



THE 4 STRATEGIC PHASES EVERY SUCCESSFUL MICROSOFT EA RENEWAL REQUIRES

Renewal strategies that consistently save our clients millions

MICROSOFT ENTERPRISE AGREEMENTS

Too important to leave to chance in today's licensing environment

Your Microsoft Enterprise Agreement (EA) is one of your biggest IT decisions and largest spends, but too many organizations rush into their EA renewal underprepared and poorly advised. The reality is this: Microsoft's licensing landscape has become far more complex since your last renewal.

Microsoft now sells AI productivity, security architecture, and hybrid work solutions – but organizations still buy them like they're upgrading Office. That disconnect is where millions get wasted.

Failing to realize the full value of this investment is now a real risk. More concerning, it's easier than ever to make costly mistakes that will impact your budget for the next three years.

This guide, packed with advice from SHI's Microsoft experts, will help you create and execute an effective strategy for managing your Microsoft EA renewal. By following the steps outlined, you'll secure a great deal and be set up to enjoy the full range of entitlements and benefits that an EA brings.

In this guide, you'll learn how to:

- Lay the groundwork for a renewal that accounts for modern licensing reality.
- Strategize for your desired outcome, including the technologies Microsoft now prioritizes.
- Structure an effective agreement that won't penalize you as your environment evolves.
- Seal the deal and move forward with confidence.

Why SHI?

We help thousands of organizations manage their EA annually. We manage one of the largest Microsoft licensing portfolios in the channel – which means we see patterns and pricing that individual organizations simply can't access. We have 35+ years' experience helping organizations like yours optimize their Microsoft licensing. More importantly, we negotiate with Microsoft daily. We know which terms you can change and which battles are worth fighting.

BEFORE YOU GET STARTED

Why timing matters more than you think

TIMING IS EVERYTHING

Especially with Microsoft's current renewal approach

Timing is everything, and it is especially true when it comes to optimizing your Microsoft EA renewal. If you wait until the last 90 days to start planning, you are very unlikely to end up with the best deal. Here's why: Microsoft's renewal team knows exactly when your agreement expires and structures their negotiations accordingly. Wait until the last quarter, and you're negotiating from a position of weakness.

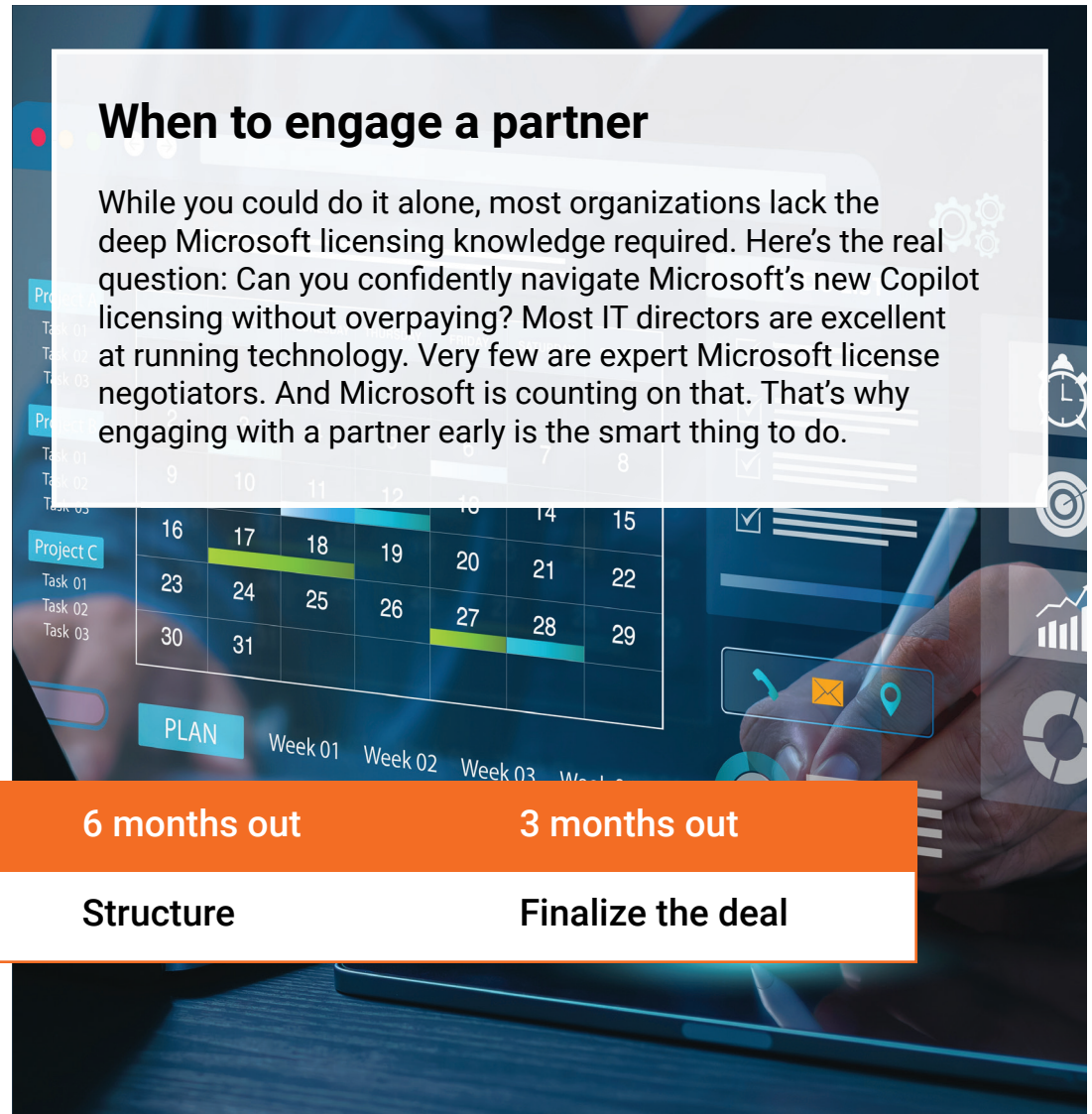
SHI's Microsoft experts can still help, but 90 days is cutting it close. We've rescued last-minute renewals, but you'll pay more and have fewer options.

In general, you need to think about your Microsoft EA renewal 12 months out. The sweet spot is 12-15 months, giving you time to understand your position, model different scenarios, and negotiate from strength.

Our 4-step plan is built on a 12-month timeline, and looks something like this:

When to engage a partner

While you could do it alone, most organizations lack the deep Microsoft licensing knowledge required. Here's the real question: Can you confidently navigate Microsoft's new Copilot licensing without overpaying? Most IT directors are excellent at running technology. Very few are expert Microsoft license negotiators. And Microsoft is counting on that. That's why engaging with a partner early is the smart thing to do.



12 months out	9 months out	6 months out	3 months out
Lay the groundwork	Strategize	Structure	Finalize the deal

YOUR 4-STEP PLAN FOR EA RENEWAL SUCCESS

Why early planning pays dividends

12 months out

STEP 1

LAY THE GROUNDWORK

Building your negotiating position

If 12 months sounds too far in advance, consider how much leverage you lose by starting late.

You need time to build an accurate view of your Microsoft environment. This includes comparing your current entitlements against your actual usage, as well as studying your current agreement structure, terms, and benefits, such as Software Assurance. This isn't just about counting licenses. You need to understand what you're actually entitled to use, where you might have compliance gaps, and what benefits you're paying for but not leveraging.

It's also wise to start looking at recent or anticipated Microsoft product licenses and volume licensing program changes. A lot can happen in three years. Microsoft doesn't send you a memo when they change licensing terms. They just expect you to know. The organizations that stay on top of these changes save money. The ones that don't get surprised at renewal time.

You should also start pulling together the right team from IT, procurement, and finance. Get them aligned early, or you'll be scrambling later.

ACTION PLAN

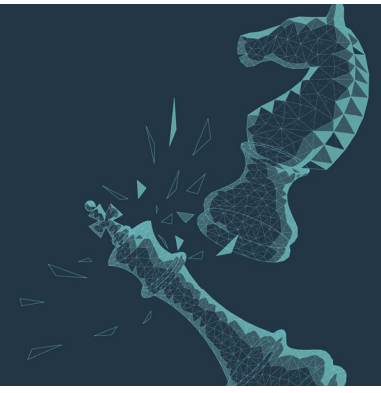
- Build your team with the right stakeholders and make sure everyone understands their role.
- Understand current entitlements and usage through a comprehensive license position analysis.
- Identify underused benefits and potential compliance issues that affect your negotiating position.
- Understand program changes since your last renewal.
- Assess your security licensing status, as this is a key focus for Microsoft.
- Evaluate your readiness and licensing needs for Copilot; don't wait for Microsoft's guidance.

9 months out

STEP 2

STRATEGIZE FOR THE DESIRED OUTCOME

See your options



Once you have a clear understanding of where you are and you know what the options are in terms of Microsoft's current or planned licensing conditions, you can start to reconcile that against what you know about your organization's future IT initiatives.

By engaging with the right stakeholders, it's easier to plan for what your Microsoft needs might be in two or three years' time, rather than just the first year of the EA. But think strategically. Microsoft wants to sell you everything. Your job is to buy what you actually need, when you need it, at the best possible price.

The key insight here: Microsoft has multiple licensing paths to the same outcome, and they're not all priced equally. For example, you can get advanced security features through Microsoft 365 E5, through standalone security products, or through add-on licenses.

Each approach has different cost implications and flexibility. The organizations that understand these options negotiate better deals.

Working with a partner – or at least a Microsoft license advisory specialist – you can then start to model different options that will best meet these business requirements, building a financial analysis that puts you in a better position to make an informed decision.

One distinct benefit of working with a trusted Microsoft licensing advisor like SHI is that you can gain access to much better situational awareness than you can get through your own experience. We see hundreds of these negotiations every year. We know what Microsoft is willing to negotiate on, what they're not, and how to structure deals that work for both sides.

ACTION PLAN

- Outline future business and technology needs with realistic timelines and adoption rates.
- Compare various program options, including non-traditional EAs.
- Conduct a financial analysis of total cost versus reward over the agreement's duration, considering different scenarios.
- Leverage insights from similar organizations to enhance decision-making.
- Model Copilot licensing scenarios carefully. Microsoft's pricing here is still evolving.
- Evaluate your security architecture needs against Microsoft's security offerings.
- Assess hybrid cloud requirements and how they align with licensing models.

6 months out

STEP 3

STRUCTURE AN EFFECTIVE AGREEMENT

Getting the details right

There is often no single 'right answer' to structuring your EA. As part of step 2, skilled Microsoft licensing specialists will have identified several options. With step 3, it's time to evaluate those possibilities, narrow down your options, and start to structure an agreement that fits both your requirements and the constructs of the EA program.

Here's where experience matters. Microsoft's EA structure includes dozens of variables that can significantly impact your total cost and flexibility. Payment terms, true-up provisions, growth assumptions, product mix — each of these elements can be optimized, but only if you understand how they interact.

A detailed analysis of the terms and conditions of an upcoming agreement can be performed against the current agreement so you understand the major changes. This helps avoid any nasty surprises. Every EA renewal includes changes in terms. The key is understanding which changes matter.

In short, you know exactly what you're signing up for. This is the point when a detailed final financial analysis is performed to ensure all changes have been accurately incorporated. Because once you sign, you're committed for three years. You're now ready to go back to Microsoft.



ACTION PLAN

- Formalize program renewal options.
- Review proposed terms and conditions line by line.
- Finalize pricing terms and secure internal approval.
- Structure Copilot licensing for gradual adoption instead of full deployment.
- Align security licensing with compliance needs and growth plans.
- Maximize value from Software Assurance benefits and hybrid use rights.

3 months out

STEP 4

FINALIZE THE AGREEMENT BEFORE EXECUTING

Closing with confidence

You are entering the final stage, but it's not quite time to relax just yet. There is often a flurry of activity from both your internal team and Microsoft which will likely demand a skilled team to handle. This is when Microsoft's renewal team becomes most aggressive about closing deals. They have quotas to meet and timelines to manage. Don't let their urgency become your pressure.

In response to your submission in Step 3, Microsoft will issue an EA proposal. You must thoroughly review it to ensure it fully matches your entitlement and cost expectations throughout the agreement's lifespan. Microsoft's first proposal is rarely their best offer. They expect negotiation. The question is whether you're prepared to negotiate effectively.

It's also important to ensure your existing agreement is closed out with no loose ends before you renew or enter into a new EA – no potential contractual obligations, compliance risks, or unaccounted costs. EA transitions can be surprisingly complex. Make sure you understand what happens to your existing licenses, what true-up obligations you might have, and how the transition affects your day-to-day operations.

During the last 30 days is when you would typically sign the new EA, and it can go down to the wire, but with the right team on your side, it doesn't need to. A skilled Microsoft license advisory team will help you avoid a last-minute scramble for the line or any confusion over what you are really signing up for.

With a team like SHI, you can be sure you know exactly what your costs and entitlements will be, and that you have created the very best Microsoft EA possible for your organization.



ACTION PLAN

- Review and finalize the deal structure against Microsoft's proposal.
- Close out current contract cleanly, ensuring all obligations are met.
- Sign and execute your optimized agreement with full understanding of all terms.

DON'T SETTLE FOR AN AVERAGE MICROSOFT EXPERIENCE

Make it work for your business

MAKE IT A GREAT ONE.

Your Microsoft EA is a major commitment and deserves the right licensing partner; one that will invest in you as a customer, proactively manage your account, and provide access to the support and services you need.

If your Microsoft EA is close to renewal, this page will help you understand SHI's unique approach to managing over 8,700 EAs. The difference isn't just experience — it's current, relevant expertise in a rapidly changing licensing environment.

There are many reasons why customers choose to renew their Microsoft EA with SHI, year after year. On top of perhaps the world's most experienced team of Microsoft licensing experts, our 5-step approach leaves nothing to chance and lifts the burden of managing many of the complexities off your shoulders.

Working with SHI, you can expect:

- 1. Structured engagement:** Every customer has a dedicated account team and success plan. Your team knows your environment, challenges, and objectives.
- 2. Expert license advisory:** We'll help you make the right licensing decision for now and the future. Our advisors negotiate with Microsoft daily. They understand current pricing and what's actually negotiable.
- 3. Deployment and adoption:** Our teams will help you make the most of your Microsoft investments, including the benefits you're already paying for but might not be using.
- 4. Cost optimization:** From SQL and Server licensing to 365 and Azure optimization, we'll help you run lean. We regularly identify significant savings through license rightsizing and strategic restructuring.
- 5. Proactive renewals management:** No surprises, no last-minute scrambles! We start renewal conversations 15 months in advance, giving you time to plan and negotiate strategically.

The ideal Microsoft partner	Your reseller	SHI
Assess your current licensing entitlements and advise on impact to future requirements	?	YES, through comprehensive license position analysis
Explore program and cost models to guide you through selecting the most desired outcomes	?	YES, with modeling tools and scenario planning
Mitigate risk on non-compliance through licensing knowledge transfer and guidance	?	YES, through ongoing compliance monitoring and advisory
Offer access to a network of licensing experts	?	YES, with dedicated specialists for complex scenarios
Optimize cloud initiatives through extended product use rights and SA benefits	?	YES, including hybrid benefit optimization and Software Assurance maximization
Deliver customizable tools which provide insights to procuring and licensing	?	YES, using proprietary analysis tools and regular licensing reviews
Provide guidance on navigating complex operational processes to ensure timely and accurate transactions	?	YES
<i>The bottom line:</i> Microsoft licensing has become too complex and expensive to manage casually. You need partners who understand the business impact of licensing decisions.		

KEY MICROSOFT SERVICES FROM SHI

Make the most of your Microsoft investments

MICROSOFT LICENSE ADVISORY

Strategic guidance for complex decisions

With over 35 years' experience providing organizations like yours with professional advice on Microsoft licensing, we've perfected a simple but effective approach to maximizing our customers' ROI on licensing investments. Our Microsoft license advisory approach is based on three steps:

1. Build according to your vision and strategy

Working with organizations of all sizes, SHI's licensing experts have a good understanding of what you're trying to achieve and how your future plans need to be accommodated into your EA. Our in-depth knowledge of Microsoft's licensing roadmap helps you better prepare for changes to your needs or costs. We help you build licensing strategies that support your business objectives rather than constraining them.

2. Evaluate and select the right solution

Once your requirements are identified, everyone is in a better position to determine a cost-effective licensing program. To achieve the best licensing outcomes, we help you discover, evaluate Microsoft programs and licensing models and leverage additional use rights and benefits. This includes helping you understand the real costs and benefits of different licensing approaches, not just the list prices.

3. Deploy with a focus on optimization

Once your requirements are known and our licensing experts have laid out your program and licensing choices, SHI can help you recognize ROI on your Microsoft technology investment through successful implementation, adoption, and optimization. Because having the right licenses is only half the battle – you need to use them effectively to justify the investment. We can help you deploy a hybrid solution, optimize O365 usage, and ensure end users are trained so new technologies are adopted.

OPTIMIZED LICENSE POSITION

Understanding what you actually have

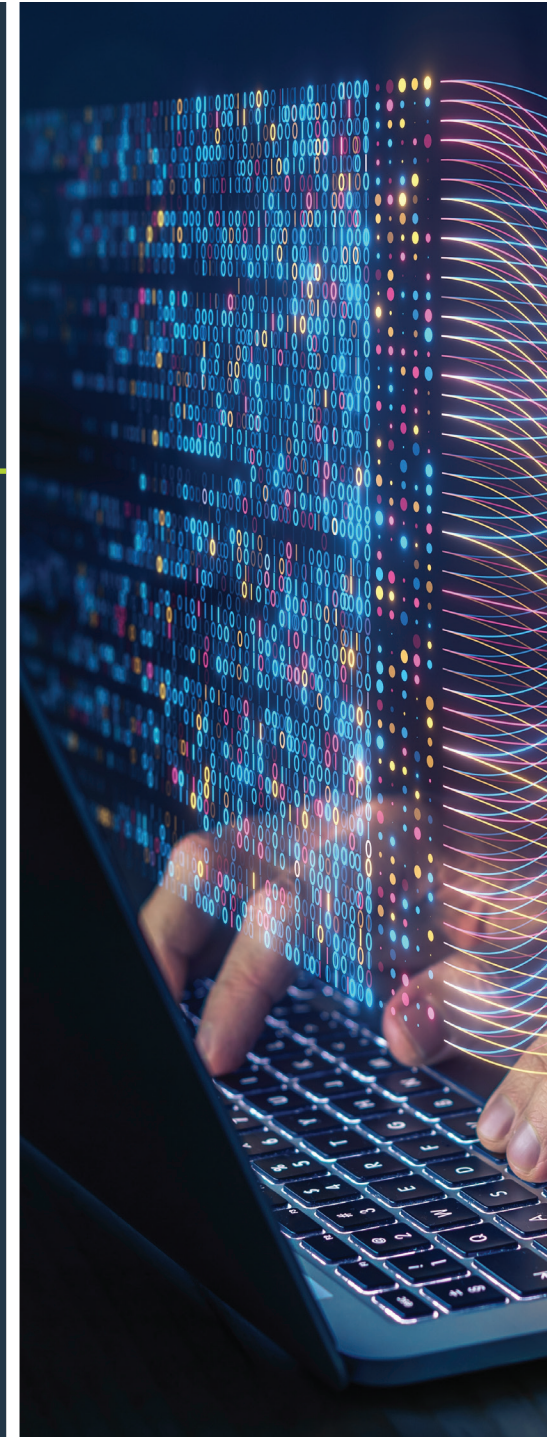
How much software do we have from Microsoft? How is it licensed? Do we have any compliance risks? Are we using the most effective licensing options? If the answer is “I don’t know,” then you need to talk to SHI about creating an Optimized License Position (OLP).

A baseline of your current licensing and usage is an essential part of a successful Microsoft EA renewal strategy. But at SHI, we combine our IT asset management skills with license advisory to go beyond simply reporting your baseline and instead focus on providing you with the licensing expertise to put your organization in the best licensing position possible.

Most license position assessments tell you what you have. Ours tells you what you should do about it.

A Microsoft OLP includes:

- A complete understanding of your current Microsoft licensing entitlement.
- A full inventory of deployment and usage.
- Advice from SHI’s experts on how to improve your current license position.



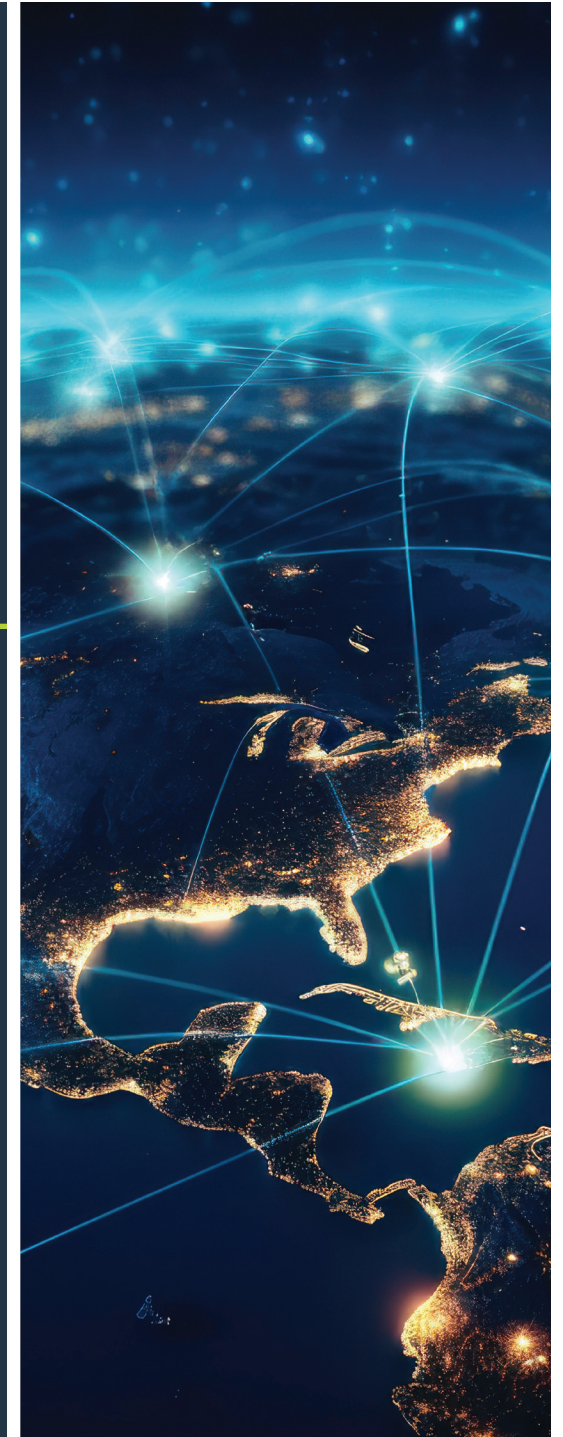
MICROSOFT AND OFFICE 365 COST OPTIMIZATION

Getting more value from your investment

You went to the cloud to make life simpler — to provide staff with the tools they need to be productive no matter where they work, to lighten the load on the IT team, and to provide better value.

But perhaps you've discovered life isn't quite so easy, and you need a helping hand to make the most of your Office and Microsoft 365 investment. The challenge isn't just technical — it's economic. Are you paying for capabilities you're not using? Are you using the most cost-effective licensing model?

SHI's 365 cost optimization services can generate findings in less than 48 hours, giving you almost-instant advice on how to find savings. Immediate cost savings are just the beginning. Over time, our services will give you the insight needed to better define future needs, leading to further savings.



AZURE COST OPTIMIZATION WITH SHI ONE

Visibility and control for cloud spending

The SHI One management platform gives everyone on your team, from procurement to C-suite, a centralized portal to track, manage, and support all your public clouds, including Azure.

Manage your multicloud strategy differently and efficiently with a single dashboard, giving you insight into your multiple platforms, costs, and consumption. With benefits like customized visibility for different teams, self-service capabilities, and multiple reports and analytics, your multicloud strategy will be taken to the next level to become more effective and streamlined than ever before.

SHI One helps you cut waste and ensure every cloud investment is worthwhile with a 360-degree view of cloud usage. Proactive recommendations from SHI's cloud experts will help you determine where cost optimizing opportunities are on your cloud journey, because cloud costs can spiral quickly without proper oversight.

Access your current usage, purchase history, and remaining contract value with the ability to submit additional requests directly as needed. Utilize SHI One's insights and practices to simplify your cloud governance and ensure your investments deliver measurable business value.





**SOLVE WHAT'S NEXT
WITH SHI AND MICROSOFT**

WHY SHI

Proven expertise when it matters

For over 35 years, SHI has been guiding IT organizations around the world with their Microsoft license investments. Drawing on years of experience supporting some of the most complex Microsoft environments in the industry, SHI can help you identify and select the Microsoft volume licensing program that will meet the goals of your organization.

The difference is practical experience. We've seen what works, what doesn't, and what's worth fighting for in Microsoft negotiations. That experience translates into better outcomes for our clients. Our unrivaled partner relationships, international presence, and dedicated Microsoft experts will ensure your organization is ready to face the challenges ahead with confidence, and with the right technologies in place to support your workforce.

As a Microsoft EA customer, you can seamlessly switch from one licensing partner to another. And contrary to what some might tell you, there's no such thing as a bad time to move your contracts, especially if you're unhappy with your current support levels. We're so familiar with helping customers move their EAs over to us that we've built a standardized 90-day transition plan.

The question isn't whether you should optimize your Microsoft licensing. The question is whether you're going to do it strategically or reactively. We recommend strategically.

