Overview

In concert with the KACE Cloud Mobile Device Management Fireball release, an add-on is available to SMA 10.2 customers who wish to take advantage of the new Modern Management approach for Windows and Mac computers. The add-on provides license reconciliation to avoid double counting co-managed nodes for Windows and Mac and enables the SMA to correctly interpret inventory imported from KACE Cloud MDM.

What is Modern Management?

Modern device management is the practice of combining cloud-based enrollment, management and security features to accomplish systems management goals, which helps to empower users to be secure and productive on any device, anywhere – regardless of their location.

Definitions

Mobile Device Management	Cloud based, profile-based management of iOS and Android devices
Modern Management	Cloud based, profile-based management of computers, similar to mobile management
Traditional Systems Management	Premises based, traditional, deep, granular management for computers and servers, including discovery, scripting, software installation, patching, SAM, vulnerability scanning. Agent or agentless.
IoT	Two types: 1. Agentless SNMP enabled devices like printers, projectors, network devices 2. Agent managed POS, signage, SNMP enabled devices and Chromebooks.

License Types to Use by Device Types

	MDM	Modern	Traditional	IoT
Mobile Device	X	X		
Servers			X	
Windows		X	X	
Linux			X	X*
Desktops		X	X	
Laptops		X	X	
Chromebooks				X
IoT agentless inventory (Printers, projectors, etc.)				X
*IoT Embedded (Microsoft, Linux, Raspbian…)			X	

Modern vs Traditional Computer Management Types

Users

Personas	

Moe Mobile	Moe doesn't work from the office much and moves around a lot. I don't need to provide granular management and need to keep it super simple. Everything is done through the cloud as opposed to him connecting to an on-premises system. Think of this as if his laptop computer is a mobile device like an iPad. KACE UEM interacts with Apple, Google, Microsoft's cloud services to help it enroll, configure and manage the laptop.
Stacey Stationary	Stacey is not "offline" as much as Moe and so we are able to provide much more granular, traditional management in terms of SAM, ITAM, patching, etc. This is the preferred method for managing most laptops and desktops for that reason - particularly for those who prefer on premises solutions, and have a history of working with Group Policy, AD, patch management and other traditional management features.
Dana DataCenter	Modern Management is just not an alternative for Dana. Servers much be managed very granularly with limited access.

Administrators

Major differentiators for KACE Traditional Systems Management vs modern management.

Organizations have overall endpoint management style preferences. In addition to the three Persona/User types outlined above, there are **Admin** types/styles to consider. You further need to help them separate user types into groups that are best managed with Modern vs Traditional style provisioning, configuration, updating…etc. so you know how many of each type license you should quote.

What do you need? What is your preferred management style? How many of each type license do you need?

	Modern	Preferences < or >	Traditional
Inventory	X	<>	X
Hardware Asset Management	X	<>	X
Enrollment (Apple, Google, Microsoft)	X	<>	

Discovery		>	X
Cloud	X	<	
On Premises			X
Subscription License	X		
Perpetual License			X
OpEx	X		
CapX			X
Over the Air	X		
Agent			X
Profile	X		
Scripting (software distribution, PowerShell…)			X
Active Directory			X
Group Policy			X

Software Asset Management			X
Patching			X

There is likely never going to be an organization who fits precisely into one box. Part of the beauty of Unified Endpoint Management with KACE is the flexibility systems admins/engineers have in terms of the types of management they can use. So, using the qualification tools above, you should be able to locate where they belong in the spectrum of possibilities.

Sales Motion

For net new customers:

Customers would want to co-manage devices would purchase whatever they need in different "categories" that we have: **Mobile**, **Modern**, **Traditional**, and **IoT**.

- **Mobile:** a customer would need MDM standard nodes for purchase (*see Mobile above*)

- **Modern:** for Windows 10 / macOS devices, a customer would need MDM standard nodes if they just want to manage those devices with MDM. If they wish to include SMA functionality with those modern devices, they would need to purchase an SMA appliance (includes 100 SMA nodes) and however many co-manage nodes in a subscription.

- **Traditional:** for any devices that they would typically manage with SMA, they would need to purchase an SMA appliance (includes 100 SMA nodes) and perpetual licenses for additional managed computers, agentless nodes for any non-computer devices, etc. (*see Traditional above*)

- **IoT:** for any devices they would want to manage that don't use an agent, they would need to purchase an SMA appliance along with whatever agentless nodes are applicable. (*see IoT above*)

For existing SMA customers:

A customer that wishes to add mobile and/or modern management to their portfolio would need to purchase:

- an MDM subscription for any mobile devices needing to be managed

- a co-manage subscription for any modern devices needing to be managed, or

- a combination of both, depending on their needs

These can be sold as additional components to their existing endpoint management scenario - just sell it! *There is no SWAP program*. At their next maintenance renewal, they can reallocate/true-up nodes as needed.

KACE SMA Add-On

The following are the instructions that customers see on the support side

This add-on is only for KACE SMA customers who have subscribed to co-management through their KACE Cloud Mobile Device Management connection. Co-management enables Modern Management of computers – allowing you to enroll and manage Windows and Mac computers similarly to how you manage iPads. If you are interested in Modern Management, please contact your salesperson.

After successfully subscribing to KACE Cloud MDM and installing the KACE Systems Management Appliance (SMA), you will need to apply the [actual add-on file name] add-on file in order to co-manage computers using Modern Management.

To apply the kbin after successfully installing the KACE SMA

1. Download the [actual file name] add-on file using the link below

2. Go to Settings | Appliance Updates

3. Click Browse in the Manually Update section

4. Navigate to the [actual file name] add-on file file downloaded in step 1

5. Click Update to the right of Browser

FAQ

Support Questions

Q. What does it look like?
A. After applying the hot-fix a new license count will appear on the SMA about page called "Co-Managed Devices"

Q. How would it look if you had the SMA 10.2 Add-on and not the correct license or vice versa?

A. The SMA 10.2 Add-on gives explicit instructions to only use it if you have KACE Cloud MDM. Both the Add-on and the SMA 10.2 release are required. If co-managed machines on the KACE Cloud MDM use up all their licenses, the SMA should consume a SMA Agent license count. If those are exhausted, the SMA will follow standard procedure.

Q. To whom do we escalate when it does not work. SMA support or MDM?

A. Contact Product Mangement in cases where standard Support escalation does not apply

Q. To whom do we escalate licensing issues?

A. Contact Product Mangement in cases where standard Sales Support escalation does not apply

Q. Does bootstrap fail on the SMA if the licenses run out for cloud, meaning could it potentially interrupt agent communication because the MDM is out of seats?

A. The SMA will behave the same way as it would when it does not have enough standard agents. Agents will always consume a license. Adding devices is enforced separately for each license type. When managed computer licenses are exceeded, no agent systems can be added. When non-computer licenses are exceeded, no non-computer devices can be added. However, an exceeded count on one type does not prevent usage on the other.

If co-managed machines on the KACE Cloud MDM use up all their licenses, the SMA should consume a SMA Agent license count. If those are exhausted, the SMA will follow standard procedure.

Q. How do I troubleshoot it should a customer say it is not working?
A. After a KACE Cloud device has been provisioned to the SMA (either using the Provision->Agentless: Automatic Action on the Discovery Results screen or because Auto-Provision was selected as part of the discovery schedule)

- Verify that only one instance of the device exists in SMA inventory

- Verify that the "Device Entry Type" is reported as "Agent / Agentless device" on the device detail page

- If the above 2 are not expected delete the agentless entry (if it exists) and re-provision the device from the KACE SMA Cloud discovery results page

- Verify that the tenant the discovery schedule the device was created from has available Co-managed licenses

- If the tenant does not have Co-Managed licenses and the customer wants to purchase them sales can assist them

Q. Where does it log?
A. When an attempt to use a Co-Managed license from the KACE-Cloud tenant fails and error along with the status from KACE Cloud will be logged in kbox_log.

Q. How often does it negotiate?
A. License reconciliation occurs at device provisioning and on regular agentless inventory of the (determined by the agentless inventory interval).

Sales Questions

Q. Is the pricing graduated?
A. Volume pricing – if they buy 100, then pricing for all of their nodes resides within that final tier level. It's not a graduated approach.

Q. How does it work when a customer wants to add some licenses? Would they manage multiple subscriptions or just one?
A. Since co-manage is a subscription, it should be handled like an MDM subscription. You should be able to amend a sub if they want to add licenses (currently, as long as they're not changing BillTo/ShipTo, etc.). If they have standard MDM nodes as well as co-manage nodes, then yes there would be multiple subs.

Q. What are the parameters if the customer wants to cancel their subscription or reduce a quantity?
A. I believe whatever exists currently would apply. Quantity reduction would be a sub amendment, and sub cancellation would proceed just like MDM subs.

Quote Flow Chart (Draft 1)

Customize the table below to help walk your prospective customer through the amount of each type of licensing they need to best suite their organization's needs. This example is from a new or Add-On SMA initiated prospect approach. Flip the columns for the MDM initiated approach. See the information above for additional help.	
With KACE UEM, you have flexibility to use a variety of tools. To help me determine what tools work best for your organization, I want to first get a feel for your preferred endpoint management style from the administrator's point of view and then we can talk about what works best for your user needs.	
Tell me a little about your organization's preferred Management Style. (Use the buzz words below in your open ended and clarifying questions) *Do you all tend to prefer:*	
If you hear: on premise, perpetual license, servers & computers, discovery, agent, patching, scripting, software asset management, reporting…	**If you hear:** cloud, subscription license, road warriors, work from home, enrollment, profile/policy, basic management
Summarize: *So, it sounds to me like all you prefer to start with traditional style management and then add some modern device management*	**Summarize:** *So, it sounds to me like all you prefer to start with modern style management and then add some traditional management*
Describe the difference, as needed, using the other material provided	
Move on to getting actual counts of modern vs tradition licensing required.	

For about how many computers and servers will you need traditional endpoint management? (It may help to prompt them to include computers with Windows, Windows Server, Mac and Linux operating systems)	*For about how many computers will you need Modern endpoint management?* (It may help to prompt them to include computers with Windows 10 and Mac operating systems. Note that servers)
Enter the number of Traditional devices	Enter the number of Modern devices
#	#
Great, thanks. So, that takes care of your computers and servers. *Now let's talk about your other devices.*	
About now many non-computer devices do you have on your network like printers, projectors, any SNMP or SSH enabled devices.	*About how many mobile devices do you need to manage?*
#	#
Objection?	Objection?
Every device hitting your network is an attack vector. September 2019 "McAfee shows cyberattacks … have more than doubled this year" most organizations are in catch up mode in reducing attack vectors. Source: McAfee	A Dimensional Research, "survey showed 64% of respondents are 'doubtful their organizations can prevent a mobile cyberattack,' and more than one-third of companies fail to adequately secure mobile devices.'" Further, "Twenty percent of companies' mobile devices have already been breached, and 24% don't know whether or not they experienced a breach, respondents said." Source: Enterprise Mobility Exchange

	"Nearly 41% of all data breach events from 2005 through 2015 were caused by lost devices such as laptops, tablets and smartphones." Source: Forbes
Why don't we include them in the quote and we can take them off later if your Team thinks it is acceptable to allow these security vulnerabilities. I'll think you'll see that it doesn't add a whole lot to the overall cost while protecting you from risks like cyberattacks.	
Thanks for taking the time to walk me through that. I will put together a quote and…	

Modern Management Order Options

How many of each product component will you need for a variety of different scenarios

Additional Information

Support Training - Recorded Presentations

- Sales Training

- Support Training

KACE Modern Management Options

(This document was prepared for direct sales and Channel sales procedure will differ)

In November, subscription for the "SMA" component will be available and you will be able to order mobile, traditional and modern management components together in the new Quote to Cash system. Until then, customers who want to take advantage of the flexibility of a combination of traditional, modern and mobile management will need the component combinations described below.

Keep in mind

- Customers can still order either KACE SMA or KACE Cloud MDM separately.
- Customers can now use modern management for Windows 10 and Mac computers using KACE Cloud MDM without using SMA at all.
- It is more likely that customers who want modern management will want to use both MDM and SMA as Unified Endpoint Management typically includes *devices* like servers and IoT; *operating systems* like Linux and Windows Server; functionality like software asset management, patching, service desk, etc.

Until November, there is no subscription based SMA. The following scenarios will help you understand what to order until that time. Again, as mentioned above, customers can still buy standalone MDM or SMA separately if they want.

Net new co-management customer July – November

Customer wants cloud based mobile device management only

- Order a minimum subscription of 25 devices of KACE Cloud MDM in Zuora.

Customer wants traditional on premises endpoint management only

- Order a minimum 100 node perpetual license of KACE SMA in CPQ

Customer wants cloud based mobile device management and modern management of computers only

- Order a minimum subscription of 25 devices of KACE Cloud MDM in Zuora.
- Order the required amount of KACE UEM Co-Manage subscriptions in Zuora.

Customer wants cloud based mobile device management plus both traditional and modern management of computers

- Order a minimum subscription of 25 devices of KACE Cloud MDM in Zuora.

- Order the required amount of KACE UEM Co-Manage subscriptions in Zuora.
- Order a minimum 100 node perpetual license of KACE SMA in CPQ
- Order Asset Packs in bundles of 250 for printers, etc. as needed
- Install the SMA co-management Add-On

Customer wants traditional and modern management of computers (only, i.e., does not want mobile device management)
- Order a minimum subscription of 25 KACE UEM Co-Manage devices in Zuora.
- Order a minimum 100 node perpetual license of KACE SMA in CPQ
- Order Asset Packs in bundles of 250 for printers, etc. as needed
- Install the SMA co-management Add-On

Existing SMA customer wants net new add-ons July – November

Existing SMA customer wants to add net new mobile devices (only, i.e., does not want modern managed computers)
- Order a minimum subscription of 25 devices of KACE Cloud MDM in Zuora.

Existing SMA customer wants to add net new modern management (only, i.e., does not want mobile device mgt and does not want to reduce traditionally managed computers)
- Order a minimum subscription of 25 devices of KACE UEM Co-Manage subscriptions in Zuora.
- Install the SMA co-management Add-On

Existing SMA customer wants to add net new modern management and net new mobile devices (does not want to reduce traditionally managed computers)
- Order a minimum subscription of 25 devices of KACE Cloud MDM in Zuora.
- Order the required amount of KACE UEM Co-Manage subscriptions in Zuora.
- Install the SMA co-management Add-On

Existing SMA customer wants to swap out traditional nodes July – November

Existing SMA customer wants to swap some existing SMA licensing for new modern management (does not need additional mobile device management)
- Order a minimum of 25 devices of KACE Cloud MDM and/or Co-Manage subscriptions in Zuora.

- Order the required amount of KACE UEM Co-Manage subscriptions in Zuora. (see minimum requirement)
- Order KACE UEM Swap nodes (details forthcoming)
- Install the SMA co-management Add-On
- Get a new SMA license key for the customer with the reduced node count.

Existing SMA customer wants to swap some existing SMA licensing for new modern management and add net new mobile devices
- Order a minimum of 25 devices of KACE Cloud MDM and/or Co-Manage subscriptions in Zuora.
- Order the required amount of KACE UEM Co-Manage subscriptions in Zuora. (see minimum requirement)
- Install the SMA co-management Add-On
- Order KACE UEM Swap nodes (details forthcoming)

Existing SMA customer integrated with Workspace One or Google G Suite wants to swap their existing SMA agentless licensing for Workspace One or Google G Suite for KACE modern management and mobile devices. Treat as a net new MDM customer.
- Order a minimum subscription of 25 devices of KACE Cloud MDM in Zuora.
- Order the required amount of KACE UEM Co-Manage subscriptions in Zuora (see minimum requirement)
- Install the SMA co-management Add-On
- There is no swap for Asset Packs (true up upon renewal of SMA)
- Get a new SMA license key for the customer with the adjusted node counts. [and remember that agentless is sold in bundles of 250 only at this point.

Existing SMA customer wants to swap out traditional nodes while renewing maintenance July – November

Order whatever the customer needs.
- If using the SMA component, there is a minimum of 100 nodes.
- Minimum of 25 MDM/Co-mgt nodes.
- Get a new SMA license key for the customer with the appropriate node count.

Existing KACE Cloud MDM customer July – November

Existing KACE Cloud MDM customer wants to add modern management (does not want any traditional management)

- Order a minimum subscription of 25 devices of KACE UEM Co-Manage subscriptions in Zuora.

Existing KACE Cloud MDM customer wants to add modern management (does want traditional management)

- Order required amount of KACE UEM Co-Manage subscriptions in Zuora.
- Order a minimum 100 node perpetual license of KACE SMA in CPQ
- Install the SMA co-management Add-On