

FastTrack Ready Partner Customer Discovery Call

FastTrack Ready Partner Community Call

Referral Self Service Resources Demo

Agenda: Navigating Customer Self-Service Demo

Partner FastTrack Benefit Evolution

Partner Referral Actions

Discovery Meeting Topics & Demo

Partner Expansion Opportunity

Evolution to Self-Service Demonstration

Past Fiscal Years

FastTrack Ready Partners were expected to deliver the **FastTrack Benefit “remote deployment guidance”**

- Provide remote end-to-end guidance for deploying and using Microsoft 365 services during FastTrack business hours
- Provide ongoing best practices, self-service tools, resources and remote workshops to assist deployment

FY26

FastTrack Ready Partners deliver a demonstration of self-service resources through 1x Discovery Call

- One-time customer discovery call where partner demonstrates the self-service resources & functionality in the admin center
- Partner demonstrates the integrated capabilities and connection into the customer’s tenant
- Partner aligns proper self-service resources to customer deployment goals

Benefits

- No ongoing partner commitment
- Partner determines post call resource investment
- Faster ability to position planning, deployment or adoption partner-custom offers
- Ability to create bundled “FastTrack” curated offers, assessments, or add-on’s

FastTrack Customer Communication

Customer FastTrack Communication:

(Verbiage pasted in FastTrack customer/partner assignment email)

"Your Partner will set up a *free 'discovery' call to learn more about you; your organization and the IT services you require.* They will introduce themselves and their skills and expertise and explain how they can potentially assist you. They will also present applicable self-help resources such as the available Advanced Deployment Guides and Data Migration tools.

If you agree to continue working past the 'discovery' call with this partner, then you and your partner will *collaborate to develop a tailored deployment plan based on fee-based services, designed to address your specific needs.*"

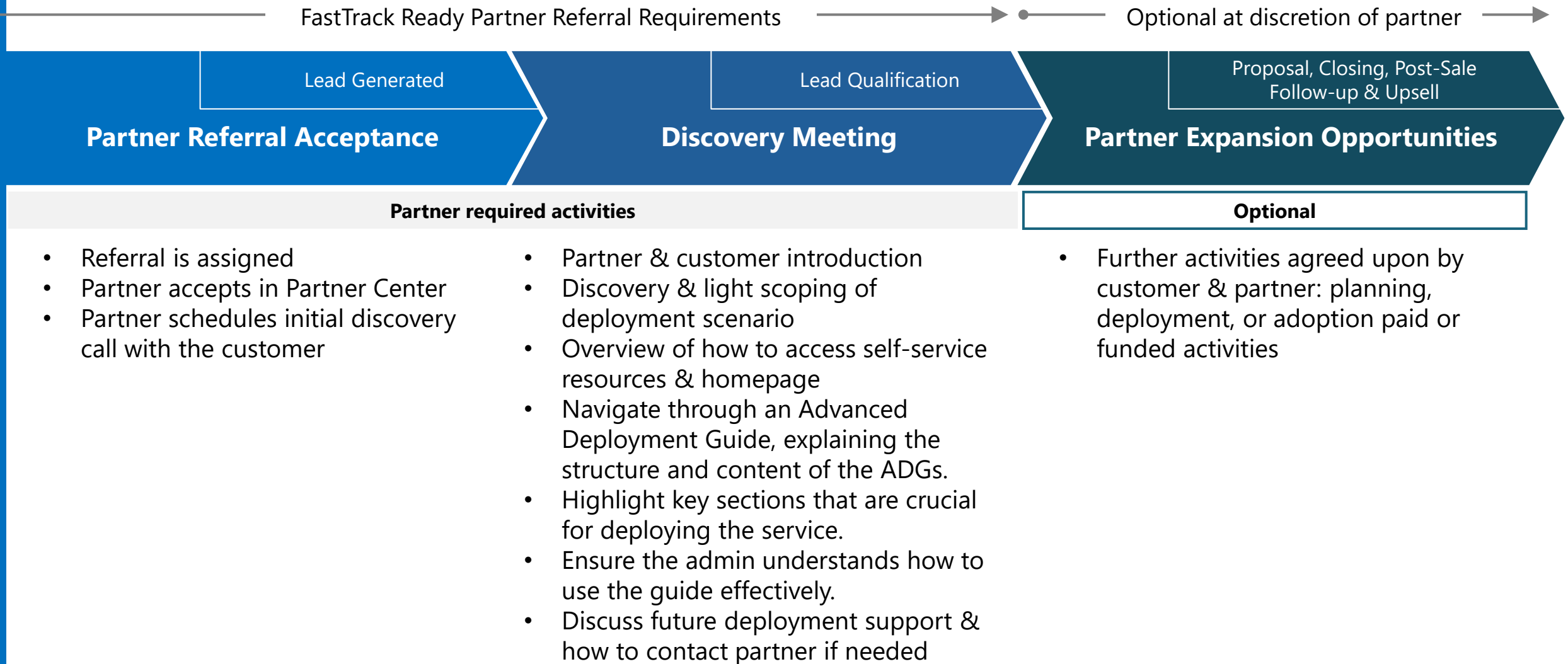
Customer Value Proposition:

- Kickstart their deployment journey by receiving live demonstration from a trusted deployment expert of how to access & utilize the self-service tools available for guidance
- Introduction to one of Microsoft's proven specialized and qualified Modern Work deployment partners for additional needs

Partner Value Proposition:

- Minimal customer acquisition costs
- Lightweight "offering" to customer allowing entry for partner to scope lead in time efficient fashion
- Embed into standard lead intake process

Partner Referral Actions




Discovery Meeting Topics 1/2

Home > Setup


Setup

Discover, learn about, and set up services, solutions, and add-ins available with your subscription.

For organizations like yours [Show more](#)

 **Set up email with a custom domain** ...

Connect a domain that you own, or get a new one.

 **Connect with more customers** ...

Let customers schedule virtual and in-person appointments with you.

Featured collections

Lists of related actions to help you manage a scenario or meet a goal.

Advanced deployment guides & assistance

Detailed guides to help larger organizations with complex deployment tasks.

Migration and imports

Bring email, content, and organizational data over from your existing services and manage them all in one place.

Access Self-Service Resources

Guiding Questions

Partner Insight

What are the Advanced Deployments Guides?

A consolidation of Microsoft's recommended best practices across product setup & security features centrally located in the admin center as a guided digital experience

How does a customer access the self-service resources?

Access the guides through the Admin Center or M365 Accelerator site

What is the preferred method based on the stakeholder or phase?

Leverage Global Admin credentials to log into your Admin Center to configure feature & deploy using ADGs

Leverage m365accelerator.microsoft.com for planning activities or leadership or business stakeholder's access

What are the different guide experiences?

There are +70 total guides, & multiple feature level guides per workload

The ADGs integrate & point to each-other based off the tenant's deployed prerequisites

The ADGs are listed in the recommended sequential workload deployment order

Discovery Meeting Topics 2/2

Deploy Microsoft Defender for Endpoint

Defender for Endpoint is an enterprise security platform designed to help your networks prevent, detect, investigate, and respond to advanced threats.

What to expect

This guide helps you deploy Defender for Endpoint. It also helps you set up preventive protection, breach detection, automated investigation, and response features. You'll plan your deployment, review prerequisites and recommended configurations, and onboard devices.

Plans and features

To deploy Defender for Endpoint, review the two available enterprise plans to determine which features meet your organization's security requirements. After selecting the appropriate plan, onboard your devices and set up the relevant Defender for Endpoint capabilities. Use the available Microsoft resources to help you protect endpoints and effectively detect, investigate, and respond to threats.

Review Plan 1 (P1) features



Review Plan 2 (P2) features



To learn more about Defender for Endpoint, select Review additional information.

Review additional information

Navigate through an Advanced Deployment Guide

Guiding Questions

What are the Advanced Deployments Guide stages?

How will the Advanced Deployment Guides help me (the customer) deploy?

Partner Insight

Guide Phases:

Overview & requirements

Scope & scenario questions

Prerequisite tasks

Deployment tasks

Configuration

Review/Finish

Guides populate the current tenant licensing & deployed features

Set configurations directly within guide that hydrate back to tenant

Use project management tools to assign due dates & other admins deployment tasks

Click on linked MS Learn documentation or links pointing back to direct deployment location within tenant

Compare P1 & P2 feature sets & deployment activities

Advanced Deployment Guide Demonstration

In-Product Experience Product Owner

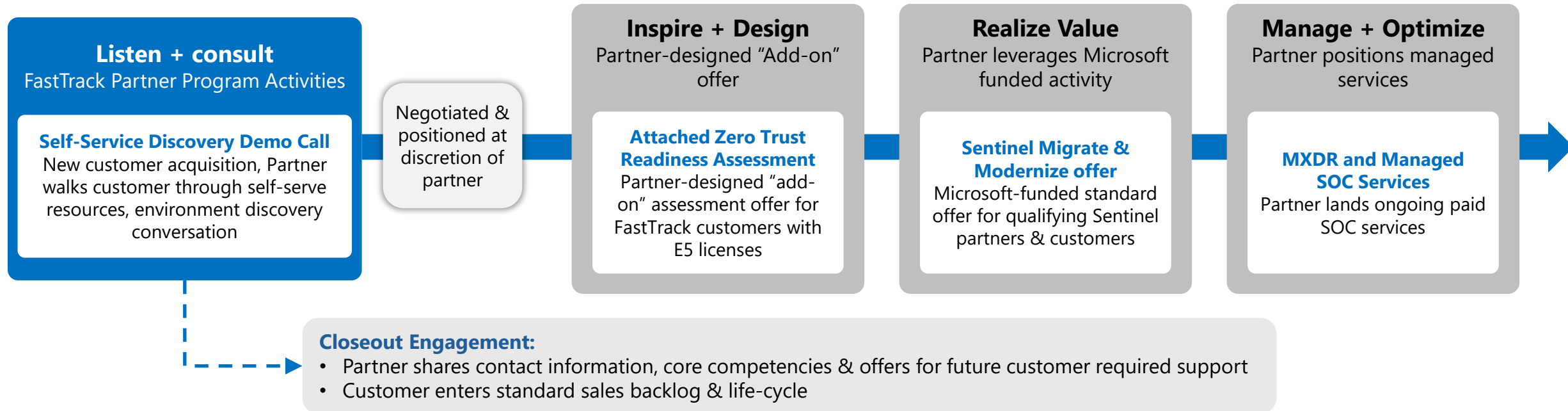
Partner Expansion Opportunities

At a partner's discretion, they may choose to provide further guidance & scoping activities with the customer leading to paid services

Expanded "Demo" Engagement

- Leverage Microsoft GTM Solution Area Playbooks, Win Formulas, & other Microsoft partner programs to integrate FastTrack customers
- Develop light-weight packageable "add-on" offer attachments for further lead qualification activities such as assessments, planning guidance
- Curate light-weight customer facing assets: one-pagers, offer summaries, & contact information

Example Engagement Win Formula



Partner Referral Checklist

Referral Assignment	Discovery Meeting Agenda			Optional
Partner Acceptance	Introduction	Navigate Resources	Resource Demo (ADGs)	Post-Demo Engagement Expansion
<ul style="list-style-type: none"> <input type="checkbox"/> Accept referral in Partner Center & contact customer >2 days <input type="checkbox"/> Schedule a discovery/demo call <input type="checkbox"/> Standard lead scoping activities: (MSFT contacts, internal CRM search) 	<ul style="list-style-type: none"> <input type="checkbox"/> Introduce FRP as one of Microsoft's preferred M365 & security deployment partners <input type="checkbox"/> Capture customer deployment details <input type="checkbox"/> Share partner core competencies & contact information for future necessary customer support 	<ul style="list-style-type: none"> <input type="checkbox"/> Show how to access self-service resources: Admin center/setup site <input type="checkbox"/> Route to setup page in admin center <input type="checkbox"/> Describe connectivity, breadth, & how to navigate through guides <input type="checkbox"/> Highlight compliance, secure, & adoption score 	<ul style="list-style-type: none"> <input type="checkbox"/> Select relevant guide to the customer's scenario <input type="checkbox"/> Demo deployment stages & guide scenarios: scoping questions, tenant hydrations, tasks, & adoption resources <input type="checkbox"/> Point to a deployment configuration within guide <input type="checkbox"/> Show project mgt. capabilities 	<ul style="list-style-type: none"> <input type="checkbox"/> Conduct deeper scoping or environmental assessments <input type="checkbox"/> Position partner service offerings <input type="checkbox"/> Leverage MSFT funded opportunities: MCI-funded workshops, ECIF, partner programs or deployment vouchers through customer lifecycle

Guide Components

Set up Intune to manage and secure Windows devices

This tenant has the required Intune license.

Microsoft Intune is a cloud-based service for mobile device management (MDM) and mobile application management (MAM) that helps you enroll, manage, and secure Windows devices.

What to expect

This guide will help you:

- Identify the most appropriate enrollment method for your organization's security standards.
- Understand the enrollment process and key steps for securing and managing your Windows devices.
- Verify you've met the required enrollment prerequisites.
- Secure your devices with compliance, Conditional Access policies, and configuration profiles.

Tenant Hydrations
Populates the tenant's
existing licensing

Review the scoping questions

Need assistance with this product? FastTrack helps customers with [eligible Microsoft 365 subscriptions](#) deploy Microsoft 365 cloud solutions at no additional cost. To get help, submit a [FastTrack request for assistance](#).

The Manage and secure devices for Windows guide helps you enroll and secure Windows devices. If you've already enrolled Windows devices and would like to secure them now, you can skip to that section of this guide.

Please select an option: *

Enroll and secure Windows devices

Secure already enrolled Windows devices

Device management

Do you want to enroll corporate or personal Windows devices in Intune? *

Corporate

Personal

Scoping Questions
Adjusted guide content
based on scenario

Configure automatic enrollment

MDM user scope MAM user scope

Choose the scope of users that you want automatically enrolled in MDM when their devices are joined to Microsoft Entra ID. To specify individual groups, select **Some**.

Select MDM user scope

None

None

Some

All

Automatic Configuration
configure within guide &
save back to tenant

To create an assigned security device group for Windows Autopilot

- Sign in to the [Intune admin center](#) and go to **Groups**.
- Create a new Group, and enter a name and optionally a description.
- For the Group type, select **Security**.
- For membership type, select **Assigned**.
- In the **Add owners** screen, scroll through the list of objects and select the service principal **Intune Provisioning Client** with AppID **f1346770-5b25-470b-88bd-d5744ab7952c**.
- Once selected, create the group to finish.

If the **Intune Provisioning Client Service Principle** is not available when selecting the owner of the device group, then follow the steps in this document to add the service principle [Windows Autopilot device preparation user-driven Microsoft Entra join](#).

Links point customer
directly back to tenant or
MS Learn documentation

Create Device Group

[Share through email](#)

Windows Autopilot device preparation uses a device group as part of the Windows Autopilot device preparation policy. This specified device group is where devices are added automatically during the Windows Autopilot deployment and it needs to be an assigned security group.

Assignment tracking

Due date: Fri Aug 01 2025

Update your progress: Not started

Assigned to: Search for an admin

Project Management
Tools assign other admins
& track due dates

THANK YOU