

pax8Academy

Guide

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Welcome to **pax8**Academy

Your Place for Learning Everything MSP

At Pax8, we know that simplifying the way organizations buy, sell, and manage cloud solutions is only one piece in the puzzle for success. To truly enable our partners to achieve more, we also provide Pax8 Academy, an extensive learning environment designed to help you overcome the many challenges MSPs face.

In a nutshell, Pax8 Academy is cloud-solution education and operational improvement driven by structured learning courses, peer connection, one-to-one coaching, and a library of self-guided resources. You'll have the chance to learn and grow through the support of Pax8 industry experts, leading MSP business coaches, and other MSPs all sharing their combined knowledge, experiences, and visions for establishing and building a successful business around selling cloud solutions.

The partner-exclusive learning opportunities available through Pax8 Academy



General operational learning

Courses that help you strengthen your business from the inside



Vendor specific education

Foundational and technical courses that meet you where you are in your business journey



Peer-to-peer resources

Strategically curated support among small cohorts of similar MSPs



One-on-one business coaching

Individual goal-focused support from industry-leading experts



Knowledge-building content

Information to expand your technical expertise and boost your bottom line

For MSPs of all sizes

It doesn't matter if you're a small shop or big, whether you're just starting out, or at an advanced stage of business maturity, Pax8 Academy is designed to provide you with the specific knowledge you need to move your MSP forward and deliver it in a way that works best for you.



The Pax8 Academy Mission

Meet every partner where they are.

With what they want to learn.

Exactly how they want to learn it.

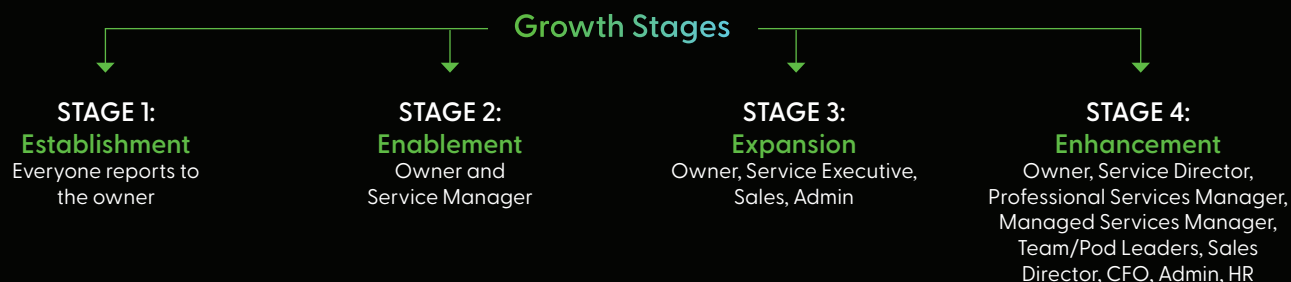
Pax8 Academy is the consummate resource for MSPs looking to expand their knowledge of cloud offerings and understand their own MSP business in order to build trust with clients and drive revenue growth.

You don't have to be a Pax8 Partner to check out the opportunities Academy offers, but you do have to become one to take a course or participate in our peer groups and coaching.

Read on to learn more about the courses, peer guidance, and coaching available through Pax8 Academy, and feel free to contact us if you have any questions.

Determining your MSP's Maturity Level

There are four common business growth stages in the life of every MSP that define the current maturity level of their company. Understanding which growth stage your company is in at the moment provides a starting point for determining what combination of learning courses, peer groups, and coaching would be the best approach. Each growth stage has its own set of decisions to be made, strategies for driving positive growth, tactics for executing on your strategies, and key performance indicators (KPIs) that signal a readiness to jump to the next growth stage. These are some of the areas we help you focus on with Pax8 Academy offerings.



Growth Stage 1: Establishment

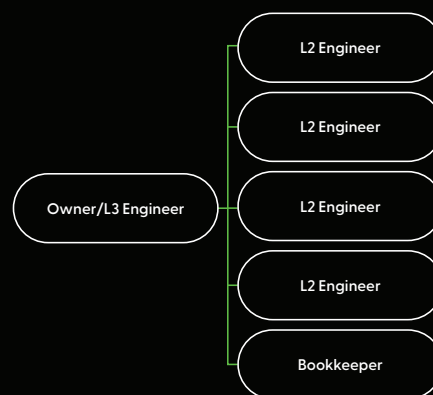
Typically, less than 8 employees.
Everyone reports directly to the owner.

There is very little need for KPIs because the owner is close enough to all the client interactions and all the tickets, that they have a strong and very accurate gut feeling about how the company is running and how the employees and clients are feeling.

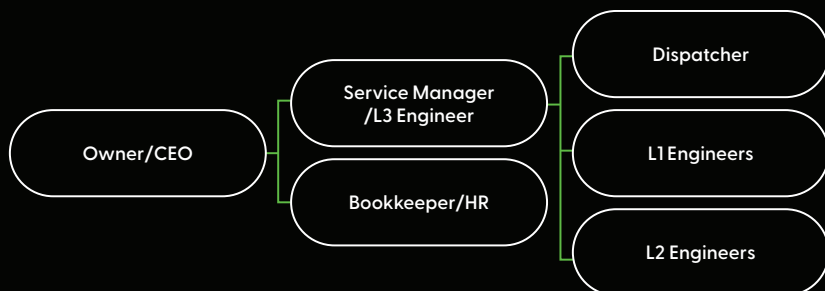
For example, the owner knows an agreement is becoming unprofitable because they have been talking to the client and have been directing the engineer to go onsite.

Tension develops between the owner and the engineers because the owner feels things are taking too long and often increases their micromanagement.

Stage 1 Org Chart



Stage 2 Org Chart



Growth Stage 2: Enablement

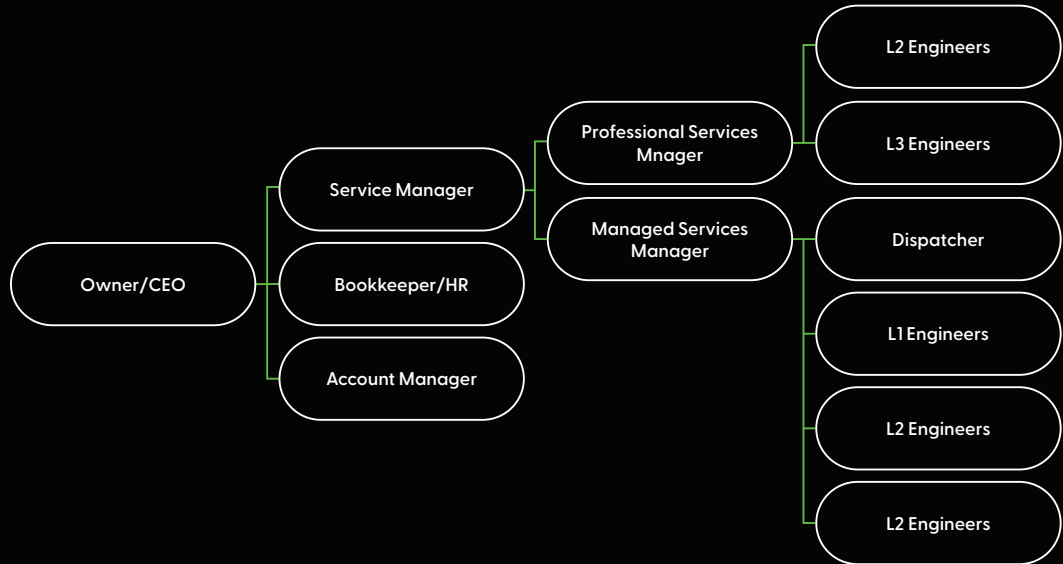
Typically, up to 15 employees. The most common organizational structure is for the owner to promote their best tech to service manager.

In this stage, companies start hearing about industry standard KPIs or best-in-class margins, and they want to compare themselves against the industry standards.

You run some reports to see how you stack up, but those reports don't make any sense because they lack the standard processes or procedures that would generate good data for reporting. So, you go to work on your processes and procedures. This creates good data, which creates meaningful and consistent KPIs.

The data is getting better and KPIs begin to confirm what the owner already knows in their gut, but more people in the company become aware of the issues. Unfortunately, agreement profitability generally does not improve, yet.

Stage 3 Org Chart

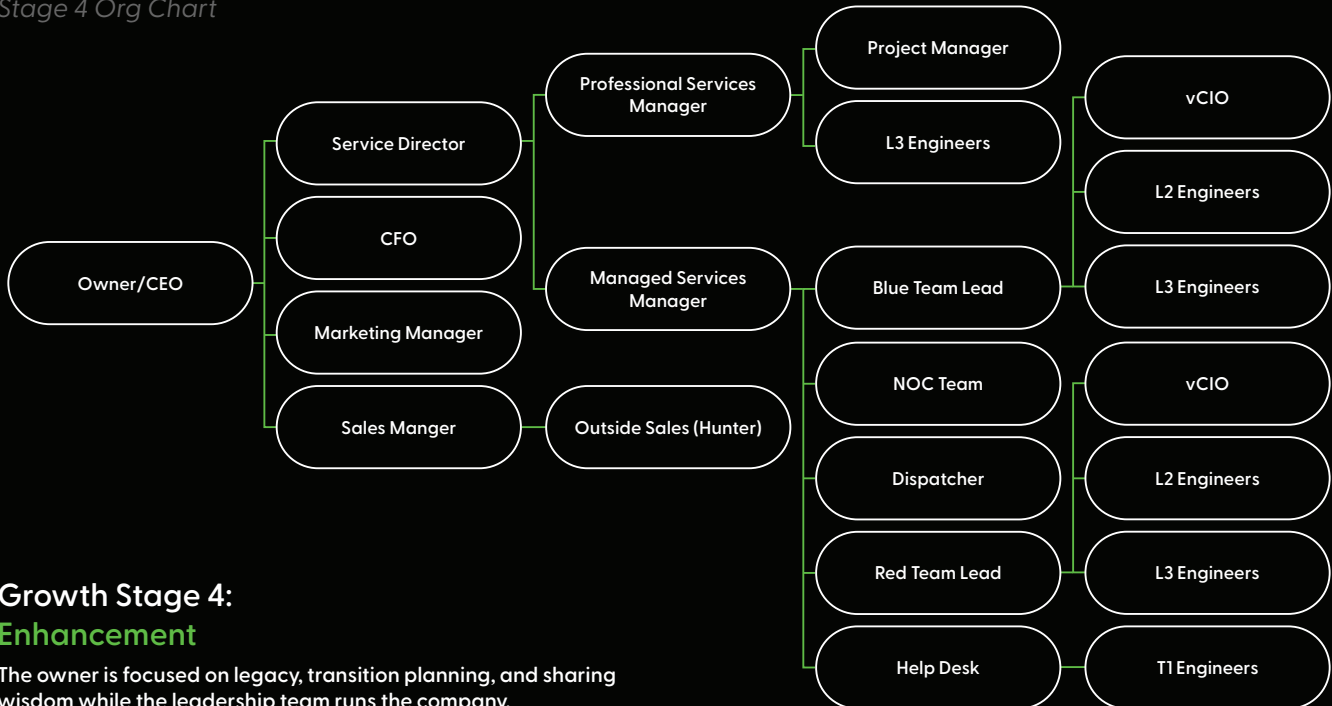


Growth Stage 3: Expansion

The emergence of the leadership team, typically made up of the owner, someone representing sales, someone representing admin/finance, and possibly between 1 and 3 people representing service delivery.

Company culture becomes incredibly important (mission, vision, core values). However, as employees become one or two levels removed from the owner, culture can go off course quickly. As the owner and the leadership team become one or two levels removed from the individual client interactions and individual tickets, the dependence on KPIs increases dramatically. Owners tend to struggle with “highest and best use” (HABU) of their time because they have successfully transitioned all their hats to other leaders.

Stage 4 Org Chart



Growth Stage 4: Enhancement

The owner is focused on legacy, transition planning, and sharing wisdom while the leadership team runs the company.

Meet the Thought Leaders



CRAIG DONOVAN

SVP of Partner Services, Pax8

Craig has more than 20 years of experience in both engineering and leadership with focuses on software and operational teams. He has embraced the role of understanding partner needs and building requirements and processes to meet them. As Vice President of Software Projects at Pax8, Craig drives the strategic direction of the company's service delivery, sales engineering, and professional service teams. He provides a voice for the partner community within Pax8, for which pax8 Academy plays a crucial part.

Craig is a strong believer in understanding the 'why' behind what Pax8 does. Through Pax8 Academy, he is able to take the understanding of our partners and their challenges and provides them with ways to strengthen and grow their businesses that extend beyond just technology solutions.



REX FRANK

VP of Academy, Pax8

Rex has over 30 years of IT service delivery experience, with more than 25 years specializing in managed services. He has held several executive-level positions, including Chief Technology Officer, Vice President of Managed Services, and Director of Operations.

His leadership and industry knowledge drive the vision of Pax8 Academy. Rex works with other company leaders to discover how Pax8 Academy can help drive their success.

In 2010, Rex founded Sea-Level Operations, a leading education firm providing world-class coaching, education, and resources to enable businesses to thrive. He is a recognized industry thought leader and a member of the CompTIA Executive Committee for its Managed Services Community.



CHRIS KAISER

Director of Peer Initiatives, Pax8

Chris found his way into the IT world while he was a clinical case manager in the mental health field. After creating his own templates and database to increase the efficiency of tracking his client care workload, his superiors promoted him to extend his personal system to the entire company. It was in this role where Chris witnessed how technology serves as a tool to make things easier for people.

In 2002, he started C Squared Computer Consulting with the belief that people with technology problems are more important than the technology problems themselves. It's this people-centric approach to help educate and empower companies with the right tech solutions that Chris brings to Pax8 Academy.

KEN SPONSLER

Director of Academy Coaching Pax8

Ken is a senior executive coach who came to Pax8 Academy with Sea-Level Operations, where he was a partner. He has mentored and trained executives in the IT industry since 2011. He has over 20 years industry experience in Managed Services and over 45 years in Operations Management.

Ken's extensive knowledge of computers and applications dates back to 1970 working with mainframes back in high school.

In 1998, Ken joined Connecting Point of Greeley as a computer engineer and was promoted to the Vice President of Services Position in 2000. He successfully assisted in the transition of Connecting Point from a product-oriented computer reseller to a managed service provider of over 100 networks.

CHRIS BUTLER

Director of Academy Integration, Pax8

Chris is a senior executive coach who came to Pax8 Academy with Sea-Level Operations, where he was a partner, and he mentored and trained Service Executives in the IT industry since 2011. Chris has 25+ years in Operations Management and 17+ years directly managing IT Service Delivery.

Since 1992, he's been building business computers, implementing local area networks, and helping with long term technology planning.

Chris built 11 years of direct, day-to-day, executive MSP Service Management experience with two different MSP practices. Chris has firsthand knowledge of what it takes for excellent client relationships, service delivery, employee motivation, and to sustain healthy growth organically and through acquisition.

RYAN STROUSE

Director of Academy Content, Pax8

Ryan entered the IT channel in 2014 while working for a master agent in various marketing focused positions. In 2016, he was tapped to run the partner education program overseeing the delivery of educational initiatives for the partner community. Ryan managed more than 40 vendor relationships and orchestrated the national partner sales training program. Through this experience he discovered his passion for the 'So What?' for customers and how education can help MSPs help clients achieve their goals.

In 2019, he joined Pax8 to develop educational programs and initiatives for the MSP channel. As Director of Academy Content, Ryan is responsible for delivering a world class educational experience for Pax8 Partners that will meet them wherever they are on their journey, helping them establish and build a successful business.

JAY HOKKE

Manager of Academy Coaching, Pax8

Jay is a senior executive coach who came to Pax8 Academy with Sea-Level Operations, where he mentored and trained Service Executives in the IT industry since 2016.

Jay has 17+ years IT experience, including 13 years working directly with multiple Managed Service Providers.

Jay was involved with a rapidly growing MSP in Canada, where he transitioned them to a Managed Services model. He helped foster a strong company culture as well as ground-up operational process and procedures. He oversaw an 18-member team including technical engineers, project managers, team leads, and professional services teams that regularly broke annual growth records for terms of client base, profitability, and team size over the course of his tenure.

DAVID SCHAFFRAN

Head of Strategic Coaching, Pax8

With over 34 years of experience, David has built a highly respected reputation in the IT services industry working in and with services companies and vendors as a consultant, executive coach, and speaker.

David has a long track record of successfully helping service-centric firms develop their portfolio of services and delivery mechanisms to increase revenue; reduce service delivery costs; achieve closer, more stable relationships with clients; and create predictable cash flow.

His expertise encompasses strategy, operations, services definition, mergers and acquisitions planning, and integration, marketing, sales, technology, corporate governance, team building, and leadership.



Course Offerings

Pax8 Academy courses are the ultimate resource for MSPs looking to expand their knowledge of cloud offerings and understand their own MSP business. They are designed to impart essential knowledge and build a lasting expertise that will help you increase your ability to sell, facilitate growth, and move your businesses forward.

Almost all of our offerings are four-week and eight-week courses, with some exceptions that may include an additional week or two of study. The goal is to provide you with a combination of immediate knowledge that you can apply to your business right away as well as a deeper toolset that helps you focus on your long-term goals.

Relevant Learning with Immediate Value

We have worked closely with Pax8 vendor partners in developing our course curricula to ensure it's not only accurate, but applicable for you as an MSP. Pax8 Academy courses leverage proven sales methodologies, vendor insights, and relevant business use cases to help you shape your own business and help your clients see you as an expert and a leader for their cloud transformation journey.

We constantly assess course content to make sure you are building relevant knowledge that you can apply to your clients as soon as the next day. We also keep our fingers on the pulse of industry trends, so you can get a jump on the future with your own business and with the client solutions you provide.

Small Class Sizes

We intentionally limit the number of partners enrolled in each class to facilitate in-class interactions with the instructor and productive discussions among the participants. If registration for a course that you're interested in is full, be sure to get on the waiting list, so we can quickly create new sessions as we get sufficient interest.

Industry-Leading Instructors

Pax8 Academy offerings are run by instructors and coaches who are both subject matter experts and thought leaders in MSP operations and in the cloud solutions industry. Many times, you will be learning from the people the industry calls on to lead conference learning sessions and to deliver keynote addresses. Pax8 Academy instructors offer a wellspring of knowledge that'll keep you ahead of the competition by helping you build trust with your clients and drive revenue growth.

82%

Revenue Increase

on average for MSP Foundations graduates within six months of course completion

300

Partners

have graduated a Pax8 Academy course in the past year

COURSE CURRICULA

MSP Foundations

ABOUT THE COURSE

This course provides emerging and growing MSPs with the fundamentals for running a successful business. You'll learn to establish service delivery standards, understand Profit and Loss (P&L) statements, and drive profitable growth, all while networking with other growth-minded MSPs.

You'll work closely with a 20-year MSP veteran and other industry experts who will help you:

- Establish company service delivery standards and identify quantifiable performance measures
- Understand your P&L statements and set financial goals to drive toward profitability
- Learn key fundamentals of growing an MSP in today's modern workplace
- Participate in a live Q&A panel with the nation's top MSPs

Participants in this course will have access to:

- Interactive workshops to help you apply the key learnings specifically to your business
- A dedicated Microsoft Teams channel to connect with your entire MSP Foundations cohort
- Guided group activities and moderated discussions with your peers
- Peer-to-peer networking opportunities to connect with MSPs from different regions and verticals to share ideas and collaborate.

The first few weeks will focus on creating a solid mission statement, branding, and how to market your company. Then, we'll delve into the organization of your financials, such as analyzing P&L statements. And finally, you'll learn how to track the Key Performance Indicators (KPIs) of your employees, which will allow you to see if marketing strategies are working, if sales are underperforming, or if there are any areas that need improvement in your organization.

At the end of the course, you will have the tools to say:

- You can make business decisions based on your financials
- You can confidently and accurately determine the profitability of your business
- Your service delivery is optimized for client and employees
- You have established a repeatable sales process

WHO SHOULD ATTEND

This course is geared toward MSPs that are in Stage 1: Establishment of their growth maturity journey. (See the Determining Your MSP's Maturity Level section for more) This includes, but isn't limited to, MSPs that are just getting established or small MSPs with fewer than 3 employees – basically those who are small and are looking to advance their operations and speed growth.

MSP Foundations is right for you if you are:

- A small MSP with fewer than 5 employees
- An MSP that's less than 2 years old
- Running a solo shop and looking to take your business further

COURSE LENGTH AND TIME COMMITMENT

MSP Foundations is a nine-week course involving a combination of video-based content and facilitator-led group training. The final session involves a live panel and Q&A with leading MSPs.

Classes meet virtually once per week for one hour. Most weeks will include an assignment designed to help you apply the course content and lessons to your unique business situation. There is also a 30- to 60-minute video to watch each week between weeks two and seven, as well as some independent course work based on the weekly lessons.

COURSE SYLLABUS

Week 1: **Introductions**

Meet your Partner Educators, course mechanics, and induction to week 2 content

Week 2: **Vision and Mission**

Creating your vision and mission statements

Week 3: **Finance**

Chart of accounts; profit and loss statements

Week 4: **Sales & Marketing**

Marketing and branding your MSP

Week 5: **Operations**

Setting service delivery up for success

Week 6: **Finance**

Profitability

Week 7: **Operations**

Tracking success with key performance indicators (KPIs)

Week 8: **Sales & Marketing**

Building a repeatable sales process

Week 9: **Panel**

Final content review and Q&A

[Reserve Your Seat](#)



Cloud Foundations

ABOUT THE COURSE

Cloud Foundations is a four-week guided course during which you will learn key fundamentals for establishing a successful MSP business in today's market. The class covers four focus areas that we've found to be common challenges for new MSP businesses:

- Establishing your business model and operating in the cloud
- Choosing products and services to build your solution stack
- Optimizing internal processes with tools, documents, and security best practices
- Determining your value, choosing pricing models, and positioning to clients

Participants in this course will have access to:

- Weekly live, instructor-led classes
- Moderated group discussions with your peers
- A dedicated Microsoft Teams channel to connect with your Cloud Foundations cohort

This course covers topics critical to setting up a modern managed services business including how to operate in the cloud, selecting the right solution stack, optimizing your internal processes, and positioning your value to prospects.

WHO SHOULD ATTEND

Cloud Foundations is meant for MSPs who are just getting started – whether you're transitioning from a break/fix business to a recurring revenue model or setting up a new business after leaving corporate IT. The course provides go-to-market best practices, such as building your solution stack; optimizing internal tools, documents, and processes; and positioning your value to prospects.

Cloud Foundations is perfect for you if you are:

- A small IT business looking to move from the break-fix model into managed services
- Looking to start an MSP business from scratch
- A small IT business owner wanting to build your first MSP stack

COURSE LENGTH AND TIME COMMITMENT

MSP Foundations is a nine-week course involving a combination of video-based content and facilitator-led group training. The final session involves a live panel and Q&A with leading MSPs.

Classes meet virtually once per week for one hour. Most weeks will include an assignment designed to help you apply the course content and lessons to your unique business situation. There is also a 30- to 60-minute video to watch each week between weeks two and seven, as well as some independent course work based on the weekly lessons.

COURSE SYLLABUS

Week 1: Intro to Managed Services

Compare the MSP business model to break/fix or project-focused IT

Week 2: The Stack and the Microsoft Opportunity

Strategically build a tech stack with Microsoft as the foundation

Week 3: Modern MSP Tool Set

Explore common MSP tools, business documents, and security best practices

Week 4: Go to Market Strategy

Define your value proposition, establish pricing, and determine your target audience and industry verticals

[Reserve Your Seat](#)

Contracts & Agreements

ABOUT THE COURSE

The Contracts & Agreements course will cover fundamentals of legal best practices for your MSP business. The classes will include all types of employee, company, and client agreements and how they need to be aligned for a simplified, holistic approach in how you approach a legal structure. Sample agreement information will be provided to participants.

This course is for informational and educational purposes and does not replace the need for legal advice.

Each class will cover one of three main categories:

- Master Services Agreements and client-facing agreements
- Scopes and Statements of Work
- Types of Employee Contracts

Upon completion of the course, you will be able to:

1. Identify the difference between internal and external contracts, and gain general knowledge for a scalable structure utilizing a Master Service Agreement approach
2. Design and build a client-facing agreement structure that is customized to your business
3. Differentiate when a scope or statement of work is the best solution for agreeing to service delivery and be able to create a scope of work in 60 minutes or less
4. Feel comfortable with the internal structure of employee agreements and how they protect both your business and clients

WHO SHOULD ATTEND

Partners looking to increase their knowledge of agreement and contracts and how they relate to service delivery.

COURSE LENGTH AND TIME COMMITMENT

Contracts & Agreements is a 4-week course that meets virtually for one hour per week.

COURSE SYLLABUS

Week 1: Intro to Legal Basics for an IT Service Provider

Learn the different types of agreements needed in everyday business operations.

Week 2: Master Service Agreement and Attachments

Design and build a client facing agreement structure customized to your service offerings.

Week 3: Scopes of Work

Creation of a scope of work that sales and service delivery agree on.

Week 4: Employee Agreements

Feel comfortable with the internal structure of employee agreements and how they protect both the business and clients.

Reserve Your Seat

Microsoft Azure Foundations

ABOUT THE COURSE

Microsoft Azure Foundations is the capstone product for driving cloud-native IaaS Solutions for the SMB arena. Topics covered in this 4-week course include a review of the technical fundamentals for pricing, selling, deploying, and managing key technologies like Azure subscriptions; Azure virtual machines (VMs); directory services on a VM; managing an Azure AD DS domain; point-to-site VPNs, site-to-site VPNs; and VM backups on Azure.

Azure Foundations represents a unique partnership between Pax8 Professional Services and Pax8 Academy. This course leverages tenured Pax8 engineers who deploy and empower Azure resources every day. You will have the opportunity to collaborate with Pax8 technical resources as well as with your peers in the channel.

WHO SHOULD ATTEND

Azure Foundations is designed for small- to medium-sized MSPs that are looking to learn the fundamentals of Azure. This course is for those who have no experience or very limited experience with Azure and want to expand into this technical space to better serve their clients.

COURSE LENGTH AND TIME COMMITMENT

Azure Foundations is a four-week course involving a combination of video-based content and facilitator-led group training. The final session involves a live panel and Q&A with leading MSPs.

Classes meet virtually over Microsoft Teams once per week for 90 minutes. Recordings of each class will be available for participants who complete at least the first three weeks.

COURSE SYLLABUS

Week 1: Intro to Cloud and Azure Concepts

This first week will cover the reasons to use public cloud and hybrid cloud solutions vs. traditional on-premises models. We will then review moving a data closet to Azure as a pricing and resource choice exercise. We will close out with support and billing and support at Pax8.

Week 2: Moving to the Cloud Identity and Getting to Know the Azure Portal

The second week will be a deep dive into identity and the cloud, a review of the Azure portal, and role-based access control (RBAC).

This isn't just hours of PowerPoint content, Azure Foundations features:

- **Real deployment**

As we work through the class topics, we'll be demonstrating the build process on a real Microsoft Azure Tenant, so you can see the portals and tools firsthand.

- **Live proof of concept**

During class, you'll see the fruits of our collaborative labor through a real demonstration of a fully deployed Azure Environment.

- **Recordings for review**

At the completion of the course, session recordings will be made available to attendees who attend at least three quarters of the course.

Week 3: IaaS Build Out part 1

This will be a guided build out of the Azure resources priced out earlier in the course. The next two sessions will be in-depth discussions of the resources as they are built out and configured.

Week 4: IaaS Build Out part 2

This will be a guided build out of the Azure resources priced out earlier in the course. This final session will include an in-depth discussion of the resources as they are built out and configured.

[Reserve Your Seat](#)

Microsoft 365 Foundations

ABOUT THE COURSE

Microsoft 365 Business Premium is the capstone product for driving Modern Workplace solutions in the SMB arena. Our Microsoft 365 Foundations course covers all the critical tools the suite offers for managing users, devices, and employee experiences.

This course builds on a fundamental knowledge of Office 365 and focuses on Modern Workplace topics such as managing devices with Intune and protecting clients from threats with Defender for Office 365.

Microsoft 365 Foundations represents a unique partnership between Pax8 Professional Services and Pax8 Academy. The course leverages tenured Pax8 engineers who deploy and empower the Modern Workplace every day. You will have the opportunity to collaborate with Pax8 technical resources as well as with your peers in the channel.

WHO SHOULD ATTEND

Microsoft 365 Foundations is designed for a technical audience looking to learn the fundamentals around the features included in Microsoft 365 Business Premium. The most successful students will already have basic working knowledge of Office 365 features such as Exchange Online, SharePoint, Teams, etc.

COURSE LENGTH AND TIME COMMITMENT

Microsoft 365 Foundations is a four-week course with two 90-minute sessions each week.

COURSE SYLLABUS

Week 1: **Session 1: Azure Active Directory (Devices, Conditional Access, Self-Service Password Reset, Branding)**

- Review of device review and management.
- Implementing self-service password reset properly.
- Branding – Personalizing your customer's environment and adding a touch of security.
- Conditional Access: Ensuring data is only accessible under appropriate conditions.

Session 2: Intune Part 1 (Tenant Administration, Windows Enrollment, Autopilot)

- Review of overall tenant administration, MDM and MAM scopes, etc.
- Windows Hello for Business
- Deployment Status Pages
- Autopilot concept and enrollment review

Week 2: **Session 3: Intune Part 2 (Mobile Device Enrollment)**

- iOS Requirements and Enrollment
- Android Requirements and Enrollment

Session 4: Intune Part 3 (Configuration Profile, All Platforms)

- Review of configuration options for Windows, iOS, iPad OS, Android, and macOS

This isn't just hours of PowerPoint content, Azure Foundations features:

• **Real Deployment**

As we work through the class topics, we'll be demonstrating the build process on a real Microsoft 365 environment, so you can see the portals and tools firsthand.

• **Live proof of concept**

During class, you'll see the fruits of our collaborative labor through a real demonstration of a fully cloud-managed Windows workstation.

• **Recordings for review**

At the completion of the course, session recordings will be made available to attendees who attend at least three quarters of the course.

Week 3: **Session 5: Intune Part 4 (Application Deployment)**

- Android and iOS App Deployment
- Microsoft 365 App Suite Deployment
- Windows Application Types (Line of Business, Win32, Store, etc)

Session 6: Intune Part 5 (App Protection Policies, Compliance Policies, AAD Conditional Access Pt 2)

- Overview and creation of application protection policies
- Overview and implementation of compliance policies
- Enforcing compliance through Conditional Access

Week 4: **Session 7: Intune Part 6 (Review of Live Windows Device and Intune Q&A)**

- Demonstration of a live, AAD Joined, Intune enrolled Windows device
- Review of policies and collaborative Q&A

Session 8: Microsoft Information Protection and Defender for Office 365

- Review of MIP labeling policies, retention labels, DLP, encryption, Safe Links, Safe Attachments

Session 8: Microsoft Information Protection and Defender for Office 365

- Review of MIP labeling policies, retention labels, DLP, encryption, Safe Links, Safe Attachments

[Reserve Your Seat](#)

Service Management

ABOUT THE COURSE

The Service Management course will provide your company with best practices and a practical approach to grow your service manager role along with steps to overcome common challenges to success in the role.

Upon completion of the course, you will be able to:

1. Define your role as service manager and its boundaries
2. Know what numbers a service manager should look at and how to manage each person effectively
3. Build a checklist of must do items each day to ensure consistent service delivery and manage by exception principles
4. Get buy-in from your team or leadership team on project direction or approach

WHO SHOULD ATTEND

Our Service Management course is designed for current service managers stuck in the loop of being too busy to be effective or not able to show a measurable impact, or anyone transiting from another role or industry to the service manager role.

COURSE LENGTH AND TIME COMMITMENT

Service Management is a 4-week course that meets virtually for one hour per week.

All attendees will receive a complete toolbox that includes course materials. It's all designed to facilitate implementation once you get back to your office.

COURSE SYLLABUS

Week 1: Introduction and Top 6 Operational Mistakes

Learn about the 6 most common mistakes

Week 2: Leadership Lessons

Defining Vacuum Culture, The Quality Curve, and The 68 Key Decisions

Week 3: Understanding Service Company Finance

Breaking down your Profit & Loss (P&L)

Managing the 4 Levers of Service Gross Margin

Week 4: Working with Data and KPIs

Discuss how to create good data and what to measure at each maturity stage

[Reserve Your Seat](#)

Security Foundations

ABOUT THE COURSE

Security Foundations is an eight-week course designed to provide MSPs the necessary skills and knowledge to improve and strengthen their current security posture. This course covers the basics of defensibility and what it REALLY takes to protect your clients. You'll gain a stronger understanding of the threats to your business and to your clients. You will also learn how to strategically develop your security line of business to increase profits.

Each week, we will take a practical walkthrough of the Center for Internet Security (CIS) Controls in the Implementation Group 1 (IG1) framework. This includes baseline education and practical examples of how applying the CIS Controls will help secure your MSP. Additionally, where possible, we explain the controls from the attackers' point of view and how the controls help create threat protection.

During the course we will discuss:

- How you can secure your MSP
- The basics of a control framework
- An understanding of defensibility using CIS v8 for MSPs
- What the IG1 CIS Controls are and how they help you stay secure
- What not implementing the controls looks like to a threat actor and how it impacts you and your clients
- How adopting any control framework increases your defensibility

Participants in this course will have access to:

- Weekly live, instructor-led classes
- Direct guidance from security experts
- A dedicated Microsoft Teams channel to connect with your Security Foundations cohort

The Security Foundations course covers eight different focus points that we've found to be the most important for MSPs. They fall under these four categories:

- Security in the workplace and for remote workers
- Device, user, and email security
- Training, policies, and procedures for employees
- Backup and disaster recovery as part of your security plan

WHO SHOULD ATTEND

Security Foundations is meant for MSPs looking to learn about, address, and improve on critical cybersecurity issues they have within their business and with their clients.

This course is right for you if you are:

- An MSP needing guidance to incorporate security offerings for your clients
- An MSP looking to deepen your cybersecurity knowledge, learn best practices, and evolve your practice
- An MSP that wants to understand how to position security offerings with your clients

COURSE LENGTH AND TIME COMMITMENT

Security Foundations is an eight-week course involving direct lectures by expert instructors and peer-to-peer networking, discussions, and coaching. Classes meet once a week for 90 minutes.

While you won't have required homework, you will receive take-home notes and a copy of the presentation deck from each class. Our goal is to minimize the time you spend on busywork outside the classroom and maximize interactions and discussions with our security experts during class.

COURSE SYLLABUS

Week 1: Identity and Devices

Managing user identify and devices more effectively

Week 2: Human Elements

Best practices for addressing the people side of security

Week 3: Policy

Policies and procedures to reinforce security

Week 4: Email and Endpoints

Beyond filtering and anti-virus software

Week 5: Compliance

Introduction to compliance concepts

Week 6: Internal affairs

Best practices for securing your business

Week 7: Modern workplace

Taking a deeper look at trending Microsoft tools and more

Week 8: Business Continuity

Backup and a crucial part of your business strategy

Reserve Your Seat



Peer Groups

At Pax8 Academy, we understand that some of the best business lessons come from those who have experienced what you are going through firsthand, which is why we include Peer Groups as one of our MSP development offerings.

Our Peer Groups are an ongoing program where partners can apply to be matched up in small peer support networks of six to ten comparable MSPs. To help create effective, equitable knowledge exchange, we match applicants by role within their company and the general size and maturity of their MSP. To make sure each Peer Group is a safe space where partners feel comfortable openly sharing, we split applicants by geographical region to avoid potential conflicts with competitors.

80%
growth

in cloud revenue for partners who
have remained with our peer
groups for at least six months

Pax8 Academy Peer Group
participants give the program an

80
NPS score

Your Peer Group is meant to be a small, trusted community within the industry where you can learn and share knowledge, set goals and share results, and hold one another accountable. It's a place you can convene with your peers; bring up issues, problems, or worries you face running your MSP; and learn from them how they addressed similar issues. It's not uncommon for the experience to result in life-long connections with people you can trust as you go through your personal and professional career journey.

Peer Groups meet once a month in a live 90-minute virtual meetup using a semi-structured format organized and hosted by your group's Pax8 Academy facilitator. Then three times a year, your facilitator coordinates and hosts an in-person gathering where your entire peer alliance hangs out for two days and does a deep dive on each of your businesses.

Due to the nature and structure of Pax8 Academy Peer Groups, it's not uncommon for partners to have to wait before they are accepted and placed into a Peer Group.

[Begin Your Application](#)

Coaching

There are points when an MSP hits a barrier on their business growth journey (See the Determining Your MSP's Maturity Level section for more) that educational learning isn't always the best course of action. For MSP leaders who are looking for help determining where they want to be next month, next year, or even further into the future, and how to get there, Pax8 Academy offers individual leadership coaching.

Our coaching programs are an intensive experience that delivers industry-leading one-on-one, personalized business guidance tailored to the needs of MSPs. But we don't stand and watch from the sidelines. Your personal coach gets right down into the trenches with you to assess where you are, learn where you want to get to and when, and work with you and your team to successfully implement the right changes.



**Gain
Efficiency**



**Increase
Profit Margins**



**Retain
More Clients**

Coaching from people who know MSPs

Our personalized, one-on-one expert coaches have been in your shoes. They have been through the grinder, working their way up from being engineers and service managers to holding C-level and ownership positions in MSPs. They understand every phase of your business journey and can help you develop, implement, and execute strategies and tactics to hit your goals. They can help you build processes and accountability frameworks that improve your operations and increase profit margins in good times and bad.

The tools to drive success

Along with the expertise and guidance of our coaches, we leverage technology to keep you on track. You'll have an accountability portal where the progress of every goal and every change is monitored and tracked at the individual and the company levels.

We also utilize advanced benchmarking tools that help us assess the impact of operational changes on your gross margins, bottom line profit, and over 77 other metrics. We also benchmark your figures against your own previous quarters, the industry average, and best-in-class business results.

Coaching Partners have
cloud revenue that is

2.5x industry
average

95
NPS Score

for Pax8 Academy coaching
from participants

MSP Operations Coaching

Pax8 Academy offers a uniquely insightful, personalized, one-on-one coaching experience for MSPs. We don't just stand on the sidelines and tell you what's wrong, we get into the trenches and work closely with you and your services manager. We begin with a thorough examination of your business, your processes, and your goals. From there, we help you identify your areas for change, build process frameworks, and establish accountability to propel your business forward.

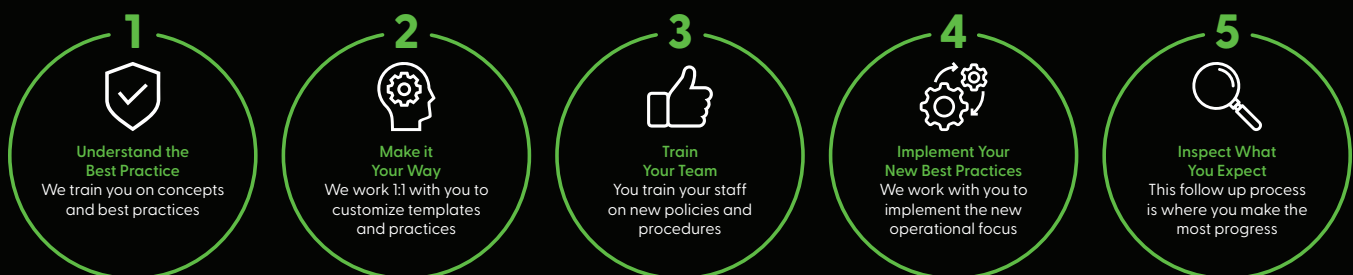
Our expert coaches are all veterans of MSP growth campaigns having risen through the ranks themselves or having built successful MSPs of their own. They coach from an expertise built on decades of experience supported by a team of fellow coaches who bring their own personal and professional experience, industry knowledge, and understanding of best practices to the mix.

DEFINING YOUR SUCCESS

As an MSP owner, you should be big-picture focused. With solid processes and effective planning, the day-to-day should take care of itself. Our coaching methodology is crafted to help you build your next level of leadership, which is why we work so closely with the person you are passing the hat to – your services manager. This gives them ownership of new processes and positions. It also establishes them as a leader when they help design, train, implement, and measure the progress of your operational process.

DEVELOPING YOUR OPERATIONAL EXCELLENCE

By taking you through our five-phase process for developing operational excellence, your coach will help you address your specific challenges and reach your desired business goals. As owner, you'll work with your coach to define monthly operational strategic objectives. Specific policies, procedures and processes – based on our Operations Guide – will be defined with your service manager. Weekly calls are made to create accountability and monitor implementation.



We also have a few proprietary tools and resources to help guide the process and keep your efforts on track. These include our comprehensive Operations Guide, our accountability portal, and our financial benchmark reporting.

THE OPERATIONS GUIDE

If there's a definitive resource for successful MSPs and IT providers, this would be it. Our compendium of planning templates, policies, best practices, and procedures has been called by many the business bible for MSP executives.

The Ops Guide helps you:

1. Configure of your PSA
2. Document policy and procedure
3. Establish measurable KPIs
4. Build human resources for your service team
5. Leverage your tools
6. Get your accounting systems in order
7. Create and manage client-facing systems
8. Prepare for growth
9. Run successful marketing programs
10. Develop your outside sales strategy approach

The Ops Guide is a dynamic resource that covers an extensive range of operational needs, and we are constantly revising it to ensure you always have access to up-to-date resources you can reference in today's ever-changing business climate.

Every partner we work with through our one-to-one coaching has access to the documented policies, procedures, extensive templates, and best practices we've painstakingly documented in The Ops Guide.

[Speak With A Coaching Advisor](#)



Value Creation Coaching

Pax8 Academy Value Creation Coaching is a unique, strategy-based, one-to-one coaching method designed to help MSPs reach their very specific growth goals. It's a top-down strategic approach that starts with asking "Where do you want to get to and by when?" Your Pax8 Academy coach then works with you to create an actionable plan of aggressive and attainable weekly, monthly, quarterly, and annual goals for getting you there.

Value Creation Coaching is a business transformation program that takes a holistic approach, focusing on all areas of the business:

- Takes an increased focus on strategic and financial planning
- Adds focus on overall value creation for the company's equity owners
- Retains a focus on operations, but as a means to achieve the overall strategic goals

COACHING WITH VISION

Through Value Creation Coaching, you are partnered with a coach who brings with them the understanding and experience of what it takes to run an MSP at the valuation level you are targeting. They work closely with you to build the roadmap that will help you reach your end goal, then they share the business intelligence you need – all while helping make sure you stay on course and meet all your goals.

Say your goal is to be a \$10 million shop within two years, so you can exit. Your coach would then lay out for you exactly what a \$10 million shop looks like—what their operations look like what their cloud on prem looks like, what their service looks like. They will then build you the roadmap backwards from what a \$10 million shop looks like to where your shop is today. Based on that, we'll deliver a detailed prescriptive guide that includes tools and tech as well as platforms and processes. We also coach you for the entire run to get you to where you need to go so you can reach your \$10 million milestone within your stated time frame.

Ultimately, Value Creation Coaching provides a way to focus on what you are already trying to do. It just helps you do everything better and get there faster.

[Speak With A Coaching Advisor](#)



Self-Guided Learning

As part of the Pax8 Academy knowledge sharing environment, we offer a variety of educational options, so you can learn at your own pace and in your own time frame. This includes a library of e-learning courses as well as informational resources and guides. It's all designed to help you better understand how to leverage vendor solutions, how to build growth, and where the IT world is heading in the future.

E-LEARNING

Pax8 offers partners access to our eLearning platform filled with a collection of self-guided modules that allow you to learn when it's most convenient for you. We offer virtual courses to help you understand specific vendor solutions, strengthen your business processes, leverage your Pax8 partnership, and prepare yourself and your clients for the future of cloud services.

[Explore E-Learning Options](#)

FEATURED COURSE: How to Break Through Your Next Business Plateau

Ever wonder where you stack up on the business maturity scale on your journey to success? Take the long view in this powerful explanation of the MSP business journey with Rex Frank, VP of Pax8 Academy. Rex takes you through the stages of growth and development that are common to almost all MSPs. He also shares the tips and suggestions to promote efficiency and success as you overcome challenges and refine your processes through four key stages.

CONTENT LIBRARY

The Pax8 Academy resource library is designed to help you expand the level of expertise you bring to meeting your clients' needs. It's filled with sales guides, playbooks, and other content to help you better understand the vendor solutions that you can leverage to build cloud solutions for your clients.

[Explore the Content Library](#)



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