



# The Evolving Business Advisor's Guide to Building a Data Management Practice

How to ensure your clients' business data is protected, compliant,  
and leveraged for data-based decision-making.

NEED AN EXPERT FOR YOUR DATA MANAGEMENT PRACTICE?

# How Pax8 Helps Modern Business Advisors Achieve More with Cloud Technology

Data is the most valuable – and vulnerable – asset for any modern business. As the role of the business advisor evolves beyond financials, it's time to offer technology solutions that help your clients deploy, protect, analyze, and visualize their data. The simplicity of today's cloud tech creates a unique opportunity for business advisors to become a single source of cloud consumption for clients while guiding their digital transformation.

## The Challenge

Historically, business advisors have specialized in a limited offering of on-premise technology solutions that required significantly more expertise and upfront investments than today's cloud technologies. Therefore, advisors relied on either traditional IT distribution or direct agreements with multiple different vendors, resulting in back office inefficiencies. The move to cloud technology has brought improvements to traditional advisor offerings, but as the majority of business data migrates to the cloud, a new opportunity around data management has arisen.

## The Opportunity

Many businesses don't have the budget to employ a full time Chief Data Officer (CDO). Much like outsourcing bookkeeping, accounting, and controller services, businesses can realize the greater benefits of a specialized, trusted advisor at a much lower cost than an in-house position. Herein lies the opportunity in building a Data Management Practice (DMP).

By enhancing the productivity and security features of enterprise-level Microsoft Office 365 (O365 E1, E3, or E5) with complementary cloud-based data management solutions, you can help your clients optimize the way they handle, store, and share data. If you specialize in financial performance and analysis, risk assessment, and compliance, you can also leverage the Microsoft platform to productize your Client Advisory Services (CAS) with real-time dashboards, custom applications, and Robotic Process Automation (RPA).

But how can business advisors easily build and deploy the cloud technology stack needed to underpin a DMP?

**“Data is not the byproduct of business; instead, the business is built around the data.”**

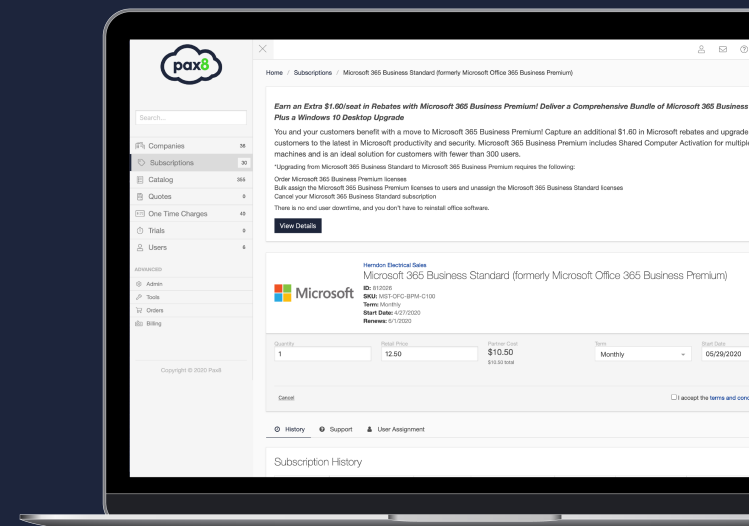
Forbes, 2019

# The Solution: DMP Through Pax8

Pax8 removes the barriers to entry for business advisors to offer a world-class cloud technology stack as the foundation of their DMP. Our modern platform simplifies cloud procurement and is backed by our award-winning partner experience.

**15,000+ partners trust Pax8 as their strategic cloud partner due to our:**

- **Industry-leading platform:** The Pax8 Platform streamlines ordering and provisioning, consolidates billing, and optimizes support engagements.
- **Intuitive buying experience:** Built-in data analytics and business intelligence provides partners with the insights they need to optimize margins and sell more.
- **Exceptional support and enablement:** We provide responsive pre-sales support and 24/7 US-based technical support, as well as educational resources to empower our partners to grow their cloud business.



## BUILDING A STRONG FOUNDATION

# Why Choose Microsoft for Your DMP?

Not long ago, businesses had to buy multiple tech solutions from multiple sources to get all the tools they needed to be successful. This resulted in operational inefficiencies and required investment in significant technical expertise.

### The Microsoft Difference

The modern cloud-based Microsoft suite takes much of the complexity out of IT and reduces your client's total technology costs through a huge range of integrated functionality. It requires no coding experience or patches to install, and in most cases, increases security, remote work, and analytics capabilities. When you recommend Microsoft, you know your advised solution is at the top of every tech analyst's list.

Microsoft allows you to assist any client, regardless of size or industry, with central data governance and compliance. Familiarizing yourself with Microsoft will give every advisory conversation more breadth as you will be able to proactively identify risks your client is facing, build recurring revenue with compliance monitoring, and take financial performance and analysis beyond Excel with consolidated real-time KPI and KBO dashboards from any device.

If your client is already using Microsoft Office 365, make sure they have the correct licensing, are properly deployed, and are fully utilizing the functionality they have purchased. From there, encourage their digital transformation one step at a time by starting with the Power Platform, then adopt other areas as they see progress. In addition, using Microsoft doesn't limit you to one platform as they've spearheaded an open data initiative with SAP and Adobe.



“Moving from traditional on-premises technology to O365 E5 reduces technology costs by 21%.”

Forrester, 2019

## BUILDING A STRONG FOUNDATION

# Why Choose Microsoft for Your DMP?



### Power BI Pro

Deliver insights with business analytics.



### Office 365 Advanced Threat Protection - Plan 2

Protect against phishing and zero-day malware.



### Advanced Compliance

eDiscovery, audit, encryption, and more.



### On-premises Active Directory Sync For Single Sign-on (SSO)



### Azure Information Protection

Control and secure email, documents, and sensitive data.



### Microsoft Teams

Chat, meet, and collaborate in a shared workspace.



### Mobile Device Management

Secure and manage employees' mobile devices.



### Power Automate

Automate workflows for repetitive tasks.



### OneDrive For Business

Access 1-5+ TB of personal cloud storage from anywhere.



### Power Apps

Build, extend, and customize business apps.



### Microsoft Stream

Engage and inform with intelligent video.



### Microsoft To Do

Plan your day and manage your life.



### Microsoft MyAnalytics

Explore your work patterns to work smarter.



### Microsoft Whiteboard

Collaborate on content with a freeform digital canvas.



### Microsoft Forms

Easily create surveys, quizzes, and polls.



### Microsoft Planner

Organize teamwork, assign tasks, and get progress updates.



### Shifts App in Microsoft Teams

Easily manage schedules.



### Bookings

Simplify how customers schedule and manage appointments.



### Microsoft Sway

Create visually striking newsletters, presentations, and documents.

**MORE THAN JUST MICROSOFT**

# How a DMP Tech Stack Fills Microsoft Gaps

While many, if not most, of your clients already use Microsoft Office, they are probably underutilizing the functionality, overpaying for add-on solutions, or at risk due to outdated, unsupported versions. They also may think they are covered with what they have, but chances are there are gaps that leave them open to data loss. The questions and statements below can drive the conversation to help your clients realize they need more comprehensive coverage by adding on backup, email security, archiving, anti-phishing, and password management cloud solutions, as well as security awareness training.

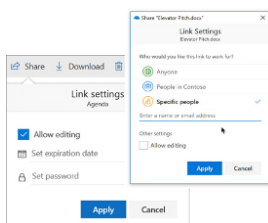


## **“Did you know Microsoft does not come with backup?”**

How would it feel to offer your client a technology “reset” button? In today’s landscape, 94% of cyber attacks happen via email, with half of attacks attached to an Office document or spreadsheet. One click on a malicious link by an employee can shut down an SMB, while human error can lead to mistaken deletions of essential files. That’s why backup is a critical conversation to have with your clients – and you can protect them with automated, easy-to-use cloud backup solutions.

## **“IT security is everyone’s responsibility.”**

Security awareness training is a cornerstone of any company’s IT security plan and required for compliance. Teaching employees how to recognize and report threats saves money and prevents business disruption; in fact, the number of employees susceptible to phishing decreased by 75% after security awareness training. Talk to your clients regularly about security and offer them security training that includes online dashboards that assess, educate, and score simulated threat responses.



## **“Proper setup saves money in the long-term.”**

As a business advisor, access to clean data is critical to providing good advice. However, accessing that data can often be a time-intensive process – onsite visits, USB sticks, and third-party online storage apps are not only inefficient, but also create a security liability. Advising on proper Microsoft deployment ensures your client is compliant when sharing data, gives you instant and auditable access to important client documents, and offers data encryption both in transit and at rest.

## BUILDING RECURRING REVENUE WITH DATA GOVERNANCE SERVICES

# Data Governance Areas of Opportunity

### Retention Services

- Automatically discover, classify, and label data subject to compliance
- Financial
- Personally Identifiable Information (PII)
- GDPR/California Privacy
- Retention labels

### Access Services

- Encryption
- Secure lines for all client communications
- Security groups
- Files access reflective of the company's org chart

### Monitoring Services

- HR or harassment
- Profanity or sexually explicit words
- Automatically encrypt and report unsecured, sensitive data sharing

### Non-Microsoft Application Data Services

- Shadow IT
- Discover and document all applications used in the organization
- Cloud Access Security Broker (CASB)
- Connect all business applications from a catalog of 16,000+ cloud apps



### Starting The Data Conversation

Are your systems currently connected to share data?

Are you currently able to see KPIs and KBOs in real time?

Do you currently leverage data-driven decision making?

# 3 Stages of a Data Management Practice (DMP)

## STAGE 1

### Support a DMP Technology Stack

#### Microsoft Office 365 E5

##### + Add-on Cloud Solutions For:

- Backup
- Data compliance and governance
- Email encryption
- Password protection
- Anti-spam and phishing
- Dark web monitoring
- Security awareness training
- User analytics



## STAGE 2

### Automate Processes & Workflows

#### Microsoft Automate

- Connect functions from separate applications, whether cloud or on-premises
- Reduce labor and manual processes with Robotic Process Automation (RPA)

#### Power Apps

Included with Office 365 E5

- Create low/no-code custom applications that plug in to accomplish business objectives

## STAGE 3

### Deliver Impactful KPIs & Reporting

#### Power BI

Included with Office 365 E5

- Proactive dashboards and KPIs from data collected across all applications

#### Dynamics 365

- Bring the whole company on the same ecosystem for low cost, agile, unified Enterprise Resource Planning (ERP)

#### Hosting & Data Warehouse

- Keep client data secure and available on the world's best cloud, Microsoft Azure



LET'S LOOK AT THE NUMBERS

# Tech Stack Profit Potential

## DMP Tech Stack from Pax8

 Office 365 E5  
Office Backup  
Email Security & Archiving  
Anti-Phishing  
Multi-Tenant Management  
Password Management  
Cybersecurity Awareness Training

**Total Stack per Seat Cost** **\$55**

**\$55**

**Business  
Advisor**

**\$100**

**End  
Client  
User**

DMP Tech Stack Price per Seat	<b>\$100</b>
DMP Tech Stack Cost per Seat	<b>\$(55)</b>
Potential Stack Profit per Seat	<b>\$45</b>
Annual Revenue per 500 Seats	<b>\$270,000</b>
Annual Support Costs	<b>\$(80,000)</b>
<b>Potential Gross Profit (500 Seats)</b>	<b>\$190,000</b>

## BUILDING A DMP IS A WIN-WIN

### Benefits to Clients

- Better protected from disaster
- Lowered IT spend
- Increased employee retention
- Actionable business insights
- Ensured compliance with data laws and assisted response to violations

### Benefits to the Firm

- Passive and diverse revenue
- More frequent client interactions
- Integrated billing dashboard
- Add value to every clients' business with performance benchmarking
- Increased relevance by offering more to the clients you already advise

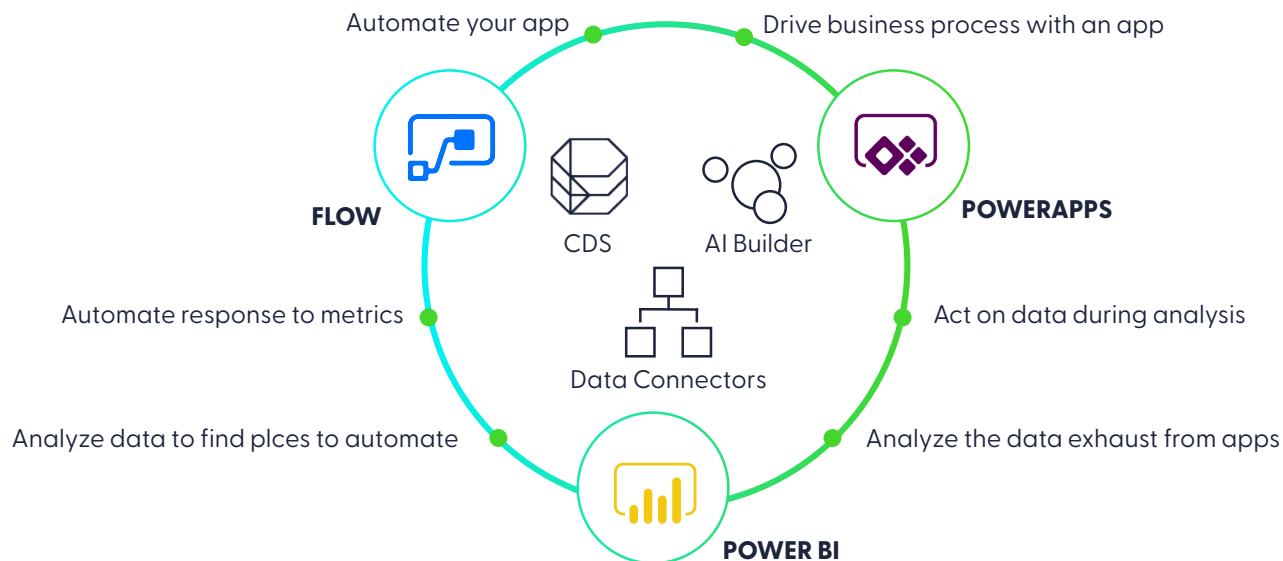
## PRODUCTIZING YOUR CLIENT ADVISORY SERVICES

# Power Platform: Automate Processes with RPA Workflows

Traditional client advisory services like Business Process Mapping (BPM) can now be amped up with a DMP. Rather than just explaining to clients what needs to be improved, a DMP enables you to provide practical solutions designed just for them, allowing your clients to see digital transformation in action without the need for costly developers.

### Enter a Solution as Simple as Powerpoint and More Powerful than Excel

With the Robotic Process Automation (RPA) capabilities of Microsoft's Power Platform, you can now take direct control of the workflow solution and customize it for your client with pre-built templates, 275+ connectors, and "record, point, and click automation". Power Apps makes it easy to modernize processes by building apps with little or no code, across any system (on premise or cloud) on the platform they use today. Power BI creates dashboards for powerful data visualization. Flow improves productivity and reduces manual processes with workflow automation.



“Over 70% of finance organizations are utilizing or piloting RPA.”

Gartner, 2019

A SINGLE PLATFORM FOR ANY BUSINESS, AVAILABLE IN THE CLOUD

# Dynamics 365: ERP & Customer Engagement

Enterprise Resource Planning (ERP) solutions bring various business processes together to improve collaboration and information-sharing between departments, driving data-based decisions and providing holistic prospect and customer intelligence.

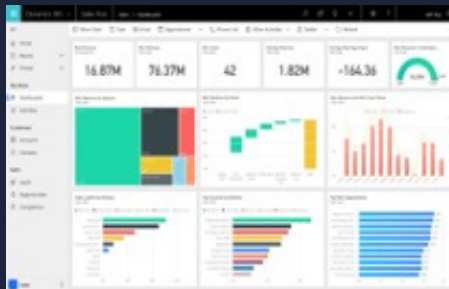
## A New Era of Customer Intelligence

In today's buying environment, prospects do their due diligence before engaging. This can lead to a very one-sided conversation, where a prospect knows much more about your client or their product than they know about them. Understanding how a potential customer thinks, what they've read about you, and their sentiment in a previous engagement is critical in delivering an excellent experience.

Dynamics 365 is a set of ERP business intelligence apps that provide predictive, AI-driven insights – helping you give your client the clarity to see large opportunities in the pipeline, keep their biggest customers happy, and boost employee productivity. Providing typical financial data is important; however, it's a lagging factor. Using predictive data can help you pinpoint acquisition and retention rates.



As an advisor, providing real-time dashboards allows you to narrow your clients focus on the data that directly informs crucial business decisions.



HOST & MANAGE YOUR CLIENTS' DATA... AS-A-SERVICE

# Azure: Streamline Data Compliance

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 streamlines data compliance.

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

## Your Experts for Microsoft Azure

Pax8 Professional Services has deep Azure expertise to assist you with any Azure deployment or data migration project! With the help of our team of cloud infrastructure architects, you can leverage the power of Microsoft Azure with your clients to ensure regulatory compliance and propose data governance with intelligible access to data-driven decision making.



## TELL THE WHOLE CLOUD STORY WITH PAX8

# To Be Successful in the Cloud, You Want to Work with Pax8

Pax8 is the leader in cloud distribution. As a born-in-the-cloud company, Pax8 empowers business advisors to capitalize on the \$1 trillion cloud opportunity through our world-class partner experience.

Our enablement program removes barriers to entry for a Data Management Practice with an easy-to-use online marketplace, no minimums or contracts, in-depth Microsoft and cloud solutions expertise, and a technology Wingman to assist with any concerns. Pax8 can help you tell the whole cloud story – beyond financials – to increase your revenue per client, and most importantly, protect your clients as their trusted advisor.

### Modern Platform

- Quote, order, bill, and instantly provision
- Single invoice across monthly, annual, and usage-based billing
- API-enabled provisioning

### Pre-Sales Support

- Dedicated Cloud Solutions Advisors
- In-house Sales Engineers and Cloud Infrastructure Architects
- POCs, NFRs, and trials
- Quoting tool
- Microsoft demos

### Cloud Enablement

- Channel focused cloud products
- Optimized incentives and rebates
- Azure, Dynamics, and M365 Bootcamps
- API-enabled provisioning
- No quotas and no minimums

### Post-Sales Support

- Dedicated Service Delivery Manager
- Implementation support
- 24/7, US-based technical support
- Professional services for migrations and more

**Ready to learn more about building your data management practice with Pax8?**

[Get An Expert](#)



**Security**



**Communications**



**Productivity**



**Network**



**Continuity**



**Infrastructure**