

# THE CLOUD SOLUTION PROVIDER GUIDE

YOUR TRUSTED HANDBOOK TO NAVIGATE MICROSOFT'S CSP PROGRAM



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# WHY YOU CAN'T IGNORE THE CSP

There's no getting around it. The cloud has become part of the new business landscape. And it shouldn't surprise you to learn that it's only going to get more popular as time goes on. If you want to stay current and keep your business growing, you'll have to adapt. Have you started looking at your options? As a Managed Service Provider (MSP) or Value Added Reseller (VAR), you might find the cloud a bit daunting at first. Don't worry. There are many ways to get things moving.

One way to become your customer's most trusted advisor is to embrace tried and true methods. In other words, don't start with a blank sheet! Surely you've heard about Microsoft's Cloud Solution Provider program (CSP). This guide will help you clear up all the questions you might have after hearing that tongue-twister! And, if you're stumped for ideas, SherWeb will help you explore your opportunities in the cloud! The CSP program will help you adapt and evolve your business so you can own the end-to-end relationship with your clients and still leverage products that are known, wanted and needed by small business owners.

We can't stress this enough. Microsoft's CSP program can help you drive stronger customer relationships and engagement, increase your profitability and streamline your revenue and growth for years to come. And you don't have to start from scratch. We bet you have a lot of questions. You want to know how this program works and what you'll need to get started. What kind of profits can you earn? Can you get help when you need it? Just keep on reading. You'll find the answers to all these questions and more!

# \$500 BILLION

WILL BE SPENT IN THE GREATER CLOUD  
MARKET BY 2020

IDC FutureScape: Worldwide Cloud 2016 Predictions — Mastering the  
Raw Material of Digital Transformation, doc #259840, November 2015

# 80% OF BUSINESSES

ARE DEPLOYING OR FULLY EMBRACING  
THE CLOUD TODAY

# TWO-THIRDS

OF GLOBAL 2000 CEOs HAVE  
DIGITAL TRANSFORMATION IN THEIR  
CORPORATE STRATEGIES

CLOUD PARTNERS OUTPERFORM THEIR  
PEERS BY:

**2.0X** ON GROWTH

**1.5X** ON GROSS PROFIT

**1.8X** ON RECURRING REVENUE

# WHAT IS THE CSP PROGRAM?



As we mentioned earlier, the CSP, or Cloud Solution Provider program, is an initiative set up by Microsoft. The CSP lets you set your **own prices** and **profit margins** for reselling Office 365, Dynamics 365 and Azure, three of Microsoft's most popular products. The program has **no restrictions** regarding **company size, location or your level of competence**. In other words, your cloud business can join from anywhere in the world and with any number of employees, even if you're a newcomer to cloud solutions.

## HERE'S HOW MICROSOFT DEFINES THE CSP PROGRAM:

“ The Microsoft Cloud Solution Provider program enables partners to directly manage their entire Microsoft cloud customer lifecycle. Partners in this program utilize dedicated in-product tools to directly provision, manage and support their customer subscriptions. Partners can easily package their own tools, products and services and combine them into one monthly or annual customer bill. ”

In other words, the CSP is a way for partners to resell Microsoft products by working with Microsoft directly, or going through a trusted partner that is already a member of the CSP program. These two options are called Direct and Indirect CSP. We'll talk more about that later!



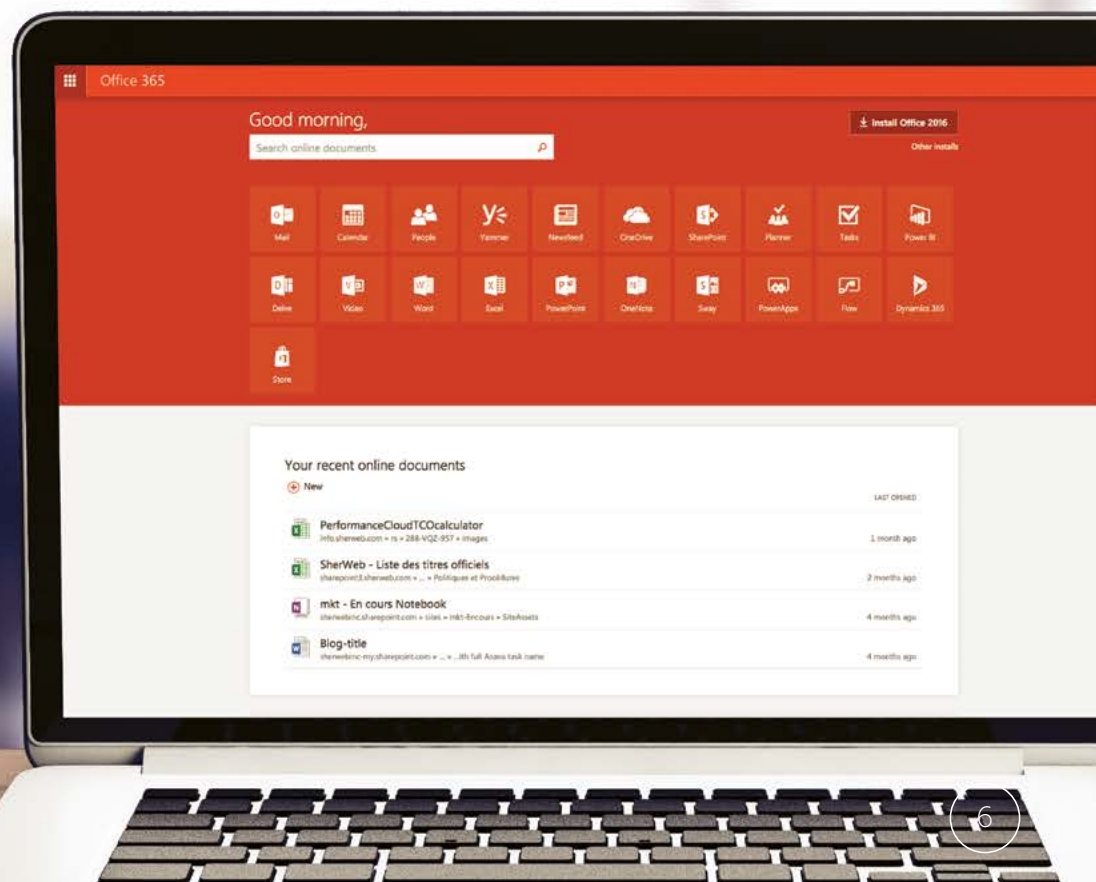
WHAT PRODUCTS ARE  
**AVAILABLE IN THE CSP?**

# Office 365

Everyone knows about Office 365. It's a set of Microsoft Office applications that includes Word, Excel, PowerPoint, Outlook and OneNote. But it also has other services such as Exchange for business class email, online storage with OneDrive and Skype for Business. With Office 365 you get the full, installed Office experience on PCs, Macs, tablets and phones, all synced together, no matter where you are. There's no doubt about it. This product is the corner store for modern business. As a CSP program subscriber, you get to build offers by moving your clients to the cloud with Office 365.

Take advantage of this opportunity to transform your business and develop monthly recurring revenue by offering value-added services for Office 365 such as business consulting, integration work and app development. Don't forget about the managed services you can offer your clients under the CSP, such as support and deployment. Because most of your potential customers already know Office and need it to run their business, you can use it to draw attention to your services. Everyone needs email. Everyone uses documents during their workday. This makes your strategy simple: Go in, get the client talking and sell Office 365. Build a relationship based on trust. The door is now open for you to upsell the client to any other services you offer, whether they're your own or a third-party product.

“  
**EVERYONE NEEDS  
EMAIL. EVERYONE  
USES DOCUMENTS  
DURING THEIR  
WORKDAY. THIS  
MAKES YOUR  
STRATEGY SIMPLE.**”





# Microsoft Azure

Microsoft Azure is a growing collection of integrated cloud services, such as analytics, computing, database, mobile, networking and storage. Azure supports the broadest selection of operating systems, programming languages, frameworks, tools, databases and devices. It's a leader in infrastructure and a lot of businesses rely on its services for their day-to-day computing. As a CSP partner, you have two choices to integrate Azure into your business:

- Add Azure to your offering
- Wrap your managed services around Azure

Most people start by reselling Azure. This allows you to resell other services such as VMs, backups or data, which are all valuable items to add to your portfolio. Under the CSP, you can even sell these services as a white-label offering. If you already offer Infrastructure-as-a-Service you can decide to provide a hybrid experience, such as doing development tests with Azure on your own environment. Take advantage of Azure's hyperscale presence and use its 24 worldwide locations as a backup for your clients' data.

Branch out into different kinds of offerings with Azure's integration of Visual Studio Online. You can manage the complete application lifecycle for your customers.

Technical support is probably the easiest managed service you can offer. Provide your clients with a premium support experience and uptime SLAs for the applications they run in the cloud. You'll set yourself apart from the competition. Familiar with data migration? Offer your clients migration services to the cloud, either as a lift and shift or as a virtualization platform. You'll be providing them with all the speed, agility and scale that the public cloud has to offer. Looking for other possibilities? How about infrastructure, application performance or database monitoring on top of Azure?

Management services, such as patching, updates and user configuration monitoring is a great way to relieve your customers of several administration headaches. Azure will let you offer deep security and endpoint protection to optimize their environment.

**“  
WONDERING WHICH  
OPTION WILL WORK  
FOR YOU? YOU DON'T  
HAVE TO CHOOSE. YOU  
CAN DIFFERENTIATE  
YOUR BUSINESS WITH  
YOUR OFFERING AND  
MANAGED SERVICES  
AND QUICKLY  
TRANSFORM AZURE  
INTO MORE PROFITS.”**



# Dynamics 365

Dynamics 365 combines the capabilities of CRM and ERP into a single application that can be used for sales, customer service, field service, operations, financials, marketing and project service automation.


As a CSP Partner, you can resell Dynamics 365 and transform this into revenue and more profits for your cloud business. Microsoft offers rebates and discounts for partners, which allows you to buy licenses at a lower cost and make a profit on every sale. You can also make easy money by offering services such as data migration or deployment for your Dynamics 365 projects.

Looking for more opportunities to increase your revenue? Consider managed services like training and support or even professional services such as advisory or benchmarking. Whichever services you choose, you'll be strengthening your relationship with your customers and building up your monthly revenue!



“ EARNING MICROSOFT COMPETENCIES GOES A LONG WAY IN BUILDING YOUR PROFILE AS A DYNAMICS 365 RESELLER. YOU CAN STILL SELL DYNAMICS WITH AN INDIRECT CSP PARTNER AND EARN YOUR COMPETENCIES AT THE SAME TIME. ”





# HOW THE CSP PROGRAM WILL CHANGE YOUR BUSINESS

Be prepared. If you embark on this journey without knowing what to expect, you're just setting yourself up for trouble. We've seen many MSPs and VARs stall or fail simply because they weren't properly equipped for the ride.

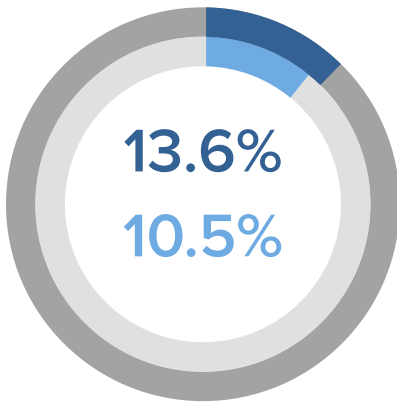
Do your research. Take a hard look at your business and decide what you have to do to succeed. SMB owners rarely have the time to give the proper attention to their daily tasks, which usually includes everything from accounting to customer relations to marketing and sales. Going solo on your cloud journey can be tricky. By joining a solid partner program, you can skip ahead and jump into the action right away. Forget the small details. Use your provider's knowledge and tools to start growing and profiting right away.

## A QUICK WAY TO INCREASE YOUR PROFITS

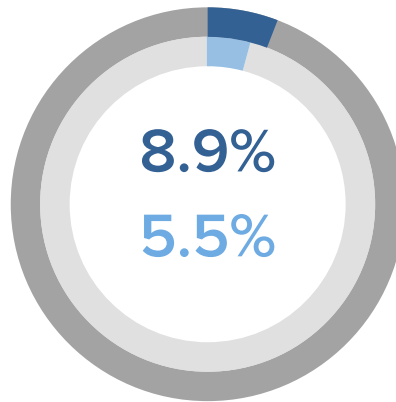
It wasn't too long ago that people were reluctant to move to the cloud. Fast forward a few years and the situation has changed dramatically. Bad experiences with hardware or fears of losing data have convinced a lot of business owners that the cloud is important. Companies are now spending more of their budget on IT. A recent study by IDC Research has shown that more than 90% of businesses are either evaluating, adopting or embracing the cloud. Only 8% of those surveyed claimed they weren't interested. That's a big shift from the 21% who made that claim in 2014!

## AVERAGE IT BUDGET DISTRIBUTION OVER THE NEXT 2 YEARS

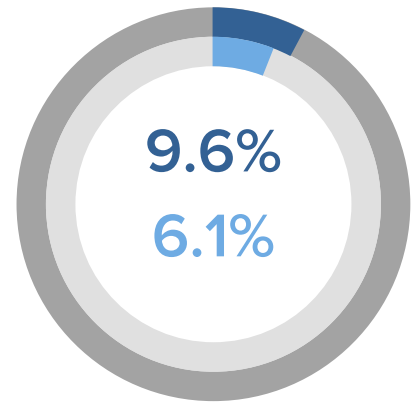
■ Today  
■ In 24 Months



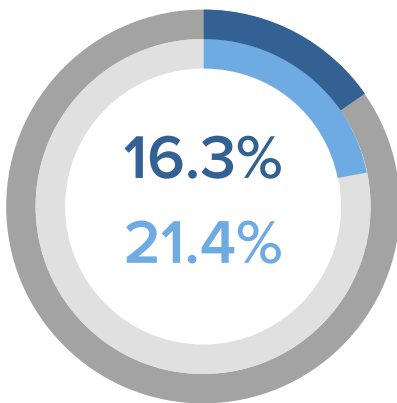
**Public Cloud**



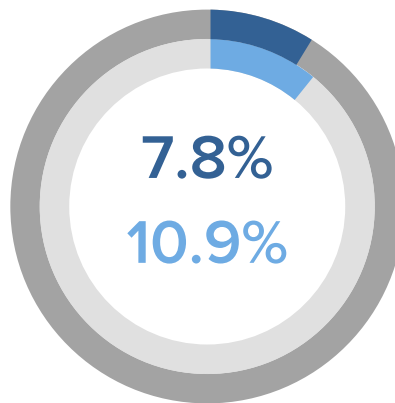
**On-demand Hosted Public Cloud**



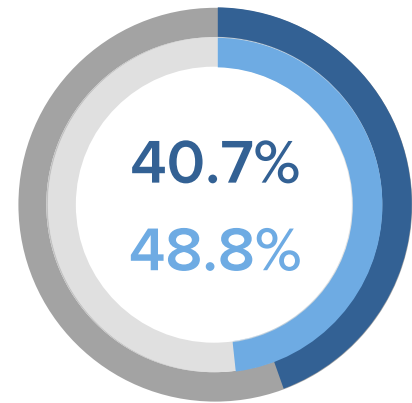
**Dedicated Hosted Public Cloud**



**Traditional Outsourced**



**Enterprise Private Cloud**



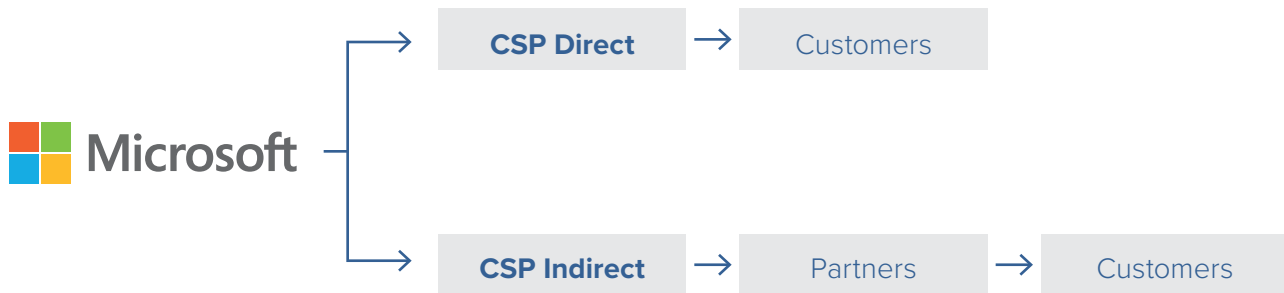
**Traditional In-house Deployment**

Source: IDC CloudView Survey, 2016, n=11350

Generally speaking, most IT partners will provide a service based on a client's request. Since the majority of clients want to migrate their data to a more secure environment, it is critical that partners find solutions to this problem and deploy them quickly.

The CSP can help you launch your business and address your clients' IT needs faster and easier than you could as an independent provider.

# THE DIFFERENCE BETWEEN CSP DIRECT AND INDIRECT



## DIRECT CSP PARTNER

As the name implies, resellers who opt for the Direct CSP program will work directly with Microsoft. They'll purchase all their SKUs from Microsoft and sell them to their customers at a profit margin of about 20 percent. Reseller who opt for this program usually have the resources required to handle their customers' needs because Microsoft offers very little in terms of technical support. However, going solo as a Direct CSP Partner is a complicated process that could take about four months to complete. Direct CSP Partners must also meet the following requirements:

- Be capable of providing 24/7 technical support
- Have a solid customer billing structure
- Commit to selling a minimum of 5,000 new Office 365 seats every year
- Maintain at least one Microsoft Gold Productivity Competency

You have to be sure the commissions you earn as a Direct CSP Partner exceed your initial expenses. If you decide to work directly with Microsoft, you'll need a Microsoft Partner Network ID number (MPN). Then, you'll have to apply for a Microsoft Live ID. To qualify, you have to meet the billing and support requirements we referred to earlier.

## INDIRECT CSP PARTNER

On the other hand, if you work as an Indirect Partner, the whole process is a lot easier. You can cut through the red tape and be ready to go to market a lot faster. You can buy all your SKUs from the CSP distributor and sell them to your clients at the profit you choose. You don't have to be a migration or support expert. Some CSP distributors offer professional partner support and white-label services that you can use to grow your business. They'll give you access to a business portal plus business guidance and flexible rates and terms.

As an Indirect Reseller, you deal with your CSP Partner and not Microsoft. You can also rely on your partner's experience and infrastructure to do most of the heavy lifting. This scenario is by far the most popular, accessible and the fastest way to go to market. It's a great option for resellers:

- You can ramp up quickly
- You can focus on your investment
- You can evolve at a slower, more controlled pace
- You can take advantage of your partner's services

MICROSOFT EXPECTS  
**80% - 90%**  
**OF CSP SUBSCRIBERS**  
**TO BECOME INDIRECT**  
**PARTNERS.**

Source: Microsoft Partner  
Network website

## WHICH MODEL IS BEST FOR YOU?

DIRECT

INDIRECT



### DIRECT OR INDIRECT?

This question can be daunting if you don't know where to start. By purchasing from an Indirect Provider, you get a renowned mentor who can collaborate with you for customer support and billing. This model is great for businesses that want to focus on strengthening their cloud service offerings and invest more gradually in support and billing capabilities. Most MSPs or VARs rarely have the time, capital or resources to sell directly with Microsoft.

## WHEN DIRECT IS A BETTER OPTION

If you'd like to be a Direct reseller, you'll have to provide 24/7 technical support and be able to bill your customers directly. Direct resellers usually have the necessary tools in place or are ready to make the substantial capital investments required for their business to become successful in the long term.

### What You Need

As we already mentioned, Direct Partners run their own show. Make sure you're set up to provide the following:

### Billing and Invoicing

You set the payment terms that are right for your business and create the cash flow model you're looking for. You're free to choose the billing systems and software you want to facilitate your customer billing relationship. You'll also prepare and send invoices to your end customers and maintain payment receipts.

### Support

You're responsible for end-customer support. Direct Partners have to design a go-to-market strategy to sell Microsoft cloud services and support managed services, add-on projects and additional services.

### Incentives

As a part of the CSP Program, you're eligible for Microsoft's program incentives and funds. To be admissible for the incentives, you have to meet the following criteria:

- Be an active Microsoft Partner Network (MPN) member
- Have a valid Cloud Distributor Agreement for Distributors and/or a Reseller Agreement for Resellers
- Be a Managed Partner on Microsoft's FY16 Managed Partner List
- Be enrolled for incentives before the end of the fiscal year

### Licensing

You'll have to manage your licenses manually through the Microsoft Partner Network Center rather than provisioning them through your provider's partner portal.

## WHY GO INDIRECT

As an Indirect Reseller, you get the infrastructure you need to sell through the CSP. You won't have to worry about set-up costs because your CSP provider has the systems and infrastructures in place to provide this level of support. This gives you more time to focus on your customer offerings and grow your business.

### Questions to Ask Your Potential CSP Distributor

Services offered by Indirect Distributors vary. Take a close look at the providers in your area to determine which ones suit your needs. Make sure you get answers to these questions:

- Does the distributor offer technical support?
- Will they market your products and services?
- Do they offer data migration?
- Do they establish financing and credit terms?
- Will they help you grow your business?
- Do they sell additional products and services?

## KENTUCKY MSP INCREASES PRODUCTIVITY WITH CSP

“  
THERE'S NO DOUBT OUR  
TECHNICAL STAFF IS EASILY  
SPENDING 20% LESS TIME  
DEALING WITH EXCHANGE-TYPE  
ISSUES. IN A GIVEN MONTH, WE'RE  
EASILY SAVING A 40-HOUR WEEK  
OF MANAGEMENT TIME SPREAD  
ACROSS OUR TECHNICAL STAFF.”

*Mike Hopkins, President of  
DEVsource Technology Solutions*



# FOUR KEYS TO SUCCESS

## ESTIMATE YOUR INVESTMENT

As an Indirect Reseller, all you have to do is set aside time and money to build your offers and start your marketing strategy to get your business off the ground.

On the other hand, if you want to become a Direct Partner, you will have to invest more capital in your infrastructure and the requirements we mentioned. You'll have to assess your current structure, redefine your business model and available capital in order to define your current solutions and see where you need to expand. Remember, the Direct model is designed to fit the reality of bigger business. Only 10-20% of enterprises will be able to take this path.

The CSP Program is a great opportunity to differentiate yourself from most VARs and MSPs in your region. Your strategy should focus on why your customers should do business with you.

- What can you offer your clients that other resellers can't?
- What makes you more relevant than your competitors?

Your differentiator should be unique to your business and will depend on your business model and the products you sell. You should also consider the type of services you'll be offering.

## DEFINE YOUR DIFFERENTIATOR

# BUILD YOUR OFFERS

In the Products section, we talked about different strategies for bundling and packaging your offers. Take your pick and think hard about what your clients need from you, what you are willing to provide and how. Your offerings will be the base you'll use to build your business and be successful.

Marketing is a lot of work, but you should at least know the basics to get your message across. The important part is to leverage any marketing strategies you can, measure your efforts and see what works for you! Marketing is a big factor in business success. When it's time to evaluate your business, make sure you have at least a couple of marketing tactics up your sleeve. If you're currently in search of a distributor for reselling indirectly, make sure that you partner with someone who cares about your success. You need to access marketing material and make sure there are sales reps available to help you close more deals. Some Indirect Providers also have white-label material and campaigns in a box that you can use to get started.

# GET YOUR MARKETING GOING

# GETTING STARTED AS A CSP PARTNER

So, ready to take the plunge? We know it's not always easy to make adjustments to your business plan. You've already read about the Direct and Indirect models and chosen which option is best for you. Now, it's time to get started. Don't be afraid of change. Kodak, RIM, Nokia and Blockbuster are all perfect examples of businesses that failed to respond to a changing world, and they probably had more resources than you do. Embrace the change and seize the opportunity. Where do you start? It's quite easy. Follow these 3 steps and then read on for more [details](#).



## 1. START

Did you know that 60% of partners have been selling some kind of cloud offer for at least 3 years? Jump in and start selling cloud solutions and services immediately. Falling behind shouldn't be an option! Planning incessantly should never be a substitute for real work.



## 2. GROW

As you gain visibility and success, ramp up your cloud efforts accordingly. Don't stay in one place. Make sure you can always keep growing and answer more prospects' requests. Staying in one spot won't help your business.



## 3. OPTIMIZE

Analyze what you did, where you failed, and most importantly where you succeeded. What did you do right? What are other partners doing - good or bad? Double down and extend your lead on other solution providers who are still trying to figure out their cloud game plan.



# FREQUENTLY ASKED QUESTIONS

## WHAT DO I HAVE TO DO TO PARTICIPATE IN THE MICROSOFT CLOUD SOLUTION PROVIDER PROGRAM?

Partners participating in the Cloud Solution Provider program will be required to provide the following:

- Customer support – Partners will be responsible to provide their customers with technical support. Your support offering should meet industry standards for availability and response time.
- One invoice – Partners will be responsible for billing their customers for Microsoft Cloud Services. Customers want a single, straightforward bill for all the cloud services they consume.

Although it's not a requirement, many partners will offer project implementation or managed services in addition to their own add-ons or IP.

IP is defined as any customized service resellers develop for their clients, such as reactive help desk support or performance and application troubleshooting.

There are two main paths to become a CSP reseller:

**Indirect** – For partners who want to invest gradually in developing the systems, tools, and staff needed to take full advantage of the cloud. CSP Distributors can provide help with value added services, support and billing.

**Direct** – If you already have support and billing capabilities, or are willing to invest in the necessary tools, it might make sense for you to work directly with Microsoft. If you already work with a local Microsoft Partner Manager, ask them for more information.

## WHAT ARE THE BENEFITS OF THE CSP?

IDC forecasts revenue for worldwide public IT cloud services will reach **\$141.2B USD by 2019**, which translates into a 19.4% compounded annual growth rate. This is almost six times the rate of overall IT spending growth!

The CSP makes it easy to build a managed services business with Microsoft Cloud Services and provides an opportunity to build monthly recurring revenue.

## WHAT KIND OF INVESTMENT IS REQUIRED?

New investments will vary based on your current practice. Areas to consider:

- Support personnel and the technology needed to adequately service customers
- Ability to bill customers on a monthly and/or annual basis and provide billing and technical support in the local language
- Local tax implications of selling a subscription product versus a service
- Adjustments to your sales incentive programs to reflect monthly revenue recognition
- Management of credit risk and collections

## HOW DOES THE CSP BENEFIT CUSTOMERS?

Customers find it easier to purchase partner tools, products, and/or services with their subscription in one predictable monthly bill. Beyond the fundamental benefits of the cloud, customers will have more frequent partner interactions which can only strengthen the relationship. Studies show that 67% of customers expect to purchase a wide variety of cloud services from a single vendor and 84% of customers want to establish a trusted relationship with a vendor as their Cloud Service Provider\*.

\*IDC Successful Cloud Partners 2013, IDC Buying Into the Cloud 2014, 2014 Forrester TRUE Brand compass

## **HOW DOES THIS AFFECT THE WAY I SELL TODAY?**

How you sell Microsoft Office 365, Microsoft Dynamics 365 and Microsoft Azure won't change. This is simply one of the business models that partners can consider when selling Microsoft cloud subscriptions. If you have the resources to manage the customer lifecycle, this model may be a great fit for your business.

## **ARE THERE ANY PARTNER INCENTIVES AVAILABLE IN THE CSP?**

Yes. The CSP Incentives reward Cloud Distribution partners for driving the activation and enabling a resale channel and the sale of Online Services.

The CSP 1-Tier and Indirect Reseller Partner Incentives are designed to support partners in the initial stages of building Cloud Solution Provider practices.

## **WHAT DOES IT MEAN TO HAVE MICROSOFT AZURE AS PART OF THE CLOUD SOLUTION PROVIDER (CSP) PROGRAM?**

Microsoft Azure is an open and flexible cloud platform that enables partners to rapidly build, deploy and manage secure applications at scale, on-premises, in the cloud, or both. Bringing Azure to CSP enables partners to capitalize on the Azure opportunity. Partners own the end-to-end customer lifecycle with direct provisioning, billing and support of Microsoft's cloud services. Partners are now able to transact the license along with their services to customers.

## **HOW IS THE MICROSOFT AZURE BUSINESS MODEL DIFFERENT FROM SEAT-BASED SERVICES LIKE MICROSOFT OFFICE 365 OR ENTERPRISE MOBILITY SUITE IN CSP?**

Microsoft Azure is sold as a pay-as-you-go service and billed in arrears. This means that customers or partners set up a new Microsoft Azure service under a Microsoft Azure subscription and consume resources against those services during the month. At the end of the month, Microsoft will bill the CSP partner for the consumption of those Microsoft Azure services at the relevant rates.

## **I HAVE A LOT OF CUSTOMERS UNDER AN EA, OPEN AND ADVISOR AGREEMENT – CAN THEY ALSO PURCHASE SUBSCRIPTIONS FROM ME AS THEIR CLOUD SOLUTION PROVIDER? HOW DO I MOVE THEM INTO THIS PROGRAM?**

It is possible for a reseller to have subscriptions under several agreements at the same time. If you have customers in other Microsoft licensing programs, such as EA, Advisor or Open, you can easily transfer them to the CSP through a new multi-channel feature. You don't have to create a new tenant or do a full migration for each conversion. Take note that Microsoft's Advisor program officially ends on July 1, 2017.

## **WHAT ARE MY RISKS?**

As a partner, you own the billing relationship and assume the responsibility for credit and collections with your customers. Since you directly provision, monitor and manage the subscription, customers will contact you with related provisioning, help and how-to questions as well as all issues related to technical support. You must be able to provide quality 24/7 end-user support.

## **HOW DOES THE MICROSOFT OFFICE 365 SERVICE LEVEL AGREEMENT (SLA) WORK?**

Microsoft offers a financially backed 99.9% service uptime guarantee for Office 365. This translates to about 8 hours of downtime a year. A full copy of their Service Level Agreement can be found [here](#).

Approved service credits are provided to you and it's your responsibility to pass these service credits to your affected customers. Note that Office 365 offered by SherWeb is hosted and owned by Microsoft and their SLA applies.

## **WHAT ARE MY REVENUE OPPORTUNITIES IN THE CSP MODEL?**

You will have access to a wholesale price list that enables you to take advantage of upfront margins at the initial sale and with every subsequent renewal. You have the opportunity to attach the initial deployment and migration services, ongoing maintenance and support to every subscription. Many partners develop their own add-ons which they sell as additional services or IP.

And because of your ongoing customer relationship, when a customer has questions or wants to make a change in their subscription, you will have a greater opportunity to drive adoption services, customization, and upsell. You can also consider financing customers' initial deployment and migration services to spread upfront costs in exchange for a long-term commitment for ongoing managed services.

## **WHAT IF YOU'RE ALREADY A DIRECT PARTNER? CAN YOU USE A DISTRIBUTOR'S SERVICE?**

Yes! As a member of the CSP Program, you can choose to go Direct for some products and pick other products to be sold through a tiered system with an Indirect Provider.

This makes it easier for Direct Partners to offer a wider variety of products without deploying new infrastructure for every product line.

## About SherWeb

SherWeb has nearly two decades of experience simplifying the cloud for MSPs. Today, more than 5,000 partners worldwide rely on our expertise in high-volume provisioning, migration and support. SherWeb is an Indirect CSP partner in Microsoft's Cloud Solution Provider (CSP) program. This allows SherWeb to help partners go to market faster with Office 365. You own the customer relationship, control the pricing and billing and set your own margins.

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