



## Voleer Assessment Planner

### The MSP guide to customer retention and business growth for Microsoft 365 environments

Long-term customer relationships are built with honest, consultative feedback and proactive, customized recommendations. Voleer makes it easy to stay in front of customer needs with automated assessments that monitor their IT environment. Insights from regularly scheduled assessments help you engage with customers and win new opportunities by recommending ways to increase their security, productivity, and efficiency.

#### How to use this guide.

Use the chart on the next page as a guide for scheduling assessments and engaging with your customers.



**Educate:** Explain to your customer how you can help them increase ROI and bring insights into the health of their Microsoft 365 environment with Voleer assessments. We recommend starting with the top 4 assessments shown on the chart. The insights in the middle column give a glimpse into the value of each assessment.



**Schedule:** We've included recommended timing with each assessment. Assessments can be set to run automatically, and reports can be white labeled and delivered directly to your customers' inbox at the same time you receive them.



**Engage:** Using assessments during pre-sales engagements or when discussing ways to improve customers' IT environments. Each assessment provides an opportunity to extend value and reinforce why they choose you as their trusted IT partner. Review the third column for ideas that will lead to additional service opportunities.



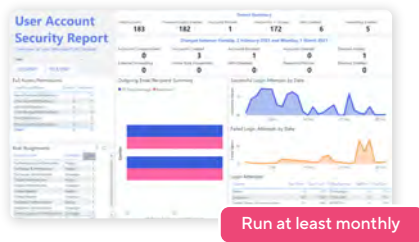
**Grow:** This plan gives you several ways to expand your business by serving the customers you already have. You'll gain insights to recommend more services. You can also include assessments as a line item or part of a service contract. Satisfied customers are more likely to stay loyal and be a source of referrals.

## Analytics & Suggested Schedule

## Top Insights




## Engagement Opportunities

### Security Analytics



- Monitor user compliance with security protocols
- Identify accounts not using MFA
- Report successful and unsuccessful logins by region

Use this report to:



-  Embed the PowerBI report so your customers can easily access their daily report
-  Recommend targeted security measures
-  Schedule quarterly security business reviews

### Microsoft 365 Insights



- Track use of Microsoft 365 licenses
- Check for unusual or out-of-scope activity
- Identify potential security vulnerabilities

Use this report to:




-  Impress prospects at pitch meetings by showing insight into their environment
-  Discover up-sell opportunities and strengthen client relationships

### Teams Analysis and Adoption

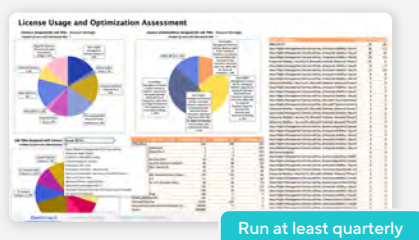


- Track Teams adoption by user, group, and even job title
- Monitor external guest access to limit exposure
- Track policy settings and changes to help establish Teams governance

Use this report to:



-  Recommend programs to drive more user adoption
-  Offer valuable Teams collaboration training
-  Provide a proposal to clean up Teams Sprawl

### Microsoft 365 License Optimization



- Determine license availability, allocation, and utilization
- Target insights by department, individual, or role

Use this report to:

-  Schedule regular business reviews on license utilization
-  Recommend training to ensure they are getting the most out of Microsoft 365 tools they consume

## Pricing tips

How you add Voleer to your business model is up to you. Here are some ways MSPs structure assessments into their pricing:



### All-in-one:

Include a set of standard assessments in your service package.



### Choose your favorites:

Add your customer's choice of assessments as line-item extras.



### Limited time offer:

Include a year's worth of assessments for a special low price.

Regardless of how you price them, be sure to remind your customers of the value of the assessments they're receiving and use them to stimulate conversations that will help retain and build the relationship.

[Contact us](#)

for more business building ideas!