



# NerdioCon

2025  
— PALM SPRINGS





# Building Strong Foundations: Your Blueprint for a Flawless Cloud Migration





# Agenda



Importance of Discovery

Nerdio MSP Partner Journey

Partner Success Manager

Sales Engineer

Go Live Engineer

Support



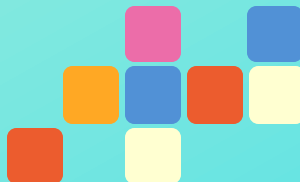


# Alex Guzzardo

- Solutions Engineering Manager

Nerdio OG

Onboarding Engineer from the previous MSP  
that Nerdio came from



# Chris Plouffe

## - Senior Technical Trainer

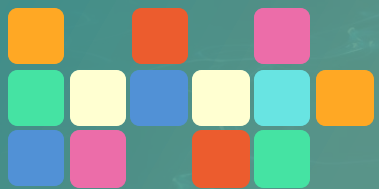
Nerdio employee for over a year now

Owned my own MSP for 17 years

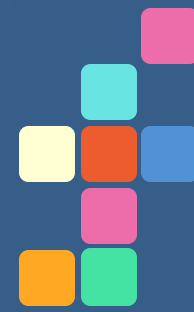
Successfully exited and sold MSP in 2022 to The20

Nerdio partner since 2018

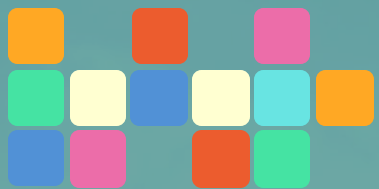




**Nerdio's Mission is to empower  
MSPs to build successful cloud  
practices with Microsoft Cloud**

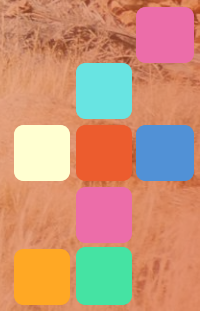






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# Discovery process





# Importance of discovery

Discovery is where great deals (MRR) are forged

Asking the right question can make the difference between winning or losing

A great discovery call has these 4 main phases



1. **PLANNING** – Don't just expect to run a great discovery call, you need to PLAN!
2. **EXPECTATION SETTING** – not only do we need to set the proper expectations for the discovery meeting, but for the rest of the relationship.
3. **DISCOVERY** – this is the meat where you get your questions answered, uncover their buying criteria and needs.
4. **MUTUAL AGREEMENT & NEXT STEPS** – Agree you are still on the right path together and what the next steps in the process will look like.



# PHASE 1

**Have a meeting template and sales process** – Build a template to ensure you follow the same format and get what you need answered

**Research the company** – Your CRM, their Website, Social, haveibeenpwned.com, etc.

**Send the questions over to them ahead of time** – That way they can ask internally

**Prewrite a thank you card** – Drop in the mail on your way to the meeting





# PHASE 2

## PROTIP:

Think about the stakeholders and their personas. CEO vs IT Director vs Cloud Tech

An **Owner** may be concerned about cost and business impact

An **IT Director** may be more concerned with productivity and security

A **Cloud Technician** may be more concerned with how your cloud solutions make things easier





# Common personas

**Financial Buyer**

**Technical Buyer**

**Operational Buyer**

***May be more concerned about cost & business impact***

- *Can reduce or make costs more predictable*
- *CAPEX vs OPEX*
- *No more hardware costs / extend upgrade cycles*
- *Built-in DR / BC*
- *Scalability – grow and shrink on the fly*

**Business Owner, Controller, CFO, CEO**



# Common personas

Financial Buyer

Technical Buyer

Operational Buyer

***May be concerned with productivity and security***

- Built-in security with 2FA and conditional access
- Microsoft employs 8,500+ security experts - 24 / 7
- Modern work products keep data secure from threats
- Access from any device, anywhere at any time
- Choose your resources as needed (CPU, RAM & Disk)
- Less 3rd party agents on devices

IT Director, CIO, CTO



# Common Personas

**Financial Buyer**

**Technical Buyer**

**Operational Buyer**

***May be more concerned with how your cloud solutions make the business run smooth***

- Automation & orchestration for frequent tasks
- Application management (updates & installation)
- Securing your data (policies & compliance)
- Endpoint management & protection (Defender #1)
- Cloud redundancies (managed DR & BC)

Office Manager, Onsite IT, Operations, COO

# PHASE 2

Understand they are meeting with you because they want something, and you haven't provided much value to them yet. **The goal here is to balance your needs with their priorities.**

## Confirm the intent of the meeting

*"If you could rate your current IT experience from 1 - 10 what would it be?"*

*"What would MyMSP need to do to make it a 10?"*

## Set the stage for cloud

*"We typically focus on cloud-based solutions because they are the most flexible, but my goal is to understand your needs and help you determine what the best solution is."*





# PHASE 2

## **PROTIP:**

Don't be afraid to state your desired outcome clearly early in the discovery phase

*"If we can deliver a solution that meets ALL of your needs (business, technical and financial) I am going to ask you for your business, is that fair?"*



# PHASE 3

**Discovery should take up most of your meeting time** and for good reason because solid discovery leads to a solid proposal with a high likelihood for signature. *Start with current infrastructure > Move to goals for the new solution.*

## **PRO TIP:**

Do NOT start telling them about how you can solve their issues, this comes later in the process



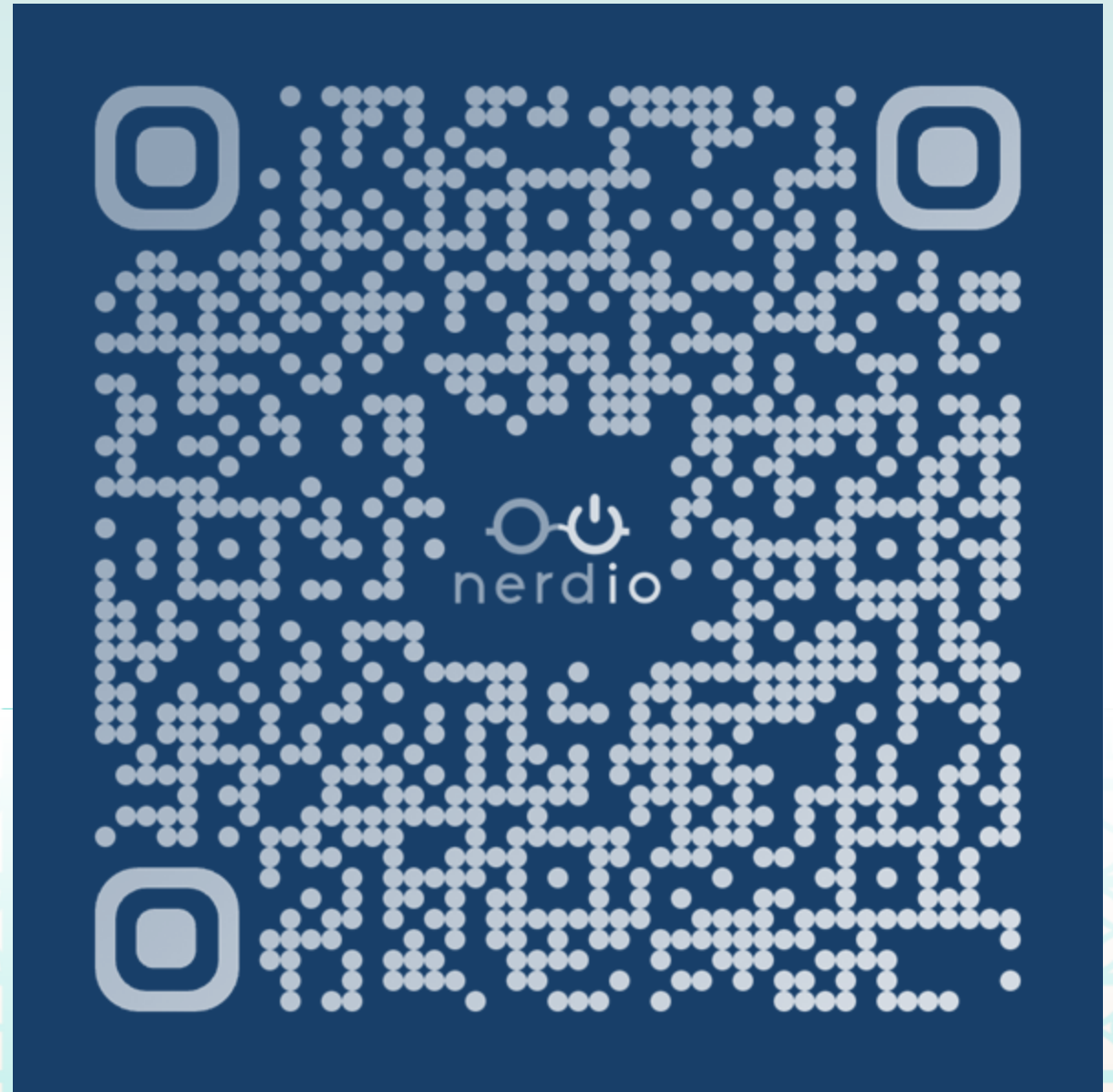


# Qualifying Questions

Cost Estimator



*Try these questions  
during sales discovery!*



[https://nerdio.co/Nerdio\\_for\\_MSP\\_Cost\\_Estimator\\_Questions](https://nerdio.co/Nerdio_for_MSP_Cost_Estimator_Questions)

# PHASE 3

Let's focus on the most important questions we need answered and WHY

## GENERAL:

- Number of named users who need computers
- Average number of concurrent users
- Typical hours in a work week

## INFRASTRUCTURE:

- Current edition of O/M 365
- Existing server list with included Role, CPU, RAM & Storage in use
- Main applications used or desired



# PHASE 3

Let's focus on the most important questions we need answered and WHY

## USAGE:

- Any high-end graphics or Audio/Video needed?
  - How many users?
- Peripherals?
- Browsing habits?

## SALES:

- Biggest challenges in IT today?
- If I can solve these challenges, will you move forward with my agreement?
- If not, why?

# PHASE 4

## Mutual agreement

Here you can start to confirm you can address their challenges, but don't overdo it.

*"Based on what we've discussed I am confident we can address your needs and have done so before".*

### **PRO TIP:**

Tell a story of how you helped someone in a similar situation, this proves you have experience, and they can trust you. Make sure they can call this as a reference.





# PHASE 4

## Confirm a next meeting to present your solution

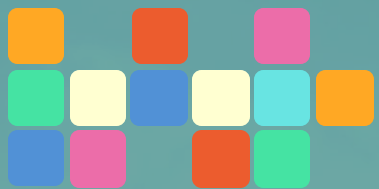
*"We do not email proposals because they are always comprehensive. I will include a timeline, how we can address each of your needs and costs both one time and recurring. When can we meet next to review our plan in detail?"*

### **PRO TIP:**

Ask who else would be involved in their decision and try to get them to join the proposal meeting.

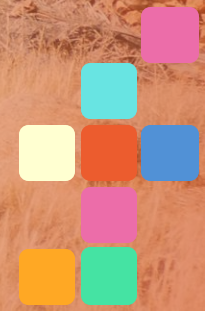






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# Starting your journey with Nerdio





# Start your journey with your Partner Success Manager

Help quote the deal and create your cost estimate sheet

Start the process if you need additional resources

Bring in a Sales Engineer if you need help architecting the project



# Sales Engineer

Help architect your environment





# What is MSFT identity

*Identity for MSFT is their Zero Trust model allowing and/or denying users access to resources based on who they are*

The 3 main “flavors” of MSFT identity are:

1. **Entra ID (AAD)** – This is the free service that is included with 365 and required for all Azure deployments.
2. **Active Directory Domain Services (AD DS)** – This is a server (physical or virtual) running the Active Directory role. The role is free but an MSP must pay for the server components (RAM, CPU, Storage, OS License) and is responsible for backup & support (security, updates, troubleshooting, etc.)
3. **Entra ID Directory Domain Services (AADDs)** – This is a serverless version (PaaS) of AD DS, delivered to the MSP as a service from MSFT. MSPs get more granular access control than AAD but do not have to manage a server or AD Connect. This service is only used for servers, and if used, desktop policies are managed with AAD with this method of identity.





**Microsoft Entra Connect**



**One-Way Sync**



## Active Directory Domain Services (VM Domain Controller)

### BENEFITS

1. Full Featured Domain Controller
2. Maximum Flexibility, Lowest Cost
3. Multi Premise & Multi Cloud
4. No Migration or New Install of LOB Apps

### CONS

1. Need to Patch/Backup/Maintain
2. Still need to deal with AD Connect

## Entra ID (Azure AD)

### BENEFITS

1. Free to Use
2. Intune Management
3. Modern Cloud Auth

### CONS

1. No Group Policy
2. No Kerberos
3. No Legacy Auth Support

## Microsoft Entra Domain Services aka Azure Active Directory Domain Services (AADDs)

### BENEFITS

1. Almost Full Featured Controller
2. Managed GPO/Active Directory/DNS
3. MS Managed Replica Sets
4. MS Managed Patching/Backup

### CONS

1. Multi-Region can be expensive for SMB
2. Domain Rebuild Required for LOB Apps



# VM – Families

A-Series, Bs-Series, D-Series, Dp-Series, E-Series, Ep\_Series, F-Series, G-Series,  
H-Series, Ls-Series, M Series, Mv2-Series, NC-Series, ND-Series

## **Bs – Burstable –**

2C|4GB, 2C|8GB, 4C|16GB, 8C|32GB

About 56% Cheaper than D-Series, have threshold and builds credits

## **D – Standard –**

2C|8GB, 4C|16GB, 8C|32GB, 16C|64GB ...

Balanced CPU and RAM

## **E – Memory –**

2C|16GB, 4C|32GB, 8C|64GB, 16C|128GB ...

2x More RAM than CPU. About 15% More Expensive than D

## **DI/F – CPU –**

4C|8GB, 8C|16GB, 16C|32GB, 32C|64GB ...

2x More CPU ratio than RAM. F series machines have non virtual cores

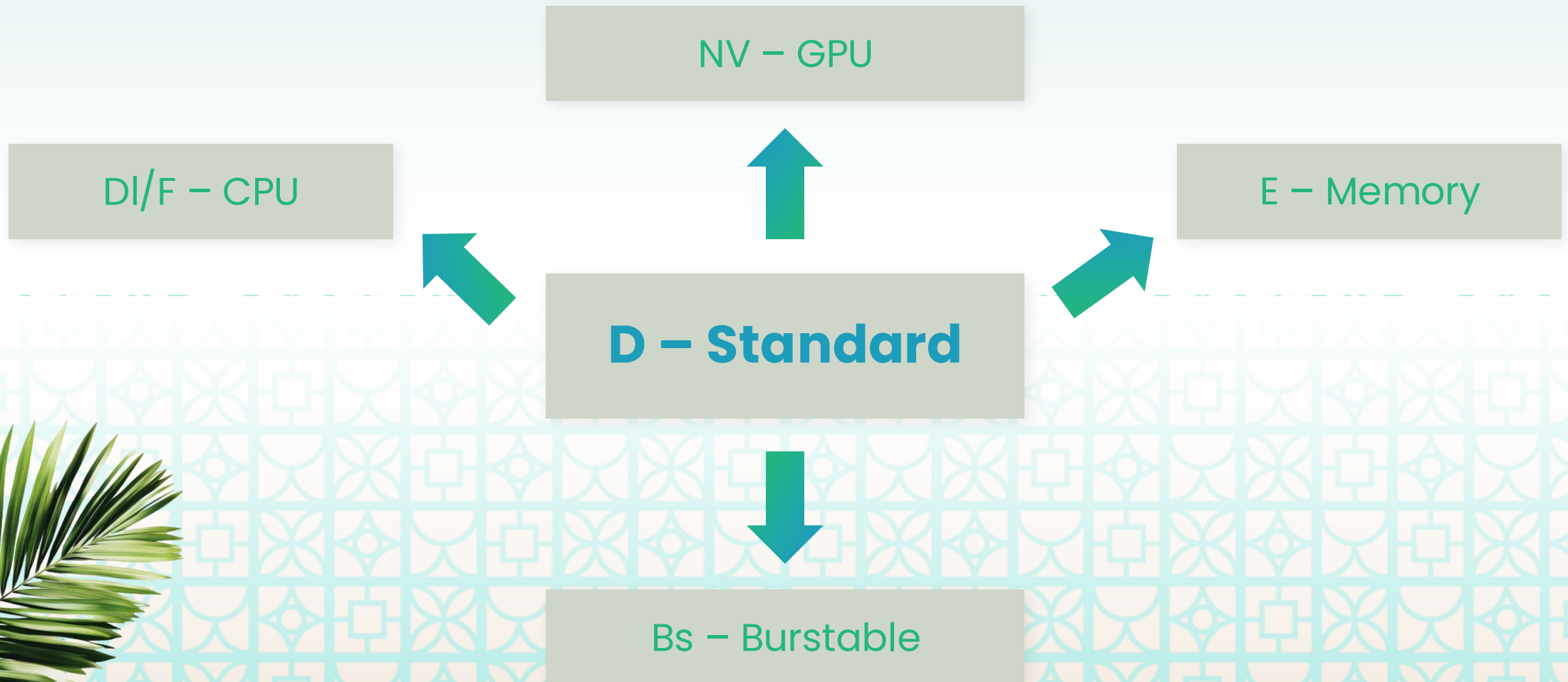
## **NV – GPU –**

6C|55GB|4GB GPU, 12C|110GB|8GB GPU, 18C|220GB|16GB GPU, 36C|440GB|24GB  
GPU ... AMD CPU, nVidia RTX GPU



# VM – how to pick?

A-Series, Bs-Series, D-Series, Dp-Series, E-Series, Ep\_Series, F-Series, G-Series,  
H-Series, Ls-Series, M Series, Mv2-Series, NC-Series, ND-Series



# VM – how to read a VM SKU

D16ads\_v6

D16as\_v4

E8-4ads\_v5

[VM Family] + [# of Cores] + [Attributes] + [Gen Version]

B D E DI/F Nv

2 8 32

a d s -#

v3 v4 v5 v6

4 16 64

## VM Family Legend

B – Burstable

D – Standard

E – Memory

DI/F – CPU

Nv – GPU

## Attributes Legend

d – Has a local temp disk, used for EOSD, Page File, SQL Logs, etc

a – AMD CPU; AMD's have higher ACU than Intel

s – Compatible with Premium SSDs

-# – CPU constraint VM; ideal for SQL workloads where CPU is not needed but high memory is required. Avoid paying high SQL licensing cost based on lower number of vCPUs

## Gen Version

v3 – Haswell Q3'15, Broadwell Q4'16  
Skylake Q1'18, Cascade Q2'19, Icelake Q2'21

v4 – Cascade Q2'19, Icelake Q2'21,  
EPYC 2 Q3'19 EPYC3 Q1'21

v5 – Icelake Q2'22, Q1'21

v6 – EPYC 4 Genoa Q4'23



# Pay attention to IOPS!

B2ms | 2vCPU | 8GB RAM | 1920IOPS/22.5MB/s | 4000IOPS/100MB/s max burst

D2s\_v3 | 2vCPU | 8GB RAM | 3200IOPS/48MB/s | 4000IOPS/200MB/s max burst

D2s\_v5 | 2vCPU | 8GB RAM | 3750IOPS/85MB/s | 10000IOPS/1200MB/s max burst

D4s\_v5 | 4vCPU | 16GB RAM | 6400IOPS/145MB/s | 20000IOPS/1200MB/s max burst

D8s\_v5 | 8vCPU | 32GB RAM | 12800IOPS/290MB/s | 20000IOPS/1200MB/s max burst

Disk Size	IOPS (Burst)	Throughput (Burst)	Price
P10 128 GB	500 (3,500)	100 MBps (170 MBps)	\$19.71
P15 256 GB	1100 (3,500)	125 MBps (170 MBps)	\$38.02
P20 512 GB	2300 (3,500)	150 MBps (170 MBps)	\$73.22
P30 1 TB	5000 (30,000)	200 MBps (1000 MBps)	\$135.17
P40 2 TB	7500 (30,000)	250 MBps (1000 MBps)	\$259.05
P50 4 TB	7500 (30,000)	250 MBps (1000 MBps)	\$495.57
P60 8 TB	16000 (30,000)	500 MBps (1000 MBps)	\$946.08

**Your workload is only  
as fast as your lowest  
common  
denominator!**



# Go-Live Engineer

**Help build your environment**

Use cost estimate sheet as the blueprint for your project

Teach you how to use NMM. We won't do the work or push the buttons, but we teach you what the buttons do and when to push them

Teams channel for direct communication with your GLE

Create

Azure Files Share

Desktop Image VMs

AVD Host Pools

Auto-scale

Backups

Etc



# Azure Business Review

After you are live with your account, Sales Engineers will ensure that your environment is built properly compared to your cost estimate sheet

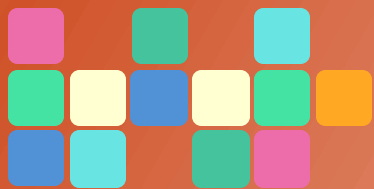
- Review
- ReservationsAzure Files Storage size
- Backups
- VM sizes compared to quote
- Auto-scale Settings





# Contacting Nerdio support

- When to contact Nerdio Support
  - If you see and cannot resolve an error in Nerdio, reach out!
- Contact Methods
  - [nmm.support@getnerdio.com](mailto:nmm.support@getnerdio.com)
- What to include
  - A full screenshot of any error messages
  - Steps to replicate the issue
  - Any steps you've taken so far
- Common items we cannot solve
  - FSLogix errors, Hosts showing "unavailable", host deployment failures\*
- *We have now launched our "Enhanced Support" -talk to your rep*



# ASK US ANYTHING!



**Chris Plouffe**  
Senior Technical Trainer



**Alex Guzzardo**  
Solutions Engineering  
Manager

