

Software Assurance Planning Services

****RETIRED ENGAGEMENTS****

A note regarding retired Planning Services engagements

If your customer created their voucher(s) prior to February 1, 2020 and you agreed to deliver an engagement that has since been retired, you may continue to deliver the engagement and invoice for payment so as long as the voucher has not expired.

A note regarding engagement templates

Predefined customer deliverable templates are no longer provided for Planning Services engagements. Your company must draft custom planning documents, then deliver them to your customer(s) and to Microsoft. Refer to the [required activities and deliverables](#) section of this document for engagement outcome requirements and required activities. Be advised, engagement

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Retired AZDPS engagements

1. Enterprise Mobility + Security Identity and Access Management

This engagement is designed to help customers maintain control over their applications across corporate datacenters and public cloud platforms through planned deployments for cloud and hybrid identity and access management solutions.

Microsoft identity and access management solutions help IT protect access to applications and resources across the corporate datacenter and into the cloud, enabling additional levels of validation such as multi-factor authentication and conditional access policies. Monitoring suspicious activity through advanced security reporting, auditing, and alerting helps mitigate potential security issues.

Employees are more productive when they have a single username and password to remember and a consistent experience from every device. They also save time when they can perform self-service tasks like resetting a forgotten password, or requesting access to an application, without waiting for assistance from the helpdesk.

Engagement length options

3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Enterprise Mobility Management](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

The engagement is designed to help customers pilot and/or implement an identity access and management solution via a complete implementation plan that enables them to:

- Create and manage a single identity for each user across a hybrid enterprise, keeping users, groups and devices in sync
- Provide single sign-on access to applications including thousands of pre-integrated SaaS apps
- Enable application access security by enforcing rules-based Multi-Factor Authentication for both on-premises and cloud applications
- Improve user productivity with self-service password reset and application access requests for directories in the datacenter and the cloud
- Provide secure remote access to on-premises web applications through Azure AD Application Proxy

Outcome

At the end of the engagement, customers will be provided a full implementation plan for implementing an identity access and management solution.

2. Enterprise Mobility + Security Identity Driven Security

The Identity Driven Security engagement is designed to help customers address the customer's security concerns and develop a solution for the customer that can protect, detect, and respond to threats of all kinds on-premises as well as in the cloud. Microsoft Identity-Driven Security addresses the security challenges of today and tomorrow across users, devices, apps, data, and platforms. Customer employees receive a single protected common identity for secure, risk-based conditional access to thousands of apps—on-premises and in the cloud. Innovative technologies safeguard the customer's network at the front door. Deep visibility into apps, devices, and data activity uncovers suspicious activities, user mistakes, and potential threats before they become real ones. And with behavioral analytics, machine learning, and unique Microsoft security intelligence, the customer's corporate files and data can be secured while freeing their employees to get their work done on the go.

Engagement length options

3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Enterprise Mobility Management](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

The engagement is designed to help customers pilot and implement solution(s) that will identify threats and attacks on networks, discover and secure unmanaged cloud apps, create control and authentication protection policies, and conditional access and multi-factor authentication to secure access to apps.

Outcome

At the end of the engagement, customers will be provided a full implementation plan for managing their identity driven security.

3. Enterprise Mobility + Security Information Protection

The Information Protection engagement is designed to help customers plan deployment for a comprehensive information protection solution that ensures persistent classification and protection of customer data by enabling customers to classify and label their data at the time of creation. Protection (encryption + authentication + use rights) can then be applied to sensitive data. Furthermore, classification labels and

protection are persistent, traveling with the data so that it is identifiable and always protected, regardless of where it is stored or with whom it is shared. The interface is simple and intuitive and does not interrupt normal working experience. Customers will also have deep visibility and control over shared data.

Engagement length options

3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Enterprise Mobility Management](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

The engagement is designed to help customers pilot and implement an information protection solution that will identify, classify, label, and protect customer data, as well as BYO and HYO key management, including tracking and reporting.

Outcome

At the end of the engagement, customers will be provided a full implementation plan for managing their information protection solution.

4. Enterprise Mobility + Security Managed Mobile Productivity

The Managed Mobile Productivity engagement is designed to help customers plan deployment for mobile device and/or mobile application management including Microsoft Office 365, corporate email, and other mobile apps. The Microsoft managed mobile productivity solutions allows the customer's employees to do their best work on any device, while keeping company data secure. With EMS, customers can enable conditional access to Office 365 (Exchange Online and SharePoint Online) as well as to on-premises Exchange Server. When the customer's employees try to access corporate resources from unmanaged devices, they are blocked and then provided with simple steps to quickly obtain access to email and other corporate resources. With the cloud architecture of EMS, IT does not need to install and configure email gateways or servers in the perimeter network nor do they need to develop custom scripts. EMS is directly integrated with Office 365 to give customer and their employees a seamless experience while also enabling IT to manage access to corporate resources.

Engagement length options

3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.

- Company competency requirement(s): company must have attained a Silver or Gold competency in [Enterprise Mobility Management](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Microsoft Managed Mobile Productivity using Intune, provides seamless access to corporate email and documents from managed and customer compliant devices. The engagement is designed to help customers implement and pilot a managed mobile productivity solution, that will enable and protect access to Office 365 and other mobile apps.

Outcome

At the end of the engagement, customers will be provided a full implementation plan for a managed mobile productivity solution.

5. Implementing Application Develop and Test on Azure

This engagement is designed to help customers implement a scalable, secure, and cost-effective development and test environment on Azure. By using Azure IaaS and Azure Dev Services, customers can provision a development and test environment in a matter of minutes and as needed, while also scaling environments up or down as their needs change. This allows organizations to increase their development velocity and flexibility, while also reducing their costs. As a registered provider of AZDPS, you can leverage structured engagement materials and best practice guidance from Microsoft to prepare your customers for a successful deployment and help them get the most out of their public cloud investment.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Platform](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Help customers plan for a scalable, secure, and cost-effective deployment of their development and test environment on Azure.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC to help implement a scalable, secure, and cost-effective development and test environment on Azure.

6. Implementing Azure Security and Management Services

By leveraging the power of cloud, Microsoft's Azure Management and Security services provide customers with new and unique ways to address their Cloud and IT Operational needs. With solutions like Azure Security Center, Azure Backup, and Azure Monitor, customers can enhance and extend the capabilities of their current IT operations solutions from the datacenter to the cloud. Azure Management Services provide protection for and insights into workloads running across Azure, AWS, Windows Server, Linux, VMware, and OpenStack at a lower cost than competitive solutions. For customers who have already deployed System Center 2012, Azure Management tools extends System Center investments into hybrid cloud delivering IT management as a service for any workload, any platform, anywhere. As an AZDPS partner, you can leverage structured engagement materials and best practice guidance from Microsoft to prepare your customers for a successful deployment and help them realize the value of their investment.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Platform](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Help customers plan for a successful deployment of Azure Management and Security services to the cloud.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC to help plan their implementation of Azure Security and Management services.

7. Implementing Event-Driven Apps (Serverless)

This engagement will help customers determine which services they can move to Azure Functions, and the best route for re-architecting or building new microservices on Azure Functions. Once identified, this engagement will help identify other cloud services that should be integrated into the application, such as Logic Apps, Cosmos DB, Event Hub, IoT Hub, etc.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Platform](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Deliver a migration plan to help customers move their services to Azure Functions and integrate other cloud services.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC to help plan their implementation of event-driven apps.

8. Integrating Azure Storage with Customers' Backup, Archive and DR Solutions (BCDR)

Help your customers meet their evolving data storage needs by integrating and migrating their current storage, backup, and disaster recovery (DR) solutions with Azure storage solution. Azure storage allows customers to reduce their data storage and archive costs, while also increasing their security, compliance ability. This engagement assesses the environment and determines the best scenarios for cloud storage integration and migration, creating an activation plan to migrate data to Azure, and demonstrates the value of Azure with a proof of concept for deployment. As a registered provider of AZDPS, you can use Microsoft guidance and resources to prepare your customers for a successful deployment and help them realize the value of their investment.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Platform](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Help customers plan for integration and migration of their current storage, backup, and disaster recovery solutions with Azure storage solution.

Outcome

Customers will have an assessment report, architecture design, deployment plan, and POC to help integrate and migrate their current storage, backup, and disaster recovery solutions with Azure storage solution.

9. Migrate VMs and Applications to Azure IaaS

Use this engagement to help customers assess, prioritize, and begin migrating existing virtualized applications. To provide value within an expedited timeframe, this engagement prioritizes the migration of applications that do not require significant re-architecting or code modifications. The following Microsoft Azure Service offerings are highlighted within this engagement: SharePoint on Azure IaaS, Windows Server on Azure IaaS, SQL Server on Azure IaaS, Azure Active Directory Premium, overall application migration, and migration from Amazon Web Services (AWS) or other competitive cloud platforms. As a registered provider of AZDPS, you can leverage Microsoft guidance and resources to prepare your customers for a successful deployment and help them realize the value of their investment.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Platform](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Help customers plan for a successful migration of their existing virtualized applications to the cloud.

Outcome

Customers will have an assessment report, architecture design, deployment plan, and POC to help plan their migration of virtualized applications to the cloud.

10. Modernizing Apps Using App Service

Build a plan for how your customers can modernize their applications using Azure App Service. This engagement will help customers map out their migration process, plan for dependencies, and conduct a

smooth app migration so that they can quickly start using and taking advantage of this powerful platform-as-a-service, or PaaS. The engagement will show your customers how to rapidly create and deploy new apps to production and development environments, automate deployments with CI/CD, and use the platform to quickly scale.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Platform](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Deliver a plan that shows customers how to rapidly create and deploy new apps to production and development environments, automate deployments with CI/CD, and use the platform to quickly scale.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC for their application using Azure App Service.

11. Modernizing Apps Using Containers

This engagement will help the customer determine the best approach for how to implement containers based on their needs and requirements. Each container platform (e.g., Service Fabric, App Service on Linux, AKS) has specific considerations and optimal scenarios. Once the best approach has been identified, this engagement can provide the customer with the optimal detailed architecture and strategy, and help the customer make key decisions such as which orchestrator to use, the best way to deploy new apps on this new platform, and how to satisfy security concerns.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Platform](#).

- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Deliver a customized plan to help customers implement containers based on their needs and requirements.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC for their applications using containers.

Retired DDPS engagements

1. FastTrack Deployment Planning for Microsoft 365

The FastTrack Deployment Planning for Microsoft 365 engagement is designed to help customers understand Microsoft 365 capabilities, assess their readiness to migrate to the cloud, and communicate how FastTrack can help facilitate this process. These engagements are offered to help plan and prepare the customer for a successful onboarding experience. This engagement will provide a proven methodology to ease transition, drive user engagement, reduce project risk, and enable faster time to value.

Engagement length options

1, 3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Windows and Devices](#) or [Cloud Productivity](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

The engagement is designed to help customers pilot and/or implement an identity access and management solution via a complete implementation plan that enables them to:

- Provide the customer with an opportunity to engage in solution strategy sessions that will focus on both business and technological aspects of moving to Microsoft 365
- Offer the customer an understanding of architectural and operational aspects of migrating to and deploying Microsoft 365
- Introduce the customer to the FastTrack and the role it can play in their move to Microsoft 365
- Educate on new workloads and functionality provided by Microsoft 365
- Define next steps to continue Microsoft 365 planning efforts

Outcome

Provide customers with a clearer understanding of the value of Microsoft 365 and FastTrack. Prepare customers for a Microsoft 365 rollout that fits their business and technical requirements.

Retired DTDPS engagements

1. Implementing DevOps on Azure

This engagement is designed to help customers maintain control over their applications across corporate datacenters and public cloud platforms through planned deployments for cloud and hybrid identity and access management solutions.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Gold competency in [DevOps](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

The engagement is designed to help customers pilot and implement an information protection solution that will identify, classify, label, and protect customer data, as well as BYO and HYO key management, including tracking and reporting.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC to help plan a mature DevOps workflow.

Retired DYDPS engagements

1. Implementing Microsoft Dynamics 365 for Customer Engagement

Prepare your customers to implement Microsoft Dynamics 365 for Customer Engagement, or extend their current CRM implementation, and help them to accelerate their digital transformation to meet the changing needs of customers. Help them capture the new business opportunities of tomorrow by engaging their customers and empowering their employees with better sales, marketing, customer service, and field service capabilities.

Engagement length options

3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Customer Relationship Management](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Help customers review their processes and business requirements, envision a custom CRM solution by discussing newer functionalities, assess the fit of the solution to their requirements, and showcase the solution advantages with a Microsoft Dynamics 365 for Customer Engagement proof of concept.

Outcome

- Help customers understand and consider newer functionalities of CRM included in Microsoft Dynamics 365 for Customer Engagement (sales, marketing, customer service, field services, and more)
- Help customers assess how to replace custom solutions and existing code, or how to extend their existing CRM implementation
- Explore and decide on preferable implementation approach considering cloud, on-premises, and hybrid options
- Test the suggested solution by implementing one to few customer processes in Microsoft Dynamics 365 for Customer Engagement

2. Implementing Microsoft Dynamics 365 for Finance and Operations

The Identity Driven Security engagement is designed to help customers address the customer's security concerns and develop a solution for the customer that can protect, detect, and respond to threats of all kinds on-premises as well as in the cloud. Microsoft Identity-Driven Security addresses the security challenges of

today and tomorrow across users, devices, apps, data, and platforms. Customer employees receive a single protected common identity for secure, risk-based conditional access to thousands of apps—on-premises and in the cloud. Innovative technologies safeguard the customer's network at the front door. Deep visibility into apps, devices, and data activity uncovers suspicious activities, user mistakes, and potential threats before they become real ones. And with behavioral analytics, machine learning, and unique Microsoft security intelligence, the customer's corporate files and data can be secured while freeing their employees to get their work done on the go.

Engagement length options

3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Gold competency in [Enterprise Resource Planning \(ERP\)](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Assist customers who have purchased Microsoft Dynamics 365 for Finance and Operations with their first time on-premises implementation planning, while considering all the existing implementation options or extending their existing on-premises implementation.

Outcome

Help your customers to:

- Assess and document their business processes
- Create a custom fit-gap analysis with LCS
- Perform a high-level solution architecture review
- Showcase the solution advantages and how they can improve operations and better track business performance, by implementing proof of concept for one-to-few business processes using LCS hosted environment

Retired SDPS engagements

1. FastTrack Deployment Planning for Microsoft 365

The FastTrack Deployment Planning for Microsoft 365 engagement is designed to help customers understand Microsoft 365 capabilities, assess their readiness to migrate to the cloud, and communicate how FastTrack can help facilitate this process. These engagements are offered to help plan and prepare the customer for a successful onboarding experience. This engagement will provide a proven methodology to ease transition, drive user engagement, reduce project risk, and enable faster time to value.

Engagement length options

1, 3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Collaboration and Content](#) or [Cloud Productivity](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

- Provide the customer with an opportunity to engage in solution strategy sessions that will focus on both business and technological aspects of moving to Microsoft 365
- Offer the customer an understanding of architectural and operational aspects of migrating to and deploying Microsoft 365
- Introduce the customer to the FastTrack and the role it can play in their move to Microsoft 365
- Educate on new workloads and functionality provided by Microsoft 365
- Define next steps to continue Microsoft 365 planning efforts

Outcome

Provide customers with a clearer understanding of the value of Microsoft 365 and FastTrack. Prepare customers for a Microsoft 365 rollout that fits their business and technical requirements.

2. Microsoft 365 Business Applications

The Identity Driven Security engagement is designed to help customers address the customer's security concerns and develop a solution for the customer that can protect, detect, and respond to threats of all kinds on-premises as well as in the cloud. Microsoft Identity-Driven Security addresses the security challenges of today and tomorrow across users, devices, apps, data, and platforms. Customer employees receive a single protected common identity for secure, risk-based conditional access to thousands of apps—on-premises and in the cloud. Innovative technologies safeguard the customer's network at the front door. Deep visibility into

apps, devices, and data activity uncovers suspicious activities, user mistakes, and potential threats before they become real ones. And with behavioral analytics, machine learning, and unique Microsoft security intelligence, the customer's corporate files and data can be secured while freeing their employees to get their work done on the go.

Engagement length options

1, 3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Collaboration and Content](#) or [Cloud Productivity](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Build a plan, assess the customer's needs, and deliver the plan, POC, or other form of tangible results.

Outcome

Establish the path to modernization with SharePoint, PowerApps, Flow, Forms, Lists, and Power BI based on the customer's needs.

Retired S&EDPS engagements

1. Microsoft Teams Adoption and Change Management Planning

This engagement allows you to provide customers with an adoption and change management plan to support their end-user adoption and usage of Microsoft Teams. The engagement focuses on assessing the business objectives, defining use cases, and identifying sponsors and champions in order to drive usage of Microsoft Teams. The deliverables include a plan for training, communications, resistance management, sponsor roadmap, and reinforcement.

Engagement length options

3, 5, or 10 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Cloud Productivity](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

- Provide an overview of Microsoft Teams and desired use cases
- Change readiness assessment
- Determine Adoption and Change Management strategy
- Guidance and a timeline for successful Microsoft Teams adoption

Outcome

Upon completion, the participants should understand the key elements of change and have translated those into related scenarios that create a plan. This aims to drive successful change, enabling your customer to change the way they work. The most important aspects of change will be covered to help deliver success, including training, communications, sponsors, champions, resistance management, and reinforcement plans.

2. Skype for Business Deployment Planning

This stand-alone engagement allows you to guide customers through an envisioning and planning process resulting in a clear implementation path designed to achieve their business objectives. The Skype for Business Deployment Planning engagement focuses on the business and technology aspects of Skype for Business Server and defines a high-level implementation plan.

Engagement length options

1, 3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Communications](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

- Provide the customer with an opportunity to meet with a Skype for Business solution expert and engage in solution strategy sessions that will focus on both business and technological aspects of Skype for Business Server
- Offer the customer an understanding of architectural and operational aspects of Skype for Business Server
- Educate on basic new functionalities provided by Skype for Business Server
- Define next steps to continue Skype for Business Server planning and deployment efforts

Outcome

Provide customers a clearer understanding of the Skype for Business platform and what it can provide to their organization. Customers will also be better prepared for a Skype for Business deployment that fits their business and technical requirements.

3. FastTrack Deployment Planning for Microsoft 365

The FastTrack Deployment Planning for Microsoft 365 engagement is designed to help customers understand Microsoft 365 capabilities, assess their readiness to migrate to the cloud, and communicate how FastTrack can help facilitate this process. These engagements are offered to help plan and prepare the customer for a successful onboarding experience. This engagement will provide a proven methodology to ease transition, drive user engagement, reduce project risk, and enable faster time to value.

Engagement length options

1, 3, 5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Silver or Gold competency in [Messaging](#) or [Cloud Productivity](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

- Provide the customer with an opportunity to engage in solution strategy sessions that will focus on both business and technological aspects of moving to Microsoft 365
- Offer the customer an understanding of architectural and operational aspects of migrating to and deploying Microsoft 365
- Introduce the customer to the FastTrack and the role it can play in their move to Microsoft 365
- Educate on new workloads and functionality provided by Microsoft 365
- Define next steps to continue Microsoft 365 planning efforts

Outcome

Provide customers with a clearer understanding of the value of Microsoft 365 and FastTrack. Prepare customers for a Microsoft 365 rollout that fits their business and technical requirements.

Retired SSDPS engagements

1. Implementing Cloud Scale Analytics

This engagement focuses on driving business insights and analytics to more people in your customers' organization. Cloud Scale Analytics empowers users to easily consume the data and insights that matter most, with the tools they prefer. Azure SQL Data Warehouse and Power BI allows customers make data-driven decisions and take intelligent action, to achieve successful business results. Key scenarios include: Deploying Azure SQL DW for customers using on-premises legacy DW appliances; and Deploying Power BI for customers looking to get rich insight and visualizations from their data.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Gold competency in [Data Analytics](#).
- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Help customers plan for a successful deployment of Azure SQL Data Warehouse and/or Power BI to better drive data-driven decisions and business insights.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC to help plan a successful deployment of Azure SQL Data Warehouse and/or Power BI.

2. Implementing Globally Distributed Data

Help your customers land Cosmos DB by targeting NoSQL Migrations (MongoDB, Cassandra, etc.) and new applications to be built using Cosmos DB. This will enable them to benefit from global distribution of data, elastic storage, and SLA-backed single-digit millisecond low latency, resulting in an optimized database scale and performance.

Engagement length options

5, 10, or 15 days

Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online [Planning Services Compliance Training Course](#) on Partner University.
- Company competency requirement(s): company must have attained a Gold competency in [Data Analytics](#) or [Data Platform](#).

- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

Engagement activities

Review the [required activities and deliverables](#) for this engagement.

Objective

Help customers plan for a successful implementation of global distribution of data to drive an optimized database scale and performance.

Outcome

The customer will have an assessment report, architecture design, deployment plan, and POC to help plan a successful implementation of globally distributed data.

Required activities and customer planning deliverable guidance

Planning Services engagement outcome

The outcome of any engagement should always produce a *customer planning deliverable* (vision and scope plan or findings and recommendations document) that prescribes a deployment, upgrade, or migration project as the next step. This proposal should focus primarily on the logistics for *how* to deploy and less on *why*.

Required deliverables

Each Planning Services engagement has two deliverables required for payment:

- 1) The customer planning deliverable
- 2) A submitted [Planning Services Online Completion Report \(OCR\)](#)

	Customer planning deliverable	Online Completion Report (OCR)
Provide to the customer	x	
Submit to Microsoft	x	x

The customer planning deliverable document should be provided to your customer. Additionally, it should be submitted to Microsoft, via the OCR, as proof of execution for the Planning Services engagement. Fully completed, the customer planning deliverable document should include detailed information about all required activities conducted (based on engagement length). Required activities for each engagement length are displayed in the below table. Include the plan you created and delivered to the customer based on their objectives and the overall assessment. You may adjust the outline to meet the customer's needs. The vision and recommended actionable next steps for deployment—including the actual deployment plan—must be provided. Engagements are available in 1, 3, 5, 10, or 15 days. The longer engagements allow for a deeper look at a specific technology and provide more in-depth analysis and deployment planning.

Summary of required activities based on length of engagement

Below is a list of activities to be performed during the Planning Services engagement. The engagement length determines which activities are required. For example, a 3-day engagement must include the following activities: assessment report, envisioning workshop, design considerations, and upgrade/migration plan.

[Required activities descriptions](#) can be found below.

Required activities	1- Day	3- Day	5- Day	10- Day	15- Day
Assessment report	x	x	x	x	x
Envisioning workshop	x	x	x	x	x
Design considerations	x	x	x	x	x
Deliver upgrade/migration plan	x	x	x	x	x
Proof of concept (POC)			x	x	x
POC findings report			x	x	x

Required activities descriptions

- **Assessment report**

The assessment report is mainly focused on giving an overview of the engagement planning capabilities, understanding the environment, and developing a problem statement that can be addressed. Please include the following:

- 1) Customer information
- 2) Participant record
- 3) Customer business goals
- 4) Problem statements

- **Envisioning workshop**

The envisioning workshop will facilitate both business and technology discussions covering methodology, processes, and an overview of the engagement. The desired outcome is an implementation plan covering:

- 1) Customer's prioritized business objectives
- 2) Desired capabilities
- 3) Estimated timelines
- 4) Required efforts

- **Design considerations**

At the end of the engagement, you should be able to provide the following information—tailored to your customer's environment:

- 1) Conceptual design (Provide any Visio graphs, architectural designs, etc. prepared for the engagement)
- 2) Logical and physical architecture drawings

- **Plan and recommendations**

Based on the findings during this session, provide details of the deployment plan you are recommending your customer. Please include:

- 1) Findings
- 2) Vision and scope
- 3) Milestones
- 4) Deliverable and execution timeline

- **Proof of concept (POC) findings report**

If you delivered a proof of concept (POC), please include the following details:

- 1) Describe the specific scenario addressed
- 2) Detail the time to build out POC environment
- 3) Define the size and scale of the POC
- 4) Outline detailed findings and insights

Learn more

Customers

- Software Assurance benefits administrators can visit the [Microsoft Volume Licensing Service Center](#) or [Microsoft Business Center](#) (MPSA customers) to identify current Software Assurance benefits.
- Review [Microsoft Product Terms](#) for information on eligibility criteria and current benefit program rules.
- Learn more about [Planning Services](#) and other Software Assurance benefits.
- Review the [VLSC Software Assurance guide](#) for step-by-step instructions to use Planning Services days.
- Search partner listings to [find a qualified solution provider](#) or check with their Microsoft representative.

Partners

- Review Planning Services [workflow](#), [policies](#), and [FAQ](#) documentation.