Microsoft

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Partner Success Kit: Skilling, Marketing Assets & Activation Framework

Security

Modernize SecOps & Unified Platform

Partner Success Kit: Skilling, Marketing Assets & Activation Framework

Leverage Microsoft resources to build skills and accelerate marketing.

What

This kit offers a centralized set of resources from skilling to GTM for faster execution

Why

To equip your team with enablement and ready to launch customizable marketing campaigns with approved value propositions, messaging and branding to accelerate GTM, and elevate customer satisfaction

How

Enable sales and marketing teams to complete training, leverage Campaign-in-a-Box, customize, and build a marketing plan to launch the campaign

Outcome

Increase Customer Adds, boost CSP Revenue and provide actionable campaign insights

Partner Checklist for Customer Success

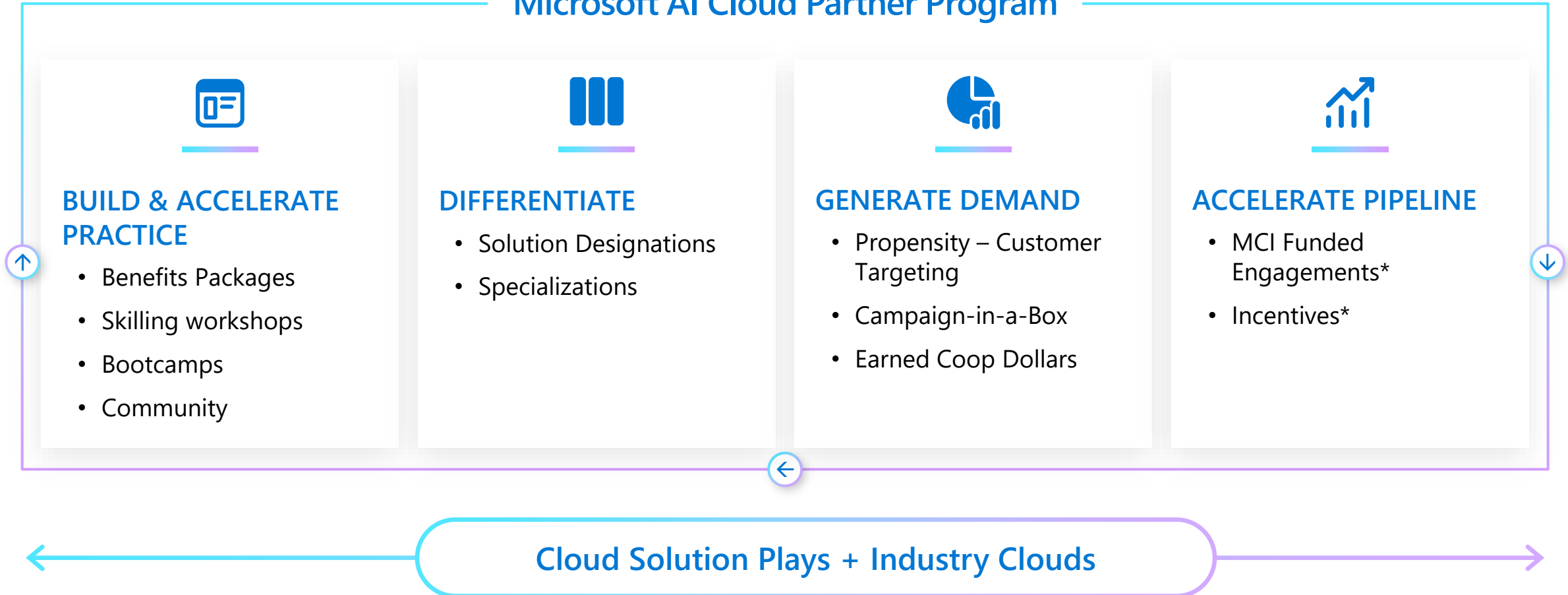| 1	2	3	4	5	6
Understand Solution Play and Get Trained	Earn the Solution Designation and Specializations	Identify target customers	Create Marketing Plan & Drive Demand	Engage with Customers & Prospects	Deploy your clients & look to expand solutions

Partner Success Kit: Skilling, Marketing Assets & Activation Framework

Microsoft AI Cloud Partner Program

BUILD & ACCELERATE PRACTICE
- Benefits Packages
- Skilling workshops
- Bootcamps
- Community

DIFFERENTIATE
- Solution Designations
- Specializations

GENERATE DEMAND
- Propensity – Customer Targeting
- Campaign-in-a-Box
- Earned Coop Dollars

ACCELERATE PIPELINE
- MCI Funded Engagements*
- Incentives*

Cloud Solution Plays + Industry Clouds

*Available to select partners

Pre-MCEM MAICPP and Skilling

It's critical to actively leverage Microsoft skilling resources to gain deep understanding of the solution play—enabling you to articulate differentiated value, accelerate customer outcomes, and drive measurable wins.

Microsoft AI Cloud Partner Program

Earn Customer Confidence

Showcase the effectiveness of your organization or solution by meeting designation criteria, which include performance, skilling, customer success, and technical requirements

Stand out in a competitive market

As a Solutions Partner, you'll earn a badge that signals your capabilities and makes it easier for customers and Microsoft sellers to find and confidently choose your solutions

Partner for growth and profitability

When you differentiate your business, you unlock program benefits, incentives, and offerings designed to help you connect with customers and drive revenue

Skilling

Prescriptive partner enablement based on partner maturity to articulate solution value to customer

Select Your Skilling Journey

- Build (New to Practice)
- Enhance (Improve Practice)
- Innovate & Grow (Specialize)

Certification

Learn new skills to boost your productivity and enable your organization to accomplish more

Microsoft

Modern Security Operations with Unified Platform

Modern Security Operations with Unified Platform | Partner Skilling

Achieve: Solutions Partner for Security – Partner Center | Microsoft Learn

Pre-MCEM to achieve Designation and Specialization		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
Modern SecOps with Unified Platform	**Credentials**	**Sales ready**		**Tech Deal Ready**		**Project Ready**
Completing Solution Partner Designation	Microsoft Certified: Security, Compliance, and Identity Fundamentals	Microsoft Security Foundation (New content being built)		Tech Deal Ready Training: Advance Identity with Microsoft Entra		Implement Microsoft Defender for O365, Identity & Cloud Apps
		Sales Training: Advance Identity with Microsoft Entra				Implement Microsoft Defender for Endpoint
Getting Specialization	Microsoft Applied Skills: Configure SIEM security operations using Microsoft Sentinel	Sales Training: Threat Protection with Microsoft XDR		Tech Deal Ready Training: Threat Protection with Microsoft XDR		Threat Protection with XDR
	Microsoft Applied Skills: Defend against cyberthreats with Microsoft Defender XDR					Deploy and optimize Microsoft Sentinel
Specialized Partners	Microsoft Certified: Security Operations Analyst Associate	Sales Training: Modernize your SOC with Microsoft Unified Platform		Tech Deal Ready Training: Modernize your SOC with Microsoft Unified Platform		Migrate your SIEM Solution to Microsoft Sentinel
						Threat Protection and Incident response with Microsoft Sentinel & Unified Platform

- Register for an upcoming live session at Partner skilling hub
- Check out Microsoft LevelUp for Self-serve partner skilling LMS
- Opt-in at aka.ms/PartnerSkillingNews for the latest partner skilling updates
- Browse Certifications, Applied Skills, and Learning Paths for Microsoft Certifications

Security Customer Win Formula

Customer Outcome
Comprehensive end to end state of the art security, data security & governance and cloud posture enhancement
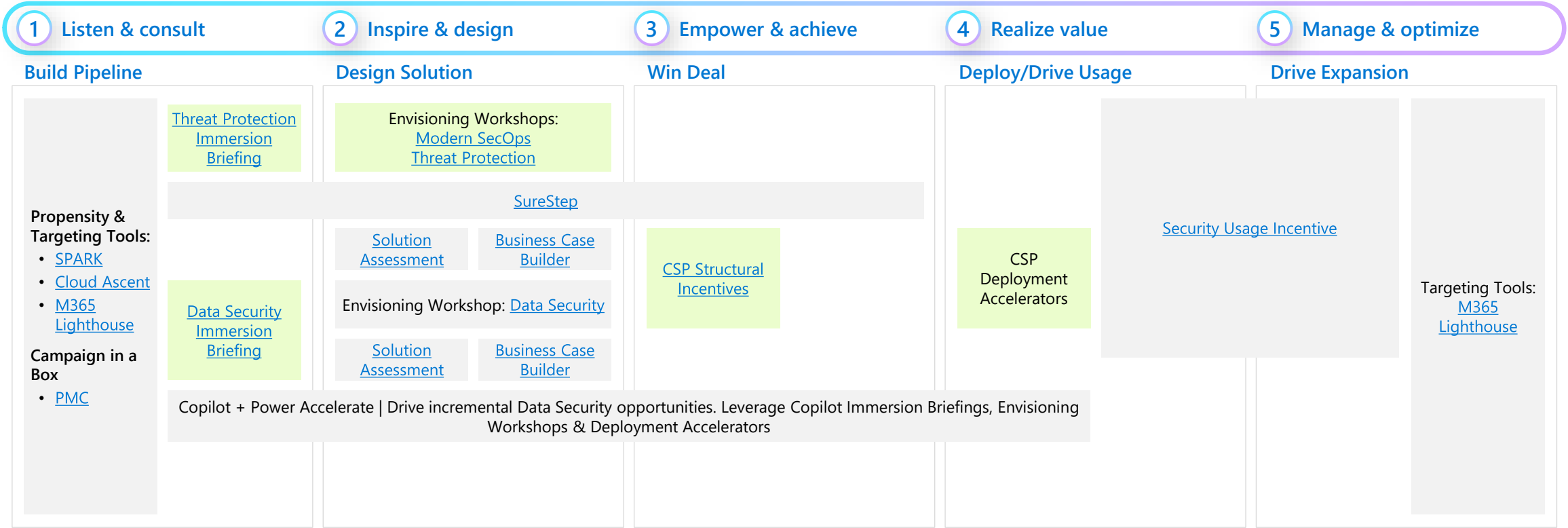
Partner Outcome
Drive scalable growth with differentiated solutions and trusted outcomes—helping customers protect more with less.

Differentiated Partners Capabilities

Secure customers' cyber foundation and become Secure AI Advisor to business decision makers	Improve customer security operations, reduce time to respond to incidents and overall security posture	Drive generative AI readiness addressing data security and privacy challenges through Purview adoption & change mgmt.	Enhance cloud security posture, workload protection and code to runtime security

Win Formula aligning to MCEM

① Listen & consult	② Inspire & design	③ Empower & achieve	④ Realize value	⑤ Manage & optimize
Build Pipeline	**Design Solution**	**Win Deal**	**Deploy/Drive Usage**	**Drive Expansion**

Build Pipeline

Propensity & Targeting Tools:
- SPARK
- Cloud Ascent
- M365 Lighthouse

Campaign in a Box
- PMC

Threat Protection Immersion Briefing

Data Security Immersion Briefing

Design Solution

Envisioning Workshops:
Modern SecOps
Threat Protection

SureStep

Solution Assessment	Business Case Builder

Envisioning Workshop: Data Security

Solution Assessment	Business Case Builder

Copilot + Power Accelerate | Drive incremental Data Security opportunities. Leverage Copilot Immersion Briefings, Envisioning Workshops & Deployment Accelerators

Win Deal

CSP Structural Incentives

Deploy/Drive Usage

CSP Deployment Accelerators

Drive Expansion

Security Usage Incentive

Targeting Tools:
M365 Lighthouse

NOTE: Available to Solution Designation partners and Envisioning workshops require specialization

MCEM: Listen and Consult – Modernize Sec Ops & Unified Platform

(1) — **(2)** — **(3)** — **(4)** — **(5)** — **(6)**

1. Review Sales Cohort Guide

1. Understand the Modernize Sec Ops & Unified Platform guide to identify, generate interest & engage customers with higher propensity plus conversation starters!
- **Customer Targeting Scenarios**
  - Advanced XDR
    - BP Attach
    - ME3 Attach

2. Cloud Ascent (CLAS) Data

1. What is Cloud Ascent
2. How to Download your CLAS data (needs to be Executive Viewer)
3. Discover Practical Use Case Scenarios for **Modernize Sec Ops & Unified Platform** customer targeting Training Video Coming
4. Leverage the Sales Cohort Guide to build your target customer profile list

1. Prioritize based on clients in Act Now and Evaluate stage
2. Customers with highest potential revenue

3. Coop Dollars**

1. Cooperative Marketing Funds (coop) provide reimbursement of earned funds to partners who have achieved MCI Incentive criteria. FY25 Co-op Guide
2. Confirm you have coop earnings by signing into Partner Center
3. Include coop spend in your marketing plan to maximize available funding and avoid leaving money on the table

4. Campaign in a Box (CiaB)

1. Why leverage the Ready to Launch customizable Campaigns in a Box with approved Microsoft value props, messaging & branding
2. Best Practices for using Partner Marketing Campaigns
3. Coming Oct – Accelerate GTM by reviewing the Modernize Sec Ops & Unified Platform execution guide and CiaB
4. Leverage "Get campaign in market: for timing & determine how you want to personalize the content

5. Package Offers

1. Incorporate Microsoft customer offerings Promo Guide
2. Recommend including your packaged service offerings for customer

6. Campaign Launch ⭐

1. Drive momentum by executing the full campaign plan
2. Track and progress opportunities through the sales funnel
3. Share performance insights and results with your Distributor contact to inform next steps

Note: ** Partner Eligibility requirements min of Solution Designation and/or Specialization

Sales Cohort:
Modernize Sec Ops & Unified Platform

Download today:
https://aka.ms/SMBModernizeSecOpsCohortSalesGuide

Cloud Solution Area:
Security

Solution Play:
Modernize Sec Ops & Unified Platform

Cohort Lists in CLAS (aka Customer Targeting Lists):

- Advanced XDR
  - BP Attach
  - ME3 Attach

About this Solution Play

The **Modernize Sec Ops & Unified platform** addresses security concerns with best-in-class advanced security protection to help transform the way SMBs work

How to use this guide

This guide is designed to help Microsoft partners and sellers understand what customer outcomes are important when executing this Solution Play. These resources prepare you for effective conversations with SMB customers about how Security solutions are best positioned to support their business needs and priorities

This guide includes:

Cohort Lists: Find Customer Targeting Scenarios along with instructions on how to retrieve Cohort Lists

Solution Play Overview: Get Solution Play and product messaging to get ready to talk to customers

Targeting Scenarios: Access specific resources, messaging, conversation starters and objection handling, based on each scenario

Next Steps: Access guidance to next steps, along with specific resources, based on what happened with your customer call

- The **SMB Cohort Sales Guide** – Modernize Sec Ops & Unified platform provides partners with resources to identify, generate interest, and engage customers that fit particular profiles that may have a higher propensity to buy a specified product
- For detailed instructions on how to execute this Solution Play, including step-by-step instructions and detailed customer journey assets, refer to the SMB Cohort Partner Playbook – Modernize Sec Ops & Unified Platform

Getting your campaign to market

Use the following timeline to activate your campaign assets. While this guide provides a sequential flow, remember that customers may engage at different stages, meaning promotion, nurture, and decision content can run in parallel depending on lead readiness

Week 1:
Campaign setup

What to do:

1. Build your customer target list and ensure you have right contact information
2. Review campaign assets and build your marketing plan with the campaign execution guide

Assets to use:

1. Microsoft CloudAscent
2. Execution guide

Weeks 2–4:
Promote and acquire

What to do:

1. Launch promotional assets (email, social, display) to drive awareness
2. Direct traffic to your gated hero asset landing page.
3. Start collecting leads

Assets to use:

1. Promo emails
2. Social assets
3. Display ads
4. Gated landing page
5. Hero asset (e-book)

Weeks 5–7+:
Nurture and execute sales

Nurture leads

What to do:

1. Share nurture emails plus corresponding nurture infographics aligned to the business outcome pillars weekly or biweekly
2. Monitor engagement to identify sales-ready leads

Assets to use:

1. Nurture emails
2. Corresponding infographics

Execute sales

What to do:

1. Pass high-intent leads to your sales team
2. Use the customer pitch deck to guide 1:1 conversations.
3. Schedule 1:1 discussions or assessments

Assets to use:

1. Pitch deck

Campaign execution checklist

Use this checklist to activate each stage of your campaign, from promotion to lead acquisition, nurture, and sales follow-up

1. PROMOTION

Social

- ☐ Select the **social platform** (LinkedIn, X) where your audience engagement is strongest
- ☐ **Build a paid media plan,** identifying budget and campaign dates for a lead acquisition campaign promoting one of the hero assets and targeting priority audiences
- ☐ Customize **social ad templates** for your brand. Be sure to direct the ads to where your hero assets are being hosted
- ☐ Incorporate **organic promotion,** posting via your brand handle
- ☐ Consider **A/B testing** different messaging variations **and optimizing** over the course of the campaign

Email

- ☐ Take advantage of **priority audience** guidance to build an email list with known prospects or existing customers
- ☐ Use the **promotional email** to promote the hero asset. Customize the .oft email files according to instructions
- ☐ **Review results** and optimize, refreshing subject lines and campaign messaging for resends to contacts who did not open previously. Consider **A/B testing** variations, such as recipient first name in the subject lines

Display ads

- ☐ Customize the **display ads** for your own brand
- ☐ **Identify the ad network** you want to advertise through (for example, Bing, Google, etc.), and whether you will run a broader PPC campaign or a more targeted campaign (displaying your ads to previous visitors to your website, or people in a particular location, for example)
- ☐ **Set up your campaign parameters** including budget and launch your campaign. Monitor and optimize your approach/audience

2. ACQUISITION

Acquisition

- ☐ Customize your campaign **hero asset,** incorporating your CTA
- ☐ **Host your asset** on your web domain, creating a **gated landing page,** (requiring prospects to enter contact details to access the asset) to aid in lead collection
- ☐ Determine **lead capture form requirements** that align with your CRM structure and minimize required fields to avoid drop-off
- ☐ **Update promotional assets with the correct link** to your hosted landing page

3. CONSIDERATION

Nurture

- ☐ **Upload assets promoted via nurture** to your marketing automation system. Add links to corresponding emails
- ☐ **Personalize the nurture email files** with your solution details, contact info, privacy information, and CTA links
- ☐ **Customize the assets promoted in the nurture** emails following instructions in each document
- ☐ Instrument the emails in your marketing automation system and create lead scoring to **qualify leads for sales follow-up**

4. DECISION

Sales follow-up

- ☐ Provide the sales team an **overview** of the campaign, including a copy of your campaign assets.
- ☐ Customize the **pitch deck** with your branding and messaging and deliver to customers in 1:1 meetings
- ☐ Enter lead and qualification details into **Partner Center.** (*See FAQs for help,* [here](.)*.*)

Tip: Not every customer will follow this journey linearly. Tailor asset use based on where customers are in their buying process

Security Campaign Planning, Tracking and Next Steps

Planning	Tracking & Insights	Next Steps

Planning

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Nurture leads	Execute sales

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Assets to use:
1. Nurture emails 1–4
2. Corresponding infographics 1–4

Execute sales

What to do:
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Tracking & Insights

Place holder for tracking metrics and insights

Next Steps

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2 Inspire & design
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Business Case Builder
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