NERDIOCON'26

Mastering the optimization journey: Streamline, scale, and automate your MSP operations

Chris Plouffe/Rolando Jimenez

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Chris Plouffe

Senior Technical Trainer

- Owned my MSP for 17 years (CSP Technologies)
- Successfully exited and sold my MSP 2022
- Member of The20, then “rolled up”
- Heavily cloud focused
- With Nerdio 2+ years

Rolando Jimenez

Technical Trainer

- Started at Microsoft retail
- Helped support the IEC in Redmond
- Microsoft funded Intune and W365 workshops
- I am a huge gamer/Star Wars nerd

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Agenda

1. Environment types
2. The optimization journey steps
3. Unified Endpoint Management
4. Unified Application Management
5. Scope for DaaS
6. AVD
7. Frameworks
8. Q+A

Environment types

Where are you today?

What's working well?

What could be better?

Which type are you currently?

Chart a course forward

How can you be more efficient?

How can you scale?

What are next steps?

Start optimizing

What can you do today?

What can you do in the future?

How do you get there?

Environment types

Traditional environments

Header

(On-premises/legacy technology-dependent)

Subheader

Traditional

Are dependent on legacy technologies and the workflows that support them. Common legacy technologies include:

- Group Policy Objects (GPOs).
- Manual administration efforts.
- One-to-one workflows.
- Domain controllers.
- File servers.
- Exchange servers.
- VPNs.
- Fragmented endpoint management and endpoint security practices/tools.

Environment types

Hybrid environments

Header

(Deprecating legacy dependencies)

Subheader

Hybrid

Are actively evolving toward a cloud-native posture. Legacy technologies are being retired and replaced.

- GPO dependencies are transitioning to Microsoft Intune.
- Automations are being built to allow common tasks to scale.
- One-to-one workflows are evolving into one-to-many tools.
- Endpoint management and security tools and practices are being consolidated.
- Exchange and file servers are retired in favor of cloud-based solutions.
- VPN dependencies are being reduced.

Environment types

Cloud-native environments

Header

(Fully operationalized Microsoft stack)

Subheader

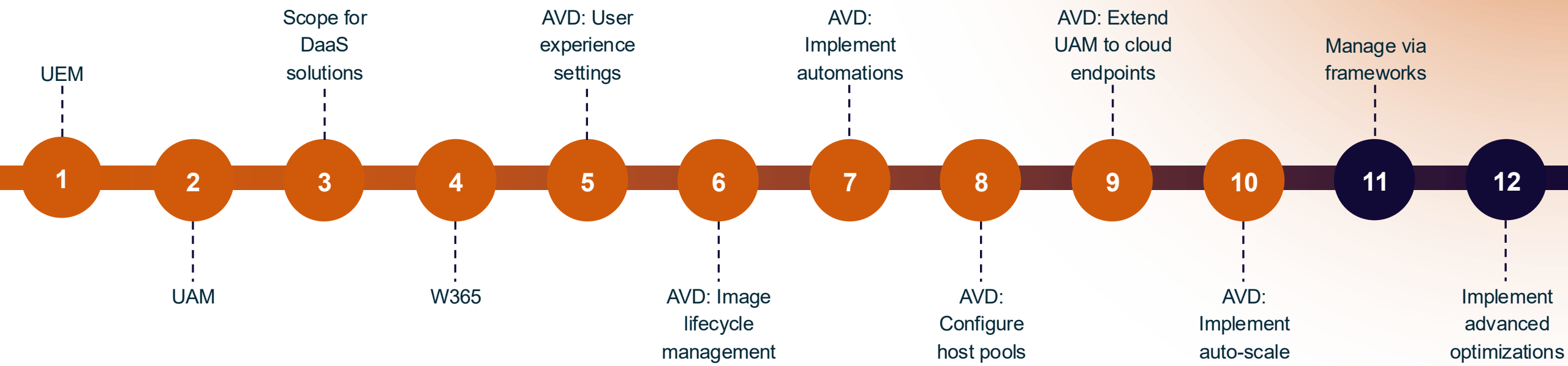
Cloud-native

Leverage the modernized Microsoft Cloud solution stack to meet the needs of the organization.

- Microsoft Intune and Microsoft Defender are fully operationalized for modern endpoint management.
- A fully realized and scalable suite of automations are implemented and evolve with business needs.
- Workflows are modernized by using Microsoft solutions as a central anchor.
- VPNs to access company resources are deprecated.
- The user experience is fully administered and served using cloud-based solutions.

The MSP optimization journey

The steps to a cloud-native posture.



Foundations

Optimizations

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Unified Endpoint Management

- Configure AD User Management in Nerdio Manager.
- Enable Exchange Online Management.
- Enable Intune in Nerdio Manager.
- Configure Microsoft Intune device policies.
- Implement Windows Update for Business.
- Implement policy backups.
- Group policies into Policy Baselines.
- Assign policies and Policy Baselines to groups.
- Enroll endpoints into management with Intune.
- Use Tenant Monitoring to assess current posture.
- Use Solution Baselines to adjust Microsoft 365 solutions.
- Use reporting to track and solve for drift.
- Implement Console Connect.

Unified Application Management

- Connect private application repositories to package and deploy your own unique applications or deploy applications from public repositories.
- Create Unified Application Management (UAM) policies in Nerdio Manager to centralize the deployment of your application portfolio.
- Implement maintenance windows to automate application updates.
- Solve for unique needs between customers by assigning applications only where they’re needed.

Scope for DaaS solutions

- Define a consistent discovery process for your sales team.
- Develop packages and plays built on your tech stack.
- For existing traditional environments, use user behavior details, logs, and reports to scope.
- For existing Azure environments, scope by combining user behavior details with data collected via Nerdio Tenant Monitoring.
- For new environments (greenfield), work with application developers to scope based on anticipated user and system needs.
- Decide on Windows 365 or Azure Virtual Desktop as the chosen DaaS solution.

Implement Windows 365

- Use the outcomes from your scoping exercise to make data-driven decisions on Cloud PC sizes.
- Enable Windows 365 Enterprise or Windows 365 Business inside Nerdio Manager.
- Create Windows 365 network connections.
- Create Windows 365 provisioning policies.
- Create Windows 365 user settings.
- Assign users Windows 365 licenses.
- Deploy Cloud PCs (happens once we assign license).

AVD: Configure user experience settings

- Create centrally managed FSLogix profiles to enable user profile routing for host pools.
- Create centrally managed RDP settings profiles to define behaviors for user sessions.

AVD: Implement image lifecycle management

- Create image source virtual machines to consolidate common update and management tasks.
- Reduce recovery motions for restoring environments with image versions.
- Automate updates to cascade throughout your host pool ecosystem.

Implement automations

- Create and/or connect GitHub repositories to create an automation toolbox.
- Leverage automations you've already built or create new automations in Nerdio Manager.
- Group individual scripts to run together to consolidate task management.
- Generalize scripts and use variables for specific outcomes based on the customer account running the script.

AVD: Configure host pools

- Use the outcomes from your scoping exercise to make data-driven decisions on host pool experience types.
- Refine resource utilization by defining session limits and load balancing.
- Create host pools and session hosts to deliver virtual desktops to end users.
- Optimize host pool settings.
- Leverage Nerdio Azure Business Reviews to identify areas to save on cost or enhance user experiences.

AVD: Extend UAM policies to cloud endpoints

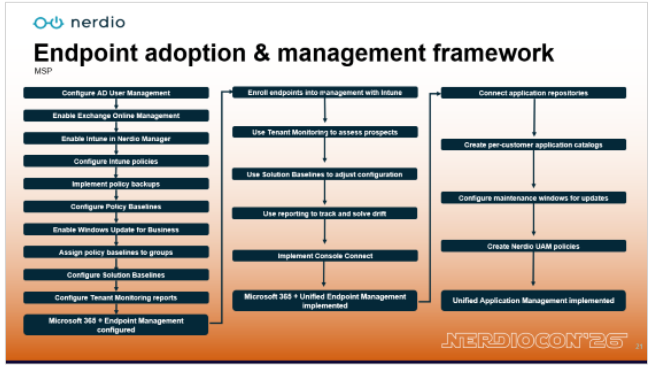
Create deployment policies for:

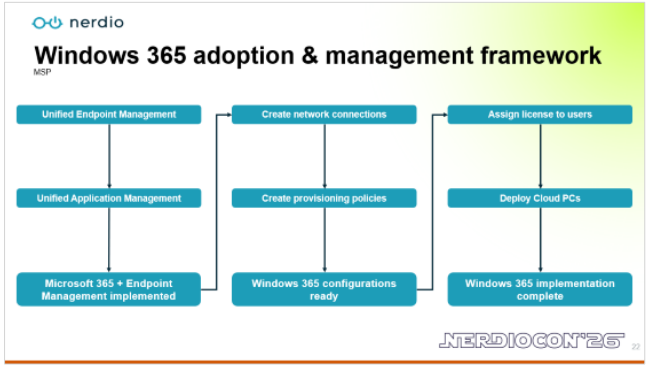
- Shared AVD host pools.
- Personal AVD desktops.
- Azure servers.

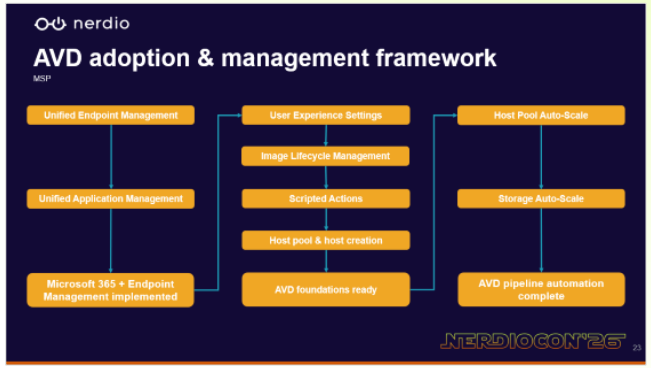
AVD: Implement Auto-Scale

- Combine individual host pool configurations with auto-scale profiles to centralize management.
- Add capacity (scale out) to meet waves of demand and reduce capacity (scale in) to reduce unnecessary costs.
- Combine auto-scale with desktop images to automatically update production hosts.
- Refine your infrastructure selections for host pools by reviewing Nerdio Auto-Scale history.
- Enable Auto-Heal to detect and remediate broken hosts.
- Optimize your storage spend by leveraging auto-scale for Azure Files Premium.

Manage via the Foundations frameworks







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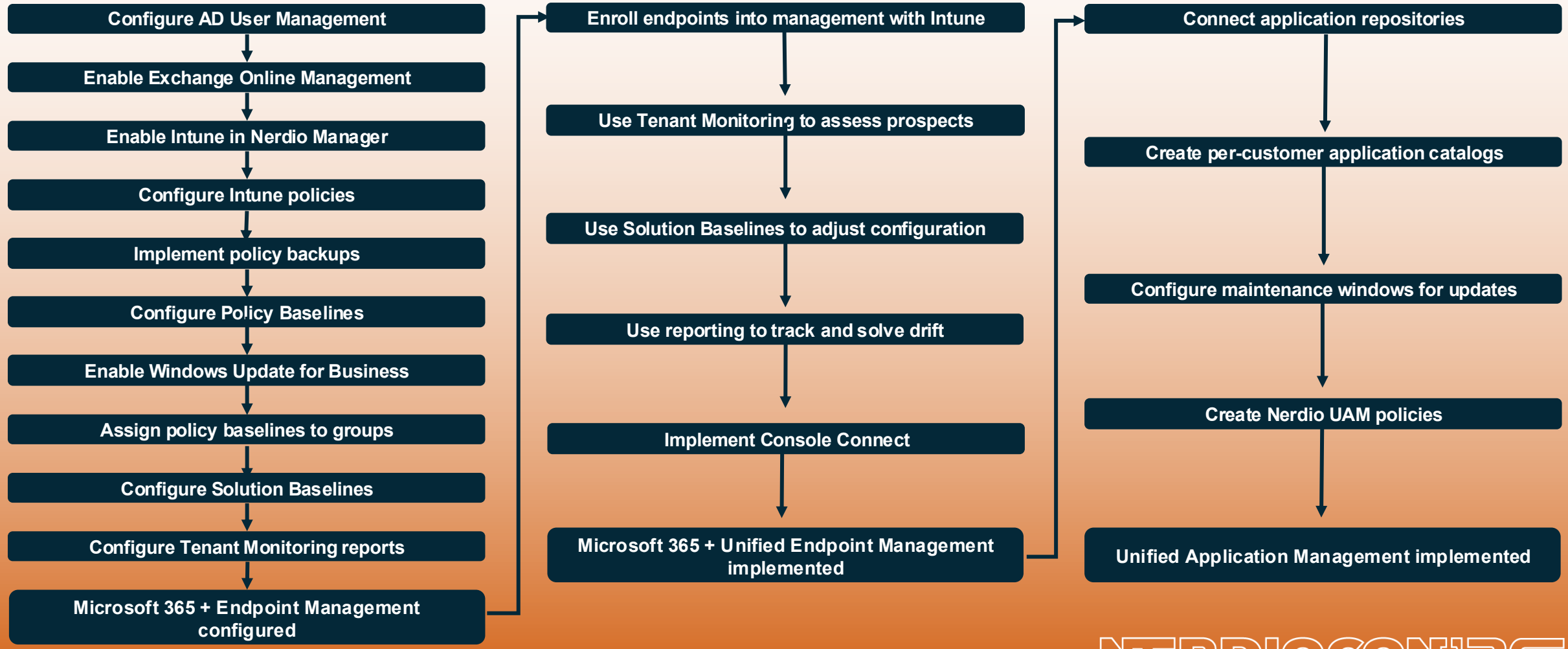
Endpoint adoption & management framework

MSP



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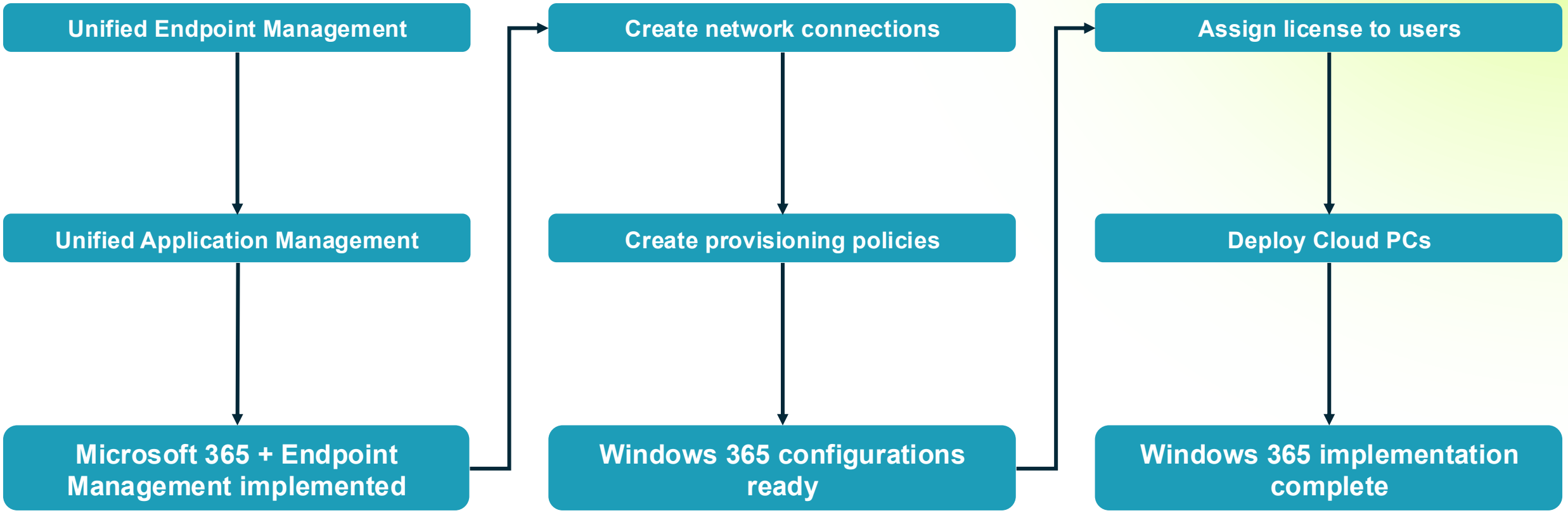
Windows 365 adoption & management framework

MSP



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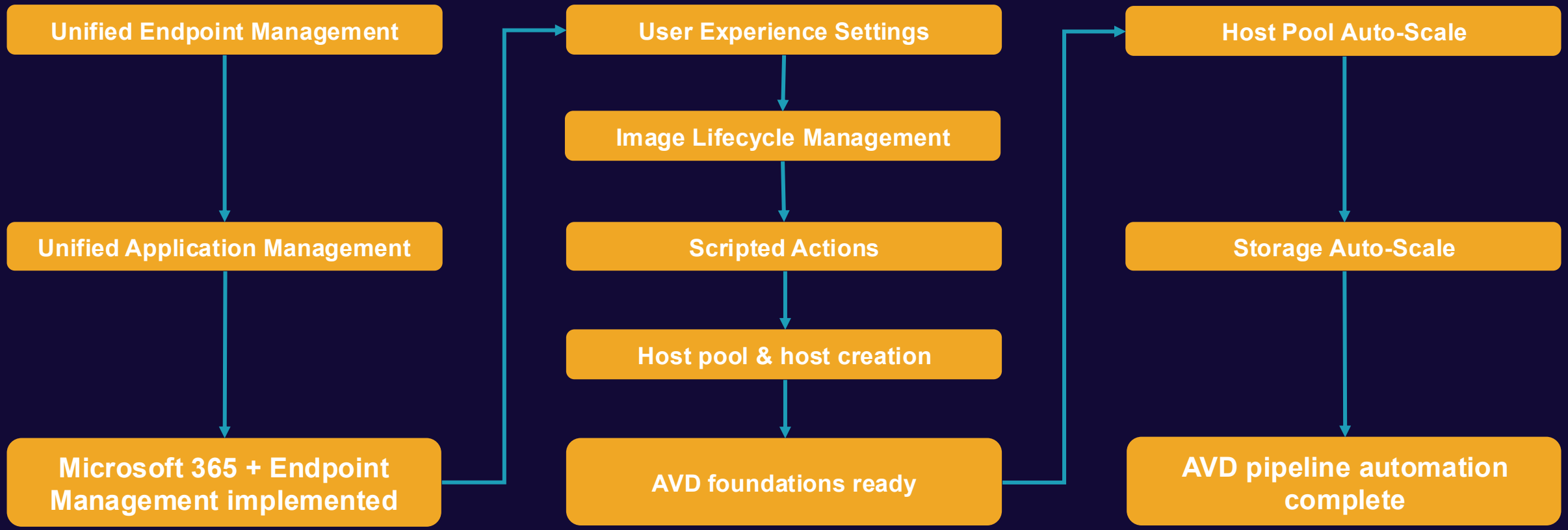
AVD adoption & management framework

MSP



Implement advanced optimizations

- Extend further into your tech stack with Nerdio API.
- Harden your Nerdio Manager install.
- Continuously improve automations.

Thank you

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Thank you

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Thank you

Please remember to fill out the post-breakout survey in the app.

Stop by the **Nerdio booth in the Expo Hall** to take advantage of our exclusive, lowest-ever pricing on Microsoft 365 management!