

Work through four phases that mirror the AMP UP! MSP Readiness Assessment. Each action has a suggested owner and the playbook template that helps you complete it. Download templates at playbook.partnerbusinessaccelerator.com.

PHASE 1 · 12 ACTIONS

1

Plan

Commit, choose your model, and plan the business. Aligned to [MSP Organization Readiness](#).

AMP UP! support: AMP UP! Business Discovery Workshop · AMP UP! Business Planning Workshop

QUALIFICATION AND READINESS

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| P1 | Understand the managed services market opportunity and how it applies to your business.
Owner: Executive Sponsor Qualification and Readiness Assessment | ☐ |
| P2 | Given your existing capabilities, evaluate and determine the managed service business model you will pursue.
Owner: Executive Sponsor Qualification and Readiness Assessment · Managed Services Business Model Selector | ☐ |
| P3 | Using the Qualification and Readiness Assessment and other available information, determine your business readiness and the priority of this initiative.
Owner: Executive Sponsor and Extreme PAM Qualification and Readiness Assessment | ☐ |

EXECUTIVE COMMITMENT

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| P4 | Affirm your executive commitment and assign an executive sponsor with full authority to develop Extreme managed service capabilities and offers.
Owner: Executive Team Executive Commitment and Team Roster | ☐ |
| P5 | Secure your extended leadership team's support and commitment.
Owner: Executive Sponsor Executive Commitment and Team Roster | ☐ |
| P6 | Establish the working team that will develop and execute the practice development action plan.
Owner: Leadership Team Executive Commitment and Team Roster | ☐ |

BUSINESS AND FINANCIAL PLANNING

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| P7 | Formulate your managed services vision and mission statements.
Owner: Executive Team Vision, Mission, and Business Priority | ☐ |
| P8 | Use the Business Model Selector to choose the Extreme managed services business model best suited to your business.
Owner: Managed Services Leader Managed Services Business Model Selector | ☐ |
| P9 | Perform a SWOT analysis to identify opportunities to establish competitive differentiation.
Owner: Marketing Leader or Managed Services Leader SWOT and Competitive Differentiation | ☐ |
| P10 | Model your anticipated financial performance and define your managed services financial objectives.
Owner: Executive Team Financial Objectives and Investment Model | ☐ |
| P11 | Develop your managed services business plan, outlining financial and development objectives, tasks, activities, and timelines.
Owner: Managed Services Leader Managed Services Business Plan Outline | ☐ |
| P12 | Establish practice, leadership, and individual MBOs / OKRs to drive performance and accountability for execution.
Owner: Leadership Team MBO / OKR Scorecard · KPI Scorecard: Customer Outcomes and Business Performance | ☐ |

2

Create

Find, define, package, and price your services. Aligned to [MSP Offer Readiness](#).

AMP UP! support: AMP UP! Service Concept Ideation Workshop · AMP UP! Managed Services Definition Workshop

OPPORTUNITY AND SEGMENTATION

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| C1 | Analyze your installed base to understand your managed services opportunity and your customers' likely service requirements.
Owner: Marketing Leader Installed Base and Service Evaluation Matrix | ☐ |
| C2 | Drawing on your market and installed base research, segment customers to identify differentiated managed service requirements.
Owner: Managed Services Leader or Product Manager
Installed Base and Service Evaluation Matrix · Market Segmentation and New Service Idea · Target Segments and Accounts | ☐ |
| C3 | Use the Service Evaluation Matrix to identify three candidate managed services, outline segment requirements, and quantify strategic value and priority.
Owner: Managed Services Leader or Product Manager Installed Base and Service Evaluation Matrix · Managed Service Roadmap | ☐ |

SERVICE CONCEPT AND VALIDATION

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| C4 | Facilitate a Managed Service Discovery Workshop to vet the candidate services, decide which to advance, and begin to frame the service.
Owner: Managed Services Leader or Product Manager
Market Segmentation and New Service Idea · Managed Service Definition (MSD) and Creation Workshop | ☐ |
| C5 | Develop a New Managed Service Idea brief to capture high-level service details to vet with prospective buyers and take forward for concept commit.
Owner: Managed Services Leader or Product Manager Market Segmentation and New Service Idea | ☐ |
| C6 | Engage target buyers through digital marketing, surveys, or focus groups to validate the high-level service concept.
Owner: Managed Services Leader or Product Manager Market Segmentation and New Service Idea | ☐ |
| C7 | Establish unique value propositions for target customers, Extreme as your business partner, and internal stakeholders.
Owner: Marketing Leader Unique Value Proposition | ☐ |
| C8 | Confirm internal concept commit to secure the resources and investment required to develop the new managed service.
Owner: Managed Services Leader or Product Manager Managed Service Definition (MSD) and Creation Workshop | ☐ |

SERVICE DEFINITION, PACKAGING, AND PRICING

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| C9 | Facilitate a Managed Service Creation Workshop, using the workshop agenda and development template, to define the new service in detail.
Owner: Managed Services Leader or Product Manager
Managed Service Definition (MSD) and Creation Workshop · Service Level Agreement and Security Builder · Service Management Process Catalog | ☐ |
| C10 | Evaluate opportunities to package or bundle the new service with other offers, and define the requirements of doing so.
Owner: Managed Services Leader or Product Manager Packaging, Bundling, and Pricing | ☐ |
| C11 | Based on the service requirements and the unique value offered, determine pricing for the new managed service.
Owner: Managed Services Leader or Product Manager Packaging, Bundling, and Pricing | ☐ |
| C12 | Based on updated service constructs, investment requirements, and pricing, finalize the business case and obtain agreement.
Owner: Managed Services Leader or Product Manager Packaging, Bundling, and Pricing | ☐ |
| C13 | Where possible, validate the offer one final time with prospective buyers.
Owner: Managed Services Leader or Product Manager Market Segmentation and New Service Idea | ☐ |
| C14 | Develop a managed service description (MSD) outlining the features of the new service.
Owner: Managed Services Leader or Product Manager
Managed Service Definition (MSD) and Creation Workshop · Service Level Agreement and Security Builder | ☐ |
| C15 | Define your customer onboarding process and methodologies.
Owner: Delivery Leader Customer Onboarding Plan | ☐ |

3

Build

Stand up delivery and prove it in a pilot. Aligned to [MSP Operational Readiness](#).

AMP UP! support: Operational readiness planning and technical certifications · AMP UP! Managed Services Optimization Workshop

NOC AND SERVICE DESK

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| B1 | Define your requirements for both the NOC and the service desk.
Owner: Managed Services Leader or Product Manager NOC and Service Desk Strategy · Service Management Process Catalog | ☐ |
| B2 | Evaluate your NOC and service desk requirements and decide whether to build, buy, or partner to deliver them.
Owner: Delivery Leader or Business Operations Leader NOC and Service Desk Strategy · Ecosystem Partner Plan | ☐ |

PLATFORMS AND INTEGRATION

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| B3 | Define the platform requirements for provisioning, managing, maintaining, and billing the new services.
Owner: Managed Services Leader or Product Manager Platform and Tools Requirements | ☐ |
| B4 | Identify, procure, and configure the platforms required to provision, manage, maintain, and bill for the new services.
Owner: Delivery Leader or Business Operations Leader Platform and Tools Requirements · Ecosystem Partner Plan | ☐ |
| B5 | Create and configure your Extreme Platform ONE dashboard.
Owner: Delivery Leader Platform and Tools Requirements | ☐ |
| B6 | Integrate your new platforms with your existing OSS/BSS/PSA platforms for seamless handoffs, delivery, and visibility.
Owner: Delivery Leader Platform and Tools Requirements | ☐ |
| B7 | Establish a lab environment to validate services before launch and to replicate and troubleshoot customer issues.
Owner: Delivery Leader Platform and Tools Requirements | ☐ |

OPERATING PROCESSES

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| B8 | Define your ordering processes and establish the business rules in your OSS/BSS/PSA platforms, including recurring billing.
Owner: Business Operations Leader Rules of Engagement and Handoffs (RACI) · Recurring Billing Readiness | ☐ |
| B9 | Define your rules of engagement for the transition from onboarding to live service.
Owner: Delivery Leader Customer Onboarding Plan · Rules of Engagement and Handoffs (RACI) | ☐ |

STRUCTURED PILOT

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| B10 | Establish a structured pilot that will validate your new managed service capabilities.
Owner: Managed Services Leader Managed Service Piloting Checklist | ☐ |
| B11 | Execute the structured pilot and address the gaps identified.
Owner: Managed Services Leader Managed Service Piloting Checklist | ☐ |

4

Launch

Take your services to market and grow. Aligned to [GTM and Sales Acceleration Readiness](#).

AMP UP! support: AMP UP! GTM Plan Workshop · AMP UP! Sales Acceleration Workshop

MARKETING AND ROUTES TO MARKET

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| L1 | Develop your go-to-market plan to take your new managed services to market.
Owner: Managed Services Leader Go-to-Market Plan and Routes to Market | ☐ |
| L2 | Define and execute your managed service marketing plan, including required collateral.
Owner: Marketing Leader Marketing Assets and Demand Generation Plan | ☐ |
| L3 | Determine your sales routes to market for each target customer segment and buyer persona.
Owner: Sales Leader Go-to-Market Plan and Routes to Market | ☐ |

SALES READINESS AND INCENTIVES

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| L4 | Develop and execute a sales readiness plan for each route to market.
Owner: Sales Leader Sales Readiness and Enablement Plan | ☐ |
| L5 | Assess sales readiness against the skills and capacity required to take your new services to market.
Owner: Sales Leader Sales Readiness and Enablement Plan | ☐ |
| L6 | Develop and execute a sales enablement plan so sellers can position the value, capabilities, and features of the service, the sales motions, onboarding, and delivery.
Owner: Sales Leader Sales Readiness and Enablement Plan | ☐ |
| L7 | Establish sales KPIs / OKRs aligned to your GTM plan and your managed services business plan.
Owner: Sales Leader KPI Scorecard: Customer Outcomes and Business Performance · Sales Compensation and Incentive Planner | ☐ |
| L8 | Align sales compensation to your business plan so it drives accountability and rewards superior performance.
Owner: Sales Leader Sales Compensation and Incentive Planner | ☐ |

LAUNCH

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| L9 | Based on the success of the pilot, develop customer use cases and testimonials to use in your launch.
Owner: Managed Services Leader Customer Success Plan and QBR · Customer Success Story | ☐ |
| L10 | Identify your initial target customers in preparation for launch, and plan key accounts with your Extreme account team.
Owner: Sales Leader Target Segments and Accounts · Joint Account Plan with Extreme | ☐ |
| L11 | Launch your new Extreme-powered managed services offer(s).
Owner: Managed Services Leader Go-to-Market Plan and Routes to Market | ☐ |