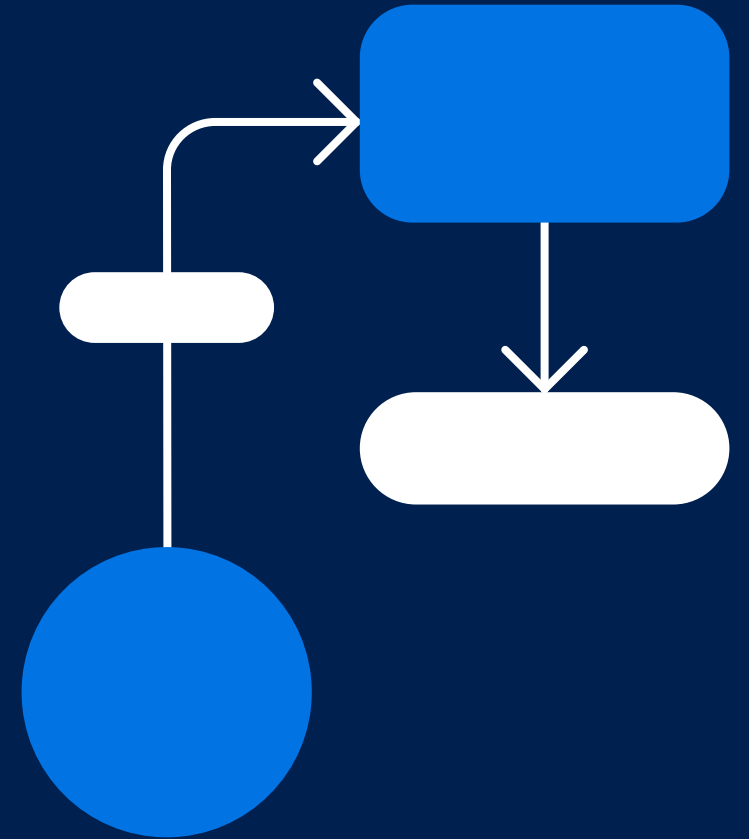# SMB Assessment Desk

FY24 SMB Solution Assessments

Assessment Purpose

Deliver **data-driven** insight to help Customer's decision-making

Technical insight

Provide Technical insight on customer's IT Estate

Security insight

High level Security insight based on real data from customer's estate

Financial insight

High level Financial Insight

Pilot/Proof of concept

Enable actual migration of 5-10

Next steps

Clear guidance for customers on next steps based on Assessment results

Migration!

Connect the customer to the right resources who will then help customers in actual migration projects

https://youtu.be/MFXr_NTXq-E

SMB Assessment Desk

- Microsoft has launched a global **SMB Assessment Desk** that partners can leverage to provide customers with light touch Azure and Security focused assessments.

- The goal is to provide more SMB customers and partners with data, insights, and actionable recommendations in support of migration to Microsoft's cloud services – helping drive velocity and scale.

- **Rapid Security Assessment** – a holistic security assessment via CSAT Quickscan, providing actionable recommendations on security improvements to drive M365 and Azure security consumption

- **Azure Express -** a comprehensive server migration assessment via Azure Migrate, providing recommendations on migrating current on-premises and cloud environments to Azure IaaS and PaaS solutions.

- ***NEW* Copilot Readiness Assessment -** Assist customers and partners in assessing their readiness for adopting Copilot for M365 taking your score on Security, Licensing and Optimisation into account.

Increasing partner profitability with the NEW SMB Desk

Growing topline business and reducing cost of sales

LEVERAGE THE DESK FOR ASSESSMENTS

GET ACCESS TO 1ST / 3RD PARTY TOOLING

ACCESS TO MICROSOFT SELLERS AND PROGRAMS

ACCELERATED PIPELINE AND BUSINESS GROWTH

To learn more visit https://www.microsoft.com/en-us/solutionassessments/

SMB Solution Assessment Overview

|	Assessment Type	Description	Usage Case	Eligibility Criteria	Tool	Geographical Scope	Nomination Process
Microsoft Azure	Azure Express	Get started on your journey to Azure with a fast, comprehensive, data-driven analysis of your server estate	Understand the costs associated with running your server workloads in Azure (assess costs for VM Compute, Managed Disk, Azure Backup, ASR, SQL MI, AVS, and various other Azure services)	• 5+ VMs	Azure Migrate & AMA Workbook	ANZ	Microsoft Forms (office.com)
Microsoft Security	Rapid Security Assessment	Provide a holistic view of the cybersecurity position together with fact-based recommendations based on an internationally recognized cybersecurity framework	Do a quick scan of cybersecurity hygiene, propose improvement actions based on data, quick report and few customisations, based on CIS controls IG1	• 30+ endpoints	CSAT (Quick Scan)	Asia (English, Japanese, Malay)	Partner: Self-nomination
Copilot	*NEW* Copilot Readiness Assessment	Customers environment is graded based on data collected from their M365 portal, Azure portal, and the answers submitted to the Microsoft Zero Trust questionnaire	Assist customers and partners in assessing their readiness for adopting Copilot for M365 taking your score on Security, Licensing and Optimisation into account.	• 30+ seats	Block64	Final Report is in English for now but consultants can deliver presentation in English, Japanese or Malay	Partner: Self-nomination

Self-serve Security Assessment

|	Self-Service Security Assessment	Rapid Security Assessment
Tooling	CSAT Self Service Assessment	CSAT QuickScan Assessment
Target Group	SMB – Open to all customers	SMB (30-300 Endpoints)
Purpose of Assessment	1. Lead Generation for full-service assessments. 2. Show customers they need a more detailed assessment to identify all cybersecurity risks. 3. Based on a limited number of controls of the Zero Trust Architecture 4. Limited datasets and concise report. Allow for first improvement actions while sparking interest for a full assessment	1. Do a quick check on the cybersecurity hygiene 2. Propose improvement actions based on actual data 3. Quick report and few customizations 4. Based on the CIS controls IG1
Outcomes of Assessment	Positioning of Microsoft's Security solutions in M365 and Azure. Customer will be interested in a comprehensive assessment	Upsell to Microsoft 365 Business Premium, Azure migrations and increase of Azure Consumed Revenue by adding Azure Security
Scan Sources in Scope	• Manual Endpoint Scan of Windows OS • Local Active Directory • Email DNS check • Limited datasets of Microsoft 365 environment • Limited datasets from the Azure tenant • Questionnaire on basic security controls – no official framework	• Basic Automated Endpoint Scan • Local Active Directory • Email DNS check • Microsoft 365 environment • Limited datasets from the Azure tenant • Checked against CIS IG1 (basic security hygiene controls)

Self-service Security   Partner: Self-nomination

Self-serve Copilot Assessment

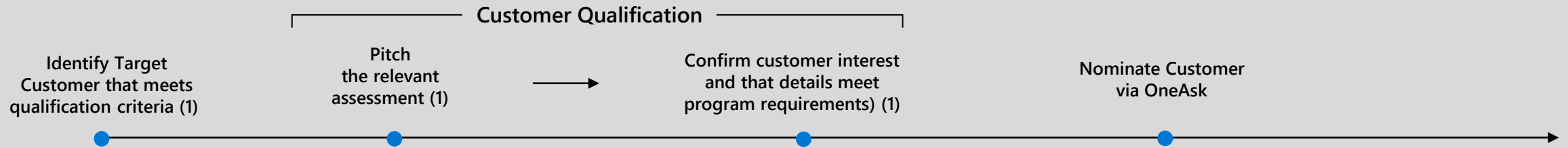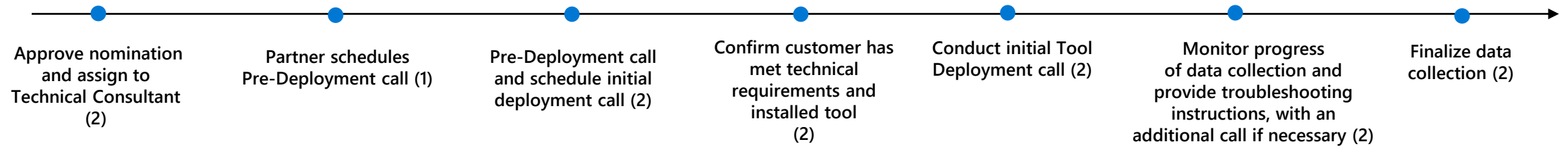|	Self-Service Copilot Assessment	Co-pilot Readiness Assessment
Tooling	Online Questionnaire	Block64
Target Group	Open to all customers	SMB (30-300 Seats)
Languages Supported	English only for now	Final Report is in English for now but consultants can deliver presentation in English, Japanese or Malay
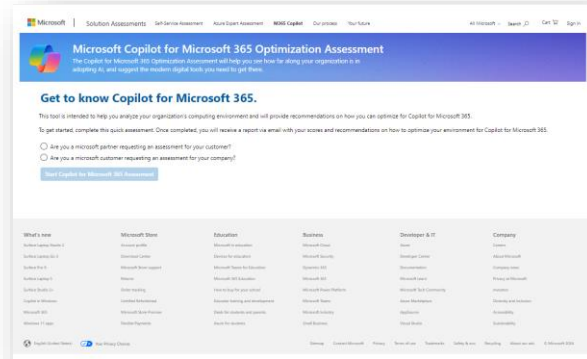
Self-serve Assessment
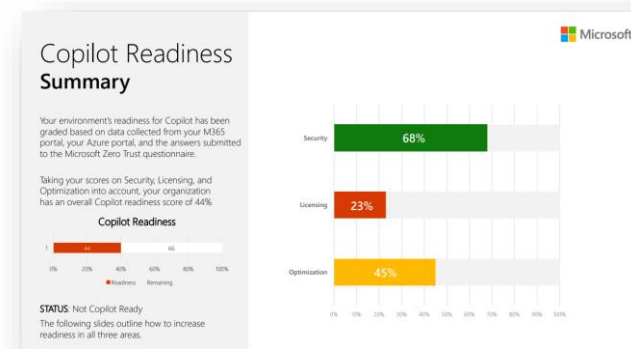
Partner: Self-nomination

SMB Desk Assessment Process

Primary Responsibility: 1. Partner 2. SMB Desk/Technical Consultant

1. Getting the Customer to yes (Partner Led)

Customer Qualification

Identify Target Customer that meets qualification criteria (1)

Pitch the relevant assessment (1)

Confirm customer interest and that details meet program requirements) (1)

Nominate Customer via OneAsk

2. Tool deployment and collecting data (SMB Desk Led)

Approve nomination and assign to Technical Consultant (2)

Partner schedules Pre-Deployment call (1)

Pre-Deployment call and schedule initial deployment call (2)

Confirm customer has met technical requirements and installed tool (2)

Conduct initial Tool Deployment call (2)

Monitor progress of data collection and provide troubleshooting instructions, with an additional call if necessary (2)

Finalize data collection (2)

3. Presenting back the assessment

Generate final assessment Azure Migrate Export (2)

Conduct Pre-Delivery call between Partner and TC (1,2)

Lead Report Delivery call with customer (2)

Pass Opportunity back to Partner (2)

Partner progresses opportunity and applies programs where appropriate
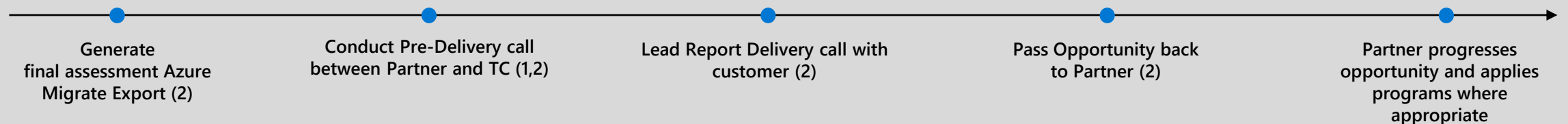
Rapid Security Assessment | Estimated Timeline

Assessment Stages

Assessment Planning

CSAT QuickScan

Report Generation and Delivery

Post-Assessment

| Nomination submitted via MS website, validated between Ops and Partner | Nomination approved, TC assigned, and Pre-deployment call scheduled | Pre-Deployment call discussing process and tool requirements | Customer Deploys CSAT Scan Wizards | Customer submits CSAT Questionnaire | Report Generated and Internal Review Call | Assessment Report Review Call with Partner and Customer | Assessment Follow-Up and Migration Planning with Partner |

| 3 Days | 1-7 Days | 3 Days | 1-3 Days | 1-3 Days | 1-3 Days | Variable |

Total Estimated Time from Nomination approval to Report Delivery: **1-3 weeks**

Copilot Readiness Assessment - Deliverable

- Data collected from M365, Azure, and the answers submitted to the ZTF questionnaire

- Assess readiness for adopting Copilot taking score on Security, Licensing and Optimisation into account.

- Recommendations ranked by urgency to improve customer readiness

Sample Report

Rapid Security - Deliverable

Access to Presentation & Report

- CSAT Generated Output

- Scan Findings

- Maturity Model

- Cybersecurity Quick Wins recommendations

- Longer-term recommendations

- Security Landscape

[Sample Report](#)

Azure Express - Deliverable

Extensive Economic Capabilities

- ✓ Azure VM Compute and Managed Disk.
- ✓ Azure Backup and Azure Site Recovery.
- ✓ SQL MI.
- ✓ Azure VMware Solutions (AVS).
- ✓ Azure Files, Azure App Service, Blob Storage.

Scenario Assessment & Migration Plan Development

- ✓ Save up to 10 assessed scenarios/migration waves.
- ✓ Compare scenario costs and system inclusions.
- ✓ Assess costs by application and/or application group.
- ✓ Record/document migration plan waves at a granular level.

Assessment Report

- ✓ Built-in, comprehensive and fully automated Assessment Report.
- ✓ Export directly to PDF.

Nominate today!

Rapid Security & Copilot Readiness


Azure Express

Appendix

How to start the conversation – Rapid Security

This discussion can help tailor the benefits of Cybersecurity Solution Assessment to your customer's needs

1 Position

Based on your knowledge of the customer's business, the questions below are designed to get you started

1. How do you currently assess the cybersecurity risks facing your IT environment?
2. How do you manage access to what data is shared within your company?
3. What is your confidence level in the way you are addressing the gaps in your data breach response plan?
4. What is your biggest fear an attacker could do with the data you currently store?
5. How do you detect threats quickly and reinforce your security posture?

2 Build awareness

Introduce what the Rapid Security Assessment can do for your customer

- Discuss how Solution Assessments are industry-standard processes focusing on business priorities by improving control of IT assets.
- Explain how it helps customers understand current assets to be better prepared to make strategic decisions.
- Provide information on how it helps identify areas to centralize management, such as security operations centers.

3 Provide value

Deliver benefits your customer receives by implementing recommendations

- Better business intelligence and control over their IT infrastructure
- Reduced costs through effective license and infrastructure optimization
- Increased security and lower risk of exposure
- Improved user productivity and better cloud governance through process optimization

4 Agreement

Get customer agreement to move conversation forward

- If there is sign of interest, gain consent to request a colleague to reach out for more information.

Helpful statistics to help support your questions
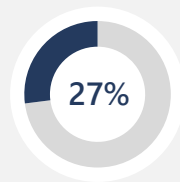
27% of organizations have experienced a security incident in their public cloud infrastructure within the last 12 months.
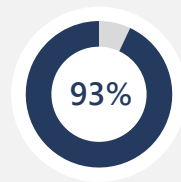
93% of Microsoft investigations during ransomware recovery engagements revealed insufficient privilege access and lateral movement controls.

The median time it takes for an attacker to access your private data if you fall victim to a phishing email is 1hr 12m.

How to start the conversation – Rapid Migration

Do you have a cloud strategy and where are you in terms of activating it?

What's driving your cloud strategy? How does this align with your business strategy and priorities?

Who is your executive/business sponsor for your cloud strategy?

In terms of timelines, are there any milestone that you're working towards?

How are you budgeting for new cloud-based investments?

Customer Conversation

1 **Position:** [Set the intention]

I'm calling today to discuss cloud migration and modernisation. Do you mind if I ask you a few questions?

[Use the questions provided or supplement your own based on your knowledge of the customer's business.]

2 **Building Awareness:** [Introduce Solution Assessments]

I bring these questions up because I want to make sure you are aware of a new complimentary Solution Assessment that Microsoft is offering its customers. It's designed to help you understand the costs of running your workloads in Azure as well as the business and technical merits of doing so.

3 **Background:** [Increase the customer's existing knowledge of Solution Assessments]

Our Solution Assessments support your transition to the cloud by providing an analysis of your server estate and help define the most appropriate solution for modernisation or cloud migration. We can help determine a migration strategy, document a migration plan and help plan and prepare next steps with us/a partner

4 **Permission:** [Get customer agreement]

If this sounds interesting to you, can I spend some time now (or setup time) to walk you through an overview?
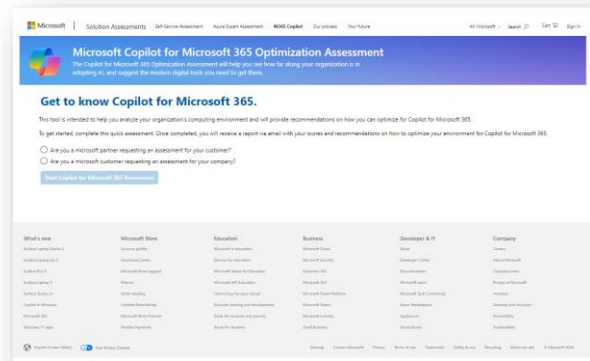
5 **Setup time/walk through customer facing deck**

Security Assessment Types

	Self-Service Security Assessment	Rapid Security Assessment	Cloud Security Assessment
Tooling	CSAT Self Service Assessment	CSAT QuickScan Assessment	CSAT FullScan Assessment
Target Group	SMB – Open to all customers	SMB (30-300 Endpoints)	Enterprise, Corporate and Top SMB (300+ Endpoints)
Purpose of Assessment	1. Lead Generation for full-service assessments. 2. Show customers they need a more detailed assessment to identify all cybersecurity risks. 3. Based on a limited number of controls of the Zero Trust Architecture 4. Limited datasets and concise report. Allow for first improvement actions while sparking interest for a full assessment	1. Do a quick check on the cybersecurity hygiene 2. Propose improvement actions based on actual data 3. Quick report and few customizations 4. Based on the CIS controls IG1	1. Comprehensive cybersecurity assessment 2. Align Business and IT management 3. Help to decide on new security initiatives based on facts 4. Deployment and implementation plan 5. Based on the CIS controls IG 1-3
Outcomes of Assessment	Positioning of Microsoft's Security solutions in M365 and Azure. Customer will be interested in a comprehensive assessment	Upsell to Microsoft 365 Business Premium, Azure migrations and increase of Azure Consumed Revenue by adding Azure Security	Upsell to Microsoft 365 E3+E5 and Sentinel, Azure migrations and increase of Azure Consumed revenue by adding Azure Security
Scan Sources in Scope	• Manual Endpoint Scan of Windows OS • Local Active Directory • Email DNS check • Limited datasets of Microsoft 365 environment • Limited datasets from the Azure tenant • Questionnaire on basic security controls – no official framework	• Basic Automated Endpoint Scan • Local Active Directory • Email DNS check • Microsoft 365 environment • Limited datasets from the Azure tenant • Checked against CIS IG1 (basic security hygiene controls)	• Comprehensive Automated Endpoint Scan including Linux machines and network devices • Local Active Directory • Email DNS check • Microsoft 365 environment • Comprehensive scan of the Azure tenant • SharePoint on-premises • Google Workspace and AWS included • Checked against the full CIS18 controls

Copilot Assessment Types

	Self-Service Copilot Assessment	Co-pilot Readiness Assessment	Zero Trust Foundations & Copilot Assessment
Tooling	Online Questionnaire	Block64	Block64
Target Group	Open to all customers	SMB (30-300 Seats)	Enterprise, Corporate and Top SMB (300+ seats)
Languages Supported	English only for now	Final Report is in English for now but consultants can deliver presentation in English, Japanese or Malay	Final Report is in English for now but consultants can deliver presentation in English, Japanese or Malay

Self-serve Assessment