



the
**Managed
Intelligence
Provider**
Playbook





Small and mid-sized businesses (SMBs) are entering a new era; one where growth is no longer constrained by labor costs. Instead of buying more software tools, they can now deploy AI agents that provide fractional access to expertise once out of reach.

The hype cycle around AI has produced its share of disappointments and inflated promises. But beneath the noise, a practical shift is underway: SMBs are quietly adopting agent-driven workflows that reduce costs, expand capacity and deliver outcomes once reserved for enterprises.

The first two decades of the cloud era saw SMBs reinventing themselves as SaaS-powered organizations. But with the advent of AI, we’re witnessing another profound reconfiguring of markets. The AI services market is undergoing unprecedented growth, with global spend projected to reach 644 billion USD.¹ Surveys paint a promising picture: 78% of SMBs using AI tools say it’s a game-changer, 87% report it helps them scale operations and 86% have seen improved margins². But broader data tells a different story. MIT’s recently released “State of AI in Business 2025” report reinforces this reality: despite 30-40 billion USD in enterprise investment, 95% of organizations are getting zero return from their GenAI initiatives, creating what researchers call “The GenAI Divide.”³

This disconnect is telling. High satisfaction with simple tools like ChatGPT doesn’t yet translate into agent-powered businesses or domain-specific AI solutions. Yet Google’s 2025 industry research shows 87% of professionals are already using AI agents in their work, indicating real transformation is happening beneath the surface of disappointing headline adoption numbers⁴. The real opportunity for **Managed Intelligence Providers (MIPs)** lies in bridging that gap; guiding SMBs beyond experimentation and into structured, scalable deployments where intelligence is embedded into everyday workflows.

And it’s in that bridge where the real shift begins. Moving from ad hoc tools to orchestrated ecosystems marks the start of the agentic economy: a new era where value is created not only through software functionality but through autonomous, adaptive and interconnected intelligence. For managed service providers (MSPs), this is both an existential inflection point and a generational opportunity. Those who adapt can become Managed Intelligence Providers — the trusted architects, integrators and catalysts of this new AI-powered future.

¹ Knox, Kevin, Chrissy Healey, and Errol Rasit. “AI Disruption Will Decide Services Provider Winners and Losers.” *Gartner Research*, 5 Aug. 2025.
² Knox, Kevin, Chrissy Healey, and Errol Rasit. “AI Disruption Will Decide Services Provider Winners and Losers.” *Gartner Research*, 5 Aug. 2025.
³ *State of AI in Business 2025 Report*. MLQ AI, v0.1, 2025.
⁴ *AI Meets the Games Industry: Global AI Meets the Games Industry Report*. Google Cloud and The Harris Poll, July 2025.

From SaaS to Intelligence Services:
A Market Ripe for Reinvention

In the SaaS era, MSPs weren’t just delivering “access to tools;” they made software work for SMBs, providing the complex implementation, integration and ongoing operational management that turned a fragmented stack of licenses into a reliable, business-critical system.

In the AI era, that same role expands into delivering intelligence, but as a service. This goes beyond selling licenses or managing infrastructure. It’s about curating, deploying and continuously optimizing autonomous agents and AI-driven workflows to achieve business results faster, with greater accuracy and at lower cost.

Unlike SaaS, which scales human operators, intelligent agents can reason, learn and solve problems to deliver digital labor that expands business capacity, from voice AI handling customer calls to backend agents that automatically fix and maintain critical systems. And just as MSPs once became the

indispensable bridge between SMBs and the cloud, MIPs will now become the trusted bridge into the agentic economy.

What makes this defensible against software vendors building agents directly? Integration. MSPs already sit at the workflow layer, not the feature layer. You understand the complete operational picture across finance, sales, compliance and IT, not just isolated applications. You face no business-model conflicts with per-seat pricing, meaning you can package agents around outcomes instead of licenses. And you can move faster than vendors locked into protecting legacy revenue streams.

This is why the channel is positioned to lead. The advantage lies not in who has access to the models, but in who has the relationships, the context and the integration expertise to turn those models into measurable business outcomes.

Why Now and Why It Matters

Speed is the new currency of competitive advantage. In the agentic economy, being first to market with intelligence-led services is the difference between market leadership and irrelevance. SMBs are moving faster than ever to experiment with AI agents, but without trusted guidance, many risk stalling in proof-of-concept purgatory or investing in tools without realizing business value. At the same time, unmanaged or poorly secured agent deployments can expose clients to significant infosec risks, introducing vulnerabilities directly into business workflows. This growing need for both innovation and protection creates a natural bridge for MSPs to evolve into MIPs, delivering AI solutions that are not only outcome-focused but also secure, compliant and resilient.

But the stakes go beyond incremental transformation. Agent-powered SMBs will fundamentally disrupt traditional mid-market companies. When an 8-person consulting firm can deliver what once required 50, the economics of professional services shift

overnight. Smaller firms gain the advantage by being agent-augmented from the ground up: lean, adaptive and able to scale expertise without bloated overhead. Larger incumbents, even with AI, struggle against their own coordination costs, entrenched structures and slower decision-making. The market will tilt toward those who can embed intelligence with speed and agility, and that’s where MIPs become indispensable.

Pax8 is building the infrastructure for MIPs to seize this opportunity today. The **Pax8 Agent Store** acts as a launchpad for commercialization and monetization, enabling partners to discover, build, buy, bundle and deliver pre-vetted agents and workflows tailored to specific industries and use cases. Coupled with the MIP Playbook, partners can turn AI from an abstract concept into a repeatable, revenue-generating engine that doesn’t just transform MSPs; it reshapes the very structure of how professional services are delivered.



The Playbook as a Monetization Engine

The MIP Playbook delivers the “how;” a pragmatic framework that guides your evolution from traditional managed services to outcome-driven, intelligence-enabled solutions. In this new world, everything comes back to one idea: transformation. Every business, large and small, must change — or risk being left behind.

Your role as an MIP is to illuminate the path forward, guiding that transformation. And here’s the truth: all the real value, all the wealth creation in AI, will come through this great transformation.

Transformation is the **superstructure**. Inside it live the five Plays of the MIP Playbook.

The five Plays are:

By aligning your agentic go-to-market with this framework, you will not only capture net-new revenue streams but also lock in recurring, high-margin services that are defensible against market commoditization. Remember: **start small** ➡ **ship fast** ➡ **measure** ➡ **expand**.

The MIP Playbook provides the strategic framework to guide your transformation from traditional managed services to intelligence-driven solutions. The Pax8 Agent Store provides the infrastructure to execute that transformation at scale. Together, they are the catalysts for turning today’s agentic curiosity into tomorrow’s recurring revenue.



Transformation



Discover: Surface the Debt, Find the Opportunity.

As a Managed Intelligence Provider, your role is to evolve from trusted advisor to strategic partner. That means helping clients reflect on how they operate: uncovering process debt, surfacing hidden inefficiencies and exposing the repetitive, manual and costly work that drains potential.

You can even start with your own business as “Customer Zero,” proving the model inside your house first. Or help clients uncover their hidden debt, apply intelligence to solve their most pressing challenges and deliver measurable outcomes they can see.

Once you’ve implemented automation with AI agents, new possibilities are unlocked: SMBs can now offer services once reserved for the enterprise: 24/7 intelligent customer support that learns over time, analytics that anticipate customer behavior, inventory systems that adapt in real time. With AI, a 10-person firm can perform like a 50-person team, delivering enterprise outcomes at an SMB scale.



Sell: Price on Actions, Workflows, Outcomes.

The agentic economy changes what you’re selling and who you’re selling to. Instead of software seats and support hours, you’re selling measurable business improvements. And in this Play, you can use the full spectrum of monetization models, from agent subscriptions and outcome-based pricing to deployment fees and resale margins. The goal is flexibility: matching the right model to the right customer. As a Managed Intelligence Provider, you’ll be selling not only to SMB clients but also to other partners, expanding your market reach while creating recurring, scalable revenue streams. Position agentic offerings with pricing models tied directly to customer outcomes. For example, if you save a client 1M USD annually, a 20K USD/month managed agent fee becomes an easy “yes.”



Buy: Curate Agents and Prebuilt Workflows.

Speed matters in transformation. Instead of building from scratch, MIPs rapidly deploy proven AI workers that deliver immediate impact: a customer service agent that resolves tickets faster, a scheduling agent that eliminates email back-and-forth, a compliance agent that catches errors before they become problems.

Your role is curation: evaluating which agents fit your clients’ needs, configuring them for their workflows, and ensuring smooth integration. Quick wins from proven agents create the foundation for everything that follows: client trust, momentum, and the business case for further investment.



Build: Package Horizontal/Vertical Agents + IP.

Every business has something proprietary; a way of working that can’t be solved with an off-the-shelf agent. That’s why MIPs will need to build. And here’s the shift: building is no longer reserved for specialized engineering teams. With today’s low-code and no-code tools, anyone can be a builder. What once demanded costly RPA platforms and deep skill sets can now be done in days, not months.



Manage: Optimize, Govern and Expand.

Manage is where MIPs build lasting client relationships. While others deploy and disappear, you create ongoing value through continuous optimization and strategic expansion. This means performance optimization, security and compliance, agent lifecycle management and staying current with rapidly evolving AI capabilities.

The real opportunity is using real-world data to identify where the next agent deployment makes sense, turning projects into relationships and transactions into recurring revenue.



The transformation is already underway. Agentic automation and digital labor are reshaping how businesses operate. Will you capture the opportunity to lead and monetize it?



Agent Store

The Pax8 Agent Store: Your Marketplace for Digital Labor

The Managed Intelligence Playbook isn't just a framework; it's paired with the tools to bring it to life. At the center of those tools is the **Pax8 Agent Store**, the first marketplace purpose-built for SMBs to discover, deploy and monetize agents.

Think of the Agent Store as a **talent marketplace for digital workers**. Instead of hiring a new employee for every function, you can "hire" an agent; a voice AI that answers customer calls, a compliance bot that monitors PII or a financial workflow agent that reconciles books in real time.

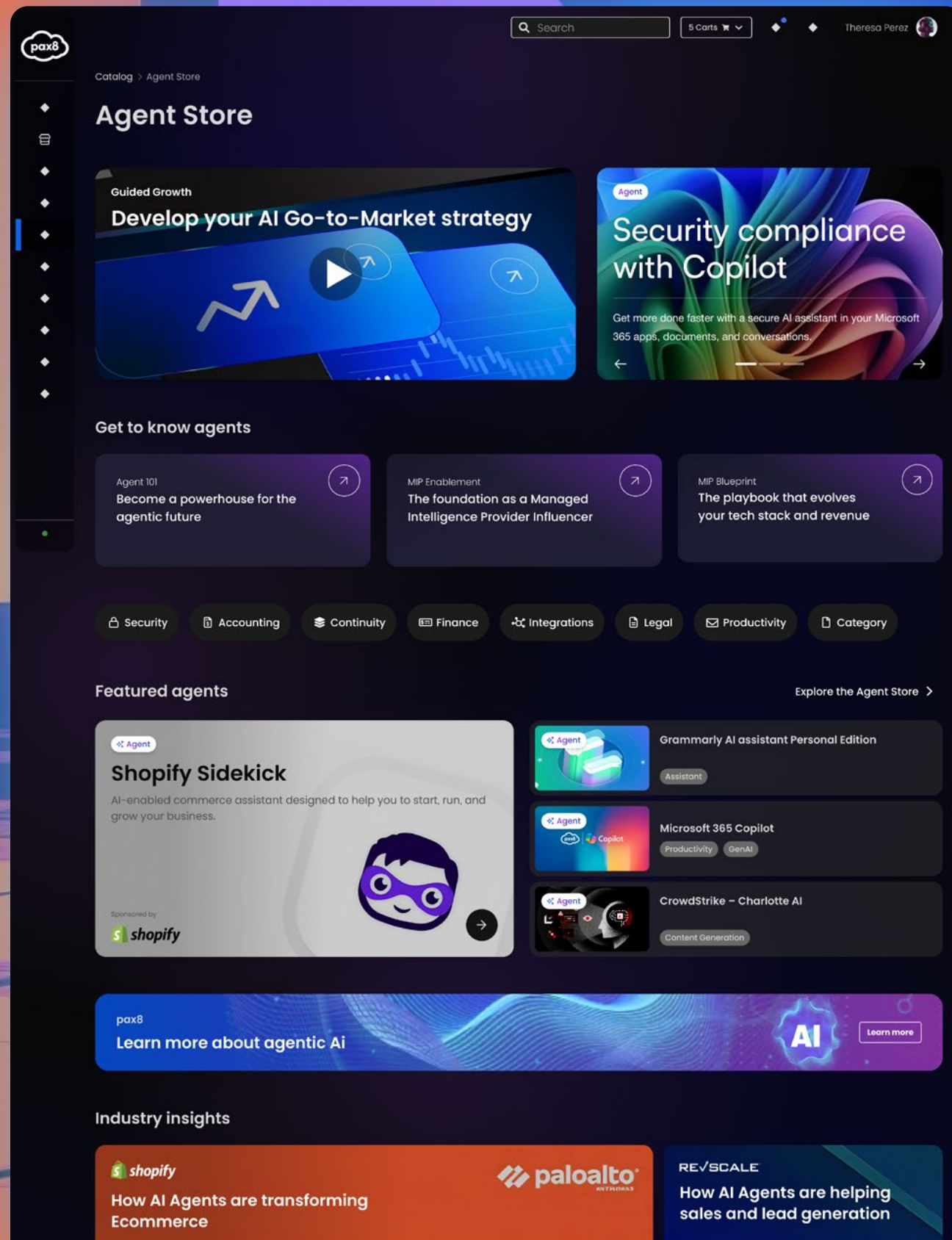
What Makes the Agent Store Different:

- **Curated and trusted:**
Every agent is vetted to ensure quality, security and compliance.
- **Connected and interoperable:**
Agents are designed to work across systems, applications and even with one another.
- **Designed for SMB outcomes:**
Vertical and horizontal agents tuned to real business challenges, from healthcare intake automation to predictive retail inventory.
- **Monetizable for MIPs:**
Agents aren't just tools to deploy; they're services to sell. MIPs can bundle, customize and manage agents as recurring revenue streams.

How It Works in Practice:

- **Discover:**
Browse a catalog of AI-enhanced SaaS, agentic workflows and digital labor.
- **Deploy:**
Activate agents quickly through low-code, pre-integrated frameworks.
- **Bundle:**
Combine agents into horizontal packages or vertical solutions for industry-specific needs.
- **Monetize:**
Sell subscriptions, charge for deployment and lock in long-term client relationships through ongoing orchestration and management.

The Pax8 Agent Store provides access to enterprise-grade automation without enterprise-level complexity, democratizing efficiency and opportunity. For MIPs, it's a launchpad to transform from IT provider into Managed Intelligence Provider, delivering the technology that transforms potential into outcomes.



The MIP Playbook: Turning Vision into Monetization

The Agentic Economy is already reshaping how business gets done. This is where partners can turn transformation into monetization; creating new revenue streams, deepening client retention and building defensible, high-margin services that scale.

While all five Plays add value, *everything starts with transformation*. Without it, new tools, agents and services risk being bolted onto old business models that can't sustain or monetize them. Transformation is the point where an MSP stops thinking like a technology provider and starts operating as a **strategic intelligence partner** — positioning every engagement around measurable outcomes, vertical expertise and long-term value.



Transformation

Process Debt: The Hidden Barrier

Every business carries process debt: years of inefficiency baked into systems and workflows. Most of this debt remains invisible until you examine the business through the lens of intelligence. MIPs bring that lens.

The Shift in Automation Engineering

Historically, automation engineering was expensive and resource-heavy. Robotic Process Automation (RPA) and early low-code platforms often required dedicated roles inside MSPs or SMBs to manage and scale. These systems were also notoriously brittle and costly to maintain, breaking whenever upstream applications changed or unexpected edge cases appeared.

Today, this barrier is collapsing. Automation tools themselves are becoming AI-driven and agentially-enabled, reducing complexity while expanding capability. What once demanded entire teams can now be managed with far less overhead. For SMBs, this wider access to automation is a game-changer.

The Agentic Progression

This is the beginning of the **agentic progression**: a path where SMBs evolve from manual

operations to intelligent, autonomous workflows. The results are already evident: SMBs adopting AI-driven workflows report 40% increase in productivity⁵.

In fact, by 2028, 33% of enterprise software applications will include agentic AI, up from less than 1% in 2024⁶. This acceleration is driven by falling entry barriers for AI deployment, the proliferation of agentic architectures and SMBs' increasing demand for verticalized, intelligent workflows. And research confirms this: SMBs adopting agentic workflows show up to 70–90% automation of complex processes and up to a 40% reduction in operational costs⁷.

SMBs Adopting
AI-driven Workflows

40%
Increase in productivity

The Role of the MIP

Transformation, then, is more than technical. It's cultural. It's commercial. And it's central to the MIP's value proposition. MIPs surface what's broken, clear the debt and lead clients through a journey that unlocks both efficiency and scalability.

⁵ Microsoft. "AI and SMBs: An Analysis of Their Adoption and Impact." Microsoft News Center Canada, 19 Apr. 2024.
⁶ Gartner. "Gartner Predicts Over 40% of Agentic AI Projects Will Be Canceled by End of 2027." Gartner, June 25, 2025.
⁷ Pax8. The Agentic Inflection Point Report. Pax8, 2025.

Internal Transformation Can Be a Powerful Learning Tool

But how do you begin? One powerful way is by adopting the Customer Zero mindset: becoming your own first adopter of AI agents to gain firsthand insight into adoption timelines, integration challenges and the tools required for success. This internal-first approach builds credibility, as SMB customers see their MIP not just prescribing AI solutions but applying them in their own operations.

No matter whether transformation starts internally or directly with a client engagement, the goal is the same: align AI capabilities with real business needs to unlock value quickly. This readiness positions MIPs to capture the accelerating market shift toward agentic AI, ensuring they can meet rising client demand with solutions that are both tested and outcome-driven.

For MSPs, the transformation imperative is twofold:

1. **Reframe value** from break-fix and traditional managed services toward orchestrating business outcomes, focusing on one high-impact outcome at a time to target the right data and intelligence needs before expanding transformation across the business.
2. **Expand capability** by investing in agent development, integration and governance frameworks starting with one high-impact outcome to ensure data and intelligence alignment before expanding across the business.

Client Education and Advisory

A critical part of this shift is knowing how to meet clients where they are.

Different SMB segments have different levels of AI readiness and require tailored support models:

- **Process-heavy, tech-light industries** (e.g., manufacturing, retail) need *full-service deployment*, with MIPs designing, implementing and managing agents end-to-end.
- **Knowledge-work firms** (e.g., consultancies, creative agencies) often benefit from *guided implementation*: they have the appetite and capability to co-build but require frameworks, best practices and orchestration guardrails from the MIP.
- **Compliance-intensive businesses** (e.g., financial services, healthcare) require a *governance-first approach*, where security, auditability and policy enforcement are the primary design criteria.

The plays start small, but they’re always strategic:

- Run structured AI readiness audits to surface where ad hoc automations exist today.
- Identify one high-impact outcome (e.g., onboarding, support ticket triage) as the foundation.
- Build the first agent + workflow to prove value, then expand outward into other functions.

This progression turns scattered tools into a system that compounds value over time, while giving clients not just results, but a roadmap they can understand, trust and grow into.

Vertical Market Specialization

Once the foundation is in place, MIPs can tailor agent solutions for high-growth sectors such as education⁸, healthcare, financial services⁹ or manufacturing; industries where SMBs face acute labor shortages and efficiency pressures. Verticalized agents accelerate adoption by addressing industry-specific needs, while proving MIPs’ domain expertise.

Governance-by-Design

From the very first engagement, MIPs must embed compliance, security and cost-control guardrails. Building governance into the architecture from day one builds client trust, ensures scalability¹⁰ and differentiates MIPs from ad hoc competitors who patch governance on later.



⁸ IDC InfoBrief: sponsored by Microsoft, [2024 Business Opportunity of AI](#), IDC# US52699124, November 2024.

⁹ McKinsey & Company. [“The Economic Potential of Generative AI: The Next Productivity Frontier.”](#) McKinsey Global Institute, June 2023.

¹⁰ IDC InfoBrief: sponsored by Microsoft, [2024 Business Opportunity of AI](#), IDC# US52699124, November 2024.

Play 1: Discover

Discover is a Spectrum

On one side are the manual workflows: people chasing information, plugging gaps and working around inefficiencies. On the other side is full automation: agents that observe, identify and resolve inefficiencies on their own. Your role as a Managed Intelligence Provider is to guide clients along this spectrum, helping them see the hidden debt in their processes, uncover the opportunities for automation and identify the first outcomes worth targeting. Because every company carries inefficiency, and Discovery is how you surface it. It’s not about selling technology first; it’s about revealing where intelligence can create measurable impact.

On the manual end, discovery begins with intake sessions, outcome mapping and consultative workshops. Sitting with clients to chart processes, define outcomes and uncover inefficiencies with data.

On the advanced end, discovery can be agentic: AI-driven workflow observation, where agents highlight bottlenecks and suggest opportunities for automation in real time.

This duality — manual mapping to automated observation — gives MIPs the flexibility to meet clients wherever they are on their maturity curve.

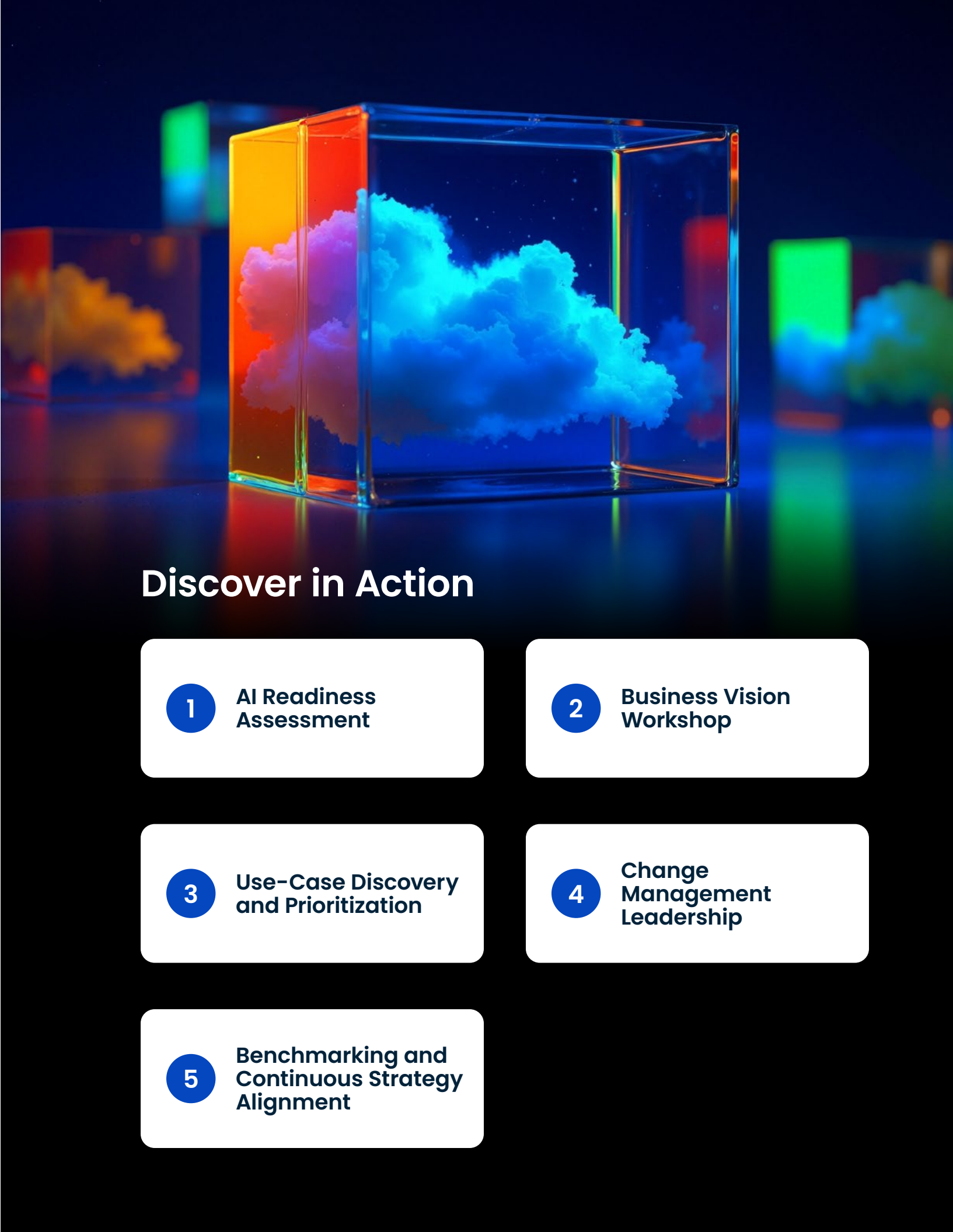
Monetization

Once process debt is surfaced, the work shifts to paying it down. Target workflows that are repetitive, expensive or slow. Re-engineer them with automation and AI-enabled intelligence. Gartner estimates that by 2027, 50% of enterprises will have AI-driven process orchestration in place, cutting process cycle times in half¹¹.

Deployment

Discovery and design mean little without execution. Deployment is where the impact becomes visible: processes are reimaged, agents embedded and measurable outcomes delivered.

For example, early movers in the manufacturing space are seeing cost reductions of around 20% and meaningful productivity gains; and companies that scale automation report reductions closer to 30–40%, as automation maturity increases¹².



Discover in Action

- 1

AI Readiness Assessment
- 2

Business Vision Workshop
- 3

Use-Case Discovery and Prioritization
- 4

Change Management Leadership
- 5

Benchmarking and Continuous Strategy Alignment

¹¹ Law, Marcus. “Gartner: AI Agents Will Drive Half of Decisions by 2027.” *Technology Magazine*, Jun. 17, 2025.
¹² Tao, Mai. “Smart manufacturing delivers ‘20 percent productivity gains’, but challenges remain, says Deloitte.” *Robotics & Automation News*, 14 May 2025.

1

AI Readiness Assessment

Offer a structured **AI Readiness Assessment**. This diagnostic uncovers where automation and agents already exist, where process debt is building and where the biggest gaps lie.

2

Business Vision Workshop

Follow up with a **Business Vision Workshop**, where those findings are mapped to the client’s strategic goals. IDC forecasts that 70% of SMBs will demand clear ROI cases for AI before committing spend this year¹³, and these workshops give clients clarity on where their biggest ROI opportunities are hiding.

Together, the assessment and workshop form a packaged engagement that MIPs can monetize — earning consulting revenue up front while laying the foundation for larger transformation projects.

From Assessment to Impact:

- **Map the workflows.** Document the client’s end-to-end processes, from customer engagement to back-office operations, with special focus on repetitive, manual or error-prone tasks.
- **Surface the pain points.** Interview business stakeholders to identify where bottlenecks occur; delays, inefficiencies or high labor costs.
- **Quantify the impact.** Prioritize processes where even small improvements (e.g., shaving minutes off ticket resolution) create outsized value in cost savings, revenue growth or customer satisfaction.
- **Match to agent archetypes.** Align opportunities with proven agent capabilities (e.g., customer support triage, invoice reconciliation, predictive analytics) to accelerate deployment.
- **Select the “first win.”** Choose one high-impact, low-barrier use case that delivers measurable results quickly — often within weeks — to create a proof-of-value project.

By pairing readiness audits with vision workshops, MIPs not only generate billable advisory revenue but also establish themselves as trusted strategists who link AI to tangible business outcomes clients can recognize and reinvest in.

3

Use-Case Discovery and Prioritization

MIPs should guide SMB clients toward high-value, domain-specific AI use cases that directly connect to measurable revenue growth or efficiency gains¹⁴. The goal is to move clients beyond surface-level experimentation and into true operational integration.

Examples of agentic workflows include:

- **Document transformation and management:** automatically extracting, classifying and routing contracts, invoices or HR forms.
- **Financial reporting & FP&A automation:** closing the books faster, generating forecasts and running scenario modeling with real-time data.
- **Application integration agents:** bridging legacy systems with cloud apps to eliminate manual data entry and broken workflows.
- **Customer lifecycle automation:** from intelligent onboarding to proactive support agents that resolve issues before they escalate.
- **Regulatory and compliance automation:** real-time audit trails, PII monitoring and automated reporting tied to industry frameworks.

By prioritizing use cases that eliminate “process debt” and create immediate business impact, MIPs help SMBs capture quick wins that build trust and lay the foundation for broader transformation.

Instead of re-mapping every process again, MIPs can:

- **Engage stakeholders across functions** to capture diverse pain points.
- **Filter opportunities by business impact**, focusing only on those that reduce costs, drive revenue or improve customer experience.
- **Validate feasibility** by matching each opportunity against proven agent archetypes and available data readiness.
- **Select a lighthouse project:** a high-value, low-barrier initiative that can demonstrate results quickly and build momentum for broader adoption.

This approach avoids analysis paralysis. By zeroing in on one or two **high-confidence, high-return use cases**, MIPs earn client trust early, accelerate adoption and create a clear runway for scaling AI across the business.

¹³ DC. IDC FutureScape: Worldwide Small and Medium-Sized Business 2025 Predictions. IDC, 2024.

¹⁴ ChannelE2E. “Empowering SMBs: How Service Providers Can Guide AI Adoption.” ChannelE2E, December 11, 2024.

4

Change Management Leadership

Research shows that 49% of C-suite executives feel their companies are developing AI tools too slowly. Meanwhile, 92% of all companies say they'll continue to invest in AI over the next three years¹⁵.

This gap between urgency and execution is where MIPs can step in.

But many SMB-focused partners don't yet provide structured change management services like:

- **Training and enablement programs** to build client confidence with agents.
- **Internal communications playbooks** to align staff and reduce resistance to adoption.
- **Workflow redesign consulting** to ensure agents integrate smoothly into day-to-day operations.

For many MSPs, these may not be services offered today.

That's okay because it opens two clear paths forward:

1. **Expand capabilities.** MIPs can begin offering these services directly, building new revenue streams around training, advisory and process consulting.
2. **Leverage partnerships.** Where internal resources are limited, MIPs can partner with providers (including Pax8 and its ecosystem) who can deliver these services on their behalf, ensuring clients still get the change management leadership they need.

Either way, the message is clear: guiding clients through organizational change isn't optional. It's a differentiator that secures longer-term adoption, positions the MIP as a trusted advisor and creates recurring value beyond the technology itself.

5

Benchmarking and Continuous Strategy Alignment

SMBs want to understand where they stand relative to peers. MIPs can use benchmarking reports, competitive intelligence and performance dashboards to ensure the transformation roadmap stays aligned with evolving market expectations, providing another layer of recurring advisory revenue.

While most MSPs are still experimenting with AI, MIPs who lead with a *discover-first* strategy can seize first-mover advantage in a global market valued at over 450 billion+ USD. This is the greenfield today, but the door to opportunity closes quickly. Delaying until next year risks losing market share to peers and even vendors who are moving downstream.

This progression turns scattered tools into a system that compounds value over time, while giving clients not just results, but a roadmap they can understand, trust and grow into.

¹⁵ Mayer, Hannah, Lareina Yee, Michael Chui, and Roger Roberts. *Superagency in the Workplace: Empowering People to Unlock AI's Full Potential*. McKinsey & Company, 28 Jan. 2025.

Discover Use Cases

1

AI Readiness and Outcome Roadmapping for SMBs

What it looks like:

Instead of attempting a full data or process audit, the MIP conducts a short, structured customer assessment to uncover a single high-impact bottleneck. Using a tailored questionnaire, the MIP engages leadership, managers and frontline staff to surface challenges in workflows, customer interactions or operational efficiency. More advanced MIPs can demonstrate real-world usage of automation by engaging an agent to conduct the assessment rather than the facilitator. This assessment output identifies one priority process or outcome that, if improved, will deliver measurable business value quickly, like accelerating quote-to-cash, reducing customer support resolution times or increasing lead conversion. By securing this “quick win” first, the MIP builds momentum and creates a natural pathway for scaling intelligence-led solutions across the business.

Why it works:

McKinsey notes companies realize materially higher returns when they align AI with human workflows and role design, what they call “superagency,” rather than dropping point tools into legacy processes¹⁶. This creates adoption pull and measurable business impact from day one.

MIP angle:

Productize the assessment into a fixed-fee offer; convert to a transformation retainer to guide execution.

2

Use-Case Prioritization Workshops

What it looks like:

A one-day workshop to evaluate potential use cases against value, feasibility, data readiness and risk. From there, the team identifies a single, high-impact process where resolution will deliver a clear, measurable ROI. This “thin-slice” pilot is tightly scoped to avoid overhauling the entire workflow, instead using an integrated agent-assisted approach to prove efficiency and productivity gains within 30–60 days, building proof, adoption and trust that fuel broader deployment.

Why it works:

Research outlines a structured approach to ranking AI opportunities by business value, data fit and time-to-impact; exactly the discipline SMBs need to avoid “pilot sprawl”¹⁷.

MIP angle:

Standardize and SKU the assessment and/or workshop component to make it repeatable and scalable across clients. Follow with a solution design phase that maps the recommended pilot to the complexity of the opportunity whether it’s basic automation, BI, agentic workflows or multi-layer LLM deployments. Proof-of-concept delivery can be packaged separately by solution type to ensure feasibility and predictable margins.

3

Outcomes-First Change Management

What it looks like:

The provider reframes IT from “tools” to measured outcomes (e.g., faster case resolution, higher conversion rates), pairing AI adoption with enablement for sales, service and ops leaders.

Why it works:

Salesforce’s SMB research shows AI adoption correlates with stronger revenue growth when tied to clear business outcomes and team enablement, versus feature-led rollouts¹⁸.

MIP angle:

Add leadership enablement sessions and KPI dashboards to every engagement.

¹⁶ Mayer, Hannah, et al. [Superagency in the Workplace: Empowering People to Unlock AI's Full Potential at Work](#). McKinsey & Company, Jan. 28, 2025.

¹⁷ Masood, Adnan. [“Identifying and Prioritizing Artificial Intelligence Use Cases for Business Value Creation.”](#) Medium, May 3, 2023.

¹⁸ Salesforce. [“AI and the Future of Small Business \(A Trends Report Recap\).”](#) Salesforce Blog, Jun. 5, 2025; Salesforce. “Agentforce Use Cases.” Salesforce, 2025.

The following insights were gathered directly from partners participating in the Pax8 AI Innovation Group; a collaborative working group of MSP leaders who are testing, piloting and shaping the next generation of AI-enabled services. Through candid conversations and structured interviews, they shared their real experiences: the opportunities, the challenges and the lessons learned as they move from awareness through adoption to implementation. Their voices bring practical perspective to the framework, grounding it in the realities of adoption and transformation.



Partner Perspectives:
Lessons from the Frontlines of AI Adoption

Discovery starts with mindset, and partners are proving that the most effective way to lead is by living the change themselves. Some MSPs see becoming “Customer Zero” as essential, piloting agents internally before rolling them out to clients. As one partner put it, *“I announced a goal this week to have all employees at NuWave to have at least one agent working for them by the end of the year.”*

Not every partner jumped in immediately; some met the MIP model with skepticism or concern about timing, but even those voices acknowledged the opportunity ahead. That mix of optimism and caution shows that transformation isn’t about blind urgency, but about preparing deliberately: testing ROI, understanding integration challenges and building credibility from real-world use before guiding clients.

Once you’ve set the direction with Discover, the next Play is Sell, because before you can buy or build, you have to sell the vision. Sell is where MIPs turn insight into influence, helping clients see not just *what* AI can do, but *why* it matters to them. It’s both the mindset sale and the contract sale; aligning the client’s belief before the transaction ever happens.

Play 2: Sell



For the **Sell** Play, MIPs shift from exploring possibilities to inspiring belief. Selling is just as much about delivering products as it is about persuasion: helping clients see what’s possible, align on outcomes and commit to the journey. This is where the MIP model becomes real: when insight turns into influence, and strategy becomes a signed agreement.

Here, the most effective MIPs move beyond features and licenses to monetize measurable value; pricing around outcomes like reduced downtime, faster onboarding or higher conversion rates. By pairing proven enablement strategies with consultative selling, they demonstrate ROI up-front and position intelligence as indispensable to client success.

Why Outcome-Driven Pricing Matters

TSIA reports that MSPs are shifting toward value-driven models, where customers demand clarity on how services affect their bottom line¹⁹. It’s no longer enough to guarantee uptime; MSPs must quantify business impact. For MIPs, this expectation will be even greater, as their success will hinge on proving measurable outcomes tied directly to client value.

These AI and intelligence services are shifting toward outcome-based pricing, charging for tangible business results rather than

access or features. Ernst & Young has documented that this model, which links revenue directly to measurable value (e.g., a transaction resolved autonomously or a service issue closed without human input), is rapidly gaining traction because it aligns provider incentives with client success²⁰. For MIPs, this approach can significantly boost margins by monetizing AI agents’ ability to cut process times, reduce costs and drive measurable business impact at scale, creating a competitive advantage in SMB markets.

¹⁹ Ronkowski, Luke, and Erin Horowitz. [The Future of Managed Services: AI’s Impact on Organizational Structures](#). TSIA Blog, Apr. 29, 2025.
²⁰ Ernst & Young. [SaaS Transformation with GenAI: Outcome-Based Pricing](#). EY, Jun. 25, 2024.

Outcome-Centric Selling

Today’s buyers increasingly value MSP and MIP services not by the features delivered, but by the measurable business outcomes they drive. This shift means MIPs must frame their offerings in terms of tangible impacts, such as boosting operational efficiency, improving customer satisfaction scores or accelerating time-to-market²¹, rather than simply listing capabilities.

But how do you frame your offerings this way?

- **Start with the client’s priority metric.**
Identify what matters most: cost reduction, faster resolution times, revenue growth or compliance accuracy.
- **Translate agent capability into that outcome.**
Instead of saying, “*This agent automates support tickets,*” say, “*This agent reduces ticket resolution time by 40%, freeing your staff for higher-value work.*”
- **Use numbers, not features.**
Replace technical detail with proof points: “*95% accuracy rate,*” “*\$50K annual savings,*” “*20% faster time-to-market.*”
- **Package the offer around the outcome.**
Build tiers or bundles aligned to those results (e.g., “up to 100 resolved requests per month” vs. “95% successful resolution guarantee”).

- **Tell the before-and-after story.**
Paint a clear contrast between the client’s current state (manual, slow, costly) and their future state with agents (automated, fast, efficient).

In this way MIPs move from selling *what the technology does* to selling *what the client gains*. This outcome-first mindset builds urgency, strengthens trust and makes pricing tied to results feel natural and justified.

Partners and Clients Share Upside and Risk

Recent research reveals enterprises prefer outcome-aligned contracts, where service providers are paid only when they deliver measurable business results. This shift is becoming the new standard framework in enterprise partnerships, tying incentives directly to outcomes like resolved support cases, reduced churn or increased revenue. Instead of shelfware or unused seats, value is transparent, predictable and shared between both sides²².

Sell in Action



²¹ Datacate, [The Real Value of Outcome-Based Managed IT Services](#). Datacate, July 2, 2025.
²² Sierra, [“Outcome-Based Pricing for AI Agents.”](#) Sierra Blog, Dec. 10, 2024.

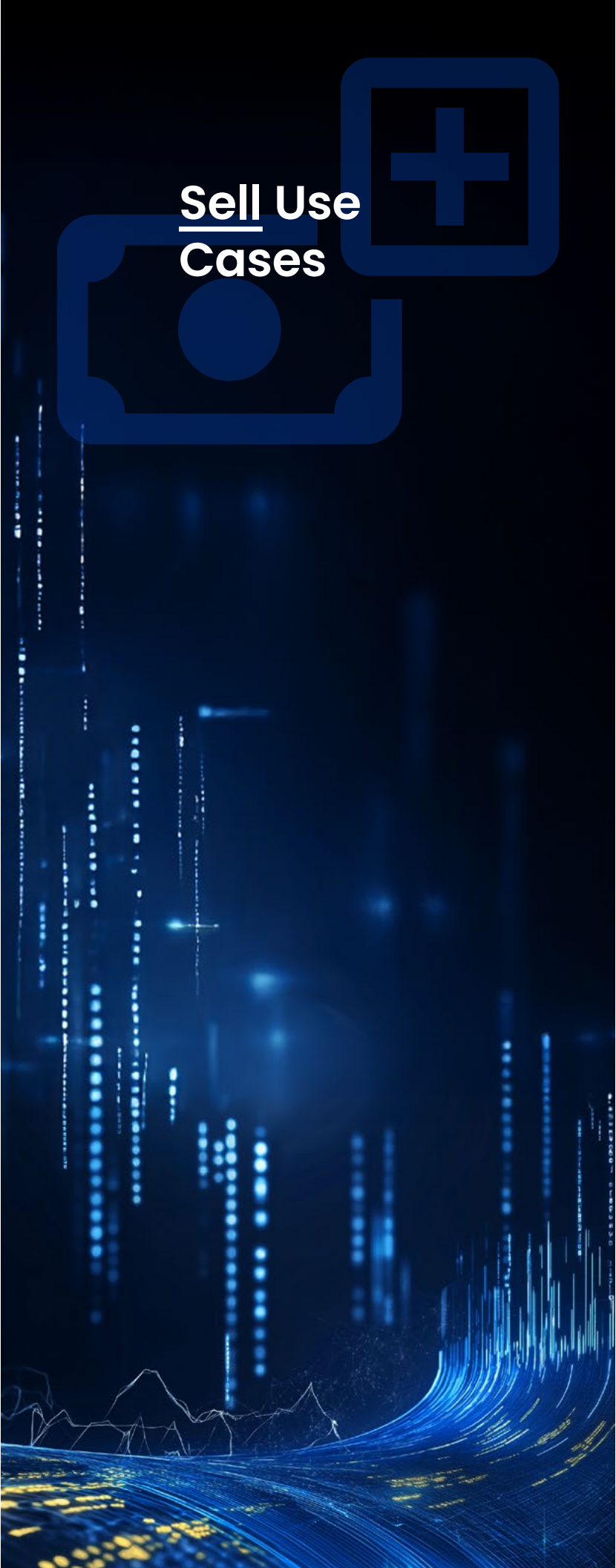
Sell in Action

1. Design Clear Outcome Triggers
- Define measurable events (e.g., “agent re-solves a support ticket”) that automatically generate billing events.
2. Use Tiered Outcome Bundles
- Offer performance tiers: basic or premium to align client budgets with expected value metrics.
3. Transparent Reporting and Dashboards
- Provide real-time visibility into outcomes (e.g., resolution rates, cost savings) to reinforce trust and justify renewals.
4. Flexible Bundles with Blended Pricing
- Combine base tiers (e.g., usage/month) with outcome bonuses, empowering clients with choice and aligning incentives.

5. Pilot Programs as Proof-of-Value
- Offer short-term outcome engagements to demonstrate ROI. Success in pilots can convert prospects into long-term contracts with favorable pricing structures.

Monetization Impact

- Drives higher margins and repeatable revenue through aligned-risk pricing.
- Accelerates renewals and loyalty by proving value month-over-month.
- Differentiates MIPs from competitors tied to traditional seat-based or feature-based models.



1

Outcome-Based Pricing
(Pay for Results)

- What it looks like:
- A tiered contract charges per resolved case, per qualified lead or per on-time invoice with transparent dashboards and credits for misses.
- Why it works:
- Analyst reports detail how GenAI is pushing SaaS toward outcome-based pricing, aligning incentives and increasing perceived value for buyers²³.
- MIP angle:
- Start with a 60-day proof-of-value then graduate to outcome pricing once baselines are proven.

²³Ernst & Young. [SaaS Transformation with GenAI: Outcome-Based Pricing](#). EY, 2024.

2

Value Proof via Public References and Demos

What it looks like:
The MIP uses public, relatable references, like agent demos and SMB case snippets, to remove perceived risk and shorten cycles.

Why it works:
Best practices indicate that highlighting real outcomes on how small businesses win with AI agents moves the needle toward adoption and implementation²⁴.

MIP angle:
Embed short demo links in proposals; run live proof sessions with client data.

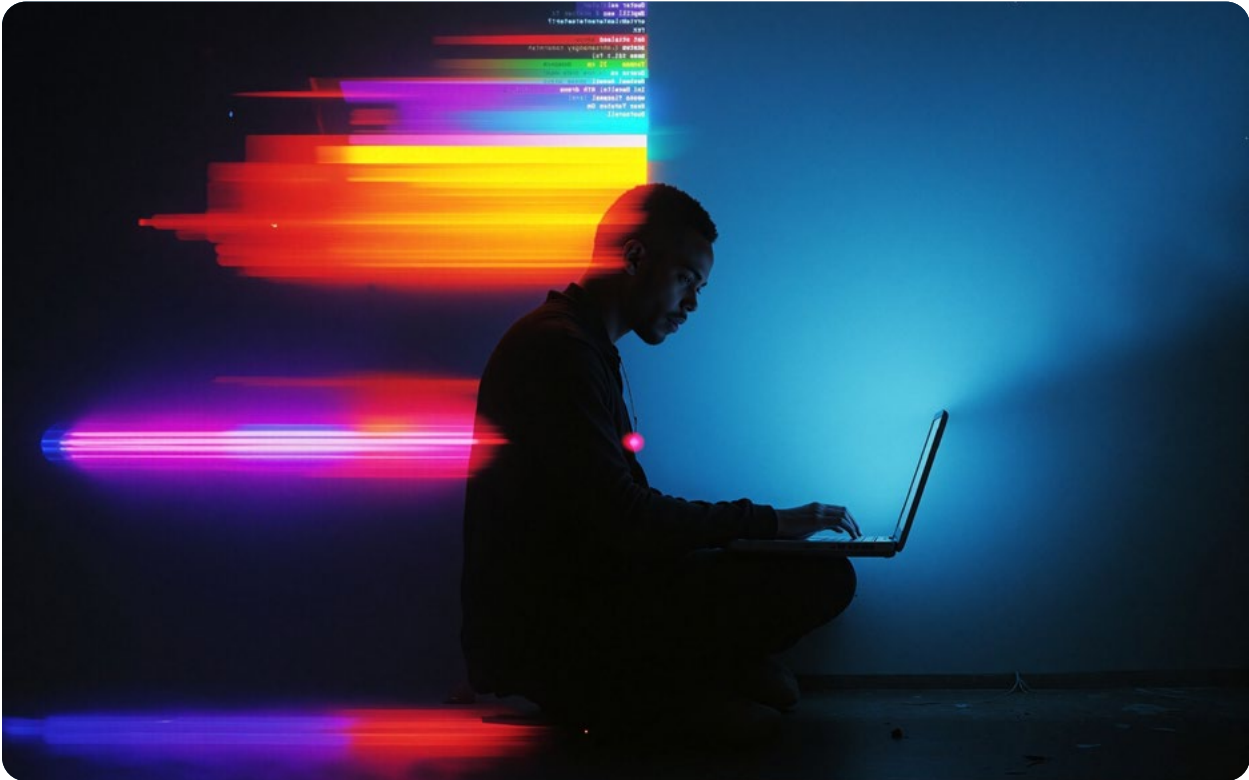
3

Org Readiness as a Sales Differentiator

What it looks like:
Sales qualifies not just budget and need, but process owners, data access and change readiness so projects don’t stall.

Why it works:
TSIA’s work on AI’s impact to managed services orgs shows providers are retooling roles and governance to deliver measurable value, improving sales-to-success alignment²⁵.

MIP angle:
Include a “readiness checklist” addendum; protect margins by gating projects until prerequisites are met.



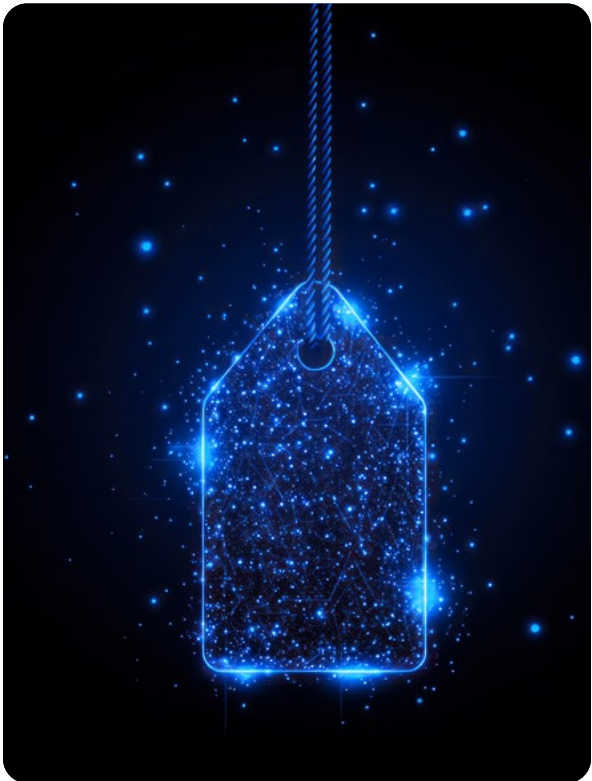
²⁴“AI Agents for Small Business: Winning in 2025,” CXOTalk, 2025.
²⁵Ronkowski, Luke, and Erin Horowitz. “The Future of Managed Services: AI’s Impact on Organizational Structures.” TSIA Blog, 29 Apr. 2025.



Partner Perspectives:
Lessons from the Frontlines of AI Adoption

Selling AI services is where partners agree the market is hungry, but they also acknowledge that packaging and pricing models are still maturing. Many prefer outcome-based pricing, with one noting, “Clients resonate with ROI, not hours.” Others remain cautious, pointing out that business-outcome pricing is desirable but not always easy to operationalize.

For now, most partners are mixing approaches: subscription tiers, block-hour models, project-based pricing while leaning heavily on ROI storytelling to make the case. What they want most from Pax8 is support: co-branded collateral, practical case studies and success stories they can point to. These proof points give them the confidence to position AI services not as abstract technology, but as business-changing investments.



From Selling the Vision to Assembling the Foundation

Selling marks the moment when possibility becomes commitment. Once clients believe in the outcome, MIPs shift from shaping ambition to enabling execution. That’s where the **Buy** Play begins. Having secured alignment and trust, MIPs move into curation: selecting the right intelligence, partners and platforms to deliver on the value they’ve promised.

Play 3: Buy

Within the **Buy** Play, MIPs move beyond procurement to become curators of digital labor. Instead of reinventing every wheel, they source trusted third-party agents, pre-built workflows and AI-enhanced SaaS that extend their clients’ capabilities. The Buy Play moves beyond purchasing tools to building a team of digital workers on behalf of SMBs, scaling their resources much like a staffing agency does with human capital.

Done well, the Buy Play accelerates time-to-market, broadens service offerings and unlocks the innovation already emerging across the agent economy. The MIP’s role is strategic: discover, curate, bundle and deliver agents through a trusted, accessible marketplace.

MIPs who focus on the Buy Play are the market-makers of Managed Intelligence. Their focus is on identifying proven, outcome-aligned agents and getting them into client environments quickly, with minimal friction.

They curate solutions from trusted marketplaces like the Pax8 Agent Store, evaluate vendor offerings, manage licensing and compliance and then handle deployment — either directly or alongside professional services. That means configuring agents, mapping data sources and enabling end-users to adopt them effectively.

But the role doesn’t stop at implementation. These MIPs continuously monitor performance, apply updates and ensure governance, compliance and security remain intact; turning short-term projects into lasting, recurring value.

To succeed, MIPs throughout this Play must master business consulting conversations to uncover measurable outcomes and use process mapping to align technology with client goals. With access to tools like Copilot and Power BI, plus participation in vendor-funded campaigns, MIPs can position themselves as trusted advisors who can deliver speed-to-value and strategic impact at scale.

Why Intelligent Curation Matters

- **Marketplace Momentum is Real**
AI marketplaces are already emerging, offering SMBs subscription-based access to specialized agents. These platforms make enterprise-grade capabilities available at SMB scale, from compliance bots to workflow automation, without forcing SMBs to build infrastructure from scratch²⁶.
- **SMBs Demand Scalable, Plug-and-Play Solutions**
Furthermore, SMBs consistently cite a need for low-code, easily deployable solutions. Platforms offering plug-and-play agents simplify adoption, enabling businesses without internal AI expertise to scale quickly. Early research shows SMBs leveraging such solutions can achieve up to a 91% revenue gain²⁷.
- **Vendor Differentiation via Pax8**
Unlike single-vendor ecosystems, the Pax8 Agent Store aggregates multiple foundational vendors under one roof. With unified billing, consolidated support and pre-integrated interoperability, MIPs can deliver a seamless procurement experience while reducing operational complexity.

Buy in Action

1

Partner with Curated Agent Marketplaces

2

Differentiate with Value-Added Bundles

3

Integrate with Low-Code Deployment Frameworks

4

Build Private, Trusted Storefronts

²⁶Puutio, Alexander. “AI Agent Marketplaces Are Here—How Companies Like Enso Are Enabling SMBs to Punch Above Their Weight.” *Forbes*, Feb.18, 2025.
²⁷rataash. “SMB AI Adoption 2025: How Autonomous Agents Are Delivering a 2x Revenue Lift—Real-World Case Studies, Budgets & Compliance Guide.” *xlearners*, May 9, 2025.

Buy in Action

1. Partner with Curated Agent Marketplaces

Align with trusted marketplaces like the Pax8 Agent Store to provide vetted vertical, horizontal and custom agents. This dramatically lowers procurement friction while increasing client confidence and accelerating ROI.

2. Differentiate with Value-Added Bundles

Don't just resell agents, bundle them with contextual services like compliance configuration, UX/UI design for SMB workflows or industry-specific tuning. This elevates the purchase from "agent download" to "business solution."

3. Integrate with Low-Code Deployment Frameworks

Offer deployment through intuitive portals with built-in orchestration, whether via Pax8's upcoming platform capabilities or partners' own backend tools, so agents can be activated with minimal friction.

4. Build Private, Trusted Storefronts

Once buyers trust your bundling and deployment model, you can curate your own catalog of pre-approved agents into a tailored storefront, making you the de facto nexus for your SMB customers. You can also use this storefront as your own lead-gen prospecting tool to attract new customers.

Monetization Opportunities

- **Margins on Agent Resales:**
Margins on resale of agents sourced from multiple vendors.
- **Deployment Fees:**
Deployment and configuration fees layered on top of agent procurement.
- **Subscription Plans:**
Generate recurring revenue by delivering ongoing management and orchestration. This includes agent maintenance, resiliency and uptime monitoring, performance tracking, authentication and API updates, security oversight, and version upgrades. By bundling operations and orchestration into a subscription, MIPs turn reliability and continuous improvement into a monetizable service.
- **Private Ecosystems:**
Private ecosystems that keep SMB sourcing locked within the MIP's storefront.

By owning the Buy Play, MIPs shift from being seen as resellers to becoming strategic workforce enablers. They give SMBs access to digital labor on demand, lowering risk, streamlining deployment and transforming AI procurement into a pathway for growth.



Pax8 Delivers the Managed Intelligence Provider Advantage



Unified Agent Store
Discover, deploy and manage AI agents in one ecosystem, fully integrated with partner billing, provisioning and governance.

Vertical-Ready Blueprints
Pre-configured, industry-specific agent bundles designed for SMB workflows, accelerating time-to-value.

Performance-Based Monetization
Move beyond resale to recurring, usage-based and outcome-based pricing models, driving higher margins.

Globally Vetted Vendors and Reach
Access Pax8's network to scale offerings across geographies without re-architecting deployments.

Seamless Vendor Integrations
API and MCP-first architecture that connects agents directly to existing SaaS stacks, no custom code required.

Buy Use Cases

1

Curated Agent Catalogs for SMBs

What it looks like:

The MIP sources pre-vetted agents from the Pax8 Agent Store and marketplaces (e.g., sales assistants, service bots, back-office automators) and wraps them with vertical configs.

Why it works:

Recent reports suggest that AI agent stores and marketplaces are enabling SMBs to “punch above their weight” by accessing specialized agents without bespoke builds²⁸.

MIP angle:

Publish a branded catalog (good/better/best) and sell deployment bundles.

2

Agent Bundles with Business Context

What it looks like:

A retail SMB buys a bundle: customer-service agents, inventory agents and marketing assistants, each category represented by 2–4 specialized agents. These are orchestrated by a supervisory agent and pre-integrated with the SMB’s POS and CRM systems for plug-and-play deployment within days.

Why it works:

Modern agent stores like the Pax8 Agent Store and marketplaces encourage composability, allowing MIPs to combine

multiple specialized agents into cohesive, outcome-driven workflows. This not only accelerates results compared to isolated tools but also showcases the potential of scalable orchestration frameworks or deployment managers, systems capable of managing, monitoring and optimizing agent interactions at scale²⁹. Such frameworks position MIPs to deliver repeatable value across industries, whether through curated independent software vendors or ISV-backed SaaS plays (e.g., RevScale.io) or internally developed solutions.

MIP angle:

Price bundles with outcome SLAs (e.g., response time, CSAT, inventory shrink), and offer ongoing orchestration management as a premium, recurring service.

3

Low-Friction Deployments Win Deals

What it looks like:

The MIP prioritizes click-to-configure deployments with standard connectors and admin dashboards that SMB teams can use on day one.

Why it works:

Industry use cases emphasize practical, workflow-level deployments where fast time-to-value and embedded measurement drive adoption and expansion³⁰.

MIP angle:

Bundle “rapid deploy” fees and upsell managed optimization.



Partner Perspectives:

Lessons from the Frontlines of AI Adoption

Here, partners stressed that their ability to evaluate and package trusted solutions is what sets them apart. One partner described integration as their biggest barrier: *“The top barrier is data integration — connecting siloed systems to fuel agents with the right context.”*

That’s why they’re asking for co-marketing, case studies and practical proof points to accelerate adoption with their SMB clients. Many partners see their role as brokers of trust, sourcing agents from marketplaces, managing licensing and positioning solutions in ways that reduce risk and build client confidence. In their words, they’re not just buying technology; they’re *buying outcomes they can deliver with speed and credibility*.

²⁸Puutio, Alexander. “AI Agent Marketplaces Are Here—How Companies Like Enso Are Enabling SMBs to Punch Above Their Weight.” *Forbes*, Feb.18, 2025.

²⁹NFX. “AI Agent Marketplaces.” *NFX Essays*, 2024.

³⁰Salesforce. “Agentforce Use Cases.” *Salesforce*, 2025.

Play 4: Build

Discover defines the opportunity, and Buy expands your reach, curating proven agents, storefronts and ecosystems that align with client outcomes. **Build** is where you go further, where you evolve into creators. With the resources and expertise to build intellectual property, you'll shape what's possible for your clients and the wider market.

Every business has something proprietary, something unique to how they operate. At some point, that uniqueness demands solutions that don't yet exist. That's where Build comes in.

And building no longer belongs only to specialized engineering teams. With today's low-code and no-code platforms, what once required costly RPA deployments and dedicated staff can now be spun up in days, not months. This accessibility means any MIP can evolve into an agent factory — designing reusable agents and intelligent workflows that scale across industries and client bases. Every industry has its pain points, which is why MIPs have an advantage across economies of scale.

Your focus is on creating custom agents and orchestrating complex solutions. You'll

also design automation roadmaps, develop ROI models and business cases and lead the change management needed to bring transformation to life.

Beyond development, MIPs excel at advanced orchestration: coordinating multi-agent workflows, integrating intelligence with enterprise systems and embedding security, compliance and governance into every layer.

To succeed, you'll lean on outcome-based consulting skills and advanced AI training. You will partner strategically with hyper-scalers like Microsoft, Google and AWS, and often participate in innovation groups and coaching tracks.

By mastering both creation and orchestration, MIPs can redefine intelligence and turn it into a sustainable competitive advantage.

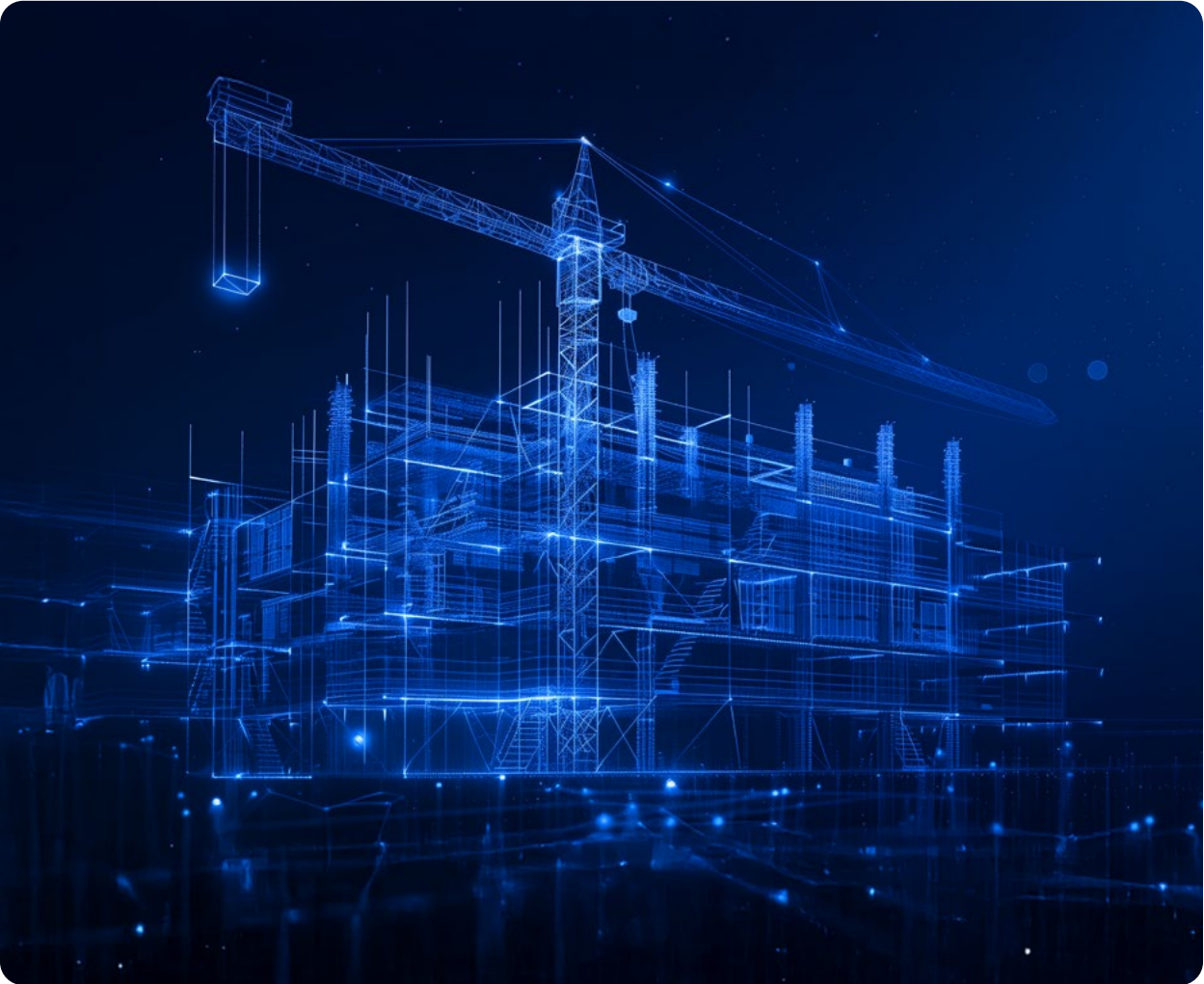
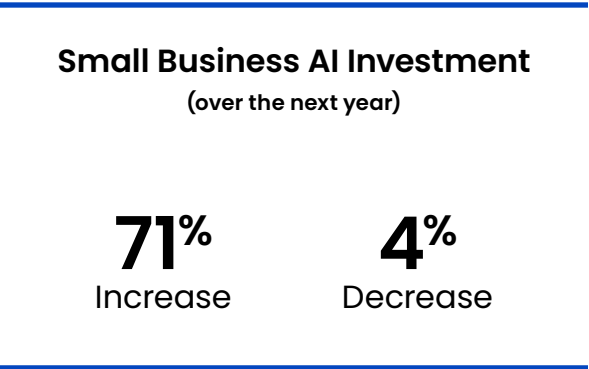
While most partners will start with the Buy Play, many will evolve over time to embrace the Build Play. The key is aligning Build activities to your capacity today while investing toward your desired future state.

While most partners will start with the Buy Play, many will evolve over time to embrace the Build Play. The key is aligning Build activities to your capacity today while investing toward your desired future state.

Why Building Matters

SMBs are no longer content with static SaaS subscriptions. They're seeking bespoke AI agents that embed directly into their workflows, adapt to changing conditions and deliver measurable business outcomes.

Recent reports indicate that 71% of small businesses say they plan to increase their AI investment over the next year, while only a small 4% are planning to scale back³¹. There's no better time for MIPs to invest in agentic infrastructure, from code repositories and prompt libraries to multi-agent orchestration frameworks.

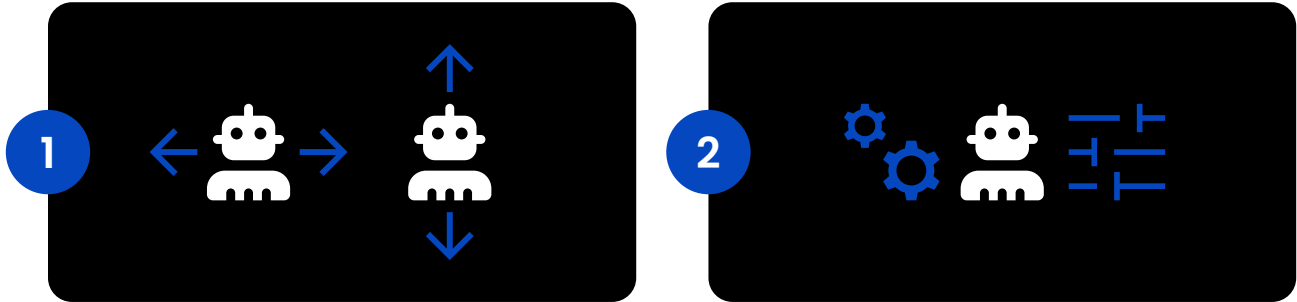


³¹ Poon, Kristie. "AI and the Future of Small Business (A Trends Report Recap)." Salesforce Blog, Jun. 5, 2025.

Build in Action



Build in Action



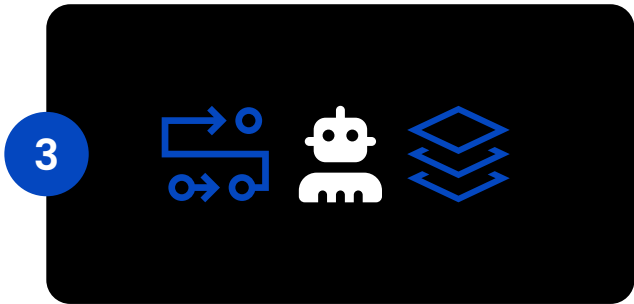
Horizontal and Vertical Agent Development

MIPs should think in two dimensions: horizontal and vertical.

- **Horizontal agents** are general-purpose building blocks, such as voice assistants, scheduling agents, customer support bots, finance reconciliation tools or compliance monitors that apply broadly across industries. These agents provide scale and efficiency because a single design can be adapted to multiple client contexts. They are especially powerful for MIPs who can package and resell proven, cross-vertical solutions as repeatable revenue drivers.
- **Verticalized agents** are tailored to the pain points of specific industries. Builders can differentiate by leveraging domain expertise to create agents like patient intake automation in healthcare, predictive inventory in retail or regulatory reporting in financial services. These agents tend to command higher margins and deeper stickiness because of their specialized value.

Custom Agents and Workflows

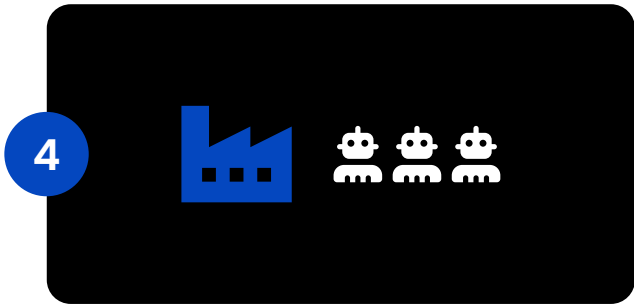
MIPs can address the proprietary, often manual or outdated processes unique to each business. Every company carries process debt, which standard SaaS or vertical templates don't touch. By automating these bespoke workflows, MIPs can unlock hidden productivity, create highly defensible client relationships and generate net-new automation opportunities that competitors can't easily replicate.



Stacking

But the real power comes from *stacking*: combining multiple agents into layered workflows that map to an industry’s end-to-end processes. For example, a healthcare MIP could stack a patient intake agent with claims validation and compliance reporting agents, creating a turnkey solution that feels less like a single tool and more like an industry-specific operating system. Custom configuration adds another layer of differentiation. By tuning agents to a client’s data, compliance requirements or regional context, MIPs can move beyond one-size-fits-all solutions and deliver outcomes that software vendors alone can’t replicate.

Across these categories, the goal is the same: design agents as “sticky” assets: solutions that drive recurring revenue through licensing, updates and outcome-based performance models. Horizontal agents create breadth of adoption, vertical agents create depth of differentiation and custom agents unlock proprietary value inside every client’s business.

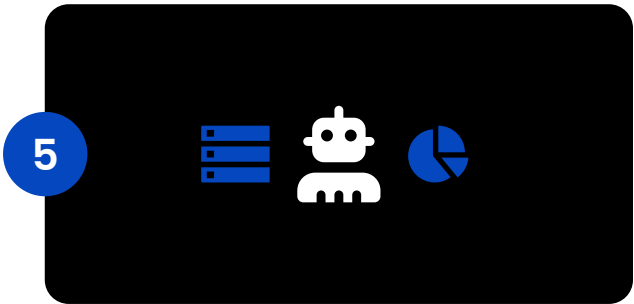


Agent Factories and Deployment Pipelines

MIPs should approach agent delivery with the same rigor and repeatability that DevOps brought to software.

- These MIPs will create full-fledged “agent factories:” pre-built templates and API integration frameworks inspired by the DevOps model. These pipelines allow rapid customization and deployment of agents, enabling faster innovation.

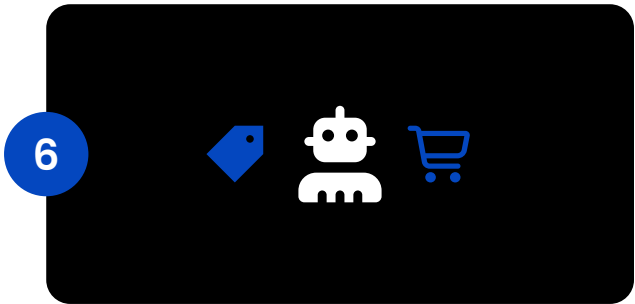
As Deloitte notes, scaling AI agents effectively depends on a “reference architecture populated with reusable core components.”³² which accelerates deployment while maintaining reliability.



Data Infrastructure as a Foundation

- You might invest in building or integrating advanced, secure data pipelines to feed agents with high-quality, domain-relevant data, maximizing accuracy, compliance and adaptability.

According to McKinsey, companies with highly structured data governance report a 40% increase in AI success rates³³, making this approach critical to the Build foundation.



Marketplace-Ready Packaging

- You should package their proprietary agents for broader sale in agent marketplaces such as the Pax8 Agent Store, turning bespoke builds into scalable, monetizable products.

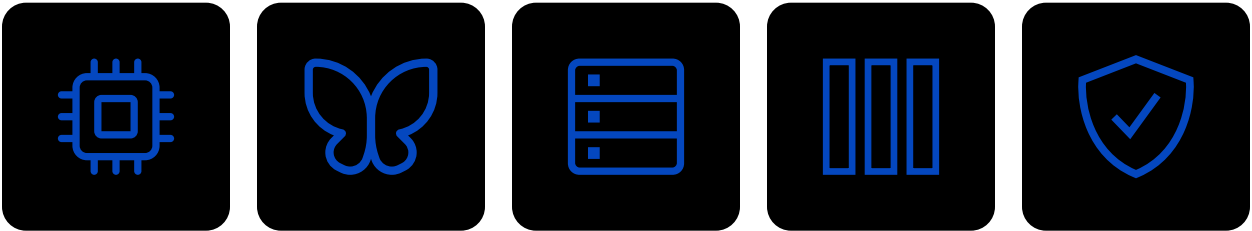
But it’s not just about agents themselves. There’s also opportunity in workflow agents: taking existing manual or “dumb digital” processes (like spreadsheets, macros or basic automations) and packaging them into generalized, intelligent workflows. These can then be quickly customized to fit specific industries or vertical scenarios, dramatically accelerating deployment for SMBs.

This approach transforms one-off deployments and legacy processes into **repeatable, intelligent solutions** that can be monetized across multiple customers facing similar challenges.

³²Deloitte, “AI Agent Architecture and Multiagent Systems,” Deloitte US.

³³ER/Studio, [The ROI of Enterprise Data Modeling for AI: Why Structured Data Matters](#), ER/Studio Blog, 2025.

MIP Archetypes: Different Paths to Build



Not every MIP will look the same. During the Build Play, partners can choose distinct paths based on their starting point, customer base and capabilities. The key is to align the model with today’s strengths while investing toward tomorrow’s opportunities.

Five emerging MIP archetypes are shaping the market:

- **Greenfield MIP (born in AI):**
New companies with no legacy managed services, focused solely on AI, data and automation from day one. They win with high margins, agility and the ability to pivot quickly into new agentic services.
- **MSP → MIP Evolution:**
Established MSPs layering MIP services on top of existing managed services. Their strength is EBITDA stacking: incremental, low-overhead revenue built on trusted relationships.
- **Data Specialist → MIP Expansion:**
Analytics or BI firms evolving into AI-driven insights and workflow automation, moving from project work into subscription-based solutions.
- **Vertical MIP:**
Niche providers (healthcare IT, legal IT, retail IT) building verticalized AI automations, turning deep industry trust into adoption and repeatable managed services.
- **Security First MIP:**
Cybersecurity consultancies or MSSPs augmenting detection and response with predictive, AI-driven intelligence. They command premium margins with advanced, differentiated protection.

Here’s the critical point: four of these archetypes do not come from a traditional MSP background. Instead, many come from adjacent spaces: data, creative, security and vertical IT. This underscores the message from earlier: *don’t be late*. The firms that move first, whether born-in-AI startups or niche specialists, will set the benchmarks for client expectations.

Each archetype has unique services and value drivers, but all share one truth: there is no single path to becoming a Managed Intelligence Provider. The opportunity is to recognize where you are today, choose the archetype that fits, and evolve over time as the market matures, before someone else captures the opportunity in your place.



Where the White Space Is

Competitor analysis shows that while large hyperscalers and independent software vendors are investing heavily in AI infrastructure, few are focused on SMB-specific agent ecosystems. This is a clear opening for MIPs to establish themselves as first movers in the SMB agent economy.

We’ve seen this story before. When cloud adoption surged, hyperscalers built the infrastructure, but it was MSPs who unlocked the SMB market, integrating, managing and

scaling solutions that big vendors couldn’t deliver at a local or operational level. That same dynamic is playing out again. The MIP model is the natural evolution of that history: purpose-built to capture the next wave of SMB transformation, this time through agents, automation and intelligence.

Just as MSPs became indispensable in the cloud era, MIPs now have the chance to define the agent era; bridging the gap between hyperscale innovation and SMB execution.

The Monetization Opportunity in Build

By mastering the Build Play, MIPs unlock multiple pathways to monetize agent deployments. But the key isn't just creating agents; it's adopting the right pricing logic for the right client scenarios.

Pax8 has identified four primary models that are reshaping how value is captured in the agentic economy:

- **Per Agent (FTE Model):**
Fixed monthly pricing per deployed agent, often benchmarked against the cost of a human equivalent. This provides predictable recurring revenue and helps clients calculate clear ROI.
- **Per Action (Consumption-Based):**
Transactional pricing tied directly to usage, ideal for high-volume, variable workflows like invoice processing. Aligns closely with cloud economics by scaling costs with business demand.
- **Per Workflow (Process-Based):**
Fixed pricing for complete processes, with performance guarantees tied to SLAs. This resembles BPO economics but delivers higher margins thanks to automation scalability.
- **Per Outcome (Value-Based):**
Revenue sharing or performance bonuses tied directly to measurable client KPIs. While more complex to structure, this model offers the highest profit potential by aligning provider incentives with client success.

Strategic Pricing Considerations for MIPs

Successful MIPs won't rely on a single model, but instead adopt hybrid approaches:

- FTE models for processes with clear human equivalents.
- Consumption models for transaction-heavy, variable-volume processes.
- Workflow models for complex, cross-functional processes.
- Outcome models for high-value, measurable results.

These models break the old link between revenue and headcount, allowing value to scale independently of team size. For MIPs, mastering pricing models will be as critical as mastering the technology itself.

- **Recurring revenue** from agent licensing, updates and per-agent pricing models.
- **Project-based income** from workflow customization and integration.
- **Data services revenue** from governance, enrichment and compliance layers.
- **Partner-to-partner revenue** by collaborating with other MIPs, either sourcing specialized agents or offering your own as white-label solutions.

This is the inflection point where MIPs stop competing on seat licenses or project hours and start competing on capability, outcomes and economic models aligned to digital labor.



1

"Agent Factory" Pipelines (Templates and APIs)

What it looks like:

The MIP builds a reusable "factory" pipeline: prompt/component templates, API connectors (CRM/ERP/PSA), evaluation harnesses and security patterns that enable new agent deployments in days rather than weeks. The factory also includes orchestration tools for workflow sequencing, real-time monitoring dashboards for agent performance and optimization routines to continuously refine results.

Why it works:

Engineering best practices show that reusable frameworks accelerate agent development while improving reliability and compliance³⁴. Classic Informatics' 2025 statistics highlight shorter cycle times and growing adoption of agentic approaches across teams. Adding orchestration, monitoring and optimization creates visibility and transparency, which increases client trust and offers a new revenue layer beyond licensing.

MIP angle:

Monetize both the build and the oversight layer: sell "factory time" as a catalog item (bronze/silver/gold builds) for vertical or repeatable agents, with an optional managed orchestration package that ensures agents continue to perform, adapt and deliver ROI over time.

Vendor advantage:

By leveraging Pax8's integrated ecosystem, MIPs can access multiple foundational vendors (e.g., AI platforms, security layers, data tools) through a single marketplace, with unified support and one-stop billing. That means every new "factory build" doesn't just stand alone, it's backed by a vendor network already harmonized for procurement, support and scaling, reducing operational overhead and accelerating time-to-value.

³⁴Skamser, Scott. "Using AI Agents to Accelerate Agent Development." LinkedIn, 2025; Classic Informatics. "AI Development Statistics 2025." Classic Informatics Blog, 2025.

2

Data Readiness as a Build Multiplier

What it looks like:

Before writing a single line of code, the MIP focuses on the data that directly impacts a targeted, high-value business process (e.g., ticket triage, quote-to-cash). Rather than attempting a full-scale data overhaul, which can overwhelm SMB budgets and timelines, this approach isolates only the datasets tied to the chosen process or outcome.

Why it works:

By reducing scope to a single outcome, the data project becomes faster, less expensive and easier for the SMB to approve. Early wins prove the value of cleaner, structured data, making it easier to expand into additional processes or broader data governance later. While hyperscalers often advocate for enterprise-wide data readiness, focusing narrowly allows MIPs to monetize AI sooner by aligning intelligence to a tangible, measurable outcome³⁵.

MIP Angle:

Productize “Process-Specific Data Readiness” as a prerequisite SKU for any agent build. Bundle it with solution design so clients see a direct link between curated data, agent performance and ROI, then upsell broader data governance once trust and results are established.

Vendor advantage:

Pax8’s vendor network gives MIPs access to pre-vetted data integration and governance tools that plug directly into agent builds. Instead of sourcing solutions piecemeal, MIPs can assemble curated stacks with a single transaction, simplifying compliance and making data readiness a repeatable, monetizable service.

If Build is where MIPs demonstrate capability, it’s also where promise meets proof. Designing and curating agents is only the beginning; success comes when those agents deliver measurable impact. This is the moment when intelligence moves from prototype to performance, when innovation transforms into sustained business value.

³⁵“Key Success Factors for AI Agent Adoption in Small and Medium-Sized Enterprises (SMEs).” Sintex AI Blog, 2024.



Partner Perspectives:
Lessons from the Frontlines of AI Adoption

Building is where partners see both the biggest opportunities and the steepest challenges. Some are already experimenting with new offers like Chief AI Officer as a Service (CAIOaaS) or paid AI workshops. Others are acquiring small dev shops or partnering with specialized vendors to gain the bandwidth needed to develop repeatable solutions.

As one partner said candidly:

Our biggest gap is dedicated development bandwidth. We have no shortage of ideation... but we don’t have the internal resources to architect agents quickly and scale them into hardened, supportable services.

This reflects a wider truth: building doesn’t always mean coding from scratch. It can mean creating intellectual property in the form of repeatable playbooks, workshops or automation packages that bring clients tangible, scalable value.

From Building Value to Managing Performance

Even the most innovative agents need stewardship to stay effective. Once the blueprint is built, the focus shifts from creation to consistency: ensuring every system continues to learn, adapt and perform at its best.

That’s where the **Manage** Play begins: the discipline of turning innovation into sustained impact.

Play 5: Manage

For MIPs, **Manage** is about longevity. In the agentic economy, success is measured by how intelligently systems evolve after deployment. Ongoing optimization, security and governance transform intelligent tools into trusted partners, and short-term wins into enduring client relationships.

Operationalizing Continuous Value

Unlike static SaaS tools, AI agents are dynamic systems that learn and evolve, and, if unmanaged, drift away from optimal performance. A 2024 Deloitte study notes that over 60% of AI projects underperform after initial deployment due to lack of ongoing oversight and optimization³⁶. For MIPs, this means life-cycle management must include retraining, resiliency management, orchestration and proactive tuning.

Manage in Action

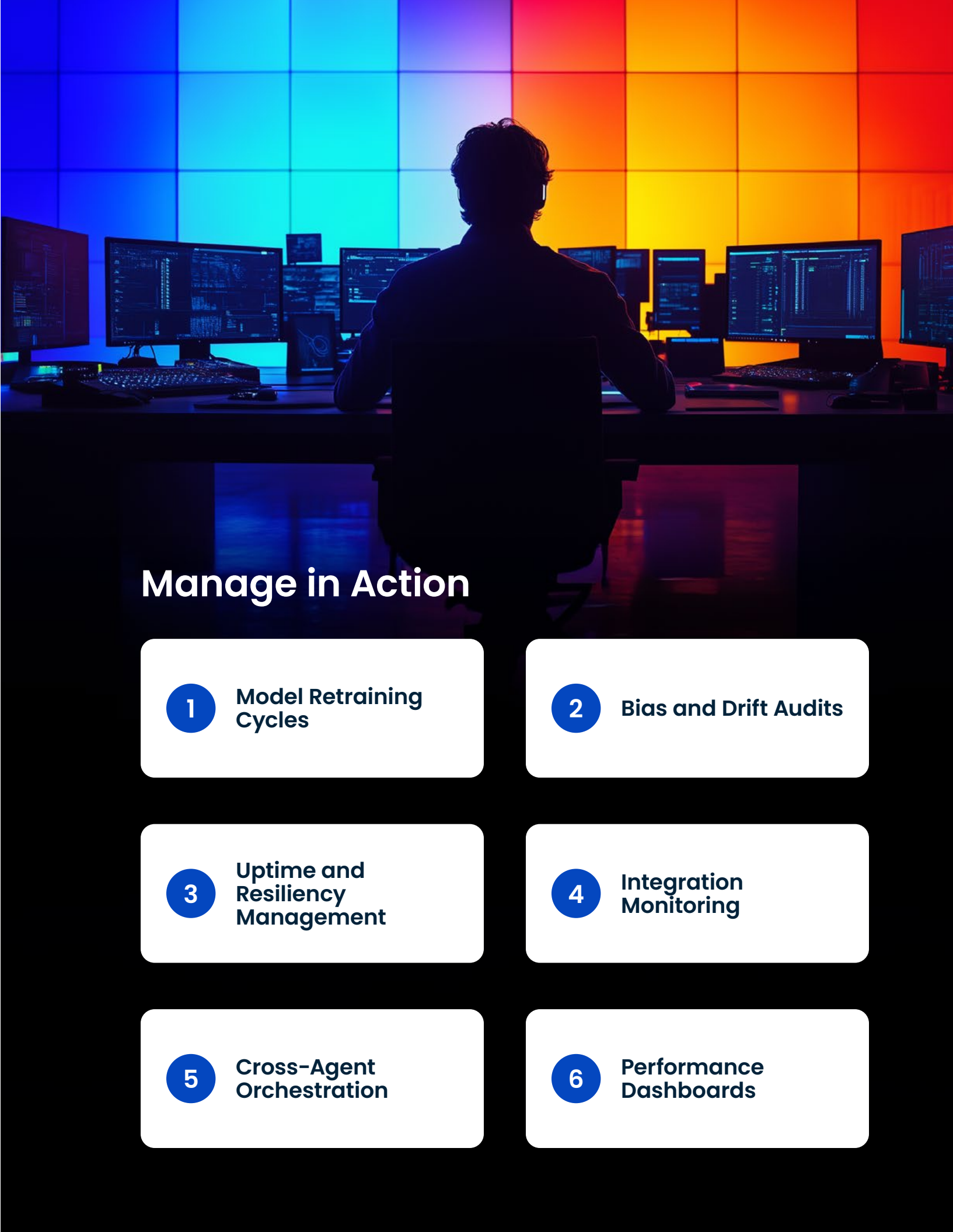
- **Model retraining cycles:**
Establish quarterly or semi-annual retraining plans tied to client data changes.
- **Bias and drift audits:**
Run automated checks to ensure agent outputs remain accurate, fair and compliant.
- **Uptime and resiliency management:**
Continuously monitor availability, error recovery and failover to ensure agents remain reliable under stress.
- **Integration monitoring:**
Track when upstream systems (ERP, CRM, APIs) change and proactively adjust the agent’s workflows.
- **Cross-agent orchestration:**
Manage how multiple agents collaborate

across processes to avoid conflicts and ensure seamless execution.

- **Performance dashboards:**
Provide clients with real-time visibility into agent efficiency, response times and ROI impact.
- For many MSPs, these may not be services offered today. That’s okay because it opens two clear paths forward:**
- **Expand capabilities.** MIPs can begin offering these services directly, building new revenue streams around training, advisory and process consulting.
 - **Leverage partnerships.** Where internal resources are limited, MIPs can partner with providers (including Pax8 and its ecosystem) who can deliver these services on their behalf, ensuring clients still get the change management leadership they need.

Either way, the message is clear: guiding clients through organizational change isn’t optional. It’s a differentiator that secures longer-term adoption, positions the MIP as a trusted advisor and creates recurring value beyond the technology itself.

This elevates the MIP from “deployment partner” to a “continuous improvement and resiliency partner,” ensuring agents not only work on day one but continue delivering value, reliability and outcomes over time.



Manage in Action

- 1

Model Retraining Cycles
- 2

Bias and Drift Audits
- 3

Uptime and Resiliency Management
- 4

Integration Monitoring
- 5

Cross-Agent Orchestration
- 6

Performance Dashboards

³⁶Deloitte. “AI Agent Architecture and Multi-Agent Systems.” Deloitte, 2024.

Security and Compliance at Scale

SMBs expect their intelligence providers to anticipate regulatory shifts, mitigate cyber risk and keep customer trust intact. According to IBM’s 2025 *Cost of a Data Breach Report*, AI-enabled breach prevention resulted in a 1.9M USD in cost savings compared to organizations that didn’t use compliance solutions³⁷. This makes compliance automation and AI-powered threat monitoring not just table stakes but differentiators in the MIP model.

For MIPs, this translates to:

- **Compliance automation:**
Map agent workflows to frameworks like GDPR, HIPAA or PCI-DSS, and keep logs accessible for audits.
- **AI-powered threat detection:**
Deploy agents that can monitor for anomalies in traffic, authentication patterns or data flows in real time.
- **Zero Trust enforcement:**
Apply continuous verification policies to agents themselves, not just human users.
- **Regulatory foresight:**
Provide quarterly “compliance briefings” so SMB leaders know their risks are being addressed proactively.

Security and compliance become not just table stakes, but high-value differentiators.

Revenue Through Optimization

Well-managed agents become both upsell engines and trust builders. Salesforce research shows that small businesses experiencing growth are nearly twice as likely to invest in AI compared to those that are struggling³⁸. By packaging ongoing optimization, plus continual updates to APIs, authentication methods and evolving protocols, as part of an AI or intelligence services subscription, MIPs ensure agents remain secure, compliant and high-performing. This proactive approach not only delivers measurable business results but also increases client confidence, leading to expanded consumption over time.

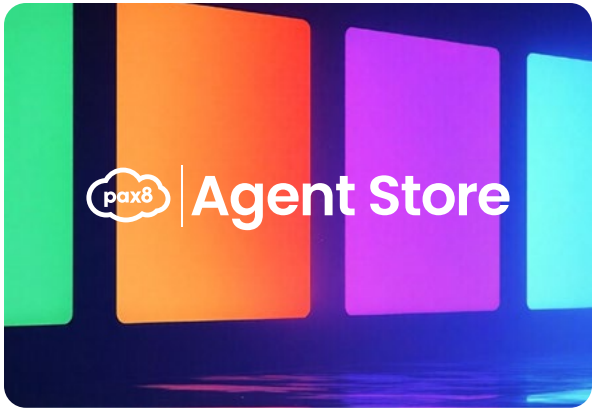
MIPs can monetize this by:

- **Bundling optimization as subscription:**
Package API updates, authentication upgrades and model enhancements into a monthly fee.
- **Outcome-based renewals:**
Tie subscription renewals to measurable ROI (e.g., reduced ticket backlog, faster customer response times).
- **Layering vertical add-ons:**
Introduce industry-specific extensions (e.g., healthcare intake forms, retail inventory predictors) as clients mature.
- **Expanding seatless scaling:**
Since agents don’t price by seat, grow revenue through function expansion (e.g., adding finance or HR agents) instead of headcount.

This proactive approach not only ensures performance but also deepens trust, creating a natural path to expanded consumption and higher-margin recurring services.

The Pax8 Advantage

The Pax8 Agent Store enables MIPs to not only deploy but also manage AI agents at scale. By integrating monitoring, analytics and update automation directly into the Marketplace ecosystem, Pax8 gives MIPs the infrastructure to sustain peak agent performance across all client environments. This creates a competitive moat: a service that starts strong and *stays* strong.



Adapt or Fall Behind

In a market where AI innovation cycles are measured in months, not years, the Manage Play isn’t optional; it’s the clearest pathway to success. MIPs who master this discipline will own the client relationship for the long haul. Those who treat management as an afterthought risk losing both relevance and revenue to more agile competitors.

³⁷IBM. *Cost of a Data Breach Report 2025*. IBM Security, 2025.
³⁸Salesforce. “AI and the Future of Small Business.” *Salesforce*, 2025.



Manage Use Cases

1

Ongoing Optimization Subscriptions

What it looks like:
The MIP delivers managed intelligence, combining continuous prompt/agent tuning, retraining, A/B testing, drift monitoring and version updates with active agent oversight, much like a functional manager monitors and coaches a human employee. This includes establishing success criteria, KPIs and performance review frameworks to ensure agents stay aligned with evolving business needs.

Why it works:
Salesforce documents that SMBs see stronger revenue growth³⁹ when AI initiatives are actively managed and aligned to business outcomes, not left as “set-and-forget.” Humanizing oversight resonates with SMB leaders, reinforcing the idea that agents require leadership and optimization to stay effective.

MIP angle:
Tie optimization to outcome dashboards; upsell higher tiers with performance guarantees.

2

Data Governance as-a-Service (DGaaS)

What it looks like:
The MIP deploys a **Data Governance Agent** that continuously monitors, enforces and optimizes governance policies across all AI agents in production. This isn’t just a service layered on top, but an intelligent agent that:

- Ensures compliance with regulatory requirements
- Maintains secure data pipelines
- Validates data accuracy
- Updates policies as laws, protocols or client needs evolve

Regular governance reviews are generated by the agent itself, with results tied directly into the client’s outcome dashboards.

Why it works:
Poor data quality is one of the top barriers to realizing AI ROI, with companies that implement strong governance frameworks seeing up to a 40% increase in AI project success rates⁴⁰. For SMBs, outsourcing this capability to a trusted MIP removes complexity and risk while improving AI performance and reliability.

MIP angle:
Sell the Data Governance Agent as a standalone or bundled component within a managed intelligence subscription. Position it not just as compliance insurance, but as an AI-driven performance multiplier that keeps every deployed agent accurate, secure and outcome-aligned over time.

3

Compliance and Risk Automation

What it looks like:
The MIP deploys a **Compliance and Risk Agent** that embeds policy checks, audit trails, PII protections and access controls directly into every agent workflow. Alerts, monitoring and remediation are handled autonomously, ensuring compliance is proactive rather than reactive.

Why it works:
SMBs consistently cite compliance as a barrier to AI adoption⁴¹. Embedding an AI-driven compliance agent helps overcome that hurdle by reducing operational burden, strengthening competitiveness, and building trust through automatic enforcement of standards. Research shows organizations see an average ROI of 340% on AI governance investments within two to five years⁴². Strong governance, paired with hands-on implementation support, accelerates adoption and ensures AI delivers its full value when embedded into core business processes.

MIP angle:
Sell the **Compliance and Risk Agent** as a standalone or bundled vertical “Compliance Pack” (e.g., HIPAA-lite for healthcare, SOC-aligned for finance). This turns governance into a monetizable, repeatable product that lowers SMB risk while raising confidence in their AI journey.

³⁹Salesforce. “[New Research Reveals SMBs with AI Adoption See Stronger Revenue Growth](#).” *Salesforce News & Insights*, 4 Dec. 2024; Salesforce. “[AI and the Future of Small Business](#).” *Salesforce Blog*, 5 June 2025.

⁴⁰ER/Studio. [The ROI of Enterprise Data Modeling for AI: Why Structured Data Matters](#). ER/Studio Blog, 2025.

⁴¹U.S. Chamber of Commerce Technology Engagement Center (C_TEC). “[U.S. Chamber Report: Small Businesses Rapidly Adopting AI Despite Regulatory Concerns](#).” *IPWatchdog*, Aug. 18, 2025.

⁴²“[AI Is Empowering Small Business Growth & Competition](#).” *Paramount Soft Blog*, 2024.

4

Data-Driven Expansion

What it looks like:

The MIP uses usage and outcome data to surface new opportunities (e.g., moving from a support agent to cross-sell marketing or finance agents once value is proven.)

Why it works:

One 2025 report tracks accelerating SMB adoption and revenue lifts where agents are chained across workflows⁴³; another argues disruption will concentrate among SMBs that layer agents continuously.

MIP angle:

Include quarterly “growth maps” that recommend the next agent(s) and projected ROI.



Partner Perspectives:
Lessons from the
Frontlines of AI
Adoption

Managing AI and intelligence services is where trust is either won or lost. Partners consistently identified **security, compliance and quality control** as their clients’ biggest concerns, and the areas where MSPs can differentiate most. Some reported high confidence: “*Cybersecurity and compliance are part of our DNA.*” Others were frank that their confidence is closer to a “6 or 7” and growing as they gain more real-world experience.

Several also highlighted the importance of proving value quickly: “*The one question I wish I could answer confidently today is: ‘How do we guarantee ROI on AI agent adoption within the first 90 days?’*” That urgency around measurement underscores that managing isn’t just about uptime — it’s about tracking and communicating business impact.

By owning governance, lifecycle management and ROI proof points, MSPs position themselves not just as implementers, but as long-term, trusted advisors in the AI transformation.

⁴³“SMB AI Adoption 2025: How Autonomous Agents Are Delivering a 2x Revenue Lift—Real-World Case Studies, Budgets & Compliance Guide.” xlearners, 9 May 2025; QuickerBetterTech (Forbes). “How AI Agents Will Disrupt Small and Mid-Sized Business in 2025.” Forbes, 14 Nov. 2024.

Conclusion:

The Time to Lead is Now

The Managed Intelligence Provider Playbook is not a promise of inevitability; it’s a roadmap for possibility. The agentic economy is still taking shape, and multiple players are vying to define it: consultancies are building strategy practices around AI, startups are moving fast with lightweight agent-native models and software vendors are already nudging downstream into managed services.

Yet MSPs begin from a position of strength. More than IT providers, you are trusted advisors, embedded in your customers’ businesses in a way few others are. You combine durable SMB relationships, operational scale, integration expertise and local presence that global vendors can’t replicate cost-effectively. With the right evolution, that trusted position becomes even more powerful, enabling you to move from advisor to true strategic partner, and ultimately, to a defensible role as a Managed Intelligence Provider.

This shift, however, requires more than technical adoption. MIPs will need to develop strategic consulting skills, vertical fluency and outcome-based pricing models that elevate them beyond tool deployment into true business transformation.

The launch of the Pax8 Agent Store creates a first-mover advantage by giving partners a platform to build, bundle and monetize agents within a trusted ecosystem. But it’s not a silver bullet. Success will come to those who plan thoughtfully, build incrementally and align closely with their clients’ business outcomes.

The window is open, and the choices you make in the next 18 months will determine your trajectory. The question is not whether SMBs will demand intelligence, **but who they will trust to deliver it.**



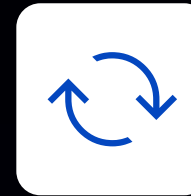
The Managed Intelligence Provider Playbook gives you the strategy; AI Guided Growth gives you the path to put it into practice. Explore this framework to see how you can apply it in your business today and transform the SMB economy tomorrow.



Your Quick Start Guide to Managed Intelligence



The MIP Playbook is a blueprint for evolving from Managed Services to Managed Intelligence. Here are three practical steps you can take right now to get started:



1 Redesign for Impact

- Identify a process you can improve with intelligence—whether inside your own business or with a client.
- Options include becoming your own *Customer Zero* (proving it internally), applying AI to repetitive workflows or helping a client streamline operations.
- The goal: start small, deliver measurable outcomes and build momentum.



2 Upskill Your Team

- Begin training your people to have business-outcome conversations about AI.
- Explore enablement resources like Pax8 Guided Growth to build skills in data, AI, security and Microsoft solutions.
- This ensures you're not just adding tools; you're building confidence and expertise.



3 Explore the Pax8 Marketplace

- The [Pax8 Marketplace](#) is your curated hub to discover, adopt and implement the latest AI products and features across SMB and MSP workflows.
- Log in to create a Pax8 Storefront and Public Storefront and begin exploring the self-service model for your clients and kickstarting your lead-gen engine.



Ready to go deeper?

These three steps are just the beginning. The full MIP Playbook shows you exactly how to Transform, Buy, Build, Sell and Manage, so you can win in the agentic economy.

[Read the Agentic Inflection Point report and MIP Playbook now](#)

www.pax8.com/managed-intelligence



Who We Are

Pax8 is the technology Marketplace of the future, linking partners, vendors and small-to-medium-sized businesses (SMBs) through AI-powered insights and comprehensive product support. With a global partner ecosystem of 40,000 managed service providers, Pax8 empowers SMBs worldwide with software and services to unlock their growth potential and enhance their security. Committed to innovating cloud commerce at scale, Pax8 drives customer acquisition and solution consumption across its entire ecosystem.

Our Purpose

Our purpose is to help every small business turn their dreams into reality through the power of technology — and Managed Intelligence Providers are the architects of that purpose.