The Pax8 and Microsoft Playbook

Learn how our Microsoft expertise can help you optimize and enhance your Microsoft experience.
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Microsoft and the shifting landscape of modern work

Microsoft is the cornerstone of modern business technology. In 2020, 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 some employees return to the office and others continue to work remotely, employers have a responsibility to make work worth it for their teams. The integrated nature of the Microsoft stack is foundational to driving hybrid workspaces that allow for seamless collaboration and strong interpersonal relationships for all businesses, no matter where their employees are. To stay relevant, it’s vital for IT providers and technology advisors to build a comprehensive Microsoft technology stack while maximizing the potential of their Microsoft program participation.

36% of organizations have dealt with a security incident due to an unsecured remote worker. 43% of business leaders say relationship-building is the greatest challenge in hybrid and remote work.

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.
Pax8 and Microsoft Playbook:
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

2. Standardize integrated communication and collaboration solutions for remote work, such as Microsoft 365, Microsoft Teams, and M365 Business Voice.
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.

pax8 Mission Briefing
Strategically expand your tech stack
Our newly revamped mission briefings 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
Solutions

M365: Remote work and security

Over 30 billion collaboration minutes per day

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 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

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

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)

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

Internal data leak prevention
- Data loss prevention
- Azure information protection
- Microsoft Defender for Business

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
Solutions

M365: Collaboration and communication

Microsoft Teams

Over 115 million daily active users

Microsoft Teams is the hub for collaboration and teamwork inside M365 — integrating chat, video meetings, calling, file sharing, screen sharing, document collaboration, presence, calendaring, and expanded capabilities through customizable app extensions.

Popular Teams third-party app extensions include:

**Business apps:** Salesforce, ADP, Zoom, Google Analytics

**Project management:** Wrike, Trello

**Marketing:** HubSpot, Mailchimp, Constant Contact

**MSP tools:** GitHub, Zendesk, Jira

Microsoft 365 Business

M365 Business Voice 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.
- Included domestic calling plan – get a new number or migrate existing ones (or bring your own calling plan).

M365 Business Voice target user profile

M365 Business Voice is a great fit for employees that do a lot of external dialing, such as sales reps or teams who often need to interface with external clients and partners.
Solutions

Keeping up with M365: New names, same 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
Microsoft Teams Essentials: Connection and collaboration for SMB clients

Microsoft Teams Essentials is a stand-alone offering for small- and mid-sized businesses (SMBs) that brings together the best of Teams with meetings, chat, calling, and collaboration. It provides a new entry point into Microsoft 365 ecosystem for businesses with 300 or fewer employees that are specifically looking for rich meetings, calling, and collaboration experiences.

Teams Essentials lets you deliver a full Teams experience to SMB clients without having to deploy the full Microsoft 365 suite, and it’s built for easy implementation. It works seamlessly with on-premises or hosted exchange, integrates with a client’s existing email system, and allows for a single calendar view. It includes access to cloud versions of Microsoft 365 apps and enables file and document sharing among users. It also includes per-user cloud storage for documents and files.

Teams Essentials at-a-glance

<table>
<thead>
<tr>
<th>General</th>
<th>Channel availability</th>
<th>Partner Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seat cap</td>
<td></td>
<td>300</td>
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</table>

<table>
<thead>
<tr>
<th>Core Teams Experience</th>
<th>Group meeting participants</th>
<th>300</th>
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<tbody>
<tr>
<td>Meeting duration</td>
<td>30 hrs</td>
<td></td>
</tr>
<tr>
<td>Unlimited chat</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>1:1 calls/meetings and screen sharing</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Virtual backgrounds</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Live closed captions</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Guest access</td>
<td>✓</td>
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</table>

| Office               | Web and mobile Microsoft 365 apps | ✓              |

<table>
<thead>
<tr>
<th>Productivity</th>
<th>Fire and document cloud storage (per user)</th>
<th>10 GB</th>
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</thead>
<tbody>
<tr>
<td>Channels</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Third-party Teams integrations</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Admin</td>
<td>Centralized management</td>
<td>✓</td>
</tr>
</tbody>
</table>

Teams Essentials is an easy, cost-effective entry point into the world of Microsoft productivity for SMB clients, so their people can connect naturally, stay organized, and bring ideas to life.

Reach out to your Pax8 rep to learn all about selling Teams Essentials.
Solutions

Azure: Unlock the power of IaaS

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

Adopt and unlock the power of Azure through 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 services to Azure**
- **Leverage Azure for disaster recovery and backup**
- **Harden Azure with Azure Defender for Servers**
- **Design and architect Azure environment**
Solutions

Azure: Going further with AVD, RIs, and DCO

Azure Virtual Desktop (AVD) and Nerdio

AVD (which is included with M365) enables central management and security of users’ desktops by creating Windows 10 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. AVD separates the computer environment from user devices, greatly reducing the risk of confidential information being left on a personal device.

Pax8 works with industry leader Nerdio to help partners easily estimate costs, automate, manage, and optimize AVD deployments.

Azure reserved VM instances and Azure hybrid benefit

Partners can realize major discounts on virtual machines by moving from a pay-as-you-go model to 1-year or 3-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!
Solutions

**Dynamics 365 / Power Platform: Business Apps**

With the process automation capabilities of the Microsoft Dynamics 365 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.

**More resources**

**Attend**
Pax8 + Microsoft Bootcamp: 2-day Dynamics Bootcamp
Services

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.

Our team of highly skilled Cloud Engineers help Pax8 partners plan, assess, design, migrate, customize, and optimize cloud solutions. All Pax8 Professional Services are white-labeled, so your clients never know we’re involved. Plus, with partner-focused pricing, our Professional Services add capabilities and bandwidth to your team, which translates to increased margins on Microsoft projects.

M365 enablement

M365 Hardening bundle: Increase overall security posture by enabling Advanced Threat Protection and turning up auditing capabilities in M365. Configure security best practices and Azure AD MFA.

Azure Architecture & Enablement
• Azure architecture and enablement
• Azure deployments
• Azure AD Connect setup
• Hands-on technical training labs

Migration services
• On-Prem Exchange to Office 365 or Microsoft 365
• Hosted Exchange to Office 365 or Microsoft 365
• G-Suite to Office 365 or Microsoft 365
• On-Prem to Azure
• Teams / SharePoint / OneDrive

Security
• Intune advisory and implementation
• Hardening Office 365
• Maas360 advisory and implementation

Got a Microsoft project that could use a boost?

Tell us about your project
Optimize and enhance

Make the most of your Microsoft program

We believe in rewarding Pax8 CSP partners for driving the activation and enablement of Microsoft clients. As your Microsoft experts, we’ll show you how you can earn additional margins on net-new Microsoft clients and navigate the Microsoft incentives and rebates requirements. Here's your checklist:

1. Attain one of the six Solutions Partner Designations.
2. See the list of available Microsoft incentives.
3. Actively sell with a valid Microsoft Cloud Reseller Agreement.
4. Complete onboarding to the CSP incentives tool.

The Microsoft Incentives/Rebate structure changed on January 1, 2023. Read this guide to learn more.

Don’t leave money on the table from Microsoft!

Our Pax8 Microsoft experts created a guide to clear up the confusion around competencies, incentives, and rebates.

Get the guide
Optimize and enhance

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 Bootcamp**

**Azure Bootcamps** teach you to navigate the complexities of building a Microsoft Azure practice with deep-dive technical learning, including how to enable remote work with AVD.

**Modern Workplace Bootcamps** are designed to help MSPs successfully adopt and deploy M365 in the modern workplace.

**Dynamics and Power Platform Bootcamps** cover how to automate sales processes and build low-code apps with Business Central, Power Platform, and CRM.

**pax8 Mission Briefing**

Mission Briefings 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 to attend

hey@pax8.com | +1 (855) 884-7298 | pax8.com
Microsoft for nonprofits

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.

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
Your Microsoft experts

**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 US, Canada, Europe, and the UK are switching to Pax8.

<table>
<thead>
<tr>
<th>2012</th>
<th>1,300+</th>
<th>70+</th>
<th>25,000+</th>
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<tbody>
<tr>
<td>Founded</td>
<td>Employees</td>
<td>Vendors</td>
<td>Partners</td>
</tr>
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**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.

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2022 MSUS

- Customer Experience Award Winner
- Indirect Provider Award Winner
- Modern Workplace for SMB Award Winner
Your Microsoft experts
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 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 Pax8 Marketplace.

**PSA integrations**
The Pax8 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 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.
Want to enhance your Microsoft experience to make more possible for your clients?

Your Microsoft experts are here to help.

Schedule a call