure migrations and advanced Azure services.

Adopt and Unlock the Power of Azure Through Pax8

Pax8 provides a structured path for partners to build, sell and grow Azure services.

Azure Kickstart

For partners new to Azure, Azure Kickstart provides a guided education path through virtual instructor-led sessions focused on Azure fundamentals and post-deployment management.

The program helps partners develop the technical foundation and confidence needed to move beyond Microsoft 365 license management and begin delivering Azure-based customer outcomes.

Build the foundation for your first Azure project and long-term Azure management. Sessions begin quarterly.

Azure Pinnacle

Azure Pinnacle builds on that foundation through a six-month program in which Pax8 Azure experts help partners build pipeline, develop qualified opportunities and close new business.

Throughout the engagement, Pax8 will help partners:

- Evaluate their Azure maturity
- Identify opportunities within their existing customer base
- Target the right Microsoft AI Cloud Partner Program (MAICPP) benefits and incentives
- Access Pax8 Professional Services for deployment support

With Azure Pinnacle, partners move from learning Azure to actively growing an Azure practice. By the end of the six-month engagement, one Azure opportunity is fully qualified and delivered through Professional Services, while two additional opportunities are qualified and ready to move forward.

Together, Azure Kickstart and Azure Pinnacle create a structured path from education to selling, deployment and long-term Azure growth.

Datacenter Optimization (DCO) Program

Partners with mature Azure practices, growth objectives or upcoming datacenter migration projects should explore Microsoft's Datacenter Optimization (DCO) program through Pax8. The program is designed to help reduce cost and risk while accelerating customer migration projects.

Participants that commit to an Azure revenue target gain access to:

- Significant rebates based on achieving their Azure growth milestones.
- Engineering escalation support.
- Azure deal support and review.
- Microsoft planning, alignment and migration tools.

If you're interested in growing your Azure practice through the DCO or Azure Pinnacle program, reach out to your Pax8 account manager to learn more and determine eligibility.

Explore Pax8 and Microsoft Azure

Going Further with Virtual Desktops, Unified Data and Built-In AI

Azure Virtual Desktop (AVD)

Azure Virtual Desktop (AVD) enables centralized management and security of users' desktops by creating Windows 10/11 virtual desktops in Azure. This allows end users to work remotely through a secure connection while storing data in the cloud rather than on local devices. Because Microsoft 365 already includes the required user licensing, only the computing resources need to be provisioned and paid for in Azure.

By separating the desktop environment from the end user's device, AVD helps reduce the risk of confidential information being stored on personal devices while providing a secure and consistent user experience from virtually anywhere.

Partner Spotlight:

Kite Technology deploys 250+ AVD instances for their client, enabled through Pax8 Azure Kickstart

Microsoft Fabric

Microsoft Fabric helps data analysts bring business data together in a unified platform, making it easier to access insights, automate reporting, and prepare for AI adoption.

Instead of managing multiple data tools and disconnected systems, organizations can centralize data and gain a more complete view of their business. With built-in AI capabilities and integration with solutions such as Power BI and Copilot, Fabric helps organizations create a trusted data foundation that supports more informed decision-making. By connecting information across systems, Fabric enables AI solutions and agents to work from a shared understanding of the business, helping ensure responses, recommendations, and actions are grounded in organizational data.

Compare Microsoft Fabric supports SMB use cases and more advanced enterprise requirements in our blog.

Microsoft Foundry

Microsoft Foundry helps organizations move beyond off-the-shelf AI solutions by enabling the creation of custom AI agents and applications tailored to specific business requirements.

Built on Azure, Foundry provides access to thousands of top AI models (including ChatGPT and Claude)with pre-built AI services that support advanced agent building scenarios such as document processing, speech and language recognition, content analysis and face and visual services. Together, these services allow MSPs to build sophisticated agents that can reason over massive amounts of data. Foundry IQ grounds agents in business context so AI can reason over organizational content rather than relying solely on the underlying language model. At the same time, organizations maintain control of Foundry's data access while prompts, outputs and customer data used within Microsoft Foundry are not shared with AI model providers, nor are they used to improve Microsoft or third-party services without explicit permission. By connecting AI agents to business-specific data and workflows, MSPs can help customers automate complex processes, improve decision-making and create differentiated business experiences.

Partner Spotlight:

Razor Tech deploys AI Bot in Microsoft Foundry to support 24/7 emergency services

More Resources

Azure Bootcamp
Our two-day Azure Bootcamp helps partners navigate the complexities of adopting and selling Azure.

Attend

Azure Labs
Get technical, hands-on experience through guided virtual trainings.

Start your learning journey

Azure Sales Guide
Teach your sales teams how to identify and close Azure opportunities

Get the guide

Microsoft Security

05

Why Data Security and Governance Matter to Your Clients

As organizations adopt AI, data and cloud technologies, security and governance have become foundational business requirements. Security is no longer just an IT concern. It impacts business continuity, compliance, customer trust and the ability to adopt emerging technologies with confidence.

Security for SMBs

For organizations with fewer than 300 users, Microsoft 365 Business Premium combined with the Purview and Defender Suites provides a compelling path to advanced security and governance capabilities.

This approach gives SMBs access to many of the same advanced security outcomes available in larger enterprise environments while maintaining a solution designed for their size, budget and operational needs. Together, Purview and Defender extend Business Premium with enhanced governance, compliance, data protection and threat protection capabilities, helping establish the secure foundation required for modern work and AI adoption.

Purview Suite for Microsoft 365 Business Premium

Microsoft Purview Suite for Microsoft 365 Business Premium helps SMB customers discover, classify, protect, govern and monitor sensitive data across Microsoft 365 environments. As an add-on to Business Premium, Purview strengthens data security, compliance, governance and AI-readiness by helping organizations understand their data and apply protections before information is shared, accessed, or used by AI solutions.

Rising Threat Levels

Cyber risk continues to grow in both scale and sophistication. Threat actors are becoming better organized, more persistent and increasingly successful at targeting identities, users and business data. As organizations adopt cloud services, AI and connected work environments, they also expand the number of potential entry points attackers can exploit. For businesses of all sizes, security is no longer simply about preventing attacks. It's about reducing risk, improving resilience and maintaining trust in an increasingly complex digital landscape.



1500+
threat actors tracked by Microsoft

$4.5M
average cost of a data breach

67%
of SMBs experienced a security issue or data theft incident

Financial Impact

The consequences of a security incident extend far beyond recovery costs. A breach can impact productivity, disrupt operations, damage customer confidence and create regulatory and compliance challenges. Small and midsize businesses are often particularly vulnerable because they have fewer resources to recover from major incidents. As a result, cybersecurity has evolved from an IT concern into a broader business priority that affects growth, reputation and long-term success.

Regulatory Pressure

As privacy, security and compliance requirements continue to evolve, organizations face increasing pressure to demonstrate strong governance practices.

Regulations and frameworks such as NIS2 and other regional requirements reinforce the need for visibility into data, consistent security controls and effective governance policies.

Business Confidence

Strong security and governance practices help businesses do more than reduce risk. They help build confidence with customers, employees and partners.

As organizations prepare for AI adoption, trust becomes an increasingly important competitive advantage. Businesses must understand what data they have, who has access to it and how it is being used.

Microsoft 365 E3, E5 and Business Security Expansion

Microsoft security capabilities can be delivered through different licensing paths depending on the size, complexity and security requirements of the customer.

Microsoft 365 E3

Microsoft 365 E3 provides a foundation of productivity, identity and security capabilities. However, as security, compliance, governance and AI-readiness requirements continue to evolve, many organizations require capabilities beyond what is included in E3 alone.

Microsoft 365 E5

For organizations with more than 300 users, Microsoft 365 E5 expands security, compliance, identity and threat protection capabilities with a more comprehensive security posture.

E5 is a natural progression for organizations looking to strengthen protection across users, devices, identities, data and workloads while supporting more advanced governance and compliance requirements.

Microsoft 365 E7

Microsoft 365 E7 extends the E5 foundation by bringing together advanced security, compliance, identity, AI and agent management capabilities into a single solution.

Built for organizations moving from AI experimentation to broader adoption, E7 combines Microsoft 365 E5, Copilot, the Microsoft Entra Suite and Agent 365 to help organizations securely deploy, manage and govern AI-powered workflows and agents. By bringing intelligence and trust together, E7 helps organizations strengthen governance, maintain visibility and establish the controls needed to scale AI across the business.

Key Purview Capabilities

Feature set	What it does	Why it matters
Information Protection	Helps identify, classify, label and protect sensitive data across files, emails, meetings and Microsoft 365 locations.	Provides a consistent way to understand what data exists and apply protections before information is shared or used by AI tools.
Sensitivity Labels	Applies classifications such as Public, General, Confidential, or Highly Confidential to content, with optional encryption, access controls and content markings.	Labels remain attached to the data, helping maintain protection even as files move across users, devices and collaboration environments.
Data Loss Prevention	Uses policies to detect sensitive information and prevent accidental or unauthorized sharing through alerts, policy tips, justification prompts, or blocking actions.	Helps reduce the risk of customer, employee, financial, or regulated information leaving the organization inappropriately.
Data Lifecycle Management	Automates retention and deletion policies for emails, files and business content based on organizational or regulatory requirements.	Reduces data clutter, lowers risk and helps organizations retain the right information for the required amount of time.
Insider Risk Management	Uses privacy-focused signals to identify potentially risky activity, such as unusual access, sharing, or data movement patterns.	Helps organizations identify potential data leakage or misuse before it becomes a larger incident.
Communication Compliance	Helps detect and review risky or inappropriate communications through policy-based workflows.	Supports organizations that need monitoring capabilities for compliance, HR, or internal policy requirements.

Feature set	What it does	Why it matters
eDiscovery	Provides guided workflows to search, identify, preserve, collect and review information related to legal or internal investigations.	Helps organizations respond to legal, HR and compliance requests without relying on manual searches.
Audit	Captures user and administrator activity across Microsoft 365.	Improves visibility for troubleshooting, investigations, compliance reviews and incident response.
Compliance Manager	Provides a centralized view of compliance posture, recommended actions, control mapping and improvement opportunities.	Helps organizations understand compliance gaps, prioritize work and improve readiness.
Privileged Access Management	Helps control, monitor and approve elevated administrative access.	Reduces standing privileged access and supports least-privilege security practices.

Defender Suite for Microsoft 365 Business Premium

Defender Suite for Microsoft 365 Business Premium extends Business Premium with advanced, AI-powered protection across email, endpoints, identities, cloud applications, IoT devices and identity access controls.

The suite is designed for organizations that need stronger prevention, detection, investigation and response capabilities without introducing disconnected security platforms.

Feature set	Short description	Why it matters
Defender for Office 365 Plan 2	Provides advanced protection for email and collaboration tools, including protection against phishing, malware, malicious links, unsafe attachments and business email compromise.	Helps reduce one of the most common SMB attack paths: email, Teams and collaboration-based threats.
Defender for Cloud Apps	Provides visibility and control across cloud applications, SaaS usage, shadow IT, application risk and risky cloud activity.	Helps organizations understand which applications are being used, reduce exposure from unsanctioned services and better govern cloud and AI application adoption.
Defender for Identity	Monitors identity signals and on-premises Active Directory activity to identify suspicious behavior, credential misuse, lateral movement and identity-based attacks.	Helps protect identities and credentials, which are often the initial target in larger attacks.
Defender for Endpoint Plan 2	Provides advanced endpoint protection, detection and response, vulnerability management, investigation and threat-hunting capabilities.	Helps organizations reduce device risk and respond to threats more quickly through continuous visibility.
Defender for IoT	Provides visibility and threat detection for connected IoT devices and assets.	Helps reduce blind spots created by devices such as printers, cameras, conference room systems and other connected technologies.
Entra ID Plan 2	Adds advanced identity protection and governance capabilities, including risk-based access controls, identity risk detection, privileged identity management and access reviews.	Strengthens Zero Trust strategies by helping ensure users have the appropriate level of access at the appropriate time.

Bundled Protection

The combined Purview and Defender Suite for Microsoft 365 Business Premium includes all of the capabilities outlined above, helping SMB customers extend Business Premium with advanced data governance, compliance, identity protection and threat protection capabilities.

Pax8 Support and Professional Services

Pax8 Professional Services can help partners deploy and configure Purview solutions for eligible customers.

Available to partners purchasing a minimum of 15 seats of:

- Microsoft Purview Suite for Microsoft 365 Business Premium
- Microsoft Purview Suite add-on
- Microsoft Defender and Purview Suites for Microsoft 365 Business Premium

Purview Data Governance Implementation

Includes:

- Review of Data Lifecycle Management
- Creation of a publishing policy for sensitivity labels
- Creation of a baseline data labeling scheme (five labels)
- Creation of advanced Data Loss Prevention policies from Microsoft templates (three policies)
- Creation of baseline Data Loss Prevention policies from Microsoft templates (two policies

More Resources

Attend
Microsoft Security Bootcamp

Downlaod
Data Security and Governance: Sales Talk Track for MSPs

Start Your Learning Journey:
Microsoft Hands-On Labs

Agent 365

Build Agents with Copilot Studio. Scale AI with Copilot. Govern AI with Agent 365.

Agent 365 helps organizations move from isolated AI experiments to an operational AI strategy by providing the visibility, governance and security controls needed to manage AI agents as trusted business assets.

What Is Agent 365?

Microsoft Agent 365 is a centralized management and governance platform that enables organizations to observe, govern and secure AI agents across the Microsoft ecosystem.

As businesses deploy more AI agents, Agent 365 provides the visibility, controls and safeguards needed to help ensure agents remain compliant, accountable and aligned with business objectives.

Think of Agent 365 as the equivalent of what Microsoft Intune does for devices or what Microsoft Entra ID does for identities.

Agent 365 gives IT and security teams a unified way to manage AI agents regardless of where they were created, who owns them, or what data they access.

Why Agent 365 Matters

Many organizations are rapidly adopting AI agents, but few have a strategy for managing them at scale.

As agent adoption grows, businesses face challenges such as:

- Unknown or unauthorized AI agents
- Agent sprawl across departments
- Excessive data access and oversharing risks
- Compliance and audit concerns
- Lack of ownership and accountability
- Difficulty monitoring agent activity and health

Agent 365 addresses these challenges by providing:

Observability

Discover and monitor AI agents through a centralized registry.

Governance

Apply lifecycle management, ownership controls and policy-driven administration across AI deployments.

Security

Extend Microsoft Entra, Microsoft Defender and Microsoft Purview protections to AI agents.

Compliance

Apply security, retention and data governance policies consistently across AI environments.

Scalability

Move from isolated AI experimentation to repeatable, organization-wide AI adoption.

Building a Governed AI Foundation

Organizations can use Copilot Studio to build agents, Copilot to scale AI usage across the business and Agent 365 to establish the governance model needed to manage AI responsibly.

Together, these solutions help organizations move beyond individual AI projects toward a more structured and secure AI operating model.

Professional Services for Microsoft

06

For Microsoft projects that are too time-consuming or complex to tackle alone, partners can leverage Pax8 Professional Services, the technical enablement arm of Pax8. Pax8 Professional Services helps partners grow their Microsoft businesses, increase operational efficiency and reduce risk through the expert delivery of Microsoft deployment, migration and implementation services.

Designed to extend partner capacity on demand, Professional Services provides the scale, expertise and experience needed to support a wide range of Microsoft projects.

Azure

Pax8 Professional Services can assist with Azure deployments, Azure Virtual Desktop implementations and data migration projects. Supported by a team of cloud infrastructure architects, partners can leverage Azure to help customers improve data governance, address compliance requirements and modernize their environments.

Available Azure services include:

- Azure consultation and migration assessments
- Azure Virtual Desktop (AVD) implementation
- Server migration (lifting existing infrastructure into Azure)
- Data migration (lifting files, databases and workloads into Azure)
- Environment modernization (building new infrastructure in Azure)
- Funded Azure migrations, where eligible net-new Azure projects may qualify for funding that helps offset Professional Services costs and accelerate adoption

* Service offerings vary by region.

Modern Work

Pax8 Professional Services helps partners deliver Modern Work projects that support collaboration, migration and AI readiness.

Available Modern Work services include:

- Copilot readiness assessments
- Mailbox migrations
- SharePoint migrations
- Tenant-to-tenant migrations
- Modern Work consultations

Security

Pax8 Professional Services helps partners implement and configure Microsoft security solutions that strengthen governance, protection and identity management.

Available security services include:

- Microsoft Purview Data Governance implementation
- Defender for Endpoint deployments
- Defender for Business implementation
- Microsoft 365 identity management

Business Applications (EMEA Only)

Pax8 Professional Services also provides consultant-led Business Applications implementations in EMEA.

Available services include:

- Consultant-led implementation for Microsoft Dynamics 365 Business Central (ERP)
- Consultant-led implementation for Microsoft Dynamics 365 Sales Professional (CRM)

* Service offerings vary by region.

Expand Your Team's Microsoft Expertise

07

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

Pax8 Academy

Fuel your growth at every step of your journey with support from MSP experts. The **Microsoft Hub** in Pax8 Academy serves as a centralized destination for Microsoft-focused training, certifications, hands-on learning and partner enablement resources.

Designed to help MSPs build expertise across Microsoft solutions, the Microsoft Hub provides access to role-based learning paths, certification preparation, AI and Copilot skilling, technical workshops and ongoing education that supports both technical growth and business development.

Partners can explore training paths and build the skills needed to drive up to **2.5x more customer adoption** while expanding their Microsoft practice.

On-Demand Skilling

Build skills on your schedule with on-demand learning content including:

- Sales-focused training
- Technical enablement content
- Certification-focused coursework
- AI and Copilot skilling resources

Certification Preparation

Pax8 Academy offers live and on-demand certification preparation designed to help partners validate expertise across Microsoft's solution areas.

Current Microsoft certification training includes:

- AI-102: Azure AI Engineer
- AI-900: Azure AI Fundamentals
- AZ-104: Azure Administrator
- AZ-305: Azure Solutions Architect
- AZ-500: Azure Security Engineer
- AZ-700: Network Engineer
- AZ-900: Azure Fundamentals
- DP-600: Fabric Analytics Engineer
- DP-900: Azure Data Fundamentals
- GH-300: GitHub Copilot
- MB-800: Business Central Functional Consultant
- MS-102: Microsoft 365 Administrator
- MS-700: Teams Administrator
- PL-300: Power BI Data Analyst
- PL-600: Power Platform Solution Architect
- PL-900: Power Platform Fundamentals
- SC-200: Security Operations Analyst
- SC-300: Identity and Access Administrator
- SC-401: Information Security Administrator
- SC-900: Security, Compliance and Identity Fundamentals

In partnership with Microsoft, Pax8 offers live certification prep courses designed to help you successfully prepare for and pass Microsoft certification exams. Featured courses are available in Academy and provide expert guidance, exam-focused content and interactive learning experiences.

- AB 730: AI Business Professional
- AB 731: AI Transformation Leader

Why Microsoft Certifications Matter

Microsoft certifications do more than validate technical expertise. They also contribute toward a partner's Partner Capability Score, which Microsoft uses when evaluating progress toward a Solutions Partner Designation.

Partners earn points through:

- Skilling
- Performance
- Customer Success

Certification achievement contributes directly to the Skilling component and helps partners accrue points towards Microsoft Solution Partner designations across Microsoft solutions areas

- AI Business Solutions
- Cloud and AI Platforms
- Security

Pax8 Academy also provides access to complimentary Microsoft certification exam vouchers for all partners.

Microsoft Tools and Guidance

The Microsoft Hub provides training and guidance on Microsoft sales, renewal and opportunity-identification tools that help partners discover customer opportunities and build stronger Microsoft practices.

These resources include:

PUPP (Partner Uplift and Proposal Planning)	**ASPX** (AI Business Solutions & Security Partner Experience)	**CLAS** (CloudAscent)
Helps partners evaluate AI and security opportunities, understand profitability, generate customer proposals and support renewal planning.	Provides insights into Copilot usage, adoption, monetization opportunities, AI readiness indicators and customer whitespace opportunities.	Uses Microsoft propensity and intent data to help identify customers most likely to purchase solutions across Copilot, Azure, Security and Business Applications

Together, these tools help partners prioritize customer engagement, focus sales efforts and identify the highest converting opportunities across the Microsoft portfolio.

OneCloud Guided Growth

Simplify your Microsoft practice, guide clients and turn every move into lasting growth.

With personalized learning, expert support and proven go-to-market guidance, partners can confidently add new Microsoft workloads, deepen customer relationships and unlock new revenue opportunities across Azure, Security, Dynamics 365, Copilot and Microsoft 365.

We've seen that partners who expand across the full Microsoft stack through OneCloud Guided Growth grow 30%+ faster year over year and transact 2,500%+ more in licensing than single-solution partners.

30%+
faster year over year

2,500%+
more in licensing than single-solution partners

Bootcamps

Connect with fellow cloud innovators through Microsoft Bootcamps.

Build your community, learn new skills, stay current on Microsoft developments and gain practical knowledge that supports long-term business growth.

Browse channel events

* Service offerings vary by region.

Microsoft Monthly Update

Join us virtually each month to review essential Microsoft program updates, discuss key changes and understand the actions you can take to drive success across your Microsoft practice.

These sessions help partners stay informed about evolving Microsoft programs, incentives, product updates and strategic opportunities.

Click your corresponding region below to sign up for the series of Microsoft Monthly Update sessions:

North America | UK & I | Benelux

Nordics and Baltics | DACH | APAC

MIP Program

The Managed Intelligence Provider (MIP) Program helps MSPs evolve from delivering traditional IT services to providing AI-powered, outcome-driven intelligence services.

Through AI maturity assessments, role-based learning and a proven six-play framework, partners gain the skills, operating model and resources needed to identify opportunities, deliver agentic solutions and build a scalable Managed Intelligence practice.

Whether following the **Broker** or **Builder** path, partners can confidently turn growing AI demand into repeatable services, stronger customer outcomes and new recurring revenue streams.

Join the MIP Program

* Service offerings vary by region.

Technology for Social Impact

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The Microsoft and Pax8 Tech for Social Impact program enables MSPs to serve nonprofits and classrooms with affordable, cloud-based solutions tailored to the needs of mission-driven organizations.

Through specialized products, services, education and enablement, Pax8 helps partners support nonprofit and education customers while creating meaningful business opportunities. By expanding into this market, MSPs can strengthen community relationships, enhance brand reputation and help organizations focus more resources on their missions.

This represents a significant opportunity for partners to grow while making a positive impact.

Nonprofits have increasingly embraced digital-first operations and fundraising, 55% are actively using AI and the nonprofit sector represents a $25M global opportunity.

Microsoft Solutions for Nonprofits

Azure	Microsoft 365 and Copilot
Annual grants and discounted pricing help nonprofit organizations accelerate cloud migration, modernize infrastructure and build new AI-powered services on Microsoft Azure.	Discounted pricing on productivity, collaboration and AI-powered solutions helps organizations automate tasks, streamline workflows, improve communication and empower staff and volunteers to do more with limited resources.

Dynamics 365

Discounted pricing on CRM, accounting and customer service solutions helps organizations improve donor engagement, strengthen program management and gain greater operational intelligence.

Security and Compliance

Discounted pricing on Microsoft Defender and Purview helps nonprofit organizations assess risk, monitor threats, protect sensitive information and support compliance requirements for donor, volunteer and beneficiary data.

Explore Technology for Social Impact

More Resources

Empowering Nonprofits with Microsoft AI

Discover how Microsoft 365 Copilot can help nonprofit organizations streamline daily operations, protect sensitive information and maximize available resources.

Join the Community

The Pax8 Tech for Social Impact Community brings together partners focused on serving nonprofits and K-12 schools. Connect with peers, share ideas, learn from real-world experiences and discover new ways to create impact while growing your business.

Nonprofit and Education Resources

Access curated on-demand learning, best practices and resources designed to help partners support nonprofit organizations and schools.

Your Microsoft Experts

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Why Pax8?

- 2012 Founded
- 150+ Vendors
- 47,000+ Partners Serving 800,000+ SMBs

Accolades

- 2024 Microsoft Partner of the Year
- Named a U.S. Best Managed Company for four consecutive years
- Helped Infinity Group achieve Microsoft Partner of the Year recognition in 2025

Microsoft Success Starts with the Right Partner

Building a successful Microsoft practice requires more than access to licenses. It takes expertise, enablement, support and a partner ecosystem that can help you navigate change and capitalize on new opportunities.

Microsoft provides one of the industry's most comprehensive cloud platforms, bringing together productivity, security, infrastructure, business applications, data and AI into a connected ecosystem. Pax8 helps partners unlock the full value of that ecosystem through expert guidance, enablement, services and a Marketplace purpose-built for cloud growth. Together, Microsoft and Pax8 help partners simplify complexity, accelerate customer outcomes and build profitable practices across the full Microsoft portfolio.

Whether you're modernizing data infrastructure, helping businesses adopt AI, strengthening security, or building new service offerings, Pax8 provides the tools, resources, education and support needed to accelerate success.

Do It All in the Pax8 Marketplace

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The Pax8 Marketplace helps partners deliver and manage cloud solutions through a unified experience. Quote, order, bill, provision and manage cloud solutions from a single platform while leveraging built-in analytics and business intelligence to identify new growth opportunities and optimize margins.



Ordering

Purchase Microsoft and other cloud solutions from a single location through the Marketplace's streamlined ordering workflow.



Integrations Hub

Connect Marketplace data to CRM, billing and business systems through the Integrations Hub to automate workflows and improve visibility across your business.



Rapid Automated Provisioning

The Pax8 Marketplace integrates with Microsoft Partner Center to support rapid, automated provisioning and simplified management.



Business Intelligence

Gain a comprehensive view of your Microsoft customer base, identify cross-sell and upsell opportunities and uncover technology gaps through Marketplace analytics and reporting.



Channel-Focused Cloud Products

The Pax8 Marketplace integrates with Microsoft Partner Center to support rapid, automated provisioning and simplified management.



AI You Can Sell Today

Discover SMB-ready agentic solutions and new AI revenue opportunities through the Agent Store.



Migrations

Confidently migrate Microsoft customers with fewer steps, reduced complexity and guidance that helps streamline migration projects across multiple customers.



Public Storefronts

Create storefronts that showcase your offerings, support marketing efforts and help generate new opportunities from prospective customers.



Want to Enhance Your Microsoft Experience and Make More Possible for Your Clients?

Your Microsoft Experts Are Here to Help

Schedule a call

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