



# Moving schools to the Cloud

A workbook for Microsoft  
Education Partners



# About this workbook

This workbook is designed to help Microsoft Education Partners support schools through their transition to Cloud services. It steps you through why schools are moving to the Cloud and then shows how you can assist them. It also identifies how IT business will change from an opportunity-based model to an ongoing stream, and how you can add value to your customer relationships. You'll find an overview and guide to key resources that can help you financially model your business, train and accredit your staff and take the next step in accelerating your Cloud business.

**“** If you don't like change, you're going to like irrelevance even less.**”**  
General Eric Shinseki



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# What is digital transformation?

Change is occurring at a speed today that means we are regularly challenged to give up obsolete ideas and practices to adapt.



# The impact of digital transformation

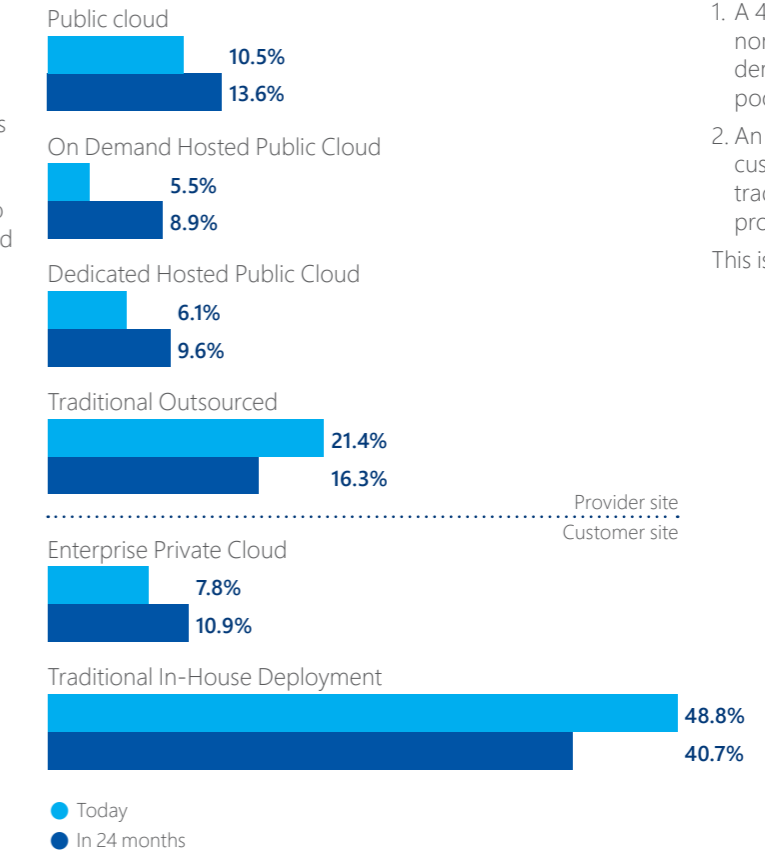
## Changing society

In today's fast-paced world, artificial intelligence, automation, mobile technology and the Internet of Things (IoT) are colliding and combining to create new products and services that redefine society and business. Airbnb, Uber and Deliveroo are great examples of how new industries and jobs are being created, while old ones are disappearing entirely. To keep pace with change, organisations are moving to Cloud-first, mobile-first IT models. Education is part of this trend. Schools find it more cost-efficient and simpler to pay for Infrastructure-as-a-Service (IaaS) or Software-as-a-Service (SaaS) rather than invest in hardware and management overheads.

## Changing your business

Wide-scale Cloud adoption presents your business with both a challenge and an opportunity. The old service model of providing on-premises and hardware-based services is shrinking. The new model of Cloud-based services is growing. To take advantage of this change and support schools through their digital transformation, you need to change your service delivery model. And the faster you move, the more market share you can obtain.

## Average IT budget distribution over the next 2 years



Source: IDC CloudView Survey, 2016, n=11350

## According to IDC, there are two major shifts in budgets

1. A 44% growth in the move from non-Cloud to Cloud delivery (i.e. on-demand, elastic, self-service, resource pooling, measured service, etc).
2. An 11% growth in the move from customer-site to provider-site (i.e. traditional outsourced, hosting provider and public Cloud).

This is great news for Cloud partners.

# How and why schools are embracing new teaching practices

## Supporting 21st century learning

The pace of change presents education systems with a real challenge. Schools can no longer equip students with qualifications for jobs that may well not exist. They need instead to provide them with the skills to tackle jobs not yet created.

To achieve this, schools are now focusing on a '21st century skillset'. A suite of evergreen capabilities that humans will always need, like critical thinking and problem-solving, collaboration, communication, creativity, agility and adaptability. NZ Ministry of Education (NZMoE) initiatives, like 'Innovative Learning Environments, Communities of Learning and Collaborative Working' have also encouraged schools to deliver contemporary and engaging education through digital experiences that match students' expectations and align with modern work practices.

## Digital school

The introduction of 21st century learning has driven the move to digital transformation.

Schools are transitioning away from paper-based methods of teaching and learning to digital processes and practices.

This digital transformation embraces the entire gamut of schooling – from student administration to reporting, teaching and learning.

It also introduces new opportunities like real-time learning analytics to support decision-making, digital tools that enable students to work more collaboratively across distance and device, coding software that opens the door to critical thinking and problem solving – and much, much more.

## Driving a move to the Cloud

Given the central role of technology in contemporary schooling the New Zealand Ministry of Education has recognised that many schools face an ongoing challenge.

They need all schools to have access to leading technology, they need it to be easily manageable, and very affordable. And therefore, the only way to keep pace with continuing exponential change is to move to the Cloud.

It supports any time, any device learning. It offers affordable pay-for-use models. And it allows smaller, less resourced schools to enjoy a higher level of IT services to ensure their teaching and learning is not disadvantaged.

The Cloud also provides an evolving IT platform that enables schools to keep pace with change and continually offer the latest learning and collaboration technologies.



They need to know how to learn because we don't know what it is they're going to need to learn."

Professor Glenys Thompson



# How and why schools are moving to the Cloud

The transition to Cloud computing has already achieved impressive outcomes for schools. These case studies provide a quick overview of what can be achieved – from boosting grades to improving student retention.

## Marlborough Boys

Marlborough Boys' College in New Zealand used digital transformation as an opportunity to reimagine their approach teaching and learning. For their Microsoft Education Partner, it was an opportunity to deliver a reformed network architecture and ongoing suite of services. They transitioned the College to a hybrid Cloud solution, moving most of their servers to Azure to complement Software-as-a-Service applications.

This opened the door for Office 365 which is licensed by the Ministry of Education for New Zealand schools, freeing students to work online at school and at home. To support this increased network use, their partner also redesigned the college network to provide content filtering and firewalling as an ongoing service.

The College saved around \$100k by migrating to the Cloud instead of opting for a 'like for like' on-premises replacement. These funds were used to fit out some of their PC labs with high-specification computers and replace their projectors.

## St Andrews

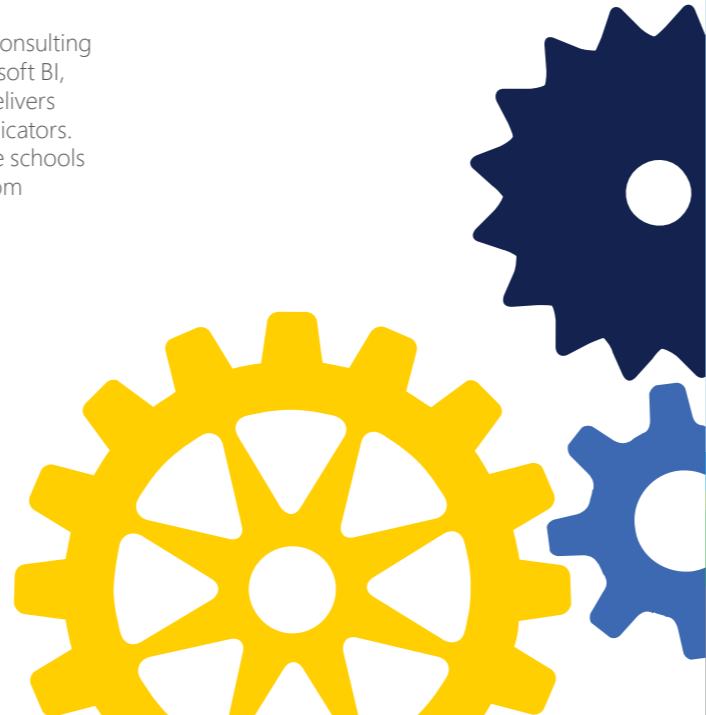
St Andrew's College in New Zealand began their digital transformation with the introduction of Cloud services and Microsoft Surface Pro tablets.

Their Microsoft Education Partner transitioned them from a traditional IT setup to a Cloud platform and equipped them with their Surface Pros. Starting with six devices in a pilot program, the school quickly scaled up to include 30 classrooms and teachers in an ongoing program and service opportunity. Office 365 allows students to use their Surface Pros with a OneNote collaborative learning platform to work together and pick up working where they left off – at home, in the library or at school.

## Tacoma Public Schools

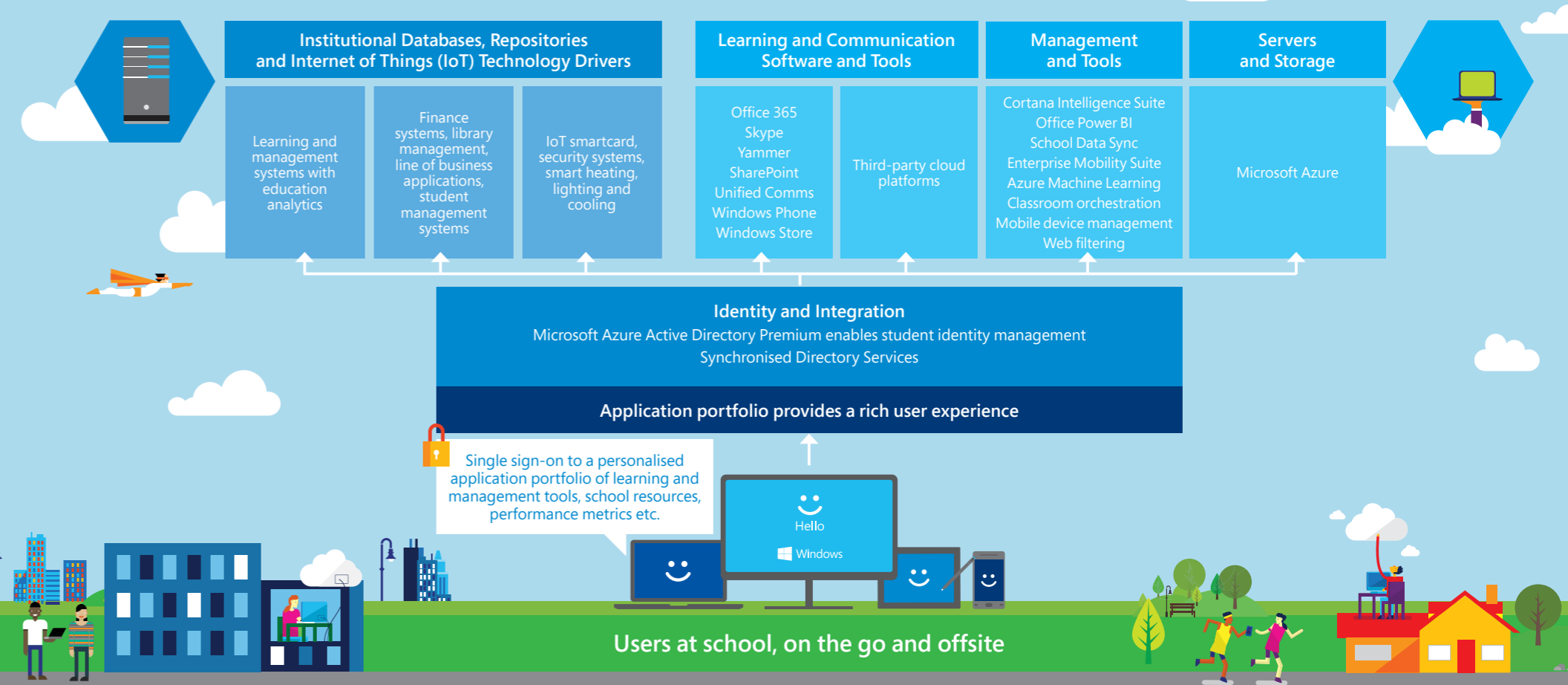
After a national study dubbed its five high schools 'dropout factories', the Tacoma Public School district in Washington, USA developed a radical vision. What if teachers and principals had analytical tools to predict whether or not a student was likely to drop out? This data would empower them to reverse the trend and help more students succeed.

Microsoft partners provided both consulting services and a solution using Microsoft BI, SharePoint, Excel and Azure that delivers comprehensive student success indicators. With the help of these analytics, the schools have improved graduation rates from 55 to 82.6 percent.



# A Cloud platform for learning transformation

This diagram shows how a school cloud IT architecture works to create a contemporary learning environment.



# The Cloud opportunity

Moving to the Cloud eliminates much of the need for an onsite data centre or server room at the school. That's because applications like Office 365 and storage using Microsoft Azure are both hosted and managed by Microsoft.

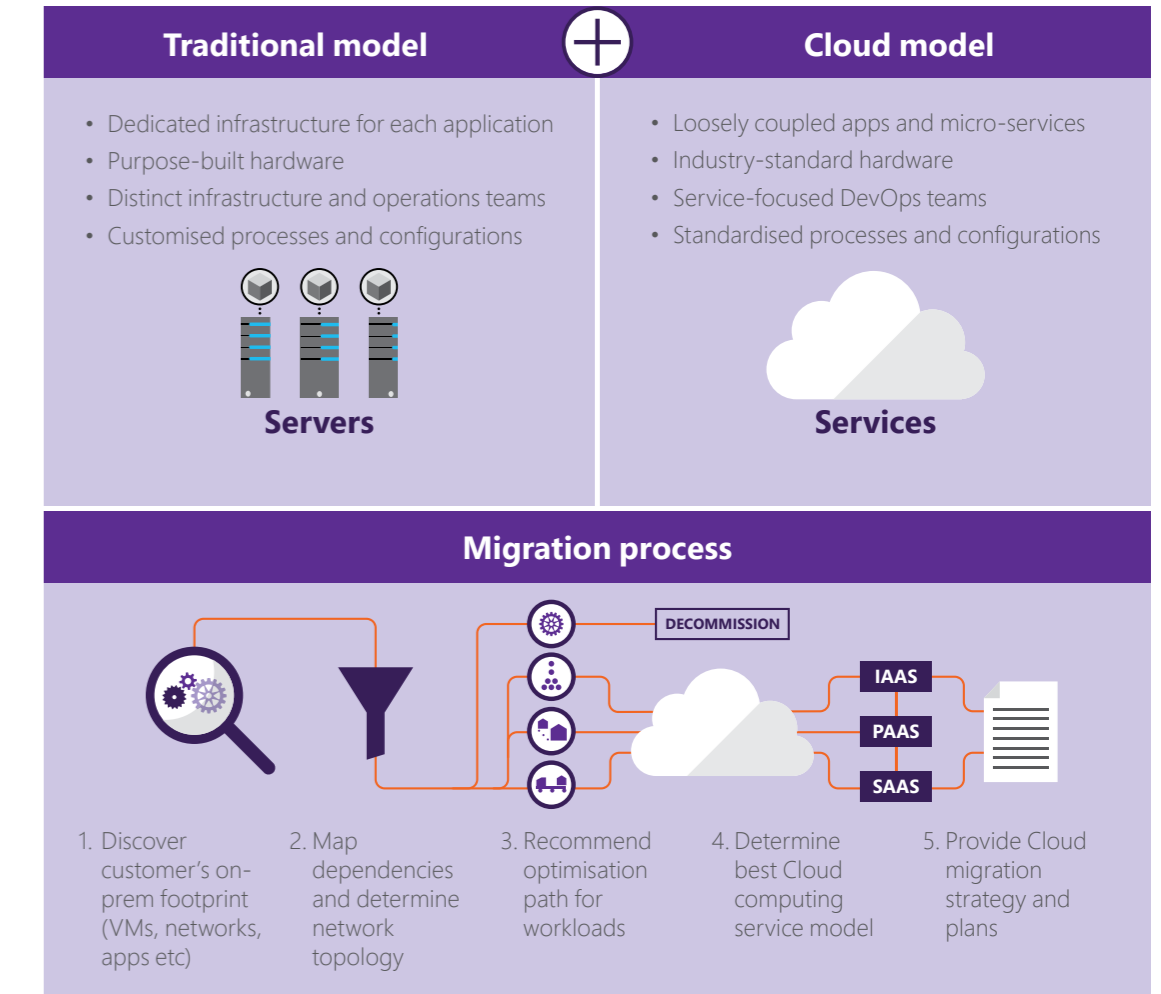


# How will the move to the Cloud change IT infrastructure?

## From servers to services

The world of traditional IT is under pressure to add agility, cut costs and do more with their limited resources. Organisations need flexible infrastructure that can scale on demand. Cloud provides additional IT resources whenever needed and allows IT teams to keep pace with changing business requirements. IDC predicts that the overall public Cloud IaaS market will shift towards optimisation and hybrid Cloud in 2017. By 2018 80% of organisations will have a commitment to hybrid architectures.

Source: IDC, Enterprise Adoption Driving Strong Growth of Public Cloud Infrastructure as a Service 2016.





# Typical stages of implementation

Many schools may not be in a position to move all of their workloads to the Cloud right away. You may find yourself planning a Cloud journey with the school to retire or redeploy hardware as it expires in order to maximise their investment in legacy systems. These four stages illustrate a typical school Cloud journey. Starting at the departure point, which identifies where many schools now stand, you can move them first to option 2, which provides a gradual introduction to Cloud services or to option 3, which is more integrated. The final stage 4 is completely Cloud-based.

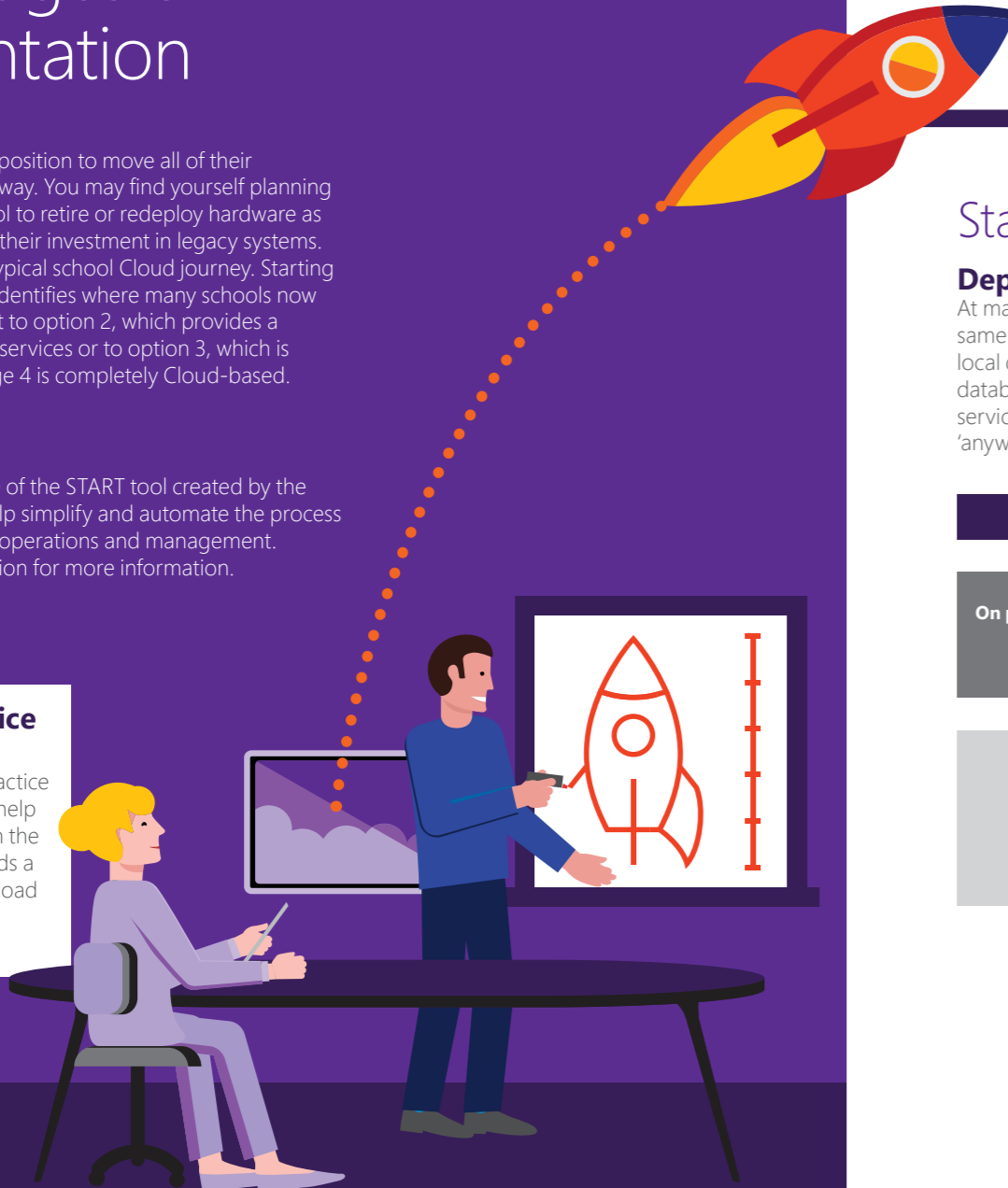
## START Tool

Make sure you take advantage of the START tool created by the Ministry of Education. It will help simplify and automate the process of diagnostics, migration, and operations and management. Contact the Ministry of Education for more information.

## Cloud Practice Playbooks

Microsoft has built Cloud Practice Development Playbooks to help guide your business through the changes as you move towards a Cloud-centric model. Download the playbook here.

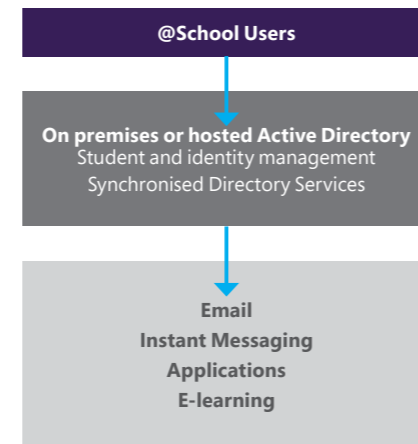
[aka.ms/cloudinfraplaybook](https://aka.ms/cloudinfraplaybook)



## Stage 1

### Departure Point

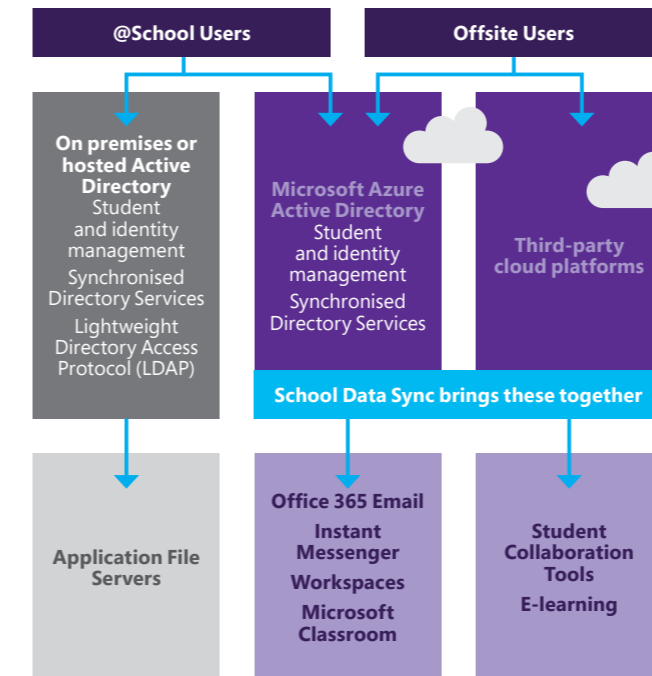
At many schools, the ICT infrastructure still contains the same components and elements as ten years ago, such as local directory services, local infrastructure, application and database servers. Usually staff and students can only access services inside the school network, putting constraints on an 'anywhere, anytime' learning model.



## Stage 2

### Transition — First Steps

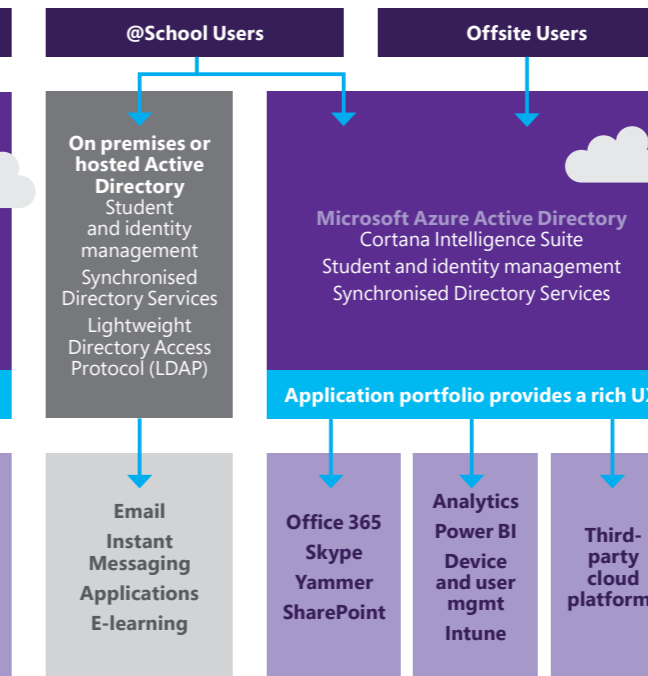
Many schools are at this stage. The transition phase involves helping schools take their first steps towards a more cost-efficient user-centric Cloud IT model. This entails moving some services to the Cloud while continuing to leverage their investment in legacy systems as you evaluate and rationalise their applications and services.



## Stage 3

### Learning Innovation — Towards Cloud

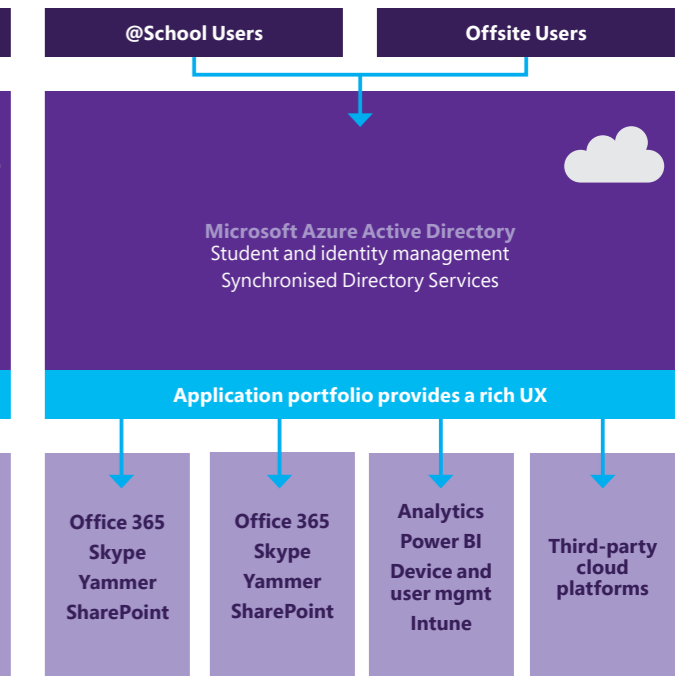
The Learning Innovation state can be achieved quite quickly, mostly using existing investments in the school's own infrastructure, as well as Office 365 Education, Azure AD, School Data Sync, Operations Management Suite and Cortana Intelligence Suite. It allows you to retain school databases on premises but still use the Cloud.



## Stage 4

### Learning Transformation

The learning transformation state is focused on greatly reducing IT infrastructure purchasing, management and maintenance costs by moving to an entirely Cloud-based IT model. This entirely Cloud-based model is the NZ Ministry of Education's desired destination for school infrastructure.



# How will Cloud services change your business model?

As schools shift to the Cloud, the services you provide will change. Managing IT infrastructure is de-emphasised, but new opportunities present themselves. Service providers have an opportunity to add value or capture more market.

1

## Line of Business Applications

Line of Business applications that are on premises will move to online and SaaS delivery options, and schools are asking to integrate these with other systems and manage these as a whole. There is increasing demand to automate school processes, like staff leave requests, in online tools like SharePoint online.

2

## Productivity

Students and staff use Office 365 productivity tools to collaborate, learn, report, assess and share work. SharePoint provides personalised learning spaces.

This requires a managed identity platform to protect staff and student files and information and SharePoint collaborative workspaces for students and staff.

3

## Mobility

Students and staff expect to work seamlessly using their mobile devices and pick up where they left off at home.

This requires an end-to-end BYOD service including devices, delivery of identity and management and advanced security.

4

## Networking

As an entire school of students and staff start to access, download and update work online, the network falls under pressure.

This requires updating and often re-engineering before cloud migration.

5

## Unified Communications

Schools will want to take advantage of a single inbox with presence, IM, conferencing and voice options.

This requires moving old PABX systems to converged networking.

6

## Infrastructure

Schools will require less and less infrastructure.

This requires migration services and a strategy that may transition through or to a hybrid public/private Cloud.



# Better technology Better learning

How transitioning a school to the Cloud creates new learning opportunities and an ongoing revenue stream.

## Marlborough Boys' College

With just shy of 1,200 students and staff, Marlborough Boys' College in Blenheim ran a traditional server system like many other schools in New Zealand. They hosted all their documents and data onsite. External IT providers spent 32 hours each week at the school maintaining the PC fleet and servers.

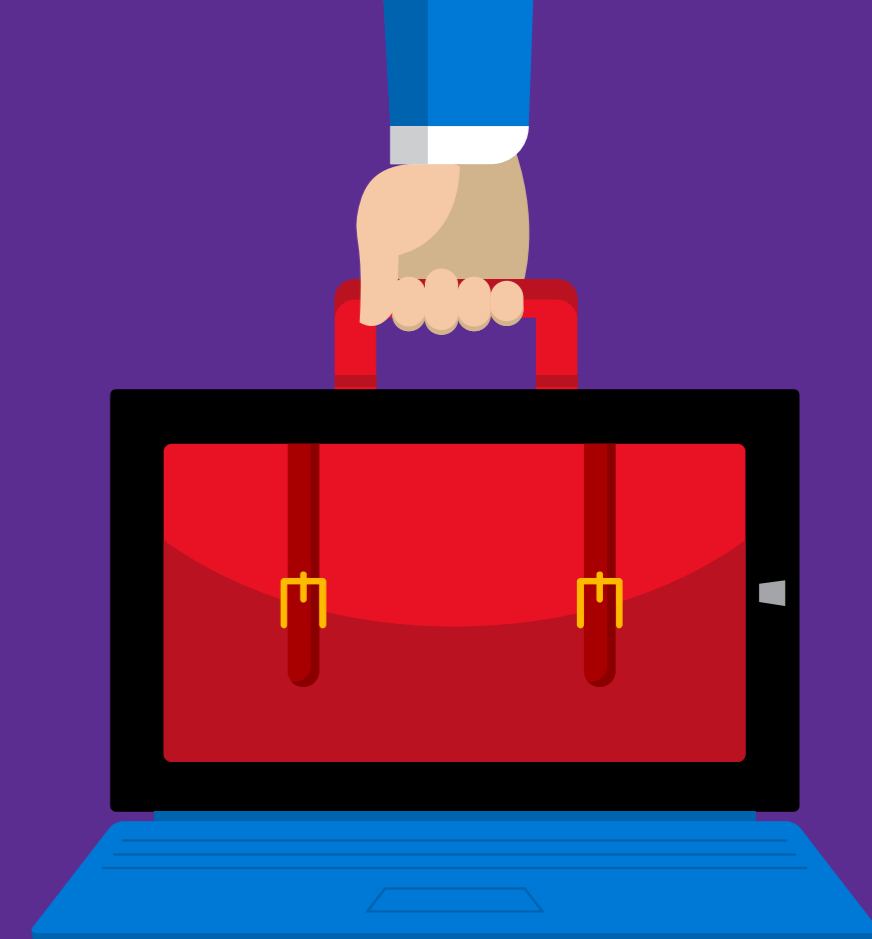
After running the tender process, Marlborough Boys' College identified an IT partner to switch them onto a hybrid Cloud solution, which centred on moving their data and applications to Software-as-a-Service, of which Office 365 formed the core productivity platform and Azure was used for core server infrastructure.

The partner's revenue stream changed to include migration to Cloud services, an ongoing service relationship to manage the school's hybrid environment, and working with the school on a roadmap to migrate more workloads to the Cloud.

The partner also delivered new added-value services. These included: the capture and automation of school processes into Cloud services such as SharePoint, and staff training in the new technologies and in teaching with technology. The partner is now gaining on-going reseller revenue from the school's consumption of Azure services through the Microsoft CSP model.

## Network 4 Learning

As part of the solution, the partner redesigned the network to take full advantage of the college's Network 4 Learning internet connection. This involved removing all additional content filtering and firewall devices, as they can now rely on those provided by Network 4 Learning. This has saved costs, sped up the network and made it more reliable. Moving to the Cloud has given teachers a more dynamic IT system, which can keep up with everyone's needs.





# Taking schools to the Cloud in six simple steps

Moving schools to the Cloud can be achieved in logical steps. Here we provide detail on what these initiatives might look like. Transformation is based on introducing Cloud-based services, automating manual processes and providing powerful learning, social and collaboration software with self-service capabilities for students and staff.

## Breaking down services into key stages



## Step 1: Introduce Cloud services



Provide students and staff with rich learning capabilities while minimising technology management costs through Office 365, Azure, and Microsoft Intune.

### Rationalise the school's Applications portfolio

Use Azure AD Cloud App Discovery to discover all the software applications. Then work with staff to suggest and replace overlapping applications with all-encompassing ones, and find alternatives to on-premises applications with Software-as-a-Service (SaaS) to reduce TCO.

Once the school is happy with the ideal portfolio, register all of their 3rd party SaaS-applications in Azure AD to provide single sign-on capabilities. Then sync their on-premises AD to Azure AD to provide synchronised data and write-back capabilities between active directories.

### Deploy Office 365 Education

- Students and staff simply sign in with their educational email address to download the latest Office apps including Word, Excel, PowerPoint, OneNote and Publisher on up to five personal devices.
- Users get 1TB of Cloud storage on OneDrive. The school can self-manage this with the help of additional services offered by you.
- Take advantage of Yammer to offer the set up of social media sites for the whole school, subject areas, sporting or interest groups.

### Extend the opportunities with Office 365 Pro Plus benefits

- Enhance the Office 365 experience and provide extended usability with full offline copies of Office 365 on up to 5 machines and 5 mobile devices for students and staff.
- Includes the latest versions of Access, Excel, Skype, OneNote, Outlook, PowerPoint, Publisher and Word, which users can load onto their devices.

## Step 2: Set up collaboration spaces

Help schools collaborate more effectively and work using shared learning spaces in the cloud.

### Use SharePoint for shared learning and collaboration

Many schools will want to use Cloud services to improve collaboration and provide a central repository for learning resources, school forms etc, presenting an opportunity to create IP around SharePoint.

Staff collaboration is often a key focus, and smart shared workspaces on SharePoint can replace shared network drives (typically S:Drive).

### Introduce Unified Communications

Replace the school PABX with unified communications bringing students and staff the power of a single inbox with Presence and Instant Messenger. Set up webconferencing and teleconferencing to support distance learning, parent-teacher interviews and the ability to connect to remote experts.



## Step 3: Improve the user experience



Provide a consistent experience across PCs, laptops, tablets and smartphones for students and staff.

Students and staff have single sign-on access to services and applications on any device from anywhere. You can help them set and reset passwords, establish and manage groups, install applications and manage student and staff devices.

### Windows 10

Windows 10 has powerful management features that make it easier to control BYOD and 1-to-1 learning environments.

- Windows 10 Education has in-place upgrades and dynamic provisioning and it's easy to safeguard identity. Students have the convenience of a password and the added security of the best multi-factor solutions, as well as anti-theft and anti-phishing to protect them online.
- You can protect essential student files with disk encryption, data loss prevention and data separation.
- Student-owned devices can also have a Windows 10 Education upgrade, keeping the user experience consistent.
- Use the Device Guard feature to lock devices down so they only run the applications you nominate.
- Enrol or un-enrol student devices to remotely control accounts, security settings and VPN configurations.

## Step 4: Provide secure access to resources

Enable students and teachers to use their school credentials to launch applications from a personalised web catalogue or mobile app.

Instead of the school firewall and network appliances controlling access to services, security now needs to be tied into identity, which should contain all relevant authorisation information. Some services or applications may need to match identity with the assigned device to gain access.

### Microsoft Azure Active Directory (AAD)

- Set up single sign-on to simplify user access to Office 365 and other SaaS-applications, as well as on-premises applications from Windows, Mac, Android and iOS devices. Multi-Factor Authentication prevents unauthorised access to both on-premises and Cloud applications.
- Set up self-service Password Change and Reset for students and staff.
- Set up self-service Group Management for teachers or year groups.
- Use the Application Proxy module to publish on-premises web applications with secure remote access and single sign-on.
- Security monitoring and alerts and machine learning-based reports identify inconsistent access patterns to mitigate potential threats.

### School Data Sync

- Use this to automate the process of importing and integrating school Student Information Systems (SIS).
- It also provides a single Cloud API for creating applications that integrate with multiple SIS providers, along with single sign-on capabilities.

## Step 5: Strengthen device management

Enable students and teachers to confidently bring personal devices to school. Manage BYOD and institution-owned tablets and smartphones with Microsoft Intune.

Trusted devices have single sign-on capabilities and (if required) enforced security policies. This gives you an organisational view of devices. The following are all included in the NZ Microsoft Schools Agreement.

### Microsoft Azure AD

- This comprehensive identity and access management Cloud solution lets you manage users and groups and provide secure access to applications.
- Manage devices and provide Multi-Factor Authentication capabilities.

### Microsoft Intune

- Has an option for managing "difficult to reach" devices that are consistently outside firewalls, ensuring security and accessibility.
- Has a cost-effective way to extend management coverage to small or remote schools and campuses by creating an integrated environment.
- Can be deployed without on-premises infrastructure.
- Create and manage an application library for the school. This is one core area where you can build IP for a managed service.

### The Enterprise Mobility Suite (EMS)

- Help your client access tools to manage mobile and desktop devices, applications, security, identity and access rights.
- EMS includes Intune Mobile Device Management, Azure Active Directory Premium, Azure Rights Management and Advanced Threat Analytics.

## Step 6: Introduce education analytics



To improve institution effectiveness, use Power BI to deliver real-time analytics.

Connect school systems so that they can use their data to track and evaluate trends and improve planning and decision-making.

### Power BI

- Use Power BI to give schools a 360-degree view of performance and operations with easy-to-use data visualisation tools that simplify access to data and make it easier to share key metrics with stakeholders.
- You can speed up analysis and time to insight with the familiarity of Excel and Power BI in Office 365, as well as access via mobile devices.
- Run it on Windows Azure to deliver the benefits of Cloud computing.

### Cortana Intelligence Suite

- To bring additional power including predictive analytics to your school, use Cortana Intelligence Suite, a fully managed big data and advanced analytics suite that enables you to transform school data into intelligent action.
- For example Tacoma Public Schools are using it to predict high school student drop-out risks, increasing graduation rates from 55 to 78 percent.

# The impact of the Cloud on your business

With every school in New Zealand being encouraged to move to the cloud and provided with the core cloud software to do so, there are significant business opportunities to support their cloud migrations with a suite of ongoing services, which can be extended with additional products.



The Cloud computing in education market is expected to be worth US\$15.02b by 2020, at a CAGR of approx. 20%."

Markets and Markets, Dec 2015

## The NZ Microsoft Schools Agreement

The NZ Ministry for Education has extended the Schools Agreement with Microsoft to support their strategic intent of moving schools to a Cloud-centric model for IT.



This Microsoft Enrolment for Education Services (EES) Agreement covers schools until 31 December 2018

### Microsoft products licensed for school computers

- Windows Server 2016
- Microsoft Office 2016
- Client Access Licences
- Windows OS upgrade from qualifying OS

### Microsoft's key on-premises software

- Windows 10
- Office 2016
- SharePoint 2016
- Exchange 2016
- Server 2016
- Skype for Business

### The Enterprise Mobility Suite

- Tools to manage mobile and desktop devices, applications, security, identity and access rights, including Intune, Mobile Device Management, Azure Active Directory Premium, Azure Rights Management and Advanced Threat Analytics

### New for students' and teachers' personal devices

- Office 365 Pro Plus
- Latest versions of Access, Excel, Skype, OneNote, Outlook, PowerPoint, Publisher and Word
- Students and staff can load up to 5 copies of the client software on their own computers (Mac/PC) and mobile devices (Windows/Android/iPhone)
- New management software for schools.

If you do not know your login credentials or are unsure whether a piece of software is free for your school, please contact [nzschools@datacom.co.nz](mailto:nzschools@datacom.co.nz)

# The Opportunities

## Deployment of cloud services

Provide schools with step-by-step assistance as they move to the Cloud. Typical services that you might offer include:

### Cloud Service Partner (CSP)

Microsoft CSPs own both the customer and the billing relationship. You can now obtain an ongoing revenue stream for the Azure Cloud services you sell and manage for schools as they are not covered in the NZMoE Agreement.

### Cloud migration consultancy

Collaborating with key personnel to develop a vision for cloud and recommend Cloud services, back-up and security options, along with a migration strategy and roadmap. Many schools will want to introduce cloud services in planned stages to minimise disruption and allow time for staff to become trained and familiar with them.

### Additional back-up and security services

Some schools may require additional backup and security solutions for email or files. As they make the move to the Cloud their internal network may need upgrading and reconfiguring.

### Access and identity services

Providing schools with end-to-end identity management using Azure Active Directory Premium. This could be an ongoing service. Initially migrating student databases and then automating moves, adds and changes and updating records as students enter and leave the school.



## Internet of Things (IoT) integration

The Internet of Things is also a powerful opportunity for schools to keep track of important resources, track student movement to optimise the use of space.

### IoT connectivity

Providing schools with a system that lets them track and locate equipment — such as projectors, lab equipment and devices instantly using RFID — reducing time-wasting and frustration. This concept can be extended to smart ID cards which mark students as 'present' as they enter class. And even to school stocks — from printer cartridges to toilet paper — triggering automatic re-ordering. Schools may also wish to enhance student learning through connected scientific instruments like thermometers, barometers and other devices.

## Management of student and school devices

Provide schools with recommendations and supply them with end-to-end management, keeping devices secure and up-to-date. Services that you might offer include:

### 1-to-1 learning consultancy

Working with schools to develop a vision and a strategy for 1-to-1 learning that factors in device provisioning, management, pedagogical change, staff development and physical changes to the classroom.

### BYOD programs as a service

Many schools will be looking for an end-to-end managed service for their school and staff devices. This includes:

- Provisioning and retiring devices on a pre-determined cycle, offering swap-outs, repairs and assisting the school with recharging stations.
- Support and helpdesk services.
- Device management using Intune to keep the Operating System up to date and in sync and ensuring that all versions of Office 365 and Office 2016 are automatically updated.
- They may also want an additional anti-virus solution for their school devices.



## E-learning and content management

School digital transformation requires digital assets. Producing a content library will be a key service requirement. OneNote as a content library is commonly adopted for this, making it a simple way for staff to share resources.

### Personalised e-learning platforms

Many schools will want to include Office 365 as part of a comprehensive e-learning platform for students that provides school news and includes a sharing space for assignments, extension activities, social media through Yammer and more.

This is a great opportunity to provide a fully comprehensive service.

### Digital content library

Help schools develop both an e-learning content library as well as a central repository for school forms etc.

SharePoint provides a great way to store forms and automate processes around them so that school protocol is consistently followed.

Office 365 offers some great options for setting up video libraries with analytics.







## Learning Analytics

School performance benchmarking is one of the key opportunities to come out of digital transformation. Finally, schools are empowered to measure and report on learning outcomes for an individual student, a class, a year or an entire school. They just need your help to do so.

### System integration for analytics

Providing schools with a turnkey solution that enables authorised staff, students and parents to view role-based analytics is a key service that many schools will require. This requires integration to draw data from attendance, reporting and student management systems, and exposing it in a graphic dashboard that updates data in real-time. Power BI and Cortana Intelligence Suite provide great opportunities to provide analysis of student and school performance data, which can inform decision making, pedagogical change, and highlight students who may need learning support and enrichment.

## Training for teachers and staff

School digital transformation is heavily reliant on well trained and well supported teaching staff. The more skilled they are the better the outcomes. They'll need help in two key areas:

### Professional development

Moving to the Cloud opens up a wealth of opportunities for teachers to engage students with flexible, collaborative learning. But they need guidance.

Offer workshops to help teaching staff become familiar with the new set of cloud tools and adopt best practice examples in using them effectively.

### Technical training

This is the basic 'how-to' knowledge that teaching and non-teaching staff need in order to work effectively in a digital school.

Offer technical and proficiency training, tailored to suit the needs of the school.

### Get certified to provide training

Microsoft has a complete certification program which partners can follow, either to become a Microsoft Innovative Educator Trainer or Master Trainer. We also accredit suitably skilled organisations as Microsoft Learning Consultants.

For more information go to: [microsoft.com/en-au/education/educators/miee](https://microsoft.com/en-au/education/educators/miee)

### Contact a Teacher Ambassador to help

We have five Teacher Ambassadors across the country whom you can engage to help showcase the latest Microsoft in Education technologies. They can provide free professional development to help the school optimise the use of their Microsoft in Education package.

E: [msnzeducation@microsoft.com](mailto:msnzeducation@microsoft.com)

## Creating value in the Cloud

### Taking a new approach to service delivery



Cloud economics changes the focus from selling hardware and software licences to providing deployment, migration, ongoing support, and up-selling a raft of additional services.

Revenue streams no longer come from the deal or the initial sale, they are derived through customer lifetime value, with each customer touch point creating an opportunity to provide an additional service.

We see two key changes in business strategy that are required to navigate this new economic landscape: lifetime value management and developing your own Intellectual Property offerings and point of difference.

# Moving to customer lifetime value management

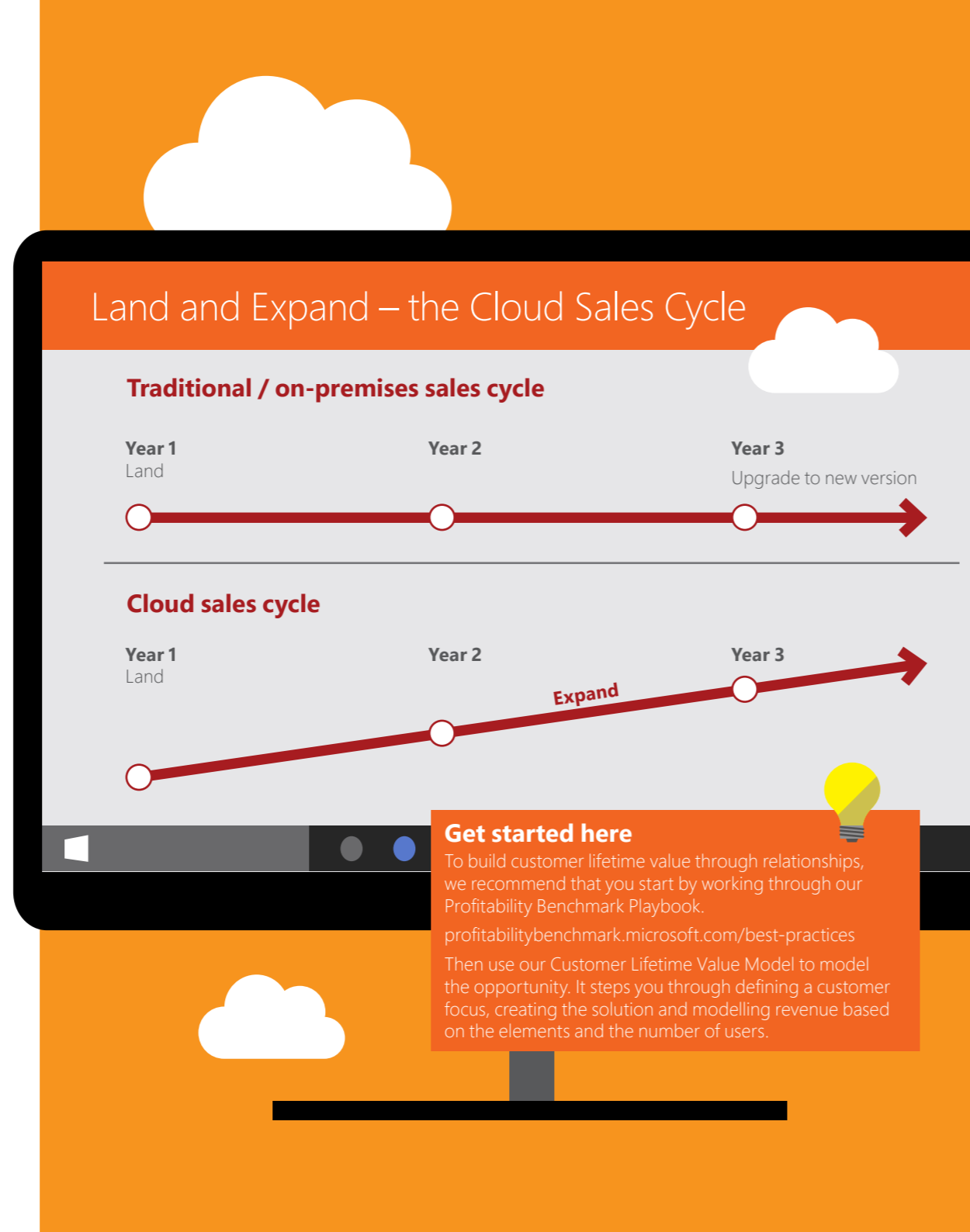
While it might seem counter-intuitive, the move to the Cloud increases the importance of having a reliable Microsoft Partner on the ground, one who comes to the school to participate in planning, migration and face-to-face meetings.

In this context it's more important than ever to hone your listening skills and craft long-term strategic plans with your school clients. Schools still require a managed service — it's just that it might be different to the one you are used to providing.

## Planning

Lifetime value does not happen without a plan. You need to map out the Cloud journey in collaboration with your customer. What should they do first? Where will they be in two, three or five years? Once you have the plan, you can work with the customer to make potential business benefits a reality. Everything doesn't need to happen at once, but it does need to happen in a thoughtful and logical way. There are typically two types of school: 'do it all now', and a one- to three-year approach. This is usually dependent on where they are in their hardware replacement cycle. You won't move a school to the Cloud if they purchased a server last year, but if it's five years old, they will want a migration tomorrow.

Always be thinking about what's next: would complementary or incremental functionality be a good fit at your customer's stage in Cloud maturity?



# Intellectual Property as a differentiator – packaged IP

One of the key ways to differentiate your business and create opportunities is to develop your own IP.

This could be anything from a smart learning platform to analytics integration. Look for unique knowledge and expertise that your company can offer as a specialisation to scaffold the Cloud core offering with smart tailored services that you own. Are you good at helping schools create, catalogue and manage learning content? Is there an App that you can see a niche for? How can you bundle services to create an end-to-end solution?

## Package services to make life simpler for schools

Not all revenue streams are created equal and based on Microsoft Partner interviews, packaged IP offerings drive on average more than 4-5 times higher gross margin than those focused on transactional services. Not only does IP drive higher margins, it also helps you deliver more value to your customers and helps to create stickiness to solidify your long-term relationships with customers. An example of a packaged IP model would be a 'BYOD or class set offering' comprising: Devices, Azure Active Directory Premium, Microsoft Intune, Office 365 and SMS.

### Get started here

To step through the opportunities available and discuss ideas with your colleagues, visit our Profitability Benchmark Playbook and check out the section on how to start, grow and optimise differentiation in your business.

[profitabilitybenchmark.microsoft.com/best-practices](http://profitabilitybenchmark.microsoft.com/best-practices)





# How will this impact my bottom line?

## Modelling the opportunities

To plan accurately, start by modelling your business in a Cloud-first model.

To help you, Microsoft offers a suite of five financial valuation tools developed by IDC. These span key Cloud technologies including Dynamics AX, Office 365 Cloud Voice, Azure, CRM Online and a combined model for when multiple or all of these services are involved.

These valuation tools enable you to input an average deal size and enter your perpetual and subscription fees, gross margins and delivery costs along with your customer projections and other key variables in order to project an income and break it down into recurring and non-recurring components. They also provide a detailed profit and loss projection, cashflow and predicted resourcing requirements.

These financial valuation tools will be made available by the NZ Microsoft Education Team.



# Cloud economics

An example of one partner's experience of the shift in revenue streams from servicing an on-premises school to a Cloud-centric school. Your personal experience may differ.



How your value streams change when you move your business to the Cloud



### Traditional school revenue streams

Server + GAPE/O365 + Devices  
Will vary per business.

- 15% of time: Managing the server, running updates, creating users in AD, resetting passwords etc.
- 60% of time: Setting up devices for end user and managing those devices and issues
- 10% of time: Managing the network, wireless and users
- 5% of time: Running updates on on-premises applications and supporting them
- 5% of time: Managing security (TMG etc)
- <5% of time: Planning
- <5% of time: Training and PD

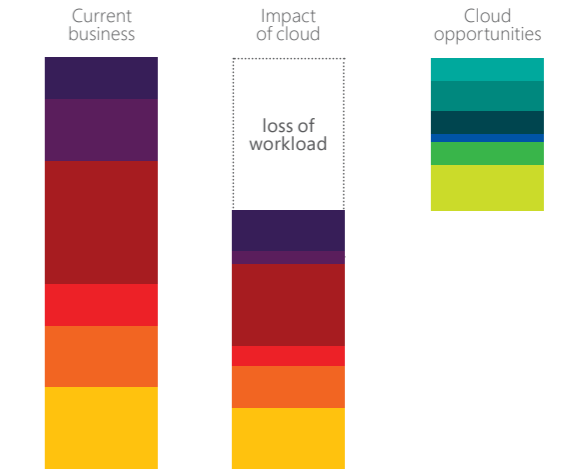


### Cloud-centric school revenue streams

Support for school post cloud migration. Will vary per business.

- <5% Running a powershell script to create users in O365, which link into other applications (GAPE etc)
- 50% of time: Setting up devices for end user and managing those devices and issues
- 10% of time: Managing the network, wireless and users
- 0% of time: Running updates on on-premises applications (0% as now all SaaS)
- 0% of time: Managing Security (all handed to N4L)
- 5% of time: Planning (new applications, roll out of new O365 tools etc)
- 20% of time: Training and PD
- 10% less than before with the additional training

How your revenue changes when you move your business to the Cloud



This is a projected view of the impact of the shift to the Cloud on an on-premises business model, suggesting which opportunities partners can pursue. This is a high-level projection; your personal experience may differ.

### Workloads

- Support
- Desktop management
- Application management
- Infrastructure management
- Hardware, server and desktop
- Network and communications

### New workloads

- Cloud deployment and management
- Learning analytics
- Training staff
- E-learning programmes
- Process automation
- Cloud reseller revenue

# Readying your company for the Cloud

The successful partner of the future will have to differentiate their practice from the wide and growing variety of competitors in the market. The competition is now global and is beginning to cross business boundaries to vendors outside of IT as well as a growing influx of new solution providers.



## Best practice guidelines

Differentiate to stand out

Making sure that your business is focused on your area(s) of specialisation and generating your own intellectual property (IP) are key.

### Start

Identify common threads in your existing business activities, processes or past successes that you could leverage to become a specialisation. Do you have areas of unique knowledge, or deep understanding in a particular technology area or customer market?

Develop one or two focus areas into pilot projects with a customer you trust and refine your specialist solutions in a way that can benefit both parties.

### Grow

Continuously review and refine your solutions over time to be better tailored to your customers' needs and make sure that you maintain ownership of the code, products or services that you develop. Properly managed with a licence agreement, this will become your IP, which you can then brand and market to an extended customer base using the successful case studies you have built as you developed the project.

### Optimise

If you are focused on a specific vertical, consider adding IP to your solutions. If you are IP focused, add vertically focused modules to that IP. Partner to get the vertical expertise you need by utilising Pinpoint and other ecosystem resources.

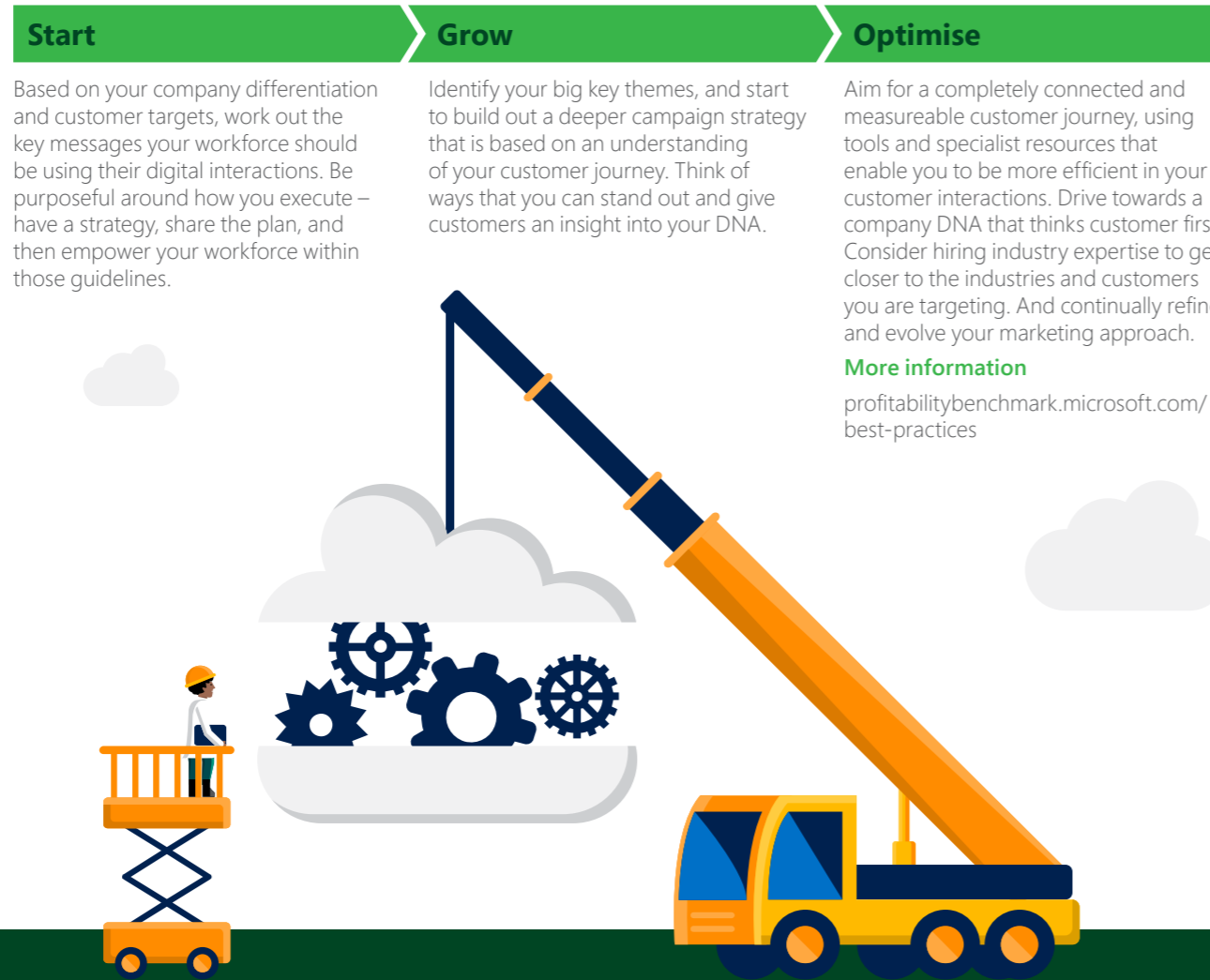
The deeper you understand your selected market and the more specific your solutions are to the markets' unique needs, the more successful and profitable you will be. If you lack expertise in an area (e.g. Professional Development and Training) look to work with a Microsoft Partner with those skills.



# Best practice guidelines

## Modernise sales and marketing

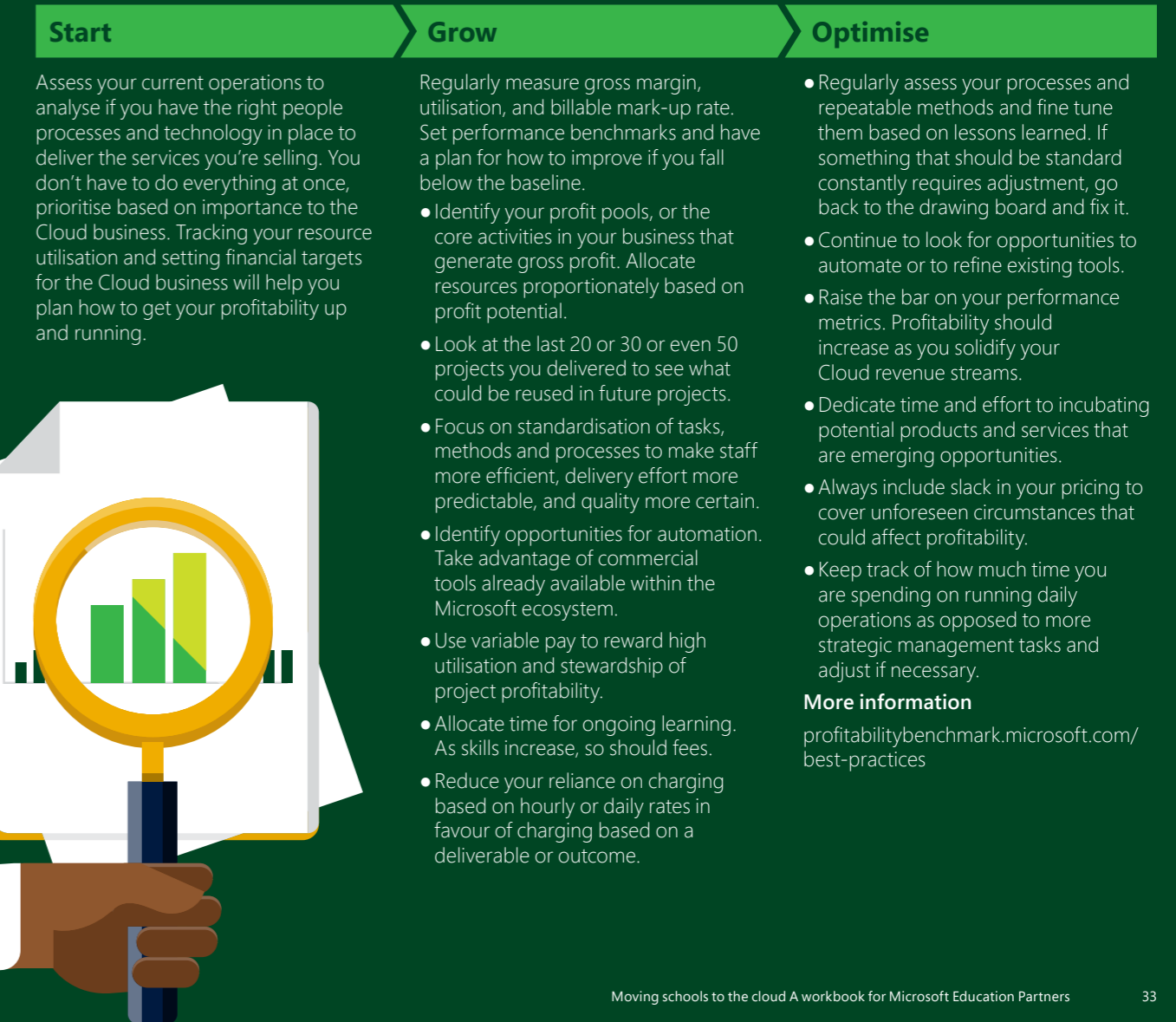
The successful partner of the future will owe some of their success to modernising their sales and marketing. These partners have not only learned to build and leverage their digital presence, but also understand the new customer journey and capitalise upon that understanding with their sales and marketing activities.



# Best practice guidelines

## Optimise your operations

Optimising your operations requires focus and discipline. You need to pay attention to documenting your processes and methods, allocating your resources in the most cost-effective way, and measuring your performance. These insights can help you get started or help you get better at running a profitable Cloud business.





## Best practice guidelines

### Deliver customer lifetime value

Moving core infrastructure to the Cloud may be low-hanging fruit, but generating lifetime customer value will help you sustain your business over time. A well-planned cloud sale can represent only the beginning of the customer purchase transaction. Creating deep engagement within your user base will ensure continuing uptake of your services and ongoing renewals, which can generate a strong, recurring revenue stream.

#### Start

Begin with the end in mind. With a clear idea of what services you can provide and how they differentiate you and your business, you can focus what you want to achieve with every Cloud sale. By asking lots of questions to truly understand your customers' needs and pain points you can add irreplaceable value.

Become the digital partner of record for every customer. The Cloud Services Partner Dashboard can then help you understand how your customer is using their cloud solutions, allowing you to refine and improve your service.

#### Grow

Refine your approach to sales and marketing to suit your Cloud-based business model and use your own customer success stories to show both what you can do, and what your customers can achieve for themselves.

Have regular planning sessions with your customers. Talk about their business challenges and opportunities so you can offer solutions that are relevant to their short- and long-term needs. Helping them move through cloud adoption in a planned, logical way will make transformation achievable for them, and generate incremental business value over time for you. Be the trusted advisor. Look beyond quoting for replacing IT. This is about a 3-5 year plan.

Use formal customer satisfaction measurement processes, training interactions and proactive conversations to help you refine your offering and identify opportunities for up- and cross-selling that will benefit both of you.

#### Optimise

Learn from others by joining the Microsoft Partner Network for insights into how other partners have built repeatable methods and processes. Become the trusted advisor on your customers' digital transformation journey by ensuring customer satisfaction measures and feedback loops are working and that matching values are instilled in your organisation.

Allocate your business resources based on the lifetime value of your customers and reward staff based on nurturing that value. And always bring cloud best practices to the table, based on your own depth of knowledge of the solutions.

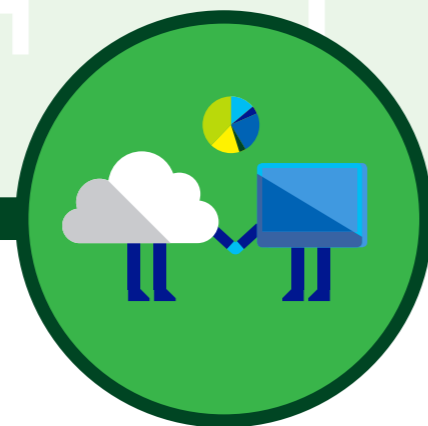
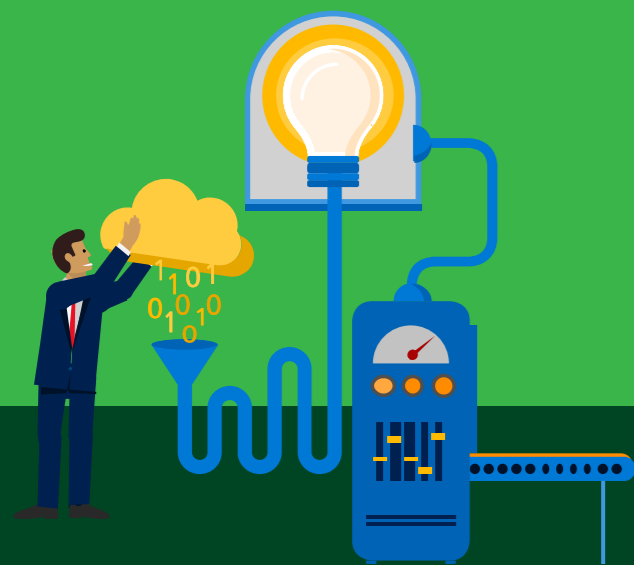
#### More information

[profitabilitybenchmark.microsoft.com/best-practices](https://profitabilitybenchmark.microsoft.com/best-practices)

# Get skilled and accredited

## Staff readiness

As your business activities change to match the needs of your customers, the required capabilities of your sales and technical staff will change. To be ready for a transition to cloud-centric models, get them upskilled and keep them up to date with the following resources.



### Microsoft Partner Network

Choose from three levels of membership based on the set of benefits you need to help your business grow. As you achieve your goals, participate in the program at the level that suits your unique needs to access more benefits and develop your relationship with us and other partners in the network.

#### More information

[partner.microsoft.com/en-NZ](https://partner.microsoft.com/en-NZ)

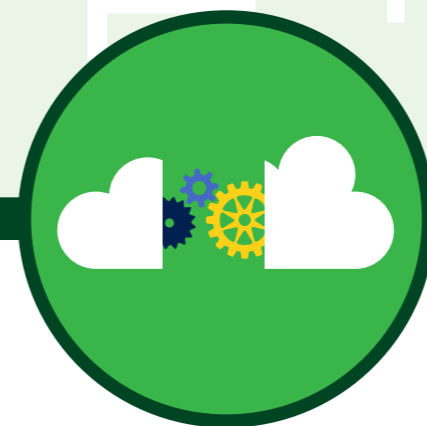


### Microsoft Education Partner Network

As an Authorised Education Partner (AEP) you can access resources to innovate your business, create more satisfied customers and boost sales. Independent software vendors (ISVs) and System Integrators (SIs), can take advantage of marketing benefits, education resources and the Microsoft network. You can sell discounted software to Education, advertise your skills, and gain training and access to exclusive Education-related resources.

#### More information

[mepn.com/MEPN/MEPNHome.aspx](https://mepn.com/MEPN/MEPNHome.aspx)



### Cloud SureStep Series

Achieve greater profitability by exploring your Cloud opportunities. Whether you're looking to start a cloud business or for new ways to optimise your strategy, Cloud SureStep is your single source for the top cloud resources to boost your business. Get personalised step-by-step guidance and access top resources for starting, growing, and optimising your Cloud strategy today.

#### More information

[partner.microsoft.com/en-nz/surestep](https://partner.microsoft.com/en-nz/surestep)



### Yammer

Join the Microsoft Partner Network on Yammer to discuss ideas, share updates, and crowdsource answers from coworkers around the globe. Our Yammer community gives our partners the opportunity to connect and collaborate with peers across the country.

#### More information

[yammer.com/nzpartner/#/threads/inGroup?type=in\\_group&feedId=4712088&view=all](https://yammer.com/nzpartner/#/threads/inGroup?type=in_group&feedId=4712088&view=all)



### NZ Education Team

The Microsoft Education Team is dedicated to creating immersive and inclusive experiences that inspire lifelong learning, stimulating development of essential life skills and supporting educators in guiding and nurturing student passions. We empower students and educators to create and share in entirely new ways, to teach and learn through exploration, to adapt to individual learning needs, so they can make, design, invent and build with technology.

#### More information

[nzeducation@Microsoft.com](mailto:nzeducation@Microsoft.com)



### Technical Training at Microsoft Virtual Academy

Microsoft Virtual Academy provides free online training by world-class experts to help you build your technical skills and advance your career and your business. Get seamless online learning experiences, track your progress and access experts through live Q&A sessions. Make it your destination of choice to get started on the latest Microsoft technologies and join this vibrant community.

#### More information

[mva.microsoft.com](https://mva.microsoft.com)



# Cloud Productivity Competency Accreditation

Stand out from the crowd with third party accreditation that differentiates you as a top performer in the industry. We recommend the Microsoft Partner Cloud-first competency. This is designed for partners to demonstrate their strengths in selling and deploying Microsoft Office cloud and hybrid solutions. The competency differentiates the partner as a cloud solution provider business for customers seeking qualified partners.

**For full and up to date requirements for achieving this competency, visit:**

[aka.ms/cloudproductivitycompetency](http://aka.ms/cloudproductivitycompetency)



## MCSA Cloud Platform

Demonstrate your expertise in Microsoft Cloud-related technologies to reduce IT costs and deliver more value for the modern business.

Required Exams

70-532: Developing Microsoft Azure Solutions

70-533: Implementing Microsoft Azure Infrastructure Solutions

[More information](#)

See page 82 of the Operationalise and Get Trained section of the cloud practice development playbook

## Requirements

- ✓ Must have deployed 4,000 active users
- ✓ Need to be associated as the Office 365 Delegated Administrator, Transacting Partner, or Digital Partner of Record
- ✓ Two people must pass:
  - Exam 70-346: Managing Office 365 Identities and Requirements
  - Exam 70-347: Enabling Office 365 Services
- OR
- Two people must obtain the MSCA: Office 365
- ✓ Provide five customer references from within the previous 12 months from customers to whom you have provided solutions based on the products and technologies associated with this competency. References need to be submitted through the portal: [partners.microsoft.com](http://partners.microsoft.com). The MPN will send your nominated customers this email ([partner.microsoft.com/en-nz/membership/customer-reference-sample-email](mailto:partner.microsoft.com/en-nz/membership/customer-reference-sample-email)) to receive references about your work.

## Training Requirements

- ✓ At least two people must take the required exam, but we can build the training plan for all technical staff to take the training.  
Exam: [microsoft.com/en-us/learning/mcsa-office365-certification.aspx](http://microsoft.com/en-us/learning/mcsa-office365-certification.aspx)  
Learning path: [mspartnerlp.partner.microsoft.com/LearningPath/LearningPath/DLPaths?trackId=1613&rowId=2244](http://mspartnerlp.partner.microsoft.com/LearningPath/LearningPath/DLPaths?trackId=1613&rowId=2244)

# Cloud Platform Competency Accreditation

The Cloud Platform competency is designed for partners to demonstrate their expertise across infrastructure and software as a service (SaaS) solutions built on Microsoft Azure. This competency creates eligibility for Signature Cloud Support, Azure deployment planning services, Azure sponsored credit, direct partner support, eligibility to deploy certain on-premises, internal use software on Microsoft Azure, and access to the cloud platform roadmap.

**For full and up to date requirements for achieving this competency, visit:**

[aka.ms/cloudplatformcompetency](http://aka.ms/cloudplatformcompetency)

## Requirements

- ✓ Partners must demonstrate US\$15,000 Azure customer consumption and/or Azure partner consumption within the previous 12 months (gold=US\$100,000)
- ✓ One person must pass one of the following assessments: (gold=2)
  - Technical Assessment for using Microsoft Azure for Datacentre solutions
  - Technical assessment for using Azure remote desktop service
  - Technical assessment for using Azure for Data Analytics and Data Platform solutions
  - Technical assessment for using Microsoft Azure for application development
  - Technical assessment for using Azure for Internet of Things solutions
- OR: one person must pass one of the following exams: (gold=2)
  - Exam 70-532: Developing Microsoft Azure solutions
  - Exam 70-533: Implementing Microsoft Azure Infrastructure solutions
  - Exam 70-534: Architecting Microsoft Azure solutions
  - Exam 70-473: Designing and implementing Cloud data platform solutions
  - Exam 70-475: Designing and implementing Big Data analytics solutions
- ✓ Provide three examples of customer references that feature how you have provided solutions based on the products and technologies associated with this competency, from customers with whom you have worked in the previous 12 months (gold = 5)
- ✓ Provide five customer references from within the previous 12 months from customers to whom you have provided solutions based on the products and technologies associated with this competency

## Training Requirements

- ✓ Exam 70-533 suitable for everyone to complete. Includes:
 

– Implement web apps	– Implement storage
– Implement virtual machines	– Implement an Azure Active Directory
– Implement Cloud services	– Implement virtual networks
- Preparation options (can take in-person training, mix of MVA course and the practice test available online)  
[microsoft.com/en-us/learning/exam-70-533.aspx#msl-GxUgiXUdixPfrk1y](http://microsoft.com/en-us/learning/exam-70-533.aspx#msl-GxUgiXUdixPfrk1y)



# Enterprise Mobility Competency Accreditation

The Enterprise Mobility competency is designed for partners to demonstrate their expertise in delivering enterprise mobility services based on the Microsoft product stack including: Microsoft Intune, Azure Active Directory, Azure Rights Management and System Centre Configuration Manager.

**For full and up to date requirements for achieving this competency, visit:**

[aka.ms/enterprisemobilitycompetency](http://aka.ms/enterprisemobilitycompetency)

## Requirements

- ✓ Must have added 5 new EMS customers and deployed 4,000 active entitlements of any one or combination of the eligible components of EMS (Microsoft Intune, Azure RMS or Azure Active Directory Premium) within the last 12 months. Will need to be the delegated administrator, transacting partner or digital partner of record.
- ✓ Two people must complete the Technical assessment for Enterprise Mobility Suite Overview  
AND each must pass one of the following assessments:
  - Technical assessment for Mobile Device Management
  - Technical assessment for Identity and Access Management
  - Technical assessment for Information protection
  - Technical assessment for virtual desktop infrastructure
- ✓ Your organisation must have five customer references from within the previous 12 months from customer to whom you have provided solutions based on the products and technologies associated with this competency.

## Training Requirements

- ✓ Online training available through Partner University: [partneruniversity.Microsoft.com](http://partneruniversity.Microsoft.com)

# Cloud Customer Relationship Management Accreditation

The Cloud Customer Relationship Management competency is designed for partners to demonstrate their expertise in delivering customer relationship management solutions through Microsoft Dynamics CRM Online, marketing, social, and Parature.

**For full and up to date requirements for achieving this competency, visit:**

[aka.ms/cloudcrmcompetency](http://aka.ms/cloudcrmcompetency)

## Requirements

- ✓ Partner must have deployed (assigned) 150 seats of Microsoft Dynamics CRM Online, Microsoft Dynamics Marketing, Microsoft Social Listening or Parature within the last 12 months. To qualify, the partner must be associated as the Microsoft Dynamics Delegated Administrator, Transacting Partner, or Digital Partner of Record.
- ✓ Two people must pass the exam requirements:  
One person must pass one of the following exam:
  - Microsoft Dynamics CRM Application
  - Microsoft Dynamics CRM 2016 Customer Service
  - Microsoft Dynamics CRM 2016 Sales
  - Microsoft Dynamics MarketingAnd the same person must pass one of the following exams:
  - Microsoft Dynamics CRM Online Deployment (2015)
  - Microsoft Dynamics CRM Online DeploymentAnother person must pass one of the following exams:
  - Microsoft Dynamics CRM 2016 Customisation and Configuration
  - Microsoft Dynamics CRM Customisation and Configuration
- ✓ Your organisation must have at least three customer references from within the previous 12 months from customers to whom you have provided solutions based on the products and technologies associated with this competency.

## Training Requirements

- ✓ Online training available through Partner University: [partneruniversity.Microsoft.com](http://partneruniversity.Microsoft.com)

# Resources

## Local support

Teacher ambassadors  
[msnzeducation@microsoft.com](mailto:msnzeducation@microsoft.com)

Software login credentials and eligibility advice  
[nzschoools@datacom.co.nz](mailto:nzschoools@datacom.co.nz)

NZ education team  
[nzeducation@Microsoft.com](mailto:nzeducation@Microsoft.com)

## Online support

Microsoft Education Partner Network  
[mepn.com/MEPN/MEPNHome.aspx](http://mepn.com/MEPN/MEPNHome.aspx)

Microsoft Partner Network  
[partner.microsoft.com/en-NZ](http://partner.microsoft.com/en-NZ)

Yammer community  
[yammer.com/nzpartner/#/threads/inGroup?type=in\\_group&feedId=4712088&view=all](https://yammer.com/nzpartner/#/threads/inGroup?type=in_group&feedId=4712088&view=all)

## School resources and reference architectures

The Microsoft Education Transformation Framework

This website contains posters, brochures and whitepapers to use when consulting with your school customers. The suite of materials is designed to help them plan and develop their cloud strategy, fast-track transformation, understand global best practices and move quickly to cloud-centric learning.

[microsoft.com/en-au/education/school-leaders/school-systems-planning/default.aspx](http://microsoft.com/en-au/education/school-leaders/school-systems-planning/default.aspx)

Make sure you check out section 10 the cloud architectures for designing technology for effective and efficient schools.

[microsoft.com/en-au/education/school-leaders/school-systems-planning/components.aspx](http://microsoft.com/en-au/education/school-leaders/school-systems-planning/components.aspx)

## Competency training

Cloud Competencies  
[aka.ms/cloudcrmcompetency](http://aka.ms/cloudcrmcompetency)

Microsoft Virtual Academy  
[mva.microsoft.com](http://mva.microsoft.com)

Microsoft Certified Solutions Associate (MCSA)  
[aka.ms/mcsa](http://aka.ms/mcsa)

## Sales training

Cloud Practice Playbooks  
[aka.ms/cloudinfraplaybook](http://aka.ms/cloudinfraplaybook)

Profitability Benchmark Playbook.  
[profitabilitybenchmark.microsoft.com/best-practices](http://profitabilitybenchmark.microsoft.com/best-practices)

Cloud SureStep Series  
[partner.microsoft.com/en-nz/surestep](http://partner.microsoft.com/en-nz/surestep)



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