



IS YOUR MICROSOFT PARTNER DELIVERING ROI?

7 checkpoints to assess your current Microsoft partnership and identify optimization opportunities.

A man with a beard, wearing a dark shirt, is pointing at a large screen with a pen. He is looking intently at the screen. In the foreground, the back of a man's head and shoulders are visible, wearing a white shirt. Another person is partially visible in the background. The screen displays some charts and text.

Your biggest technology investment deserves the most support

As you plan your 2026 budget, you'll likely face familiar questions about your Microsoft spend. CFOs want to see clear ROI, and business leaders expect measurable outcomes from technology investments. Chances are, you're not alone. Many IT leaders have found themselves managing what feels like a vendor relationship rather than a true partnership — often discovering optimization opportunities only during renewal discussions, when it's too late to capture immediate value.

The complexity of Microsoft's current licensing landscape, particularly with Copilot for Microsoft 365 rollouts and Azure consumption management, requires partners who understand both the technical architecture and the financial implications of every decision.

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, transforming a cost center conversation into a business enablement discussion.

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.

Before you begin this assessment, consider this question: When did your partner last present you with a cost-saving opportunity that you hadn't already identified? Your answer will frame how you evaluate the following checkpoints.

CHECKPOINT #1

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 Copilot readiness assessments and Azure cost optimization to Teams Phone deployment and Power Platform governance, 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 with specific business impact projections and implementation timelines.

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.

If your partner cannot articulate the specific business value of their recommendations or relies on generic best practices, request [SHI's Microsoft Cloud Matrix Workshop](#) to see strategic guidance first-hand.



CHECKPOINT #2

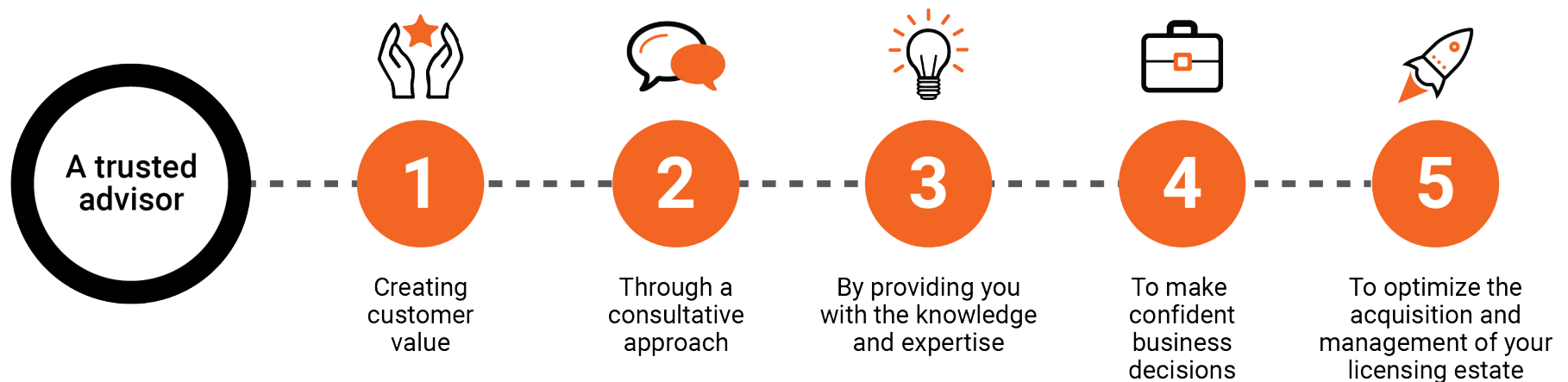
A dedicated team of Microsoft license experts

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.

Most partners can process your purchase orders and ensure basic compliance. However, experienced licensing specialists understand the financial implications of different Enterprise Agreement (EA) enrollment scenarios, know when to recommend New Commerce Experience (NCE) for Cloud Solution Provider (CSP) versus traditional CSP for specific workloads, and can model the exact licensing requirements for secure Copilot for Microsoft 365 deployments across your organization.

SHI's Microsoft licensing specialists understand the nuances of every licensing program. We regularly conduct EA optimization reviews that examine your current true-up trajectory, analyze your Azure Reserved Instance strategy, and identify opportunities to right-size your subscription mix. This approach has prevented organizations from six-figure true-up payments and optimized their licensing posture for upcoming renewals. We'll help you navigate the complexities across all relevant device types, platforms, and geographies, ensure compliance, and identify opportunities for significant cost savings.

Does your current partner provide detailed licensing modeling beyond basic compliance? Request an [SHI Microsoft Cloud Matrix Workshop](#) review to understand what comprehensive licensing expertise delivers.



CHECKPOINT #3

A Microsoft partner who proactively saves you money

Effective partners focus on your total cost of ownership, not just transaction volume. They should actively monitor your Microsoft environment and surface cost optimization opportunities throughout your agreement term, not just during renewal cycles.

One example is [SHI's Microsoft Cloud Matrix Workshop](#), which identifies redundant, duplicate, and underused licenses. SHI experts analyze your actual usage patterns and provide specific recommendations for subscription optimization. For instance, we might identify departments purchasing Microsoft 365 E5 licenses when E3 would meet their requirements, or highlight Power BI Pro licenses that could be consolidated into Premium capacity models for better economics.

When did your partner last present you with documented savings opportunities? Contact SHI's experts to schedule an [SHI Microsoft Cloud Matrix Workshop](#).

Is your Microsoft partner delivering ROI?

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 a
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 County Administrator/CIO, Essex County, NJ

[Explore more case studies](#)

CHECKPOINT #4

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.

Here's what most people don't realize about Microsoft certifications: The real value isn't the badge on the website. It's the funding and support that comes with it. When we work with clients on Azure migrations, our Solution Partner status gets them FastTrack engineering support at no cost.

That means Microsoft engineers work directly on your project. We've also secured proof of concept (POC) funding for organizations testing new workloads, which covers the entire POC phase.



Now, if a partner has current Solution Partner status across multiple areas, especially modern work, security, and data and AI, they're demonstrating real investment in staying current with Microsoft's direction.

Ask your current partner this: "When did you last get Microsoft engineering support for one of our projects?" If they can't give you a recent example, they're probably not leveraging their partnership the way they should.

Microsoft
Partner
 Microsoft

Azure
Expert
MSP

 Microsoft
Solutions Partner
Business Applications

 Microsoft
Solutions Partner
Infrastructure
Azure

 Microsoft
Solutions Partner
Security

 Microsoft
Solutions Partner
Data & AI
Azure

 Microsoft
Solutions Partner
Digital & App Innovation
Azure

Specialist
Cloud Security
Identity and Access
Management
Information Protection and
Governance
Threat Protection

 Microsoft
Solutions Partner
Modern Work

Specialist
Adoption and Change
Management
Calling for Microsoft Teams
Modernize Endpoints

 Microsoft
Solutions Partner
Private Cloud

CHECKPOINT #5

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 a dedicated time to review areas like consumption and licensing.

Most partners show up to QBRs and ask, "How are things going?" That's not a business review. It's a check-in call. Real QBRs should feel more like consulting sessions. We come prepared with your actual usage data, consumption trends, and specific recommendations based on what we see in your environment.

QBRs should not only be a quick 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.

Good partners bring you information you didn't know you needed. We might tell you about an upcoming Microsoft feature that could eliminate a third-party tool you're paying for, or alert you to licensing changes that affect your renewal strategy. The key is that we're thinking about your environment even when you're not in the room.



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

Your Software Assurance benefits are worth thousands of dollars annually, but most organizations use less than 30% of what they're entitled to. We track this for our EA clients and actively help them consume training vouchers, deployment services, and other benefits before they expire.

Some of these benefits can include:



New version rights



Spread pay options



Disaster recovery server rights

Here's a simple test: Ask your current partner to show you exactly which Software Assurance benefits you used last year and which ones you missed. If they don't have that data readily available, they're not managing your EA investment properly.

CHECKPOINT #6

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.

Here's what we see all the time: Organizations deploy Microsoft 365 and then wonder why productivity didn't improve. Usually, it's because users are still working the same way they did before. They're just using new tools to do old processes. Real adoption requires changing how people work, not just what tools they use.

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 integrate adoption planning into deployment strategies, ensuring your Microsoft investments deliver measurable productivity improvements and user engagement metrics.

The key is using actual data to drive adoption strategies. We analyze which features people are actually using versus what they could be using. For instance, if Teams usage data shows people aren't utilizing shared channels, we know exactly where to focus training efforts. Generic training doesn't work — targeted interventions based on real usage patterns do.

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

Most partners consider training complete when they finish the sessions. We measure success by actual behavior change and productivity metrics. If usage doesn't improve after training, we adjust the approach until it does.

CHECKPOINT #7

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.

We work with organizations whose boards now require quarterly supplier diversity reports. When audit season comes around, they need documentation showing they're working with certified diverse suppliers. It's become a compliance issue, not just a nice-to-have.

Being the largest Minority- and Woman-Owned Business Enterprise (MWBE) in the U.S. means we can help you meet your Tier 1 supplier diversity requirements while delivering the same Microsoft expertise you'd get from any major partner. You shouldn't have to choose between diversity goals and technical capabilities.



On the sustainability side, we're not just talking about having a recycling program. We take concrete actions to minimize our environmental impact, including:

- Establishing 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.

Ask your current partner for their diversity certifications and sustainability metrics. If they can't provide them, they're not prepared for the compliance requirements that are becoming standard across most industries.

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 who would suit the needs of your Microsoft business.



90-day EA 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 setup
- 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 evaluation reveals gaps in strategic guidance, proactive cost management, or technical expertise, you're likely not maximizing your Microsoft investment. The financial impact of an underperforming partnership compounds over time, affecting both your immediate budget and long-term technology strategy.

Your organization requires a partner who delivers measurable business outcomes, not just technical implementation. You now have a framework to evaluate your current relationship objectively.

Speak with one of our Microsoft experts to assess your current Microsoft partnership. During this consultation, we'll apply this evaluation framework to your specific environment and provide a prioritized list of optimization opportunities. This assessment typically identifies immediate cost savings and process improvements that justify the conversation within the first 30 days.

[Learn more about SHI's Microsoft services and solutions](#)

Partner attributes	SHI	Partner 1	Partner 2
How long have they been a Microsoft Partner?	35+ years		
Size of Microsoft practice	500+ dedicated Microsoft experts		
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: 2024 - Partner of the Year Finalist in Scale Solutions Category 2023 - U.S. Partner of the Year for Modern Work, Surface PC Reseller - Partner of the Year Finalist in Modern Work, Surface Hub Reseller - Partner of the Year Finalist in Industry, Education		
Global scale	Yes		