

Cloud & AI Platforms

Unify Your Data Platform

SMB Cohort Partner Playbook

Overview

The **SMB Cohort Partner Playbook – Unify Your Data Platform** provides a comprehensive guide for partners to understand and establish a robust data platform and unlock the full potential of AI for their customers. It also includes the end-to-end customer engagement journey for partners to drive small and medium-sized business customer acquisition and growth.

Partner guidance

This playbook provides resources to help partners understand how to utilize the **Unify Your Data Platform Solution Play** to drive acquisition and growth with small and medium-sized businesses.

Use this Playbook to:

- Utilize the CloudAscent Partner Workbook for customer targeting
- Drive customer demand through marketing outreach
- Leverage and incorporate the customer engagement journey to complement your resources, solutions, and campaigns and drive Fabric acquisition and growth.

Build and grow your Fabric practice

Partner opportunity

Understand the SMB market opportunity for the Azure data platform and the value of offering data platform services to your customers.

The Microsoft AI Cloud Partner Program (MAICPP)

The resources you need to build and sell innovative and impactful Microsoft Cloud and AI solutions.

Skilling and certification

Deepen your understanding of how Azure can help organizations evolve and transform.

Solution play GTM execution

Accelerate sales with curated solution plays focused on the most in-demand solutions for SMB customers.

Generate demand

Customer outreach

Find untapped opportunities and access customer leads and data-driven insights. Drive demand with SMB solution area-aligned go-to-market campaigns.

Customer acquisition & growth

Customer Sales Tools

Leverage ready-to-go assets and resources to support your end-to-end customer engagements.

Your feedback is important

We're always looking for ways to improve. [Take a short survey](#) and tell us what's working and what can be improved with these cohort assets.

Partner opportunity

Azure partner opportunity

SMBs continue to accelerate cloud adoption, driven by needs for agility, innovation, and maintaining a competitive edge.

A key vector to enabling business agility is AI.

To truly thrive in this dynamic environment, SMBs need to not only address their near-term needs but also embrace forward-thinking strategies that fuel innovation and maintain a competitive edge.

This is where Azure comes in.

Azure provides customers with the best of both worlds—the optimized platform to fully embrace AI, while maximizing ROI and providing the necessary performance and resilience—all delivered with comprehensive code to cloud security.

Azure partner opportunity

Take advantage of rich insights in the latest research:

[The Total Economic Impact of Azure Cost Management and Billing](#)



Understand the Azure opportunity for MSPs

Customers of all sizes are looking for ways to leverage AI in their businesses. Are you prepared to talk to them about the opportunity?

Microsoft partners
delivering AI within data
and analytics solutions
earn **\$11.06** for every \$1
of Microsoft revenue.¹

SMB business priorities and AI

Top business priorities for SMBs:

Drive business efficiency: enable operational efficiency by adopting the latest technology while optimizing cost and agility.

Grow the business: enable fastest time-to-market of apps and features by using a modern platform while maximizing efficiencies for developers.

Enable and develop talent in a hybrid world: enable remote workers to securely connect to business systems.

Enhance digital security: implement new technology securely and ensure compliance and resilience in an increasingly complex regulatory landscape around AI.

75%

of CEOs believe that the organization with the most advanced generative AI will have a competitive edge¹

38%

of SMBs are currently evaluating AI products and anticipating selecting one in the next 6 months²

48%

of SMBs rank leveraging AI to improve business operations and customer experience as a top priority³

¹ Source: [IBM](#)

² IDC FutureScape: Worldwide Small and Medium-Sized Business 2025 Predictions, October 2024

³ 1 IDC WW Small and Medium Business Survey, February 2025

⁴ IDC InfoBrief: sponsored by Microsoft, 2024 Business Opportunity of AI, IDC# US52699124, November 2024

AI adoption challenges

70% of companies say their data architecture is not ready for AI⁴

60% of IT leaders say their current infrastructure is holding back AI progress⁴

The Azure solution: Azure helps customers to get AI-ready.

1. **Unified.** Azure moves data from disparate silos into a single, unified platform that is integrated for low-latency availability
2. **Clean.** By modernizing your data, you can simplify the complex—obtaining clean data that is high-quality and easily integrated into AI models that are also in Azure.
3. **Governed.** Azure ensures governance. Microsoft has services and principles that ensure privacy, security, and sovereignty of your data for AI models.

Grow your cloud services business with Fabric

SMB partner opportunity

Small and medium-sized businesses (SMBs) are the backbone of the global economy, with around 400 million firms worldwide. They account for 90-95% of all businesses and need reliable and innovative solutions to grow and thrive. As our partners, you have a vital role and a great opportunity to help SMBs achieve their goals, while expanding your own business.



From Data Chaos to Unified Power: The Story Behind Microsoft Fabric

Arun Ulag, CVP of Azure Data dives into the journey behind Microsoft Fabric and how Fabric unifies data, analytics, and AI to turn chaos into clarity—empowering organizations to harness the full potential of their data.

[Watch the video](#)

SMB Fabric partner opportunity

Build a Fabric practice to unlock the full potential of AI and drive both customer acquisition and growth in your business.

The Total Economic Impact™ of Microsoft Fabric

Fabric has a unique, differentiated value prop & ROI.

Fabric Partner value prop (coming soon)

Fabric is an end-to-end data platform delivered as SaaS with a significant partner services opportunity.

Drive AI Transformation

SMB customers need to unify their data estate across on-premise, cloud, and SaaS applications to support AI transformation.

Earn Incentives

Drive profitability with consumption-based incentives.

The Microsoft AI Cloud Partner Program (MAICPP)

The Microsoft AI Cloud Partner Program (MAICPP) equips partners with the resources they need to build and sell innovative and impactful Microsoft Cloud and AI solutions. Tap into a portfolio of investments designed to drive growth and profitability—from technical consultations to skilling and enablement. [Get started.](#)

Marketing benefits

Drive demand for your offers with easy-to-use marketing resources.

- Partner go-to-market toolbox
- How to Market with Microsoft consultation
- Profile optimization and referral management
- Ready-to-go marketing assets (Partner Marketing Center)
- Geo-Expansion Readiness Assessment

Enablement benefits

Unlock training and certification resources to build your expertise.

- Technical training
- Sales and pre-sales training
- Certifications
- Partner training calendar, skilling playbooks, newsletter, and guides

Support and advisory benefits

Explore support articles or submit a request.

- Advisory hours to help plan, build, and implement solutions (TP&D)
- Assistance with technical sales prep and deal enablement (TP&D)
- Signature Cloud Support incidents
- Microsoft product support (on-premises) incidents

Partner incentives

Our incentives portfolio rewards your success to help you drive more profitability.

- Global programs, local offers to support market needs, and opportunities for reinvestment
- Programs designed to drive digital transformation
- Get rewarded for your customer success

Additional selling support with MAICPP

Cohort Lists in CLAS (aka Customer Targeting Lists)

Microsoft is providing partners with prioritized lists of customers along with detailed customer journey guidance. These lists come from CloudAscent and are arranged by level of propensity to buy.

[Learn more about how to find your Cohort Lists in CLAS](#)

Drive demand generation with Campaign-in-a-Box assets

Solution Play marketing resources to create campaigns and drive awareness and urgency for SMBs to adopt Azure solutions.

[Explore partner-ready campaigns](#)

Partner Incentives

As a partner in the Microsoft AI Cloud Partner Program, incentives provide opportunities to accelerate your business and drive exceptional outcomes for your customers. Learn more and get started with Cloud & AI incentives.

Visit the [Microsoft Commerce Incentive Resources](#) to access incentive resources, including the Incentive Guide.

Partner Incentives Co-operative Marketing Fund (Co-op)

Learn more about the [Partner Incentives Co-operative Marketing Fund](#) (Co-op), which provides reimbursements of earned funds to participating partners to help differentiate and build channel awareness and preference for Microsoft products. Drive demand gen, market development and execution offers by using and maximizing Co-Op earned funds.

Visit the [Partner Incentives homepage](#) for supplemental information about the following:

- Earning opportunities
- Enrollment
- Resources

Solutions Partner designations

Unlock CSP Incentives, specialization and expert eligibility, co-sell eligibility and additional products + credits with Solutions Partner for [Azure](#).



Deepen your engagement with Microsoft

- Unlock referral and Co-sell eligibility
- Differentiate your company with Microsoft sellers



Expand and scale your technical skill

- Technical presales and deployment services
- Skilling resources



Increase customer reach

- Unlock marketplace consulting services offerings
- Go-to-Market services, assets, and personalized consultation



Deliver on the customer promise

- Incentives and funding for solutions that fit your customers



Develop your business with Microsoft products

- Azure bulk credits
- Dev environments
- Cloud subscriptions
- Copilot licenses

[Learn more about the Solution Partner designation Azure SMB paths](#)

SMB path		Points
Performance		30
Net Customer Adds	3 net customer adds >USD \$500 ACR per month	30
Skilling		40
Intermediate Certifications	1-4 unique individuals 1 prerequisite certification	20
Advanced Certifications	1-4 unique individuals 1 prerequisite certification	20
Customer Success		30
Usage Growth	20% ACR growth YoY	20
Deployments	5 new deployments in TTM + Virtual Machines	10
TOTAL		100
Minimum total points required for Solutions Partner designation		70

Benefits of Azure Specialization

Specializations unlock additional benefits and a greater level of differentiation above and beyond a Solutions Partner designation.

Register for upcoming [Certification Weeks for Microsoft AI Cloud Partner Program](#) to prepare for qualifications.



Profit generated from partnership, worth \$1.7 million over three years.

Interviewees from Azure specialization partners touted significant profits as a result of their partnership.



Funding opportunities from Azure Specializations, worth \$1.1 million over three years.

Microsoft Azure has a robust funding opportunity program in place for its partners, including those that are certified as Azure Specializations partners.



290%
ROI



\$2.8M
Benefit PV



\$2.11M
NPV



<6
Months payback

Solution Play: Unify Your Data Platform

Technical capabilities

Eliminate data silos and unify data estates on a modern data platform that is secure by default, with:

- Microsoft Fabric (incl. Power BI)
- Azure Databricks
- Microsoft Purview
- Azure Databases (Azure SQL, Azure PostgreSQL, Azure CosmosDB, Azure MySQL)

Specialization

- Analytics on Microsoft Azure
- Datawarehouse Migration to Microsoft Azure

Benefit (Three-Year)

Profit generated from Azure
Specialization partnership

\$1.7M

Funding opportunities from Azure
Migration and Modernization and
Azure Accelerate

\$1.1M

Skilling and certification

Holistic Partner Skilling



Credential Ready

Enable all partner roles with foundational Solution Area knowledge to drive Designation and Specialization growth through Certifications, Applied Skills, and Microsoft Learn trainings.



Project Ready

Enable partners with practical skills through intermediate to advanced technical trainings to migrate, implement, and integrate a solution anchored on Microsoft Solution Plays that cover real-world scenarios, helping partners drive adoption and revenue.



Sales Ready

Enable partners to sell Microsoft solutions more effectively by demonstrating and landing Solution Play value.



Tech Deal Ready

Enable Tech sellers to influence sales solution scope and usage through in-depth feature benefit understanding, informing RFP build and deal readiness.

Unify Your Data Platform | Partner Skilling

Unify Your Data Platform	Pre-MCEM to achieve Designation and Specialization	1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
	Credential Ready	Sales Ready	Tech deal ready		Project ready	
Completing Solution Partner Designation	AZ-104: Azure Administrator AZ-305: Azure Solutions Architect PL-300: Power BI Data Analyst	Sales: Unify Your Data Platform	Sales: Unify Your Data Platform		Data governance with Microsoft Purview	
Getting Specialization	DP-300: Azure Database Administrator DP-600: Fabric Analytics Engineer	Fabric Sales Champion (SMB)	Deal Ready: Unify Your Data Platform		Microsoft Fabric Workshops: - Analytics - Real-time intelligence - Data Factory - Databases - Admin and governance	
Specialization Partners	DP-700: Fabric Data Engineer DP-100: Data Scientist DP-420 Azure Cosmos DB Developer	Fabric Sales Bootcamp	Fabric Sales Bootcamp		Modern data platform with Azure Databricks	

- Register for an upcoming live session at [Partner skilling hub](#)
- Check out [Microsoft LevelUp](#) for self-serve partner skilling LMS
- Browse [Certifications, Applied Skills, and Learning Paths](#) for Microsoft Certifications

- Opt-in at aka.ms/PartnerSkillingsNews for the latest partner skilling updates
- Use the [Readiness Calendar](#) to find upcoming events and trainings

Pre-sales & sales enablement

Partner Sales Enablement Hub

Find training options that fit your knowledge level, role, and, most importantly, your schedule. This hub provides resources to build a flexible learning journey across the depth and breadth of our partner sales and pre-sales training programs. [Learn more.](#)

Partner Sales Acceleration Program

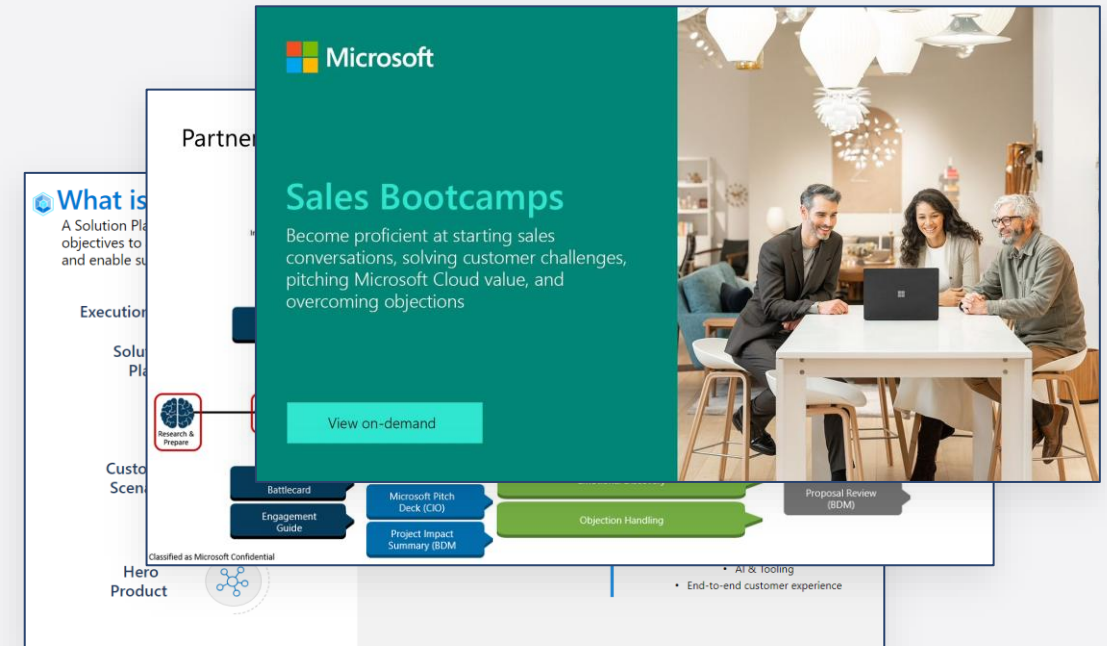
The Microsoft Partner Sales Acceleration Program (PSAP) is an on-demand training program for partners looking to increase their knowledge across the Microsoft Cloud and build solid sales strategies. It's a collection of sales tools and video guidance created to help you stand out in a crowded market and "get to yes" with potential SMB customers. Go to the [Azure SMB Partner Sales Acceleration Program](#).

Fabric Partner Community

The Fabric Partner Community is a diverse and inclusive Teams channel created for all Microsoft partners interested in building and growing their Microsoft Fabric, Power BI, and analytics practices. [Learn more.](#)

Azure Essentials PL

Azure Essentials provides technical methodologies and tools derived from real-world customer experiences to accelerate your cloud and AI adoption journey. Gain an edge when getting started, achieve architectural excellence, and enable continuous improvement. [Learn more.](#)



Use Co-op funds for training

Some training activities may qualify for Co-op reimbursements. [See if you qualify.](#)

DO NOT SHARE WITH CUSTOMERS

Technical enablement

Understand the Solution Play with Microsoft Virtual Training Days

These free training events are designed to build your skills and discover new opportunities. [Check upcoming events and register.](#)

Get ready for a cloud role with Cloud Weeks

These week-long virtual events include tracks for key roles on migration projects, such as Azure Administrator and Solution Architect.

[Attend upcoming events or watch recordings from previous cloud weeks.](#)

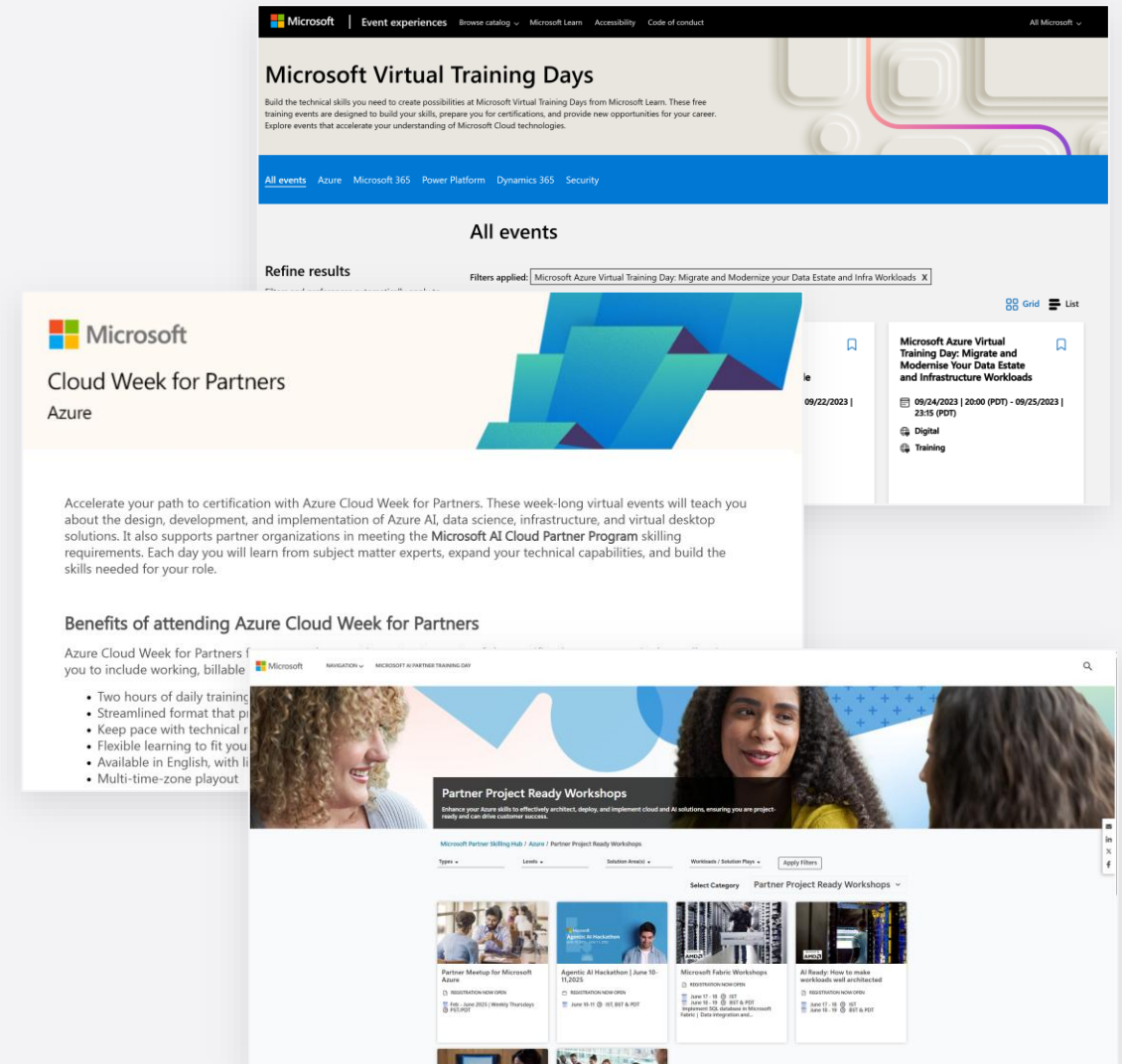
Azure Depth workshops

Allow partners to gain the knowledge needed to deliver projects aligned to key Solution Plays. [Check upcoming events or watch on-demand content.](#)

Courses, learning paths, and modules

Learn new skills and discover the power of Microsoft products with step-by-step guidance. [Explore self-paced learning paths and modules for Fabric.](#)

All attendees of a live Fabric Workshop, DP-600 or DP-700 instructor-led training receive a [free lab environment](#) as part of the class.



Solution Play overview (Go-to-market execution)

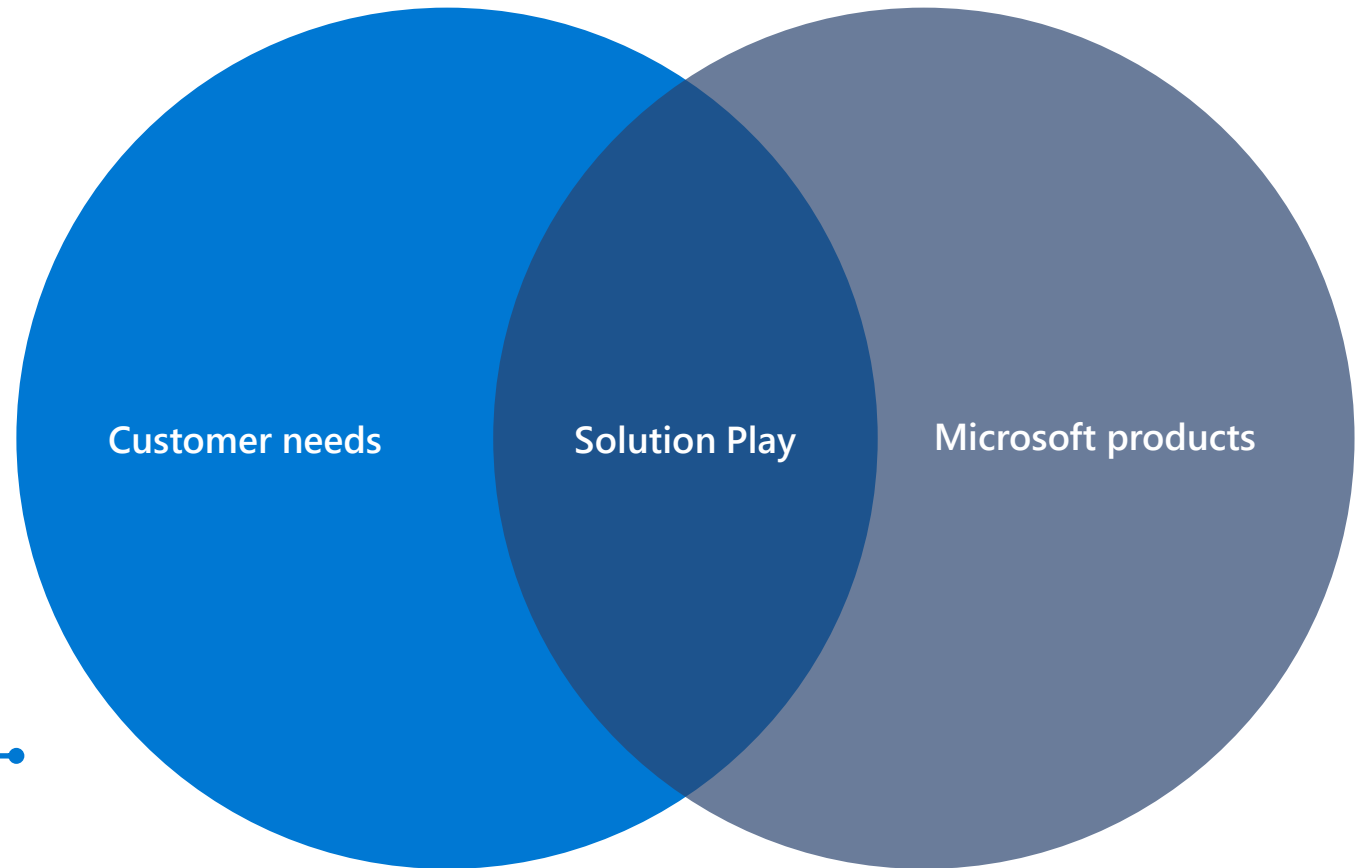
Microsoft Solution Plays

Customers need help solving business problems.

Most customers—especially SMBs—don't think in terms of technology products. They think in terms of business needs and solutions.

Microsoft Solution Plays are outcomes of aligning technology solutions with our SMB customers' top business priorities.

Solution Plays are where customer business needs are met by a Microsoft product capabilities and include end-to-end, holistic go-to-market execution guidance, assets, programs, and investments to meet SMB-specific customer requirements.



SMB Solution Plays

Cloud Solution Area

AI Business Solutions



Solution Play

Secure AI Productivity
Copilot & Agents at Work
AI Ready with Surface Copilot+ PCs
Scale Business Operations with AI

Cloud & AI Platforms



Migrate and Modernize Your Estate
Unify Your Data Platform
Innovate with Azure AI Apps & Agents

Security



Modernize Sec Ops & Unified Platform

Microsoft priorities aligned to Solution Areas



AI Business Solutions



Copilots on every device across every role



M365 core execution



Cloud & AI Platforms



Differentiated AI design solutions with every customer



Migrations, migrations, migrations



Security



Securing the cyber foundation of every customer

Finding the right Azure Solution

The [Azure AI Halo](#) is a wholistic strategy to address the business benefits of Azure and find the customer's logical next move in their migration or step.

Azure migration, data unification, and AI innovation is a journey with many paths. Uncovering your customer's current position in their Cloud and AI transformation journey is pivotal in executing the correct Solution Play and knowing where to transition to suggest the next best Azure workload for your customer.

Leverage the resources in the [Microsoft AI Sell Together](#) collection on PMC.

What's possible with AI and Microsoft

Microsoft is your trusted partner and an AI leader, focusing on AI-driven transformation with our four key pillars:

- **Enrich employee experiences:** form an AI strategy that results in your people being more productive, engaged, and enjoying their work more.
- **Reinvent customer engagement:** connect with more customers at scale with more personalized experiences.
- **Reshape business processes:** amplify human ambition and get more done with AI agents and Copilots working alongside your team.
- **Bend the curve on innovation:** bring products to market more efficiently with AI accelerating the innovation cycle.

Are you and your business ready for AI transformation?

Transitioning to the cloud, unifying your data, and securing your sensitive information are all steps toward unlocking the full potential of AI integration—like automated agents and Copilots—but there's no one place to begin the journey.

Microsoft has the tools and expertise to meet you where you're at.



Migrate and Modernize Your Estate: Accelerate Windows Server, SQL Server, Linux and open-source database migrations to Azure, highlighting a scalable, resilient, secure cloud platform as key reasons to move to the cloud and get ready for AI.



Unify Your Data Platform: Your teams can connect to unified data from anywhere, uncover insights using AI-powered tools in a unified experience, and embed those insights in the applications your people use every day to drive action and improve decision-making.



Innovate with Azure AI Apps & Agents: An end-to-end Azure AI platform that accelerates AI application and agent development and deployment, scales AI across customer organizations, and seamlessly integrates with your unified data.

Finding the right Azure Solution

Depending on the customer’s business and technical needs, it’s possible to **begin with or transition to any of the Cloud and AI Platform Solution Plays**.

Pivot across the Cloud & AI Platforms Solution Plays as needed:

- [Migrate and Modernize Your Estate Playbook](#)
- [Unify Your Data Platform Playbook](#)
- [Innovate with Azure AI Apps & Agents Playbook](#)

Technical handoff

Once you have asked the questions, use any uncovered triggers to transition to and drive the most appropriate Solution Play; focus on collecting the information needed to progress the sale to a technical Evaluation (Americas only) or Assessment.

Find the best Azure solution with these five questions

Beginning broadly and getting more specific, these questions will cause the customer to provide transition triggers which will hint at the best Solution Play to drive for their specific business needs and desired outcomes.

1. What are the top 1–2 business outcomes your team is accountable for this fiscal year? How are data, AI, or cloud modernization expected to support those goals?
2. Are there limitations in your current infrastructure that are preventing you from scaling or innovating faster?
3. Are there any blockers preventing your users from accessing the data they need without relying on IT?
4. What AI capabilities are already in use across your teams?
5. How are you equipping your developers and product teams to build, deploy, and govern AI agents at scale?

I’m hearing the need for/to _____					Drive the Solution Play _____
“Faster time to market with new apps”	“Faster adoption of new tech like GenAI”	“Modernize data to integrate with AI models”	“Maximize cost-savings and cloud costs to reinvest into innovation”	“Improve and scale (AI) app performance”	Migrate & Modernize your Estate
“Streamline analytics and operational data for AI”	“Strengthen the data that my AI models are grounded on”	“AI-powered self-service analytics”	“Full visibility and governance over my entire data estate”	“Use data agents to scale human ingenuity”	Unify your Data Platform
“An integrated AI app platform with AI-assisted development”	“Enable developers to build AI apps & agents with their tools of choice”	“Bring AI apps & multi-agent workflows to production fast”	“Scale AI innovation while reducing TCO across app & data services”	“Manage and govern AI apps efficiently with ongoing insights”	Innovate with Azure AI Apps & Agents

Microsoft Fabric

Activate your data estate for AI innovation with Microsoft Fabric.

Microsoft Fabric is a holistic, end-to-end data platform delivered as SaaS. With Fabric, SMBs can unify all their data across on-prem and cloud-based sources without moving or replicating data. Fabric is the data foundation for all SMB AI needs, preparing data for AI innovation. AI capabilities in Power BI enabled through Fabric Copilot are designed to help SMB customers create, collaborate, and innovate.



For additional messaging and key talking points based on user scenarios, use the [SMB Cohort Guide - Unify Your Data Platform](#).

Resources

[Unify Your Data Platform SMB pitch deck](#)

[Sixty-day free trial for Fabric](#)

[Fabric Analyst in a Day Workshops](#)

[Azure Accelerate](#)

[SMB Fabric DREAM Demo click-through](#)

[Cloud Accelerate Factory](#)

[Fabric SKU Estimator](#)

[Fabric Readiness and Enablement Resources](#)

Microsoft Fabric enables SMBs to:

Unify your data platform with a single source of truth

Centralize all your data in OneLake—the OneDrive for your data—without moving or duplicating data. Gain end-to-end visibility, bringing your data together in an intuitive hub that’s automatically indexed for discovery, sharing, governance, and compliance.

Prepare your data for AI innovation

AI is only as good as the data it’s based on, so you need a data estate capable of fueling AI innovation across your organization. From built-in Copilot solutions to custom machine learning models, Fabric delivers the foundation you need.

Empower data-driven decision making

Turn data into immediate impact with Power BI and Copilot. Empower everyone in your organization to uncover insights with industry-leading visualization tools. Make data-driven decisions with actionable insights displayed in powerful visualization tools.

Establish a trusted data foundation

Security is built into Fabric—security is always on, always evolving, and embedded at every layer. Your data is protected no matter where it’s coming from or where it goes.

DO NOT SHARE WITH CUSTOMERS

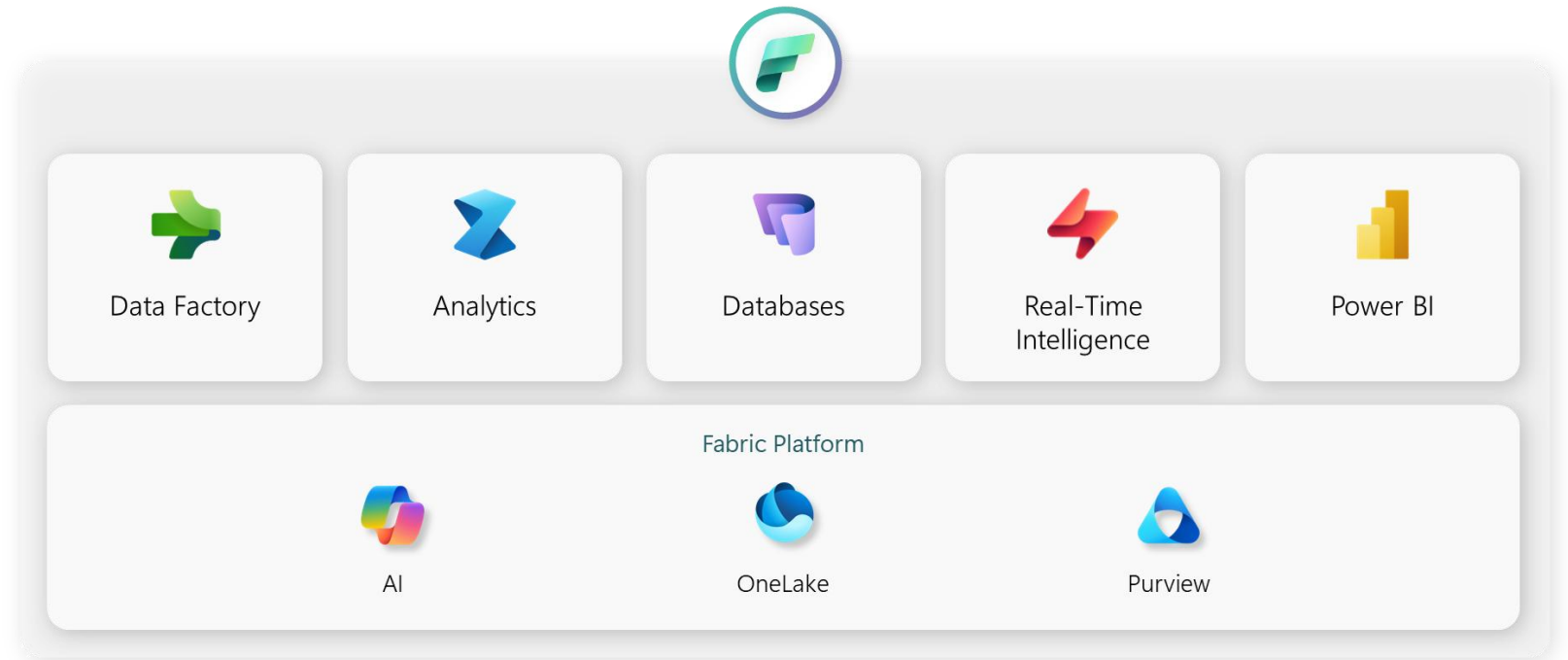
Empower SMBs to unlock value from data

To prepare their data for AI, SMBs need a unified, intelligent, end-to-end data platform. Fabric helps SMBs turn data into a competitive advantage.

Fabric is a flexible cost-effective platform for SMBs—a single connected data solution to drive smarter decisions with data visibility. Fabric is also the perfect platform for SMBs to prepare data for all AI experiences.

How Fabric unlocks value from data:

- All-in-one data and analytics platform designed for ease and efficiency for every user.
- Seamlessly integrates your data estate for 360-degree visibility without duplicating data.
- Boosts team efficiency to optimize your business-keeping costs in check.
- From built-in Copilot solutions to custom machine learning models, prepare and model your data so you're ready to take advantage of all AI has to offer.



The unified data platform for AI transformation

Customer outreach

Customer Cohort Lists from CloudAscent

Marketing outreach campaign

DO NOT SHARE WITH CUSTOMERS

Customer outreach

Cohort Lists identify high-propensity customers to target with a **marketing outreach plan** to build your pipeline. Microsoft offers **free, ready-to-use demand generation campaign materials** and a **marketing automation tool** for partners to build a pipeline of customers for this Solution Play.

1 Cohort Lists in CLAS (aka Customer Targeting Lists)



Microsoft provides access to Cohort Lists from CloudAscent—high-propensity customer targeting lists—**based on transacting partner of record**. Use these targets to drive your marketing outreach campaign. Use these scenarios to tailor your conversation and as an opening to a broader Solution Play discussion.

[Learn how to get your Cohort Lists for this Solution Play](#)

2 Marketing outreach campaign



Once you get your Cohort List, customize assets to jumpstart your high-propensity marketing efforts and use your Co-op funds to execute a multi-touch digital campaign.

[Learn more about launching a marketing outreach campaign.](#)

Targeting Scenarios and Cohort Lists in CLAS (aka Customer Targeting Lists)

What are Targeting Scenarios?

A **Targeting Scenario** is a particular motion whereby customers who fit a particular customer profile have a higher likelihood of purchasing the product within the defined scenario.

For example, certain Azure on-premises users may have a higher propensity to migrate to Azure, and this “Migrate” motion is called a Targeting Scenario.

The table to the right includes Targeting Scenario examples that consist of:

- **Current product(s):** What the customer is currently using
- **Sell:** What product or service we are selling
- **Targeting Scenarios: The motion we want the customer to follow**
 - **Acquire:** Sell a SKU or workload to a customer who is not using the product
 - **Grow/Expand:** Drive additional consumption for an existing paid subscription or workload
 - **Upsell:** Sell a higher SKU in the same product family (replace SKU)
 - **Attach:** Sell an additional SKU in the same product family (add SKU)
 - **Cross-sell:** Sell a SKU or workload to an existing customer using a product in a different product family, in a new product family
 - **Migrate:** Customer is using on-prem; move to cloud
 - **End of Support:** Customer is using an older version of a product that Microsoft will no longer support

Targeting Scenario Examples

The customer is currently using ____.	We want them to ____...	...to ____.
Current product(s):	Targeting Scenario:	Sell/Deploy:
Microsoft 365	Acquire	Microsoft Surface
Azure below AI Design Win threshold	Grow/Expand	Azure AI
EMS Mix <=50%	Upsell	M365 Business Premium or Security
Power BI	Attach	Fabric
Microsoft 365	Cross-sell	D365 Business Central
On-prem databases	Migrate	Azure

Targeting Scenarios in action

The customer is using on-prem Linux VMs. We want them to migrate to Linux on Azure.

The customer is using Remote Desktop Services. We want them to acquire (cross-sell to) Azure Virtual Desktop.

Cohort Lists in CLAS (aka Customer Targeting Lists)

Microsoft is providing partners with prioritized lists of existing transacting SMB customers, along with guidance on how to prioritize the accounts to target for sales and marketing initiatives. These lists are called Cohorts in CloudAscent.

Every model calculates two scores, based on analysis of hundreds of signals and inputs, that it then combines to produce high propensity clusters.

The **Account Fit Score**, updated quarterly, looks at the top SMB customers and what sales elements make them top customers, for example, historical revenue and sales opportunities, any win/loss information, and other Microsoft sales data. In the data collection process, CloudAscent pings the customer’s domain to collect publicly available technology profile including company size and competitor landscape.

The **Buying Signals Score**, updated monthly, includes signals about online behavior such as revenue funding events, mergers and acquisitions, hiring for specific roles that might indicate purchase of Microsoft products, etc.

Partners run a report that provides a propensity list that separates accounts into **four clusters**: Act now, Evaluate, Nurture, and Educate.

Partner can further prioritize these customers using the customer potential revenue range and understand why the customer is showing as high propensity using the buying signal explainability.

Note: For customers in Microsoft Enterprise and Corporate segments, use SPARK for propensity lists. [Learn more.](#)



Follow [these instructions](#) to learn how CloudAscent can help direct partners discover new revenue opportunities within your existing SMB customer base.

Data fed into CloudAscent



Cohort Lists in CLAS (aka Customer Targeting Lists) – Prioritized list of customers and guidance on what to do with the accounts:

Act now:
Reach out to these customers immediately

Evaluate:
Target with marketing campaigns

Nurture:
Target with awareness campaigns

Educate:
Monitor for intent and fit changes

Unify Your Data Platform: Cohort Lists

Act now:

Use the [Cohort Sales Guide](#) to start a tailored conversation with your customers.

Evaluate:

Learn how to [send a campaign to generate demand](#).

The **Unify Your Data Platform Solution Play** has the following Cohort Lists in CLAS and associated Targeting Scenarios. Use these scenarios, along with the [Unify Your Data Platform Cohort Sales Guide](#), to reach out and talk to your customers.

The customer is currently using ____.

We want them to ____...

...to ____.

Cohort List in CLAS (aka Customer Targeting List)	Current product(s):	Targeting Scenario:	Deploy:
Attach Fabric to Power BI	Power BI Pro Power BI Premium	Attach	
Migrate SQL DW to Fabric	SQL Server Standard and CAL SQL Server Premium	Migrate	
Fabric as Next Logical Workload	Azure + Cloud Ascent Next Logical Workload model Azure Data Workload	Grow	Fabric
Fabric BI Compete	Business Intelligence competitive platform including visualization (Strategy, Tableau, Qlik, etc.)	Acquire	

Retrieving Cohort Lists in CLAS

Direct Partners / LSPs

The **Unify Your Data Platform Solution Play** uses targeting scenarios to help tailor conversations around particular scenarios and customer needs. Use the provided filters in CloudAscent to get your Cohort List and follow specific messaging that resonates with these identified leads. Follow with product information to go deeper into the conversation.

Direct Partners / LSPs: In Partner Center, use filters to retrieve Cohort Lists from CloudAscent.
[Get step-by-step instructions.](#)

Indirect Partners: Reach out to your Microsoft representative for your Cohort Lists in CloudAscent.
[Learn more.](#)

Cloud Solution Area

Cloud & AI Platforms

Solution Play

Unify Your Data Platform

Targeting Scenarios

Attach

Migrate

Grow

Acquire

Cohort Lists in CLAS (aka Customer Targeting Lists)*

Cohort List Column:
Attach_Fabric_to_Power_BI
_1

(Filter = Yes)

Cohort List Column:
Migrate_SQL_DW_to_Fabric
_2

(Filter = Yes)

Cohort List Column:
Fabric_as_Next_Logical_Wo
rkload_3

(Filter = Yes)

Cohort List Column:
Fabric_BI_Compete_4

(Filter = Yes)

*Across Cloud & AI Platforms, Cohort Lists are discoverable as columns in the CLAS download

DO NOT SHARE WITH CUSTOMERS

Marketing outreach campaign (Demand generation)

Demand Generation Campaign Journey

Sequence your campaign with the marketing touchpoints, using templates in the asset library.

Customizing your assets

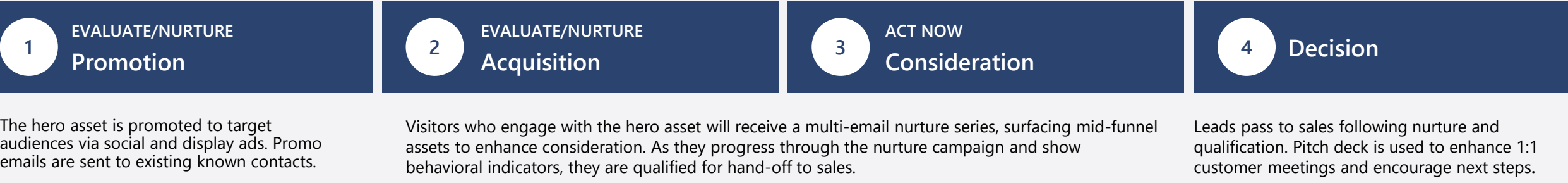
The campaign assets in this collection are templates that require **partner customization**. Each asset will give specific instructions for you to make it your own, by modifying:

- Brand font, logo, and colors
- Solution value proposition and details
- Call to Action and company contact information

Ready to start building your pipeline?

- Check out the full range of [campaign assets](#)
- Get support in our [partner portal](#)
- Review [Microsoft Partner-Led Marketing Guidelines](#)

Sequence your campaign with the marketing touchpoints, using templates in the asset library. Learn more about building a campaign and best practices for customizing assets by using the [Execution Guide](#).



Customizable co-marketing assets

Microsoft offers free, ready-to-use demand generation campaign materials and a marketing automation tool for partners to build a pipeline of customers for this Solution Play.

Campaign in a Box (CiaB)

Campaign in a box provides **ready-to-launch customizable campaigns** aligned to Microsoft priority solution areas and industries.

- Approved Microsoft value propositions, messaging and branding
- Available to all Microsoft AI Cloud Partners
- Microsoft invests so that partners can GTM quicker and faster
- Drive top of the funnel leads through partner-led marketing

Resources:

Grow your business with Microsoft partner marketing campaigns: [video](#)

Campaigns best practices: [video](#)

Leverage these resources and use your Co-op funds to execute a multi-touch digital campaign, supplementing your marketing budget. [Learn more.](#)

Leverage Campaign in a Box in Partner Marketing Center (PMC):

[Campaign in a Box](#)

Download. Customize. Execute.

PMC offers a robust collection of customizable campaigns (CiaB) to help accelerate your time to market and amplify offers to the customers you're most wanting to engage. Use these assets with Act Now customers from your Cohort Lists in CLAS (aka Customer Targeting Lists).

PMC campaigns work best for partners:

- Looking to ramp up marketing resources or to initiate new campaigns.
- With a need for customizable marketing materials and templates to distinguish offerings.

Unify Your Data Platform | Demand Generation

Gain insights into high-propensity customers for priority customer scenarios | Drive top of funnel leads through ready to launch customizable campaigns

Identify high propensity customers			Generate leads	
Customer Scenario	Sales Motion	Propensity Tool	Campaign-in-a-Box (CiaB)	Get Started
Unify your Data Platform	Accelerate capturing the market share of the entire data opportunity by landing Azure as the best destination for first party and third-party data solutions	CloudAscent	SMB - Unify Your Data Platform	PMC
		SPARK	Enterprise - Unify Your Data Platform	PMC
This playbook is focused on Cohrt Lists in CloudAscent (aka Customer Targeting Lists). For your customers that fall in Microsoft Corporate and Enterprise segments, please utilize SPARK propensity tools.			Learn more about Campaign-in-a-Box Learn more about XIAD Partner-led workshops	

Priority audiences

This campaign is targeted at SMB business decision-makers and technical decision-makers, primarily focusing on medium-size businesses with between 25-300 employees.

Business decision-makers: CEO, COO, CxO, VP, Director

SMB BDMs wear many hats and make the majority of IT decisions in small business and medium businesses with less than 250 employees. They care about driving operational efficiency and growing top-line growth, while recruiting and maintaining talent.

Pain points:

- **Operational efficiency:** SMB BDMs are prioritizing investments to drive profitability by replacing manual, disconnected, and duplicative processes.
- **Cost:** Cost is a core requirement for any SMB IT project, where ROI must exceed returns from other competing business investments.
- **SMB line-of-business solutions:** SMB BDMs need integrated, simplified solutions built for their business across finance, sales and marketing, operations, purchasing, and supply management.

Technical decision-makers: CIO, VP, Director

TDMs make IT decisions in SMBs with more than 250 employees and small or full IT. SMB TDMs prioritize enabling and developing talent in a hybrid world while implementing new technology securely.

Pain points:

- **Cybersecurity:** Solving for cybersecurity has become a top-of-mind concern for SMB TDMs.
- **Process automation:** To meet business efficiency goals, SMB TDMs are adopting AI and data solutions to drive process optimization.
- **Managing IT complexity:** SMB TDMs must maintain a simplified IT architecture while adopting and integrating new IT solutions.
- **Cost:** BDMs need easy to implement solutions that provide tangible business benefits.

Customer engagement

Customer engagement

SMB Cohort Sales Guide - Unify Your Data Platform

The [Unify Your Data Platform Cohort Sales Guide](#) is designed to help Microsoft partners understand what customer outcomes are important when executing this Solution Play.

The guide offers:

- [Resources and guidance to prepare you for effective conversations](#) with SMB customers about how Fabric solutions are best positioned to support their business needs and priorities.
- [Instructions on locating CloudAscent Cohort Lists](#) and accessing resources aligned to cohort targeting scenarios to support partners with customer conversations.
- [Targeted messaging for high-propensity customers](#), based on scenario, to use with customizable PMC marketing assets.



Get the full Cohort Sales Guide:
[SMB Cohort Sales Guide - Unify Your Data Platform](#)

Programs and offers

Be sure to understand the latest programs and offers to support your customer engagements.

Fabric Analyst in a Day (FAIAD)

Deliver [Fabric Analyst in a Day](#) workshops to customers to utilize Microsoft demand generation.

Multi-Customer Briefing

Invite your customers to a [Virtual Multi-Customer Briefings](#) to strengthen executive commitment.

Microsoft Fabric 60-day trial

Talk to your customer about a Microsoft Fabric free 60-day trial to get hands-on experience. [Learn more](#)

Azure Accelerate

Utilize [Azure Accelerate](#) for comprehensive pre-sales and post-sales customer offers to drive customer commitment and time-to-value.

CSP Incentives

Earn [Partner incentives](#) by driving Fabric consumption.

Visit the [Microsoft Commerce Incentive Resources](#) collection to access the Incentives narratives for all Cloud Solution Areas.

In a Day workshops (xIAD)

Partner eligibility



Power BI

Dashboard in a Day (DIAD)

Minimum 5 Microsoft Certified certifications for any of:

[Power BI Data Analyst Associate](#)

[Azure Data Scientist Associate](#)

[Azure Data Engineer Associate](#)

[Fabric Analytics Engineer Associate](#)



Fabric

Fabric Analyst in a Day (FAIAD)

Minimum 5 Microsoft Certified certifications for:

[Fabric Analytics Engineer Associate](#)

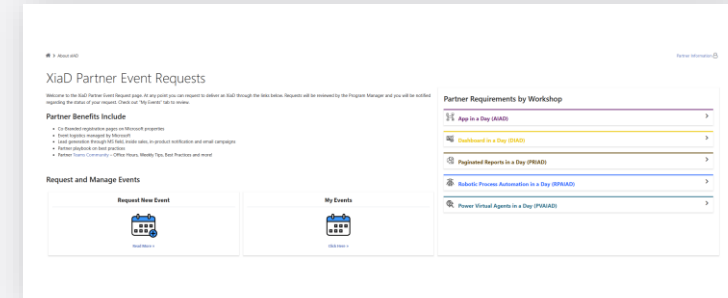
[Fabric Data Engineer Associate](#)

To request to deliver a workshop, please visit:

<https://aka.ms/xiad/PartnerEvents>

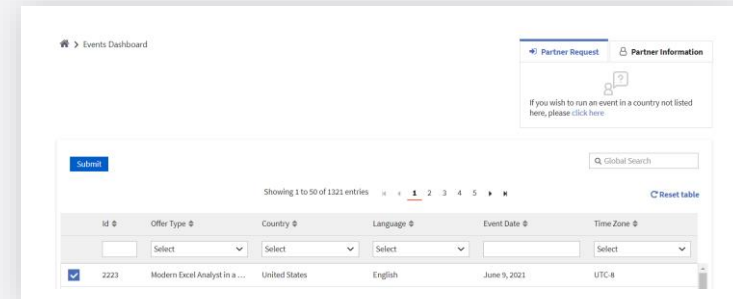
1

View event types and requirements



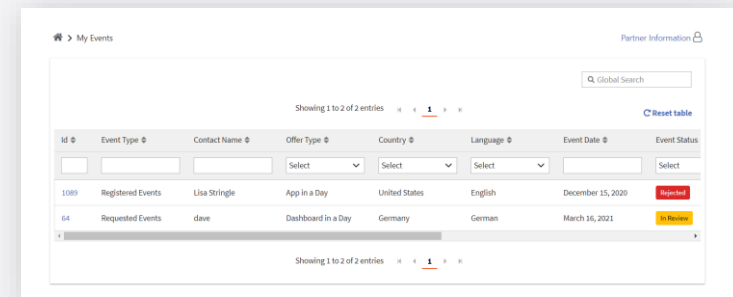
2

Select dates by event type, country, and language



3

View event status and relevant info



Microsoft Fabric Dream Demo for SMB

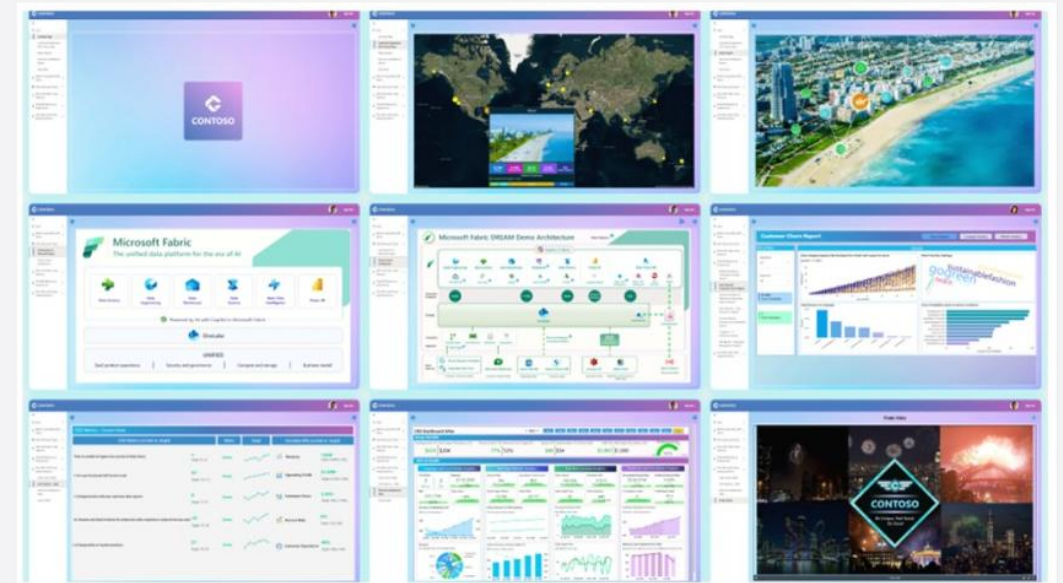
Demo Scenario

This demo highlights how Contoso, a small business, implemented a unified, lake-centric foundation to streamline and manage their data estate.

Contoso leverages Task Flow to visualize workflows in their workspace and the Fast Copy feature to quickly copy large datasets, enhancing their data management.

Explore how Contoso's data is ingested from diverse sources, including SQL, SaaS application and Amazon S3, while external sources are mapped via Shortcuts and Mirroring.

- Real-time data from IoT sensors and Azure EventHub is analyzed with Real-time Intelligence.
- Data is curated in medallion layers using pipelines, notebooks, and Copilot for notebooks.
- Advanced insights are extracted using ML models and AI skill for conversational Q&A systems. Enhanced Data Warehousing with Copilot.
- Finally, Power BI Reports are generated seamlessly using Direct Lake and Copilot.



Product and technologies showcased

Microsoft Fabric

- Fast Copy
- Data Warehouse Copilot
- SQL Databases
- AI Skill
- Mirrored Database
- Power BI
- Copilot in Microsoft Fabric
- Lakehouse

Access the [Partner Click-Through link](#)

Azure Accelerate

Fuel cloud transformation with experts, investments and resources within the partner program.

Access trusted experts

- Tap into the expertise of Azure's specialized partner ecosystem.
- Engage with Microsoft's Cloud Accelerate for zero-cost deployment assistance.
- Available across all industries, customers, and project sizes.

Unlock Microsoft investments

- Access funding for all project types and phases to deliver faster business outcomes.
- Lower initial costs with Azure credits while advancing cloud adoption.
- Skill up internal teams with free, on-demand content or customized training.

Leverage comprehensive resources

- Utilize assessments and AI enhanced tools to simplify your move to the cloud.
- Get coverage for all project stages—POCs, pilots, and full deployments.
- Support for all scenarios across migrations, databases, analytics, apps, and AI.

Learn more: [Aka.ms/AzureAcceleratePartners](https://aka.ms/AzureAcceleratePartners)

Supported scenarios with Azure Accelerate

Core Migrate and Modernize / Core Migrate and Modernize with Microsoft Defender for Cloud

Windows Server, SQL Server, Linux and open source databases (AzureSQL, Azure PostgreSQL, Azure CosmosDB, Azure MySQL, modernization of existing applications to Azure with complementary products) / with Microsoft Defender for Cloud

Migrate and Modernize VMware

Azure VMware Solution (AVS)

Migrate SAP

SAP RISE, SAP Native to Azure, SAP Grow

Data platform

Microsoft Fabric

AI apps, agents, and developer

Azure AI Foundry & Platform (Agents and Models), Azure Kubernetes Service (AKS), Azure App Service, Azure Open AI, Azure AI Services, Developer (GitHub Enterprise, GitHub Advanced Security, GitHub Copilot, GitHub Actions, GitHub Codespaces etc.), plus complementary products

Partner benefits of Azure Accelerate:

- **One unified offering** with support for all customers and industries
- **Fast approvals via automation** and standardized engagement payouts
- **Exclusive incentives** for Azure specialized and solutions designations
- **Joint delivery at no extra cost** alongside Microsoft experts when you need it
- **Richer investments** plus ROI consistency across products and scenarios
- **Increased sales velocity** with go-to-market support to enable agility and scale

Cloud Accelerate Factory: A new benefit in Azure Accelerate

Jumpstart Azure projects with zero-cost deployment assistance from Microsoft experts.

Get zero-cost assistance from Microsoft

Get Microsoft assistance to deploy 30+ Azure services via joint delivery with an Azure partner no matter the project size.

Accelerate with industry best practices

Complete deployments in weeks leveraging proven strategies developed over thousands of customer engagements.

Maximize your investments

Prioritize funding and skilled resources for the more advanced components or projects to boost business impact.

Eligibility criteria

- **Azure specialization** or an **Azure solution partner designation** to nominate to Azure partner-nominated
- **Customer commitment** and readiness to deploy workload on Azure
- **Scope is tailored for delivery** not custom consulting scenarios
- **Alignment on joint delivery model** with the Factory team

Supported scenarios

Rehost and replatform scenarios without custom code changes

- Factory **Infrastructure Migration**
- Factory **App and Database Modernization**
- Factory **Secure Azure Cloud**
- Factory **AVS Migration**
- Factory **VDI Migration to Azure**
- Factory **Analytics (Fabric)**
- Factory **Gen-AI Assistant**

Engagement approach

Preparation

(1 to 3 weeks)

- Validate requirements, pre-requisites
- Discovery
- Finalize deployment paths and project plan

Deployment

(4 to 6 weeks)

- Execution
- Conduct basic testing
- Handover to customer

Learn more: aka.ms/PartnerFactoryCollection

Cloud Accelerate Factory for Fabric

Improve capacity and accelerate time to value

Get the first workloads running in Azure in 3 weeks with the white level migration service executed by Microsoft. The end-to-end lift and shift migration service offer is available to you at NO COST and executed by dedicated Microsoft resources.

- No partner specialization required
- No minimum requirement or maximum thresholds
- No contract required

Learn more: aka.ms/PartnerFactoryCollection

Nominate your customer

Nominate your customer for one of the three engagements:

- **Pre-sales alignment for RFP response:** Validate assumptions, scope & RACI
- **Engagements requests for current projects:** Request assistance on an existing opportunity
- **Repetition for large scale:** Offer a repetitive migration for the long tail of the large customer base, referred to as “Factory SMB Scale offer”

Factory SMB Scale offer: Learn to complete a Factory SMB Scale offer in 3 weeks or less.

Factory SMB Scale offer service coverage: Learn about Factory Service Coverage for Azure.

- **Azure Power BI offerings**
 - Migration from SSRS to Power BI
 - Migration from SSAS/AAS to Power BI
 - Migrating from Power BI Premium (P SKU) to Fabric (F SKU)
- **Analytics - Lakehouse + DW Migration**
 - Lakehouse – Databricks
 - Lakehouse – Fabric
 - Datawarehouse – Fabric (Synapse to Fabric)
- **Real-time intelligence**

Cloud Accelerate Factory: Fabric offerings

In scope*

Analytics Technical Patterns:

Fabric Lakehouse Migration: Migrate data and code from source systems to Fabric Lakehouse/Warehouse

- Data Ingestion Only
- Data Ingestion + Transformation
- Transformation Only
- Data Ingestion + Transformation + Power BI Report

Fabric Warehouse Migration: One time data and code migration from source systems (SQL Server family) to Fabric Warehouse

- One Time Data Migration
- Code Migration (SP/Functions/DDLS)

Azure Databricks Migration: Migrate data and code from source systems to Azure Databricks

- Data Ingestion Only
- Data Ingestion + Transformation
- Transformation Only

Power BI Migration: Migrate SSRS/SSAS/AAS reports to Power BI

P To F SKU Migration: Migrating from Power BI Premium (P SKU) to Fabric (F SKU)

- Workplaces having only Power BI items
 - Within same Region
 - Cross Region
- Workplaces having only Fabric items
 - Within same Region

RTI Migration: Migrate Real Time data sources to Fabric RTI and ADX solutions

- CDC Sources : Azure SQL Database, Azure PostgreSQL, Cosmos DB, Azure MySQL
- Interface Patterns: Event Hub to Event House
- Azure Time Series Insights (TSI)

Prerequisites

- An established data source connection for each data source
- A detailed list of objects to be moved to Fabric/Databricks
- Contributor access to Fabric Workspaces
- Admin access to SSRS packages (all folders and subfolders)
- For P to F SKU, Fabric capacity should be provisioned by customer
- For PBI migrations, customer must assign a Power BI Pro License to the Cloud Factory team

Data sources supported

For Fabric Lakehouse/Databricks Migration

Azure SQL DB / SQL MI / PostgreSQL / MySQL / Oracle / SQL Server (on-premises) / Flat Files / Hadoop / AWS Redshift / Google Big Query / Synapse Dedicated Pool

For Fabric Warehouse Migration (One-time)

Azure SQL DB / SQL MI / SQL Server (on-premises) / Synapse Dedicated Pool

Out of scope

- Testing and configuring upstream/downstream processes
- Governance and security such as PBI capacity governance, workspace config and role membership
- Set up and training on optimization methodology, tenant management, release management, monitoring, alerting, post deployment oversight

Delivery Team: Factory PM, Solution Architect, Technical Architect, Data Engineers

**Note: In scope list is not an exhaustive list, please check with Factory team and Intake team for more information.*

DO NOT SHARE WITH CUSTOMERS

Resources

Unify Your Data Platform | SMB Customer Engagement Journey

Unify Your Data Platform Customer Engagement Journey and MCEM

The Unify Your Data Platform Customer Engagement Journey helps partners engage customers from demand generation through deployment, with a list of resources aligned to each stage of the **Microsoft Customer Engagement Methodology (MCEM)**.

MCEM is a framework that takes a consultative and relationship-based approach to selling, putting customer outcomes at the center of the sales process. This journey provides the outcomes aligned to each stage of MCEM for both Microsoft and your customer.

Why is it important?

Every Microsoft partner has an opportunity and obligation to build long-term customer relationships built on trust, our promise to deliver on commitments, and the increased value our solutions bring to our customers.

Utilizing the MCEM framework enables partners to improve all aspects of customer experience and understand how to expand relevance in each room of our customer's house.
[Learn more about how MCEM can help you sell Microsoft solutions.](#)

Listen & Consult	Inspire & Design	Empower & Achieve	Realize Value	Manage & Optimize
Partner Outcome: Partner targets high propensity customers and confirms Solution Play opportunity	Partner delivers Solution Play value prop, technical design, and financial value proposition	Partner builds business case including programs/offers and gains customer commitment for project	Partner deploys solution	Partner optimizes customer deployment & determines next workload
Customer Outcome: Qualified Opportunity	Customer aligned to solution's capabilities and financial value proposition	Customer agreement in place based on technical and business case	Outcomes met and baseline metrics in place	Completed and next steps identified

Unify Your Data Platform | SMB Customer Engagement Journey

Listen & Consult	Inspire & Design	Empower & Achieve	Realize Value	Manage & Optimize
Fabric Skilling and Certification: - Register for upcoming training on Microsoft Partner Skilling Microsoft Level Up for self-serve partner skilling - Prepare for DP-600 with Certification Weeks for MAICPP - Browse Certifications, Applied Skills, and Learning Paths for Microsoft Certifications End-To-End Tutorials Customer Outreach: - Utilize Cloud Ascent Cohort Lists via Partner Center to select top customer targets - Drive customer demand with SMB Campaign in a Box Automated marketing campaign (DMC) Engage customers: - Utilize the FY26 Cloud and AI Platform Partner Playbook for solution play win formula, investments, and programs - Utilize the Cohort Sales Guide for execution guidance and customer conversation guide - Leverage the Solution Play L100 Deck (coming soon) - Deliver an in a Day workshop with target customers to experience Fabric capabilities - Fabric Analyst in a Day (FAIAD) - Real-Time Intelligence in a Day (RTIAD) - Dashboard in a Day (DIAD) Workshops request tool	Solution Value Proposition: - Confirm Solution Play: SMB Solution Play L200 with Use Cases & Patterns (coming soon) - Showcase the vision by leveraging SMB Fabric DREAM end-to-end click through Demo - Utilize Virtual Multi-Customer Briefings to strengthen customer executive commitment Technical Design: - Capture customer current environment, needs and prioritized use cases with a Fabric Discovery Workshop (coming soon) - Have your customer sign up for a free 60-day Fabric Trial to get hands-on experience Financial Value Proposition: - Present Business Case/TCO: Leverage Azure Pricing Tool and Fabric SKU Calculator for consumption sizing - Select pre-sales programs/investment offers via Azure Accelerate (specialization required)	Win Technical Decisions: - Analyze assessment/workshop outputs and final solution architecture with customer utilizing L300 product (coming soon) content - Deploy PoC and MVP within customer environment utilizing Gold Standard Accelerators - DPF30 Repeatable IP (<i>coming soon</i>) - Based on customer needs and current capabilities, leverage Cloud Accelerate Factory (directly through the MCI portal for partner-led offers) to deliver POV based on typical SMB use cases Winning the Business Decision: - Select deployment offers via Azure Accelerate (specialization or SMB path solution designation partners)	Customer Success Plan Execution: - Based on customer requirements and current capabilities, utilize Cloud Accelerate Factory (directly through the MCI portal for partner-led offers) for deployment needs based on typical SMB use cases Perform Technical Validation: - Utilize DPF30 Repeatable IP (<i>coming soon</i>) to accelerate and de-risk deployment - Utilize Azure Landing Zone accelerators via Well Architected Framework leveraging Azure Essentials - Review operational and adoption practices for solution deployment Earn Partner incentives: - Earn Azure CSP incentives—see Microsoft Commercial Partner Incentives Guide for details.	Customer Success and Optimization Plan: - Evaluate and optimize the solution based on Well Architected Framework and customer feedback Explore Solution Expansion: - Identify next Azure workload using Cloud Ascent Next Logical Workload in Partner Center

Unify Your Data Platform | Partner Win Formula

Customer Outcome

Evolve to a data-driven business by connecting your siloed data estate and accelerate your AI transformation through a unified data platform.

Partner Outcome

Unify customer data estate and deliver differentiated data solutions to customers, helping them realize greater business value with proven end-to-end engagement model with Microsoft.

Differentiated Partner Capabilities

Lead with Unify Data to help customers accelerate AI transformation

Align customer goals to Data and Analytics use cases and deploy repeatable Data Platform solutions to realize business value

Drive solution adoption across business units and organizations

Win Formula aligning to MCEM

