



# Unlock hidden potential: How a strategic Microsoft partner empowers your success

Choose a top-tier partner who helps you get the most from your Microsoft investment



# Your biggest technology investment deserves the most support

Are you squeezing every ounce of value out of your Microsoft investments? Chances are, you're not alone. Many IT leaders struggle to maximize ROI on their Microsoft licenses due to complex deployments, inadequate training, and a lack of strategic guidance.

That's where a top-tier Microsoft partner comes in. They can be the missing piece that unlocks the true potential of your Microsoft ecosystem, streamlining processes, empowering your team, and driving real business transformation.

## Full speed ahead: Is your Microsoft partner delivering? 7 key checkpoints to maximize ROI

Is your current Microsoft partnership truly driving your organization forward? Many partners are "good enough" for a few laps yet leave hidden potential untapped over the course of the race.

This ebook will help you navigate seven important checkpoints to benchmark your current partner experience and identify areas for improvement. By setting clear expectations and ensuring your partnership aligns with your strategic goals, you can achieve the full value of your Microsoft investment.

# 1 Checkpoint

## Beyond basic support: An advisor with proven expertise

Investing in Microsoft is a strategic decision. Just like with any critical investment, having the right advisor by your side makes all the difference. When it comes to your Microsoft ecosystem, that partner needs to possess deep technical knowledge and a broad understanding of the ever-evolving Microsoft landscape.

Here are some key questions to evaluate your partner's capabilities:

### **Does their expertise span the entire Microsoft portfolio?**

From cutting-edge AI and cloud solutions to advanced hardware, a top-tier partner stays ahead of the curve, ensuring you leverage the latest technologies for your specific needs.

### **Can they tailor solutions to your unique business?**

A one-size-fits-all approach won't cut it. Look for a partner with experience across diverse industries and company sizes, able to craft solutions that align with your goals and challenges.

### **Are they true strategic advisors, not just order-takers?**

The best partners go beyond basic support. They proactively assess your IT roadmap, identify pain points, and recommend solutions to optimize your Microsoft investment and drive real business value.

### **Do they offer ongoing guidance and support?**

Regular Microsoft Business Reviews and access to advisory services are crucial to stay aligned with your evolving needs. A partner invested in your long-term success will be there for every curve and straight.



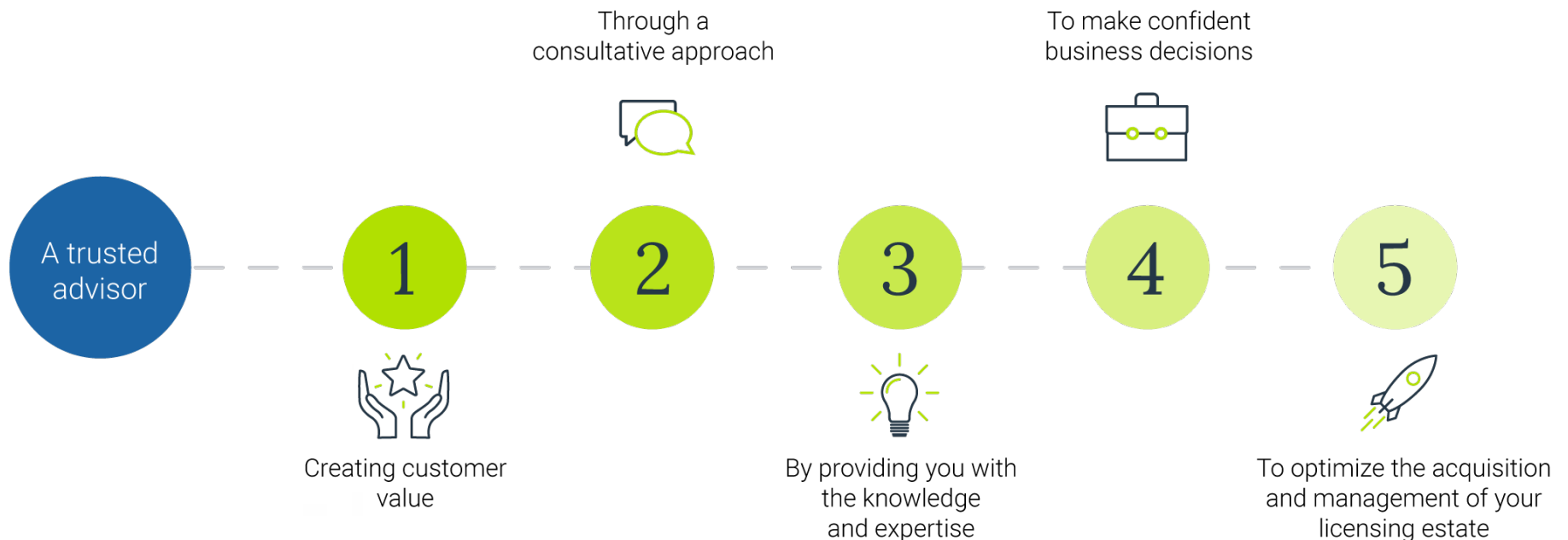
# 2 Checkpoint

Microsoft licensing changes faster than you can say 'subscription model.' Staying compliant and optimizing your costs requires a dedicated team of experts to keep you up to speed.

## No licensing wrong turns: A dedicated team of Microsoft licensing experts

Selecting a partner with a strong background in software licensing is critical to your success. A sizeable team of Microsoft specialists can offer insight and advice across the full portfolio of products and licensing options, helping you select wisely and maximize savings.

SHI's Microsoft licensing specialists understand the nuances of every licensing program, whether you're a commercial, academic, government, or healthcare organization. We'll help you navigate the complexities across all relevant device types, platforms, and geographies, ensure compliance, and identify opportunities for significant cost savings.



# 3 Checkpoint

## A Microsoft partner who proactively saves you money

Contrary to popular belief, not all partners are strictly focused on signing the biggest deals. A successful partner should care about your overall spend and work with you to identify and present potential ways to realize cost savings on your Microsoft investment.

One example is [SHI's 365 Insights](#) – a standard complimentary offering to all SHI Microsoft customers that identifies redundant, duplicate, and underused licenses. Through this service, SHI actively helps you avoid paying for unused subscriptions while optimizing the adoption and consumption of apps, features, and functions – including some you might not even realize you have.

Spotlight on customer success

How SHI helped Essex County, NJ optimize their 365 environment:

**\$1M**

immediate savings

**450**

accounts to deprovision  
prior to EA renewal

**\$300K**

savings over  
3-year period

*"The \$100,000 in savings identified through the deprovisioning process will help Essex County reallocate the savings to fund other initiatives, like purchasing additional critical software and training to further support and enhance our employee experience. Not to mention from an ROI perspective, the engagement paid for itself and then some!"*

– Assistant Country Administrator/CIO, Essex County, NJ

Explore more case studies

# 4 Checkpoint

## A certified, knowledgeable Microsoft leader

Don't settle for just any Microsoft partner. Certifications and awards are a window into a partner's capabilities and commitment to Microsoft technologies. These credentials go beyond basic badges; they demonstrate a partner's proven ability to design, implement, and manage complex Microsoft solutions.

But not all certifications are created equal. Microsoft Solution Area Certifications are the gold standard. They require partners to invest in both financial resources and top-tier technical talent. This ensures they have the expertise to deliver the solutions you need and unlock valuable benefits like proof of concept (PoC) funding and FastTrack programs supporting cloud deployment, migration, and adoption.

Microsoft Partner | Azure Expert MSP

Microsoft Solutions Partner  
Business Applications

Microsoft Solutions Partner  
Security

Microsoft Solutions Partner  
Digital & App Innovation  
Azure

Microsoft Solutions Partner  
Data & AI  
Azure

Microsoft Solutions Partner  
Infrastructure  
Azure

Specialist  
Azure Virtual Desktop

Microsoft Solutions Partner  
Microsoft Cloud

Microsoft Solutions Partner  
Modern Work

Specialist  
Adoption and Change Management  
Teamwork Deployment

# 5 Checkpoint

## A proactive, ongoing communication approach

You shouldn't have to chase down an appointment with your partner or only meet with them when you need something. Your partner should take the lead on establishing a regular cadence, such as quarterly business reviews (QBRs) to ensure you have dedicated time to review areas like consumption and licensing.

A QBR should not only check that an organization has no outstanding issues; it's also where your partner should proactively bring ideas to the table, whether it's ways to boost cost savings, suggestions to help drive adoption and consumption, previews of new products, or a wealth of other opportunities to create a winning Microsoft experience.

And, of course, QBRs are just one way of staying in touch. Look for a partner who provides easy access to experts when you need them, not only at strictly scheduled intervals.

Your Microsoft partner should be more than just a yearly transaction. In today's dynamic IT landscape, you need a trusted advisor by your side, proactively helping you navigate evolving technologies and optimize your Microsoft estate.

A proactive Microsoft partner will consistently bring new ideas and solutions to the table. Here's what to expect from a forward-thinking partner:

- **Regular industry updates:** Stay informed about the latest Microsoft developments and how they can benefit your organization.
- **Proactive recommendations:** They'll identify new technologies and solutions that align with your strategic goals and help you stay ahead of the curve.
- **Strategic guidance:** Receive insights and analysis to help you make informed decisions about your Microsoft investments.

If you're an Enterprise Agreement or Open Value Agreement customer, keep this important information in mind:

You should receive communication about your [Software Assurance benefits](#) (SABs), which you're entitled to as part of your [Enterprise Agreement](#) or Open Value Agreement. This should be covered during onboarding so you immediately understand how the benefits can lower operating costs, reduce cloud sprawl, and help remove roadblocks to SAB utilization.

Some of these benefits can include:



New version rights



Spread pay options



Disaster recovery server rights

# 6 Checkpoint

## Training and adoption service capabilities

Your Microsoft investments are only as good as the employees using the technology. While many organizations are successful with the deployment and activation of certain Microsoft solutions, just as many struggle with adoption and proficiency. When your users aren't aware of updates to features or functionalities, or worse, aren't using some of the technologies at all, your investment could be wasted.

A strategic partner is as committed to [end-user training and adoption](#) as they are to finding you the right solutions for your needs. At SHI, we discuss training services and adoption and change management (ACM) at the onset, so your overall Microsoft strategy includes a plan to equip your users with the skills and the knowledge they need to maximize productivity.

## How to fully realize the benefits of new technology via adoption



### Adoption and change management

- Champion identification
- Communications
- Outcome definition
- Persona development
- Strategy development
- Success measurement



### Technical training

- AWS
- Cisco
- Google Cloud
- Microsoft
- Palo Alto
- VMware



### End-user training

- M365
- MS core apps
- MS Teams
- Google apps
- Security awareness
- WebEx
- Windows 10/11



### eLearning

- Cloud
- Google apps
- HR enablement
- M365
- PD for educators
- Productivity
- Windows 10/11



### Professional development

- Agile
- Communication skills
- ITIL
- Leadership skills
- PD for educators
- Productivity skills
- Project management



# 7 Checkpoint

## Beyond technology: A partner aligned with your values

In today's world, responsible business practices extend beyond the bottom line. Organizations increasingly prioritize and value partners who share their commitment to diversity, inclusion, and environmental sustainability. Here's why these factors matter when choosing a Microsoft partner:

- Diversity and inclusion: A partner who reflects the diversity of your customer base and workforce fosters a more collaborative and innovative environment.
- Sustainability: Partnering with a company dedicated to sustainability helps you minimize your environmental impact and align with your own [environmental, social, and governance](#) (ESG) goals.

SHI is proud to be a leading, values-driven Microsoft partner. We are the largest Minority- and Woman-Owned Business Enterprise (MWBE) in the U.S., committed to creating a diverse and inclusive workplace. Our supplier diversity program actively seeks partnerships with MBE and WBE vendors, ensuring a strong and inclusive supply chain.

At SHI, [sustainability](#) is more than just a buzzword. We take concrete actions to minimize our environmental impact, including:

- Recycling programs that have diverted over 315 tons of cardboard from landfills.
- Implementing renewable energy solutions like our 7,000-panel solar array, which generates over 3 million kWh of clean energy.
- Achieving LEED Gold certification for our Austin office, demonstrating our commitment to green building practices.

Partnering with SHI means working with a company that shares your values and delivers exceptional Microsoft solutions. We can help you achieve your technology goals while making a positive impact on the world.

# Is your Microsoft experience more of a struggle than a victory? Switching Microsoft partners is easier than you think.

You don't need to stay with the same Microsoft partner forever. In fact, if your current partner isn't delivering the Microsoft experience you need, it's easy for your organization to switch to one that better aligns with your goals. And you don't need to wait until your current Microsoft agreement ends to make the move. Microsoft allows you to change your partner at any time – SHI can help guide you through our seamless, standardized transition plan.



Tip: A great place to start is to use research firms like Gartner to recommend or vet partners that would suit the needs of your Microsoft business.

## 90-day enterprise agreement transition plan

### Month one (1)

- Introduce SHI's team and resources
- Identify key stakeholders
- Process change of channel partner
- Request MLS report
- Establish meeting cadence
- Review monthly license updates

### Month two (2)

- Schedule licensing briefing
- Review current estate
- 365 Insights setup
- Review monthly license updates

### Month three (3)

- Discuss future projects and deployment roadmap
- Review 365 Insights results
- Prep true-up workbook and request CPS
- Review monthly license updates

# You made it to the finish line. Where does your Microsoft experience rank?

If your current Microsoft partner is falling behind on delivering these essential factors, it may be time to change direction.

Connect with one of SHI's Microsoft specialists to learn more about how and when to make a change. As a 400+ team, our friendly, dependable specialists lead the way with insights and support across the full portfolio of Microsoft products and licensing programs. With a global reach and long-standing partnership with Microsoft for 30+ years, our team delivers an end-to-end Microsoft experience you can rely on.

Realize the full value of your Microsoft investment with expert licensing advice, certified cloud planning, professional training services, dedicated customer support, and more.

## Learn more about SHI's Microsoft services and solutions

| Partner attribute   | SHI  | Partner 1 | Partner 2 |
|---|--|-----------|-----------|
| How long have they been a Microsoft partner?              | Over 30 years  |           |           |
| Size of Microsoft practice                                | 400+ dedicated Microsoft experts   |           |           |
| Capability certifications                                 | Azure Expert MSP, Modern Work, Microsoft Cloud, Data and AI Azure, Business Applications, Digital and App Innovation Azure, Security, Infrastructure Azure   |           |           |
| Proactive communication                                   | Microsoft Business Reviews at least quarterly  |           |           |
| Corporate social responsibility, diversity, and inclusion | Largest Minority- and Woman-Owned Business Enterprise, enabling Tier 1 and Tier 2 diversity spend, sustainability garden donations, solar panels to offset carbon footprint, non-profit organization engagement, and more  |           |           |
| Microsoft awards  | Partner of the Year awards, including:<br><b>2023</b><br>Modern Work, Surface PC Reseller Partner of the Year<br>Modern Work, Surface Hub Reseller Partner of the Year Finalist<br>Partner of the Year 2023 Finalist for Industry, Education<br><b>2022</b><br>Device Distributor/Reseller Partner of the Year Finalist<br><b>2021</b><br>U.S. Surface Transformation Partner of the Year<br>Microsoft Partner of the Year - Microsoft Surface Hub Reseller of the Year<br>North American Partner of the Year - Windows 10<br>North American Digital Marketing Partner of the Year - Strategic Device Reseller Award<br>Microsoft U.S. (MSUS) Partner Award in Modern Endpoint Management<br><b>2020</b><br>Worldwide Surface Resiliency Partner of the Year<br>U.S. Device Sales Growth Partner of the Year |           |           |
| Global scale?   | Yes  |           |           |