



How an EA-to-CSP Transition Works

Moving from an Enterprise Agreement
(EA) to a Cloud Solution Provider (CSP)
is rarely a single event.





A successful transition is a structured process that helps an organization understand its current Microsoft environment, align licensing to future business needs, identify optimization opportunities, develop a transition plan, and evaluate potential providers.

This workbook follows the same process many organizations use when preparing for a CSP transition. As you move through each section, you'll document information that can help support internal discussions and future conversations with CSP providers. If you come across section that you don't have the answers to, leave them blank and the right solution provider can help create clarity and next steps.

1

Understand Your Current Environment

Before a provider can make recommendations, they first need to understand the Microsoft environment they will be supporting.

This typically includes:

- Microsoft products currently in use
- Existing licensing agreements
- Current provider relationships
- User populations
- Known renewal timelines
- Microsoft technologies supporting the business today

The goal of this phase is visibility.

Without understanding the current state, it becomes difficult to make informed licensing decisions.



Workbook Sections That Support This Step

- ✓ Current Environment Inventory
- ✓ Licensing Ownership Snapshot
- ✓ Existing Provider Relationships

2

Understand Future Business Requirements

Licensing decisions should support both current operations and future initiatives.

A CSP provider will typically seek to understand:

- Planned Microsoft investments
- Upcoming projects
- Growth expectations
- Acquisition activity
- Platform modernization plans
- Technologies being retired or introduced

The objective is to ensure today's licensing decisions continue supporting the organization tomorrow.



Workbook Sections That Support This Step

- ✓ Future State Planning
- ✓ Business Initiative Planning
- ✓ Planned Microsoft Adoption
- ✓ Product Retirement Assessment

3

Identify Optimization Opportunities

Once the current environment and future requirements are understood, organizations often look for opportunities to improve licensing efficiency.

This review may uncover:

- Unused licenses
- Opportunities to consolidate licensing
- Overprovisioned products
- Areas requiring deeper analysis
- Duplicate capabilities

This phase helps ensure organizations are transitioning the right licensing model—not simply moving existing licensing to a new provider.



Workbook Sections That Support This Step

- ✓ Licensing Optimization Discovery
- ✓ Areas of Concern Review
- ✓ Assessment Capability Questions

4

Build the Transition Plan

After discovery and optimization work are complete, a transition strategy can be developed.

This typically includes:

- License Migration timing
- Renewal coordination
- Stakeholder involvement
- Administrative ownership
- Risks and dependencies
- Communication requirements

The goal is to create a documented path from the current licensing model to the future licensing model while minimizing operational disruption.



Workbook Sections That Support This Step

- ✓ Transition Planning Worksheet
- ✓ Stakeholder Mapping
- ✓ Renewal Planning
- ✓ Transition Timeline Development

5

Evaluate and Select a CSP Provider

Not all CSP providers operate the same way.

Organizations evaluating providers often compare:

- Licensing expertise
- Assessment methodology
- Governance capabilities
- Account management models
- Ongoing optimization practices
- Accountability and service quality

The provider selected will often influence the experience long after the transition is complete, making governance and ongoing partnership important evaluation criteria.



Workbook Sections That Support This Step

- ✓ CSP Provider Evaluation Guide
- ✓ Accountability Review
- ✓ Governance Assessment
- ✓ Provider Comparison Worksheet

6

Execute and Govern

The transition itself is only the beginning of the relationship.

Once licensing has moved to a CSP model, organizations should have a clear understanding of:

- How licensing will be managed
- How renewals will be monitored
- How optimization opportunities will be identified
- How Microsoft changes will be communicated
- How accountability will be maintained over time

Long-term success is typically determined by the quality of governance and operational stewardship that follows the migration.



Workbook Sections That Support This Step

- ✓ Transition Summary
- ✓ Governance Expectations
- ✓ Desired Outcomes
- ✓ Success Criteria Documentation

What This Workbook Helps You Accomplish

By completing the exercises throughout this workbook, you'll develop a clearer understanding of:

- Your current Microsoft licensing environment
- Future licensing requirements
- Potential optimization opportunities
- Transition planning considerations
- Provider evaluation criteria
- The information commonly requested during CSP discussions

The goal is not to create a final licensing recommendation.

The goal is to help you organize the information, questions, and objectives that support a successful EA-to-CSP transition.

Build Your EA-to-CSP Transition Inventory

Before a CSP provider can build an accurate licensing recommendation, they need to understand your current Microsoft environment.

Complete the sections below with the information you have available today. Any gaps can typically be discovered during a licensing assessment.

Current Microsoft Environment

Which Microsoft Products Are In Scope?

Product	Currently Used?	Approximate User Count	Notes
Microsoft 365			
Azure			
Dynamics 365			
Power Platform			
ERP			
Other Microsoft Products			

Existing Provider Relationships

What licensing programs are currently in use?

Licensing Program	Provider	Renewal Date	Notes
Enterprise Agreement			
CSP			
Other Licensing Agreements			

How would you describe your Microsoft environment?

Section 4 Future State Planning Worksheet

A licensing recommendation should support where the organization is going—not just where it is today.

Planned Changes Over the Next 24 Months

Business Initiatives

List any known initiatives that may impact licensing.

Initiative	Planned Start Date	Licensing Impact
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Planned Microsoft Adoption

Are you planning to implement any of the following?

Technology	Planned?	Timeline
Copilot		
Power Platform Expansion		
Azure Expansion		

Technology	Planned?	Timeline
Dynamics 365		
Microsoft Security/ Governance Solutions		
Microsoft 365 Adoption/Migration		
ERP-Based Products		
Other		

Products Being Retired

What platforms, products, or licenses may no longer be required?

Licensing Optimization Discovery

One of the first activities many CSP providers perform is identifying opportunities to optimize licensing allocations. Use the worksheet below to document any areas of concern.

Areas You Already Suspect Can Be Optimized

Overprovisioning

Are there licenses that may be assigned but not actively used?

Duplicate Functionality

Are multiple Microsoft products performing the same function?

Unused Products

Which products have low adoption or unclear business value?

Questions We Want Answered

Use this section to record questions your team hopes a CSP assessment will answer.

1.

2.

3.

4.

5.

Section 6

Transition Planning Worksheet

The timing of a CSP transition is often influenced by licensing renewals, business initiatives, and organizational priorities.

Transition Timeline Ideal Migration Window

Target timeframe:

Reasoning:

Known Renewal Dates

Agreement	Renewal Date	Notes
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Key Internal Stakeholders

Role	Name	Involvement
IT Owner		
Procurement		
Finance		
Executive Sponsor		

Section 7

Evaluating CSP Providers

Every CSP provider can sell licenses. The more important question is whether the provider can support your organization after the transition. Use the worksheet below during provider evaluations.

Provider Comparison Worksheet

Assessment Capability

Question	Provider Response
How do they assess my environment?	
What information do they require?	
What deliverables do they provide?	

Governance Capability

Question	Provider Response
How often do they review licensing?	
How do they communicate Microsoft changes?	
What reporting is available?	

Accountability & Service Quality

Question	Provider Response
Who owns renewals?	
Who owns escalation support?	
How is ongoing optimization handled?	
What happens after onboarding?	

My EA-to-CSP Transition Summary

Use this page to consolidate key findings.

What We Know Today

What We Still Need to Learn

Biggest Risks To Address

Areas of Concern

Desired Outcome

What would success look like one year after the transition?

Next Step

Once this workbook is complete, your organization should have enough information to begin a structured licensing discussion with a CSP provider.

Any unanswered sections do not indicate a problem. In many cases, they identify exactly where a License Optimization Assessment can provide value by documenting your current environment, evaluating future requirements, and developing a transition roadmap.

We'd like to think we wrote the book on EA-to-CSP transitions (and even turned it into this interactive guide for your convenience). If you're ready for a licensing partner that can answer your questions, evaluate your environment, and transition you to an affordable, predictable licensing structure, talk to a DCG licensing representative today.



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