pax8 | ▦ Microsoft

The Pax8 and Microsoft Playbook

Learn how our Microsoft expertise can help you optimize and enhance your Microsoft experience.

Guide navigation

A blueprint for your Microsoft journey

Microsoft and the shifting landscape of modern work

Microsoft is the cornerstone of modern business technology. In recent years, businesses of all sizes had to find ways to enable remote collaboration while keeping their workers and data secure as the world shifted rapidly to remote work on a global scale. Today, as artificial intelligence (AI) transforms the workplace once again, businesses of all sizes are looking for ways to integrate AI into their workflows to increase efficiency and remain competitive. The integrated nature of the Microsoft stack is foundational to making AI a natural part of the workday by folding generative AI and other AI capabilities into existing applications to generate instant insights and accelerate productivity. To stay relevant, it's vital for IT providers and technology advisors to build a comprehensive Microsoft technology stack that includes AI while maximizing the potential of their Microsoft program participation.

36%
of organizations have dealt with a security incident due to an unsecured remote worker [1]

70%
of employees are willing to delegate some work to AI [2]

How Pax8 enhances your Microsoft experience

Growing your Microsoft practice is easier than ever with The Pax8 and Microsoft Playbook. We simplify your Microsoft experience to make it easy to adopt in-demand Microsoft solutions, optimize your Microsoft program, and find opportunities to sell more – all while streamlining the management of your complete cloud tech stack.

- **Expertise** to help you earn more margins, optimize incentives and rebates, and keep up with program and product changes.

- **Modern Marketplace** to easily manage your licenses with consolidated billing, instant provisioning, and integrations with your preferred PSA tool.

- **24/7 technical support** to quickly resolve your Microsoft issues with in-house Pax8 engineers – reducing the need to escalate tickets to Microsoft.

- **Professional Services** to help you deploy Azure, harden your Microsoft environment, roll-out remote work tools, and more.

A blueprint for your Microsoft journey

Whether you're brand new to Microsoft or already purchasing through another distributor, Pax8 can effortlessly move your seats today. From expanding your existing Microsoft clients and migrating on-premise clients to landing net-new clients, Pax8 enhances your entire Microsoft experience so that you can make more possible for the modern workplace.

Accelerate cloud migration and achieve digital transformation	Enable remote work collaboration	Secure remote workers and ensure business continuity	Power business apps to drive data-based decisions

How to maximize every step of your Microsoft journey with Pax8

1. Guide clients toward digital transformation with Azure and by migrating from on-prem to M365.

2. Standardize integrated communication and collaboration solutions for remote work, such as Microsoft 365, Microsoft Teams, and Teams Phone solutions.

3. Tell a story about reducing risk (especially in remote work environments) with the security and business continuity features of M365 and Azure.

4. Power modern workflows and data visualization with custom business apps and dashboards through Dynamics 365 and Power Platform.

5. Margin up by offering managed services to harden Microsoft environments, secure remote workers, deploy Azure Virtual Desktop, and build custom apps – Pax8 Professional Services can augment your team on Microsoft projects and services.

6. Expand your team's expertise through education, skilling, and certifications.

7. Advance even further with Azure marketplace and optimize your Azure practice by leveraging Reserved Instances, Azure Hybrid Benefit, and Data Center Optimization.

Stay up-to-date

Strategically expand your tech stack

Our partner-focused events help you build on your Microsoft foundations with solution-focused sales advice for adding in-demand productivity, infrastructure, communications, continuity, security, and network solutions to your stack.

Register now

M365: Remote work and security

Only 4% of businesses have sufficient security for all of their data in the cloud [3]

Designed for the needs of small- to mid-sized enterprises, Microsoft 365 Business Premium offers a single, integrated technology solution that combines the Office productivity apps users know and love with granular device management and best-in-class security features.

Empower remote teamwork: With Microsoft Teams as a collaboration hub, M365 empowers your clients to work from anywhere, while Azure Virtual Desktop (AVD) protects remote workers' data and devices by allowing them to work securely on a virtualized Windows 10/11 desktop.

Defend data, documents, and the inbox: Advanced security features add a layer of defense against cyberthreats to protect business data, files, and emails.

Control and protect devices: The device management capabilities of M365 simplify device configuration and deployment, allow full control of company-owned mobile devices, and protect company data on personal devices.

More resources

Attend
Pax8 + Microsoft Bootcamp:
2-Day M365 Bootcamp

Download
Guide: Power up with
Microsoft productivity and
unified security

Watch
Teams Training Video: Free,
White-Labeled Teams End User
Training Video

Productivity

Office applications
Word, Excel, PowerPoint, Outlook, and more

Online services
Exchange, OneDrive (1 TB), Teams, and more

Advanced services
Exchange Online Archiving

Remote enablement
Azure Virtual Desktop (AVD)

Advanced security

External threat protection
- Microsoft Defender for O365
- Multi-Factor Authentication
- Enforce Windows Defender to activate BitLocker

Internal data leak prevention
- Data loss prevention
- Sensitivity labels and policies
- Microsoft Defender for Business

Device management

Device management Microsoft Intune
- Microsoft Intune
- Windows Defender Credential Guard
- SSO > 10 Apps
- Conditional access
- Shared computer activation

Deployment assistance
- Windows Autopilot
- Azure information protection
- Auto-installation of Office apps
- AAD auto-enroll

> *Each time we describe what's included with Microsoft 365, clients want to move forward, recognizing immediately the value to their business, security, and success.*
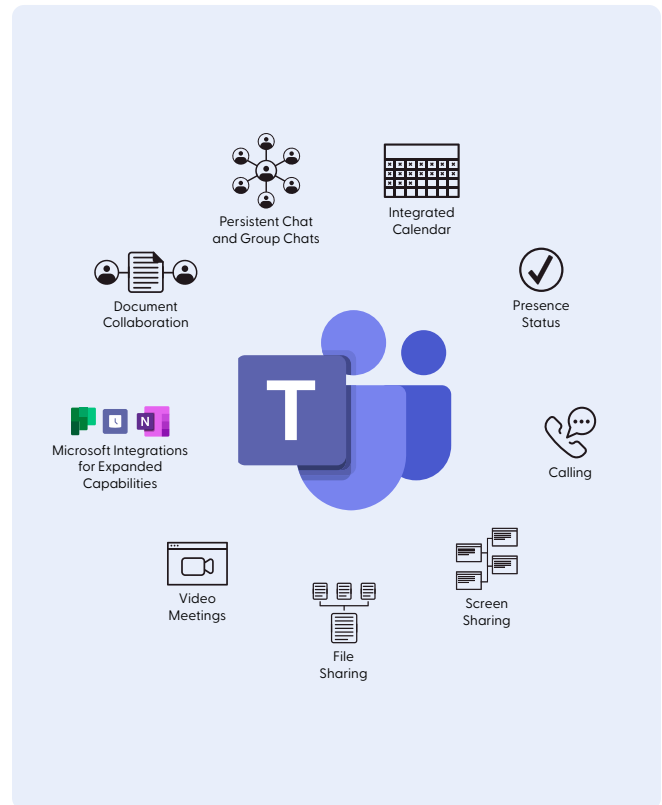
President | machineLOGIC

M365: Teams Phone Solutions

Microsoft Teams

Over 30 billion collaboration minutes per day [3]

Teams Phone is a modern cloud-based telephony add-on to Microsoft Teams that enables you to make and receive calls from anywhere, on any device. Together, they deliver an all-in-one communication solution.

- Cloud-based phone system for reliable and secure calling across your computer, mobile device, and/or desk phone, with advanced features such as call transfer, auto-attendants, and call lines.

- Built-in audio conferencing with a dial-in number for up to 250 people per meeting.

- Customize your calling plan - get a new number or migrate existing ones (or bring your own calling plan)

Persistent Chat and Group Chats

Integrated Calendar

Document Collaboration

Presence Status

Microsoft Integrations for Expanded Capabilities

Calling

Video Meetings

File Sharing

Screen Sharing

Who can benefit from using Teams Phone solutions?

Teams Phone is a great fit for employees who do a lot of external dialing, such as sales reps or teams who often need to interface with external clients and partners, and any organization that wants their communication conveniently in one central tool.

Keeping up with M365: same solution, new features

What's included in each M365 tier?

Microsoft 365 Business Basic
Cloud services

Microsoft 365 Business Standard
Cloud services and desktop apps

Microsoft 365 Business Premium
Cloud services, desktop apps, and advanced security

Microsoft 365 Apps for Business
Desktop apps

SMB Security

M365 Business Premium now includes Defender for Business – protect your user's identities, data, and endpoints with the unified security solution providing enterprise-grade security to the SMB.

M365 in the era of AI

M365 users now have access to Copilot on the web for data-protected AI assisted search, summary, and analysis. Copilot can help people find information, answer questions, and perform tasks using the power of AI.

Login and get to know your everyday AI Companion at **copilot.microsoft.com**.

Learn more about AI-readiness

Microsoft Teams Premium: Enhanced Collaboration and AI

Microsoft Teams Premium is designed to elevate your collaboration experience with advanced features that bring AI into the fold. Here's what it brings to the table:

Intelligent meeting recaps:
- AI-powered recap automatically provides a comprehensive review of your meetings, helping attendees and those who missed meetings stay informed
- Features include meeting notes, recommended tasks, and personalized highlights
- Notes allow you to see key points and takeaways after the meeting
- AI-generated tasks and action items are suggested for efficient follow-up

Efficient meeting recordings:
- To help navigate lengthy meeting recordings, Teams Premium introduces personalized timeline markers:
- These markers show when your name was mentioned, when screens were shared, and when you joined/left the meeting
- Speaker timeline markers organize who spoke during the meeting
- Soon, Teams will automatically generate meeting chapters for easy navigation

Live translation and captions:
- Teams Premium offers live translation for captions, breaking down language barriers
- Live captions are available in over 30 languages

Enhanced security and compliance:
- Teams Premium provides advanced security features to safeguard confidential information shared over Teams
- Features include end-to-end encryption for meetings with up to 50 attendees, control over who can record, preventing copy/paste in meeting chats, and the ability to block incoming chats from people in the organization
- Security features cover meetings, chats, calls, and file sharing

Expanded meeting capabilities:
- Larger storage space (up to 10GB per user)
- Larger meeting sizes (up to 300 participants per meeting)
- Collaborative annotations in Teams meetings
- Hundreds of collaborative apps to enhance productivity

> Teams Premium is ideal for businesses with complex collaboration needs, while Teams Essentials provides basic communication and collaboration tools. Work with your team at Pax8 to choose the one that best suits your organization's requirements.

Microsoft Security
Helping Pax8 partners become defenders

Choose the best M365 experience	→	Protects identities and endpoints	→	Simplify data protection and endpoints

Maximize the potential of your security framework with Microsoft tools you already know and trust. From modern collaboration to comprehensive protection, Microsoft covers every step of the way.

Secure the user

Secure the data

Secure the devices

Secure what's beyond

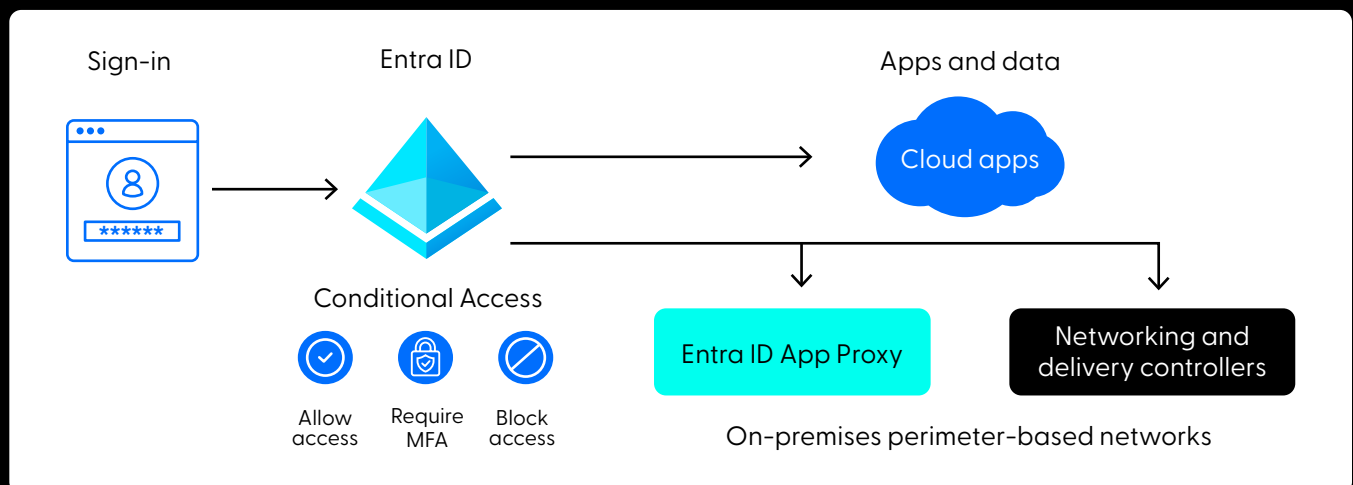## Secure the user
with Microsoft Entra ID

Transform your business's productivity with secure remote access to on-premises apps using App Proxy, all while minimizing network exposure. Control 'where, when, and who' can connect to Office apps with Conditional Access. Plus, streamline user management and cut IT overhead with Dynamic Groups, which automatically handles security group memberships by adding or removing users as needed.

Entra ID has features like:

- Multifactor authentication (MFA)
- Self-service password reset
- Conditional Access
- Dynamic Groups

Entra ID Premium P1 is included with Microsoft 365 Business Premium and M365 E3.

Entra ID Premium P2 is included with Microsoft 365 E5.

Sign-in

Entra ID

Apps and data

Cloud apps

Conditional Access

Allow access

Require MFA

Block access

Entra ID App Proxy

Networking and delivery controllers

On-premises perimeter-based networks

Secure the data
with Microsoft Intune

As mobile devices become central to your team's workflow, ensure their data and apps are protected with cutting-edge security. Microsoft Intune allows you to manage mobile devices and applications from a single cloud-based console, applying security policies and settings to ensure compliance and prevent data loss. You can also keep personal and work data separate on mobile devices, and remotely wipe corporate data if a device is lost or stolen.

Features included with Microsoft 365 Business Premium, E3, and E5:

- Microsoft Defender for Business
- Full centralized management of mobile and laptops with Intune
- Remote data wipe for lost and stolen devices
- BitLocker encryption
- Strong PIN requirements combined with Wi-Fi and VPN profiles

Mobile Device Management (MDM)

Conditional Access:
Manage access to data on company owned devices

- Enroll devices for management
- Report and measure device compliance
- Provision settings, certs, profiles
- Remove corporate data from devices remotely

Mobile Application Management (MAM)

Conditional Access:
Manage which apps can be used to access work email or files on personal devices

- Publish mobile apps to users
- Enforce that work data cannot be saved on personal apps
- Configure and update apps
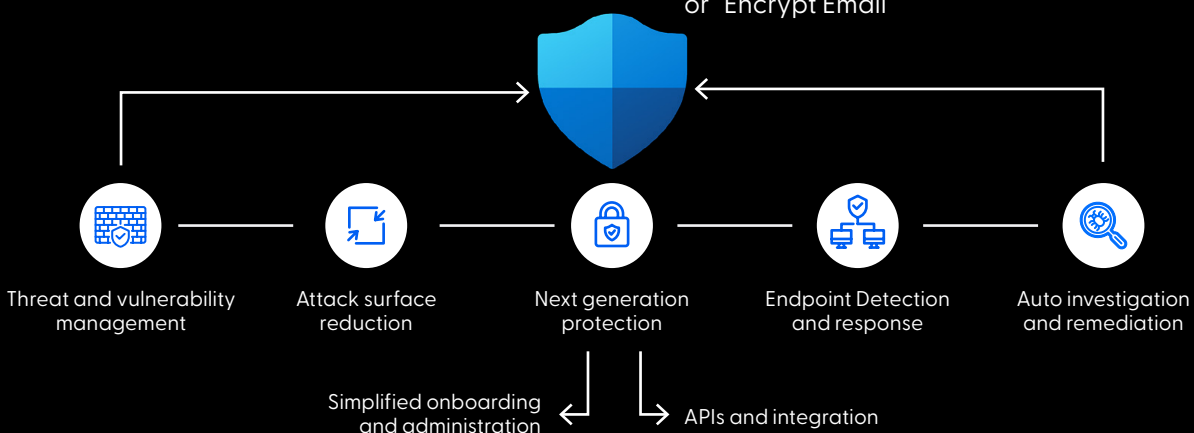- Secure and remove corporate data within mobile apps

Secure the devices
with Microsoft Defender

Secure your entire digital environment with the all-in-one solution for Threat and Vulnerability Management. Prevent, detect, and respond to cyber threats across your network, endpoints, cloud services, and applications. Stay ahead of cyber threats with advanced features like threat intelligence, behavior monitoring, automation, and orchestration.

Included with Microsoft 365 Business Premium, E3, and E5:

- Microsoft Defender for O365
- Information Protection for securing and classifying documents
- Ability to revoke access to documents
- Tracking of sensitive documents
- Email restrictions such as "Do Not Forward" or "Encrypt Email"

Threat and vulnerability management

Attack surface reduction

Next generation protection

Endpoint Detection and response

Auto investigation and remediation

Simplified onboarding and administration

APIs and integration

Secure what's beyond
with Microsoft Defender

Secure your business-critical applications and data with Microsoft Defender. Implement precise policies to manage user interactions with your data – restrict copy/paste/save actions, enforce encryption, and block access from unmanaged devices. Plus, keep a watchful eye on data usage and flow across applications, cloud services, and external networks to prevent unauthorized access and leakage.

Included with Microsoft 365 Business Premium, E3, and E5:

- Restrict copy/paste/save of corporate data to personal apps with Intune app protection policies

- Advanced threat protection to guard against malware and zero-day attacks

- Data loss prevention to monitor and prevent the transmission of sensitive data

Get up to speed on security features and best practices with Microsoft.

Learn more

Azure: unlock the power of Cloud Services

More resources

Attend
Pax8 + Microsoft Bootcamp:
2-day Azure Bootcamp

Explore
Resource article: selling guide,
pricing calculator, training

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

If your customer stores data in an on-premise or 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. Pax8 can help you simplify the complexity of Azure, with its 20,000 SKUs and usage-based billing model, and deliver an Azure solution that's rightsized for you and your customers.

Adopt and unlock the power of Azure though Pax8

Pax8 has the deep Azure expertise necessary to help you develop an Azure practice. Our two-day Azure Bootcamps help partners navigate the complexities of adopting and selling Azure, while the Pax8 Marketplace simplifies Azure management through:

- Predictive cost analytics calculates data to enable optimization of techniques and strategically lower costs.
- Threshold management notifies you when approaching customized, consumption-based thresholds.
- Detailed billing shows your clients' granular billing data.

Additionally, Pax8 Professional Services can assist you with any Azure deployment, AVD implementation, 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 improve data governance.

- Extend on-premise Active Directory to cloud-based Active Directory
- Enable MFA & SSO through identity management
- Migrate existing or new data and servers to Azure and modernize cloud environments
- Leverage Azure for disaster recovery and backup
- Harden Azure with Azure Defender for Servers
- Design and architect Azure environment
- Choose the right Azure Virtual Desktop solution for your customers and build go-to-market strategies

Azure: Going further with virtual desktops and incentive options

Azure Virtual Desktop (AVD)

Shape LineAVD enables central management and security of users' desktops by creating Windows 10/11 virtual desktops in Azure, allowing end users to work remotely with a secure connection and securely store data in the cloud rather than on their local device. (M365 already includes the required user licensing, so only computing resources need to be provisioned and paid for in Azure.) AVD separates the computer environment from user devices, greatly reducing the risk of confidential information being left on a personal device.

Azure reserved VM instances and Azure hybrid benefit

Partners can realize major discounts on virtual machines (VM) by moving from a pay-as-you-go model to one1-year or three-year commitments on reserved VM instances (RIs). By reserving VMs in advance, you can better manage costs across predictable and variable workloads – improving your forecasting with a single upfront payment or lowering your upfront cash investment with monthly payment options. You'll still have the flexibility to exchange or cancel reservations should your needs evolve.

You can achieve even deeper discounts by stacking RIs with Azure Hybrid Benefit, which allows you to maximize license investments by utilizing existing on-premise Windows Server licenses or purchasing them through Pax8 for your Azure deployment.

Pax8 Infrastructure Solutions Consultants can help you select the right VM solution to achieve the greatest savings, determine when RIs and Azure Hybrid Benefit are relevant to your project, and build go-to-market strategies.

Data Center Optimization (DCO) program

Partners with a mature Azure practice and an upcoming data center migration project should look into Microsoft's Data Center Optimization program through Pax8. This program helps partners reduce cost and risk, and accelerate migrations to deliver client success. Participants commit to an Azure revenue spend to gain the benefits of:

• Significant offers and incentives

• Engineering escalation support

• Azure deal support and review

• Microsoft tools for building deals, aligning workloads, and planning migrations

If you're interested in the DCO program, reach out to your Pax8 account manager to qualify!

Business Apps: Power Platform

With the process automation capabilities of the Microsoft Power Platform, you can now take direct control of workflows and customize solutions for your clients' business challenges. With pre-built templates, 275+ connectors, and "record, point, and click automation," Power Platform enables you to easily build apps, automate workflows, and analyze data to activate digital selling and drive data-based decision-making across all departments.

Power BI creates dashboards for powerful data visualization.

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 Automate improves productivity and reduces manual processes with workflow automation.

Power Virtual Agents helps businesses respond rapidly to customer and employee needs — at scale — using intelligent chatbots.

Power Platform

Power BI
Business analytics

Power Apps
Application development

Power Automate
Intelligent virtual agents

Power Virtual Agents
Process automation

More resources

Attend
Pax8 + Microsoft Bootcamp:
2-day Dynamics Bootcamp

Business Apps: Microsoft Dynamics 365

Microsoft Dynamics 365 offers your customers a portfolio of intelligent applications that deliver both operational efficiency and better customer experiences. It combines elements of customer relationship management (CRM) and enterprise resource planning (ERP) with productivity applications and AI capabilities so organizations can increase efficiency without increasing complexity or costs.

Dynamics 365 Business Central delivers cloud accounting and ERP capabilities to help manage departments across a small to medium-sized business (SMB). It offers real-time business reporting and analytics and native integrations with Microsoft 365 tools.

With our recent acquisition of Dynamics services company Bam Boom Cloud, Pax8 helps you launch your Dynamics business with our KickStart™ implementations that can help you implement Business Central.

Dynamics 365 Sales empowers sales teams by giving them AI-powered automation capabilities and insights into their workflows. Sales teams can use Copilot to summarize and write emails using their customer data and utilize AI-based scoring models. They can also prepare for improved customer engagements with summaries and suggested actions, forecasts, and guide sales activities.

Dynamics 365 Customer Service gives agents the capability to resolve customer issues faster by using generative AI and automation. Copilot can help agents quickly diagnose, troubleshoot issues, and draft customer responses. AI-powered chatbots enable self-service, while service operations get a boost from omnichannel, AI-driven insights.

Benefits of Dynamics 365 for MSPs*

600%
Annual contract value (ACV) deal size on Microsoft 365

2,500%
Potential revenue increase

99%
Sell-through opportunity

Internal Pax8 data, 2023

More resources

Attend
Dynamics Demystification session

Train
Dynamics Bootcamp

Read
Dynamics 365 Guide

Professional Services for Microsoft

For Microsoft projects that are too time-consuming or complex to tackle alone, partners can take advantage of Pax8 Professional Services, the technical enablement arm of Pax8. We help our partners grow their Microsoft businesses, increase efficiencies, and reduce risk through the expert delivery of Microsoft deployment and migration services. Pax8 Professional Services is designed to add scale, capability, and experience to your team in an on-demand fashion.

M365 enablement

Modern Workplace

- Mailbox Migration
- SharePoint Migrations
- Teams Phone System Implementation
- Tenant to Tenant Migrations

Microsoft Azure

- Azure Virtual Desktop
- Server Migration (lift existing infrastructure to Azure)
- Data Migration (lift files, databases, etc. to Azure)
- Environment Modernization (build fresh infrastructure in Azure)

Microsoft Dynamics 365

- Implementation of Business Central and Sales
- Support, maintenance and training on the system

Microsoft Security

- Microsoft 365 based security
- Pre-optimized, CIS Control aligned implementations for Intune, Entra ID, and Defender for Office

With Pax8 Professional Services, you can get your customers' data in the Microsoft ecosystem and build on industry security best-practices for AI. Our partner-first and channel-exclusive team of certified experts empowers you to deliver greater business outcomes for your customers.

Got a Microsoft project that could use a boost?

Tell us about your project

Expand your team's Microsoft expertise

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

pax8 Academy

Fuel your growth at every step of your journey with support from MSP experts. Get access on-demand learning; virtual, instructor-led courses; peer groups; and business coaching. Browse courses and build your path to growing your cloud revenue by up to 110%[5].

Browse Academy offerings

pax8 Events

Meet with fellow cloud innovators at channel events. Build your community, learn new information and skills, and set yourself up for continued success.

Browse channel events

Technology for Social Impact

To help partners deliver affordable and innovative cloud solutions and drive digital transformation for eligible not-for-profit organizations, Microsoft has donations and discounts available for M365, Azure, and Dynamics 365 licensing, as well as training and resources to help them succeed.

This is a huge opportunity for MSPs to grow their businesses while doing good. 77% of nonprofits say technology has helped them be more efficient or better work toward their mission, but 55% see the need to invest more in technology to increase fundraising.[6]

Pax8 is dedicated to helping partners grow while doing good in the nonprofit space, and more than 3,000 Pax8 partners have seen success by supporting nonprofits. As part of Microsoft's Tech for Social (TSI) Program, Pax8 offers grants and discounts on more than 70 cloud solutions, including Microsoft 365, Power Apps, and custom-built solutions for nonprofits with Dynamics 365.

Microsoft solutions for nonprofits

- **Microsoft 365:** improve cybersecurity, reduce costs, and empower nonprofit staff and volunteers to easily work on their initiatives from anywhere.

- **Azure:** optimize costs and rapidly scale nonprofit operations while improving operational stability and network resilience.

- **Dynamics 365:** engage donors and volunteers and manage organizational operations with business applications powered by AI-driven insights.

More resources

Learn
Program overview: learn more about Microsoft's Partners for Social Impact Program

Learn
FAQ and eligibility info: learn how to register your not-for-profit clients

Download
eBook: a Crash Course in M365 Business for Nonprofits

Move your not-for-profit clients to M365 Business and your first 10 users are free

To make the benefits of M365 Business more affordable to not-for-profit organizations of all sizes, Microsoft has a special offer that provides not-for-profit organizations with free M365 Business for up to 10 users, and discounted pricing of approximately $4.90 per additional user per month (M365 Business is typically $19.80 RRP).

Get started

Why Pax8?

Pax8 enhances and simplifies your Microsoft experience with our modern Marketplace, in-house expertise, and 24/7 US-based technical support.

We've made Microsoft (and everything cloud) so straightforward that it's easy to see why thousands of MSPs and IT service providers across the globe are switching to Pax8.

2012	**1,300+**	**70+**	**25,000+**
Founded	Employees	Vendors	Partners

2023 MSUS	2023 MSUS	IT EUROPA
Customer Service Award Winner	**Modern Workplace for SMB Award Winner**	**Channel Programme of the year**
2022	2022	2022

A modern partner experience

Pax8 simplifies the way organizations buy, sell, and manage cloud solutions, empowering our partners to achieve more with cloud technology. Our born-in-the-cloud marketplace modernizes the channel's cloud journey with consolidated billing, automated provisioning, and industry-leading PSA integrations. And our technology is backed by our world-class partner experience that provides responsive support alongside the education and resources you need to grow your cloud business. If you want to be successful in the cloud, you need to work with Pax8.

Do it all in the Pax8 Marketplace

Our dynamic marketplace helps partners seamlessly deliver and manage cloud solutions. Quote, order, bill, and provision all of your cloud products in one place, with a single monthly invoice. And, with built-in data analytics and business intelligence, the Pax8 Cloud Commerce Marketplace provides the insights you need to optimize your margins and sell more.

Ordering
Buy Microsoft and other cloud products instantly from one place with the intuitive ordering workflow of the Marketplace.

PSA integrations
The Pax8 Cloud Commerce Marketplace integrates with Autotask, ConnectWise, Kaseya, Syncro, Tigerpaw, and RepairShopr — so you can manage everything from the convenience of your preferred PSA tool.

Instant provisioning
Our Marketplace integrates with Microsoft Partner Center — enabling automated, instant provisioning.
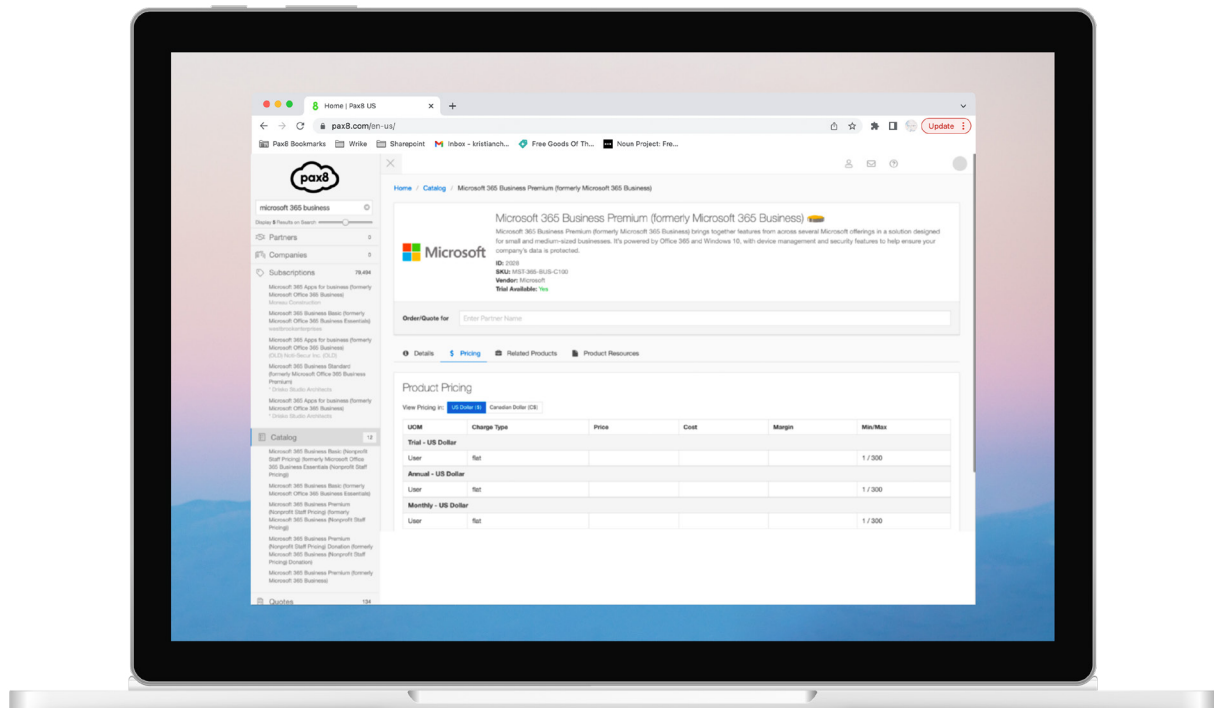
Managing clients
Get a comprehensive view of your entire Microsoft client base and manage their overall cloud tech stack within the Pax8 Cloud Commerce Marketplace.

Channel-focused cloud products
Build your complete tech stack, with leading vendors across productivity, infrastructure, continuity, and security.

Business intelligence
See targeted up-sell and cross-sell opportunities in your client base and identify gaps in your clients' technology stacks through data visualization.

pax8 | Microsoft

Want to enhance your Microsoft experience
to make more possible for your clients?

Your Microsoft experts
are here to help.

Schedule a call

Sources
1. OpenVPN, Remote Work Is the Future — But Is Your Organization Ready for It?
2. 2023 Work Trends Report
3. The State of Cloud Data Security
4. Microsoft Teams reaches 115 million DAU–plus, a new daily collaboration minutes metric for Microsoft 365
5. Pax8, 2022, "Peer Group GMRR"
6. Report: State of Marketing for Nonprofits 2023