

**FOR PARTNERS**

**Author:** Ervin Rendek

**Version:** 1.2

**Date:** July 29th, 2020

**Classification:** For Partners

**ESET Deployment   
& Upgrade service**

Pilot of 2020 services offering

Service bulletin

# Table of contents

[Table of contents 1](#_Toc46351403)

[INTRODUCTION 2](#_Toc46351404)

[Service description 3](#_Toc46351405)

[100 words 3](#_Toc46351406)

[50 words 3](#_Toc46351407)

[25 words 3](#_Toc46351408)

[Tagline 3](#_Toc46351409)

[Positioning 4](#_Toc46351410)

[Target market and buyers 4](#_Toc46351411)

[Market statistics 4](#_Toc46351412)

[Market problems 4](#_Toc46351413)

[Solutions 5](#_Toc46351420)

[What is new in ESET Deployment & Upgrade service 7](#_Toc46351426)

[1. Including Partners in the service delivery process 7](#_Toc46351427)

[2. Tier 1 and Tier 2 covered by Partner, Tier 3 covered by ESET HQ 7](#_Toc46351428)

[3. Comprehensive training plans for Partners’ staff 8](#_Toc46351429)

[Prerequisites and conditions for Deployment & Upgrade 9](#_Toc46351430)

[Responsibilities in the service delivery model 10](#_Toc46351431)

[List of products eligible for Deployment & Upgrade 12](#_Toc46351435)

[Human resources requirements for successful delivery 13](#_Toc46351436)

# INTRODUCTION

In today’s competitive cybersecurity landscape, buyers are increasingly making their choices based not only on the available products but on the services which make up the overall solution. By evaluating services first, and choosing products that have a strong supporting ecosystem, customers can rest assured that they will be able to reap a product’s full benefits – even if something goes wrong or they themselves are not able to cover all the bases.

This trend for choosing complete solutions, instead of just standalone products, has been heralded and documented by industry analysts to quite a wide extent. As such, it is clear that vendors must be able to provide services that match their products in order to remain relevant and maintain an edge over their competitors.

ESET products are sold worldwide. More than 50% of our revenue comes from business licenses. Business customers often demand not only a high-quality product, but also supporting services. And these customers are often willing to pay more for such services. At ESET, we are more than ready to provide our customers with outstanding services that result in quick and satisfactory resolution of issues that might occasionally result from using our complex products. If issues occur, it is often necessary to resolve them as soon as possible in order to mitigate the impacts on business continuity or IT security. Enterprise customers often ask for deployment services and consider these to be a true starting point in utilizing their security solution.

ESET Deployment & Upgrade is a pillar of our professional services family and the ultimate aim of this service is to achieve the most effective functioning of any ESET business product. There are two aspects to this service (as its name suggests) - Deployment and Upgrade. We have bundled these two sub-services into one service offering due to their very similar nature, the main difference being only the stage in the product license lifecycle at which each service is usually executed. In addition, bundling these two services into one offering makes sense from the point of view of offering simplicity. Not only pricing, licensing and ordering are identical, but also service delivery workflows are unified.

When it comes to Deployment, optimal functioning is achieved by installation and initial configuration of newly purchased ESET business products being executed solely by experienced and certified ESET professionals, either using remote connection to the customer’s network or by visiting the customer on-site. The Upgrade service resembles Deployment in most aspects, but is typically performed when customer wishes to upgrade from one major version of an ESET business product to another and therefore is typically executed later in the license lifecycle than Deployment.

Typically, the Deployment & Upgrade service is regarded as a great onboarding service for customers, encouraging them to purchase other ESET services as well. The Deployment & Upgrade service serves as an assurance that installation and configuration is in line with ESET recommendations and therefore the customer can rest assured that their solution will be supported and eligible for other ESET services, especially ESET Premium Support Essential.

# Service description

## 100 words

The ESET Deployment service offers end-to-end installation and initial configuration of newly purchased ESET products, within the customer’s environment, to the scale and extent agreed upon within a relevant service proposal. The aim of this service is to provide the customer with a correctly set-up and efficiently running environment for ESET business security products.

The ESET Upgrade service offers update and configuration of previously deployed ESET products, within the customer’s environment, within the scope agreed upon within a relevant service proposal. The upgrade service is applicable in case of major version changes, such as e.g. upgrading ESET products from v6 to v7, but also for minor upgrades (e.g. v7.1 to v7.2).

## 50 words

The ESET Deployment service offers end-to-end installation and initial configuration of newly purchased ESET products, to achieve seamless running of ESET business product.

The ESET Upgrade service embodies update and configuration of deployed ESET products, focusing on upgrades of major version changes, e.g. upgrading ESET products from v6 to v7.

## 25 words

The ESET Deployment & Upgrade service assures correct installation and set-up of ESET products and secures seamless upgrades between major versions of ESET products.

## Tagline

ESET Deployment & Upgrade installs/upgrades your ESET products and leaves them correctly configured.

# Positioning

As mentioned earlier, services and the offering of complete solutions are a clear market trend. Nevertheless, it is important to position the ESET Deployment & Upgrade service correctly and understand all of its benefits when communicating with customers.

To be able to address the growing landscape of cybersecurity threats, organizations are forced to adopt more advanced tools and policies which further increase the overall complexity of their business. Rapidly emerging threats and attack techniques are a concern that can easily distract workforces, and the general lack of security specialists creates a gap that can be filled by cybersecurity vendors, system integrators and MSSPs. In an attempt to reduce overall complexity and ensure business continuity, organizations turn to complete solution providers and expect such services even from their current security vendors.

## Target market and buyers

Enterprise grade customers (1000+ seats), and customers with complex environments (subject to Deployment team resource manager approval), governments and related institutions. In general, organizations that face the challenges listed below.

## Market statistics

*“European security leaders now spend more of their budget on services than products. Like their colleagues globally, European security leaders at enterprises spend, on average, more than half (52%) of their budget on security services versus acquiring new security products.”*

(Source: Forrester, Security Budgets Europe, 2019: Budgets Rise And Security Services Overtake Products)

*“Competition for security talent has firms exploring the security services route. Stiff competition for security talent has caused many firms to invest in services rather than in more expensive and hard-to-recruit security staff. Some 22% of global security decision makers cite lack of security staff as a major information security challenge, and 21% mention the difficulty of finding employees with the right skills.”*

(Source: Forrester, Security Budgets Europe, 2020: New Threats Bring New Priorities)

*"A majority of users express interest in vendor-provided deployment services to implement endpoint/security solutions."*

(Source: GfK, B2B Qualitative User Research 2018 conducted exclusively for ESET)

The security services market is considered to be focused on both SMB and Enterprise.

## Market problems

### Lack of product knowledge

Deploying new products without any previous knowledge can become tricky even for organizations with dedicated security and IT teams.

### Lack of manpower

The general lack of security specialists causes an increased need for outsourcing of tasks.

### Infrastructure complexity

Adapting to rapidly evolving business needs (and cyber threats) requires frequent updates to software and hardware and therefore version and general product compatibility must be addressed.

### Preference for outsourcing

Many organizations are, overall, turning to outsourcing as a way to simplify the management of their resources.

### Business continuity

The deployment and/or upgrade of new products into live environments without the required expertise presents a serious business continuity risk.

### Steep initial learning curve

While ESET products in general are designed to be intuitive to use, without proper training, customers could be missing out on many game-changing advanced features.

### Certification compliance

Many industries (and regions) have strict certification and compliance policies which mandate products to be deployed by authorized vendors.

### Long-term costs

Creating dedicated teams and/or hiring specialists to perform niche occasional tasks can incur high long-term costs.

## Solutions

All of the above challenges can easily be addressed by having a complete product and services portfolio offered across multiple regions. ESET Deployment & Upgrade addresses all of the above problems and its further benefits include:

### Smooth initial setup and integration

This represents a benefit for both the customer and ESET, since a well set-up product greatly lowers the number of potential issues in the future.

### No need for a specialized workforce

As ESET takes care of deploying and setting up the desired products, customers can focus their resources on their core business.

### Certification compliance

Having an authorized vendor such as ESET deploy the desired products helps organizations comply with cybersecurity regulations.

### Business continuity assurance

Deploying and/or upgrading products according to a precise schedule based on the outcome of an initial infrastructure assessment by our dedicated specialists assures greater business continuity. Having ESET experts give a stamp of approval for initial installation and configuration is often required by customers, especially those with customization needs (e.g. integration with in-house tools using ESET interfaces).

### Added value to our products

In addition to all of the above, providing professional services can be the deciding factor in tenders.

# What is new in ESET Deployment & Upgrade service

Even though ESET HQ has provided numerous Deployment & Upgrade services to our business customers in the past, we have not included our Offices and Partners (hereinafter referred to as “Partners“) into the service delivery process itself. Our Partners have mainly been responsible for the deal-closing part of the service and this usually consisted of identifying new sales opportunities for D&U and closing the deal with customers from an administrative perspective. ESET HQ, on the other hand, was in charge of technical delivery of the service in the customer’s environment. To briefly summarize, historically the Partner’s role was to win the deal and ESET HQ delivered the service itself.

At ESET HQ, we have scrutinized the aforementioned workings of the existing D&U process and identified a couple of major improvements that would be beneficial both for Partners and ESET HQ, both from a capacity leveraging perspective and from a revenue maximizing one.

## 1. Including Partners in the service delivery process

It is obvious that in recent years a great number of our Partners have invested in their employees’ technical capabilities to a very high level. It does not matter much whether we are talking about training and certification in ESET Products or other relevant IT training. Both have contributed to the fact that, as of 2020, we can state that a significant portion of our Partner network is now employing highly-trained professionals who are without doubt capable of executing the Deployment & Upgrade service. Its exact processes, of course, will be outlined by ESET HQ in order to achieve Deployment & Upgrade consistency around the globe.

Including our partners in the service delivery model is beneficial for end-customers requiring on-site service delivery capabilities. And those are almost exclusively unique to local ESET representation.

Another reason for including Partners in the technical aspect of the Deployment & Upgrade service is the limited capacity for service delivery from ESET HQ. If we are honest with ourselves, ESET HQ is currently not capable of covering Deployment & Upgrade service delivery in all countries in which we sell our products. The technical specialists based at ESET HQ and dedicated to service delivery are, capacitywise, able to deliver only tens of service deliveries a year. With regards to this fact, we feel that we are losing a big portion of revenue simply because we are currently not a service-oriented company. Therefore, including Partners’ trained staff into our service delivery model will definitely leverage the current overall resources available to both HQ and Partners. Using this deeper cooperation between HQ and Partners, we will multiply our mutual Deployment & Upgrade capacities, resulting in greater service coverage and revenue potential.

## 2. Tier 1 and Tier 2 covered by Partner, Tier 3 covered by ESET HQ

Delivery of the Deployment & Upgrade service was previously more or less a bespoke service, tailored to every single service delivery and every single customer’s situation. Since all the knowledge was possessed by ESET HQ and the numbers of service deliveries were rather small, ESET HQ could use this tailored approach.

In the course of delivering this service in the past, we have learned that categorization of partial D&U activities into tiers can help a great deal in streamlining and standardizing the service delivery process. That is of course a prerequisite for a standardized D&U service offering worldwide. We have therefore divided the service delivery process into clear categories, and each category has been assigned a tier which reflects its respective complexity. Tier 1 and Tier 2 activity categories will be almost exclusively covered by Partners, since product knowledge for Tier 1 and Tier 2 is attainable via trainings and certifications. Tier 3 activity categories will be covered by ESET HQ since these activities may include aspects that closely relate to the deepest knowledge of ESET business products, often requiring access to product development engineers. More information about categorization of Deployment & Upgrade activities can be found in Attachment 1.

## 3. Comprehensive training plans for Partners’ staff

The new service delivery model, utilizing our Partner network to a greater extent, will definitely challenge us in terms of the consistency of the delivered service across different regions. Since our ultimate goal is to achieve the highest possible quality of the service delivery consistently, we have developed a comprehensive training plan for our Partners’ professionals who will execute the service.

In the last chapter of this service bulletin we briefly suggest which trainings (either in ESET products, or other related Microsoft training) might be of great use to Deployment & Upgrade professionals, regardless of their geographical location.

# Prerequisites and conditions for Deployment & Upgrade

* Only newly purchased ESET products are eligible for “Deployment” services and should be a part of the overall solution (Products + Services) provided to customers. The “Upgrade” service can be purchased also only for a newly purchased product license and may be executed at any time within the validity of that specific product license.
* Provision of the Deployment & Upgrade service in the case of enlargement of an existing license is possible, but subject to the approval of the specific Partner’s deployment team.
* The service is primarily aimed at large Enterprise-grade customers or organizations with complex infrastructure which warrants the costs of the service (exceptions must be discussed with HQ or local deployment team).
* An initial assessment of the customer’s current environment must be performed (by completing the Assessment Form) to confirm the feasibility of products proposed by sales representatives, before promising anything to the customer.
* Date and schedule planning must be done in coordination with HQ if the customer exceeds a 1000-seat threshold.
* Normally communication between the customer and deployment specialists should be handled by a SPOC (single point of contact, e.g. the sales representative), unless agreed otherwise (e.g. for complex projects, requiring the customer’s technical staff to communicate with our deployment specialists).
* The final cost is calculated based on the final number of service units needed/agreed upon with the customer in order to successfully execute the service. This is confirmed by both parties (customer and Partner), prior to service execution, by the acceptance of a Service Proposal.
* Removal of third party security solutions is possible only using standard methods recommended by the third party vendor on officially supported operating systems (anything outside of these boundaries should be handled by the customers’ staff).
* A Deployment and/or Upgrade is considered to be completed upon signature of an Acceptance Protocol by both parties (meaning the ESET deployment specialist who performed the deployment and the customer’s designated staff).

# Responsibilities in the service delivery model

A close up of a sign

Description automatically generated

The diagram above depicts an ideal workflow for the Deployment & Upgrade service, with rows representing an “actor” or a person responsible for execution of a specific activity in the workflow. The goal of this diagram is to describe a sequence of sub-activities that lead to a successful, by-the-book delivery of this professional service. For the sake of simplicity, we will further describe the ideal workflow (indicated by green arrows) without any change requests or inconsistencies which may occur along the way. Of course, these are also fully covered by the diagram.

### Deployment Proposal Phase

Begins with an Enterprise Customer expressing the need for the D&U service. The Partner’s Services Request Handler (later in the text referred to as the Salesperson) fills in an Assessment form together with the Enterprise Customer and hands it over to the Partner’s Deployment Service Specialist (Level 1/ Level 2) (later referred to as the ‘DSS’) for evaluation. If, based on the Assessment form, it seems that provision of the D&U service delivery is feasible, the DSS prepares an ESET Service Proposal describing aspects like environment schema, endpoint requirements and scope of the service. The Salesperson in turn adds the price to the ESET Service Proposal, which is then sent to the Enterprise Customer for acceptance. In an ideal world the Enterprise Customer accepts the Service Proposal and the DSS can proceed with preparation of a Deployment Plan. The Deployment Plan is a form specifying details of service delivery, in particular: date and time, connection type and scope of the service. The customer’s agreement to the Deployment Plan means that there are no obstacles in the way of successful delivery of the D&U service. The last activity in this phase is the preparation of a Deployment Checklist which sums up the pre-conditions to be met in the customer’s environment so that the Deployment Execution Phase runs smoothly, without losing precious time in this phase.

### Deployment Execution Phase

Is pretty straightforward, with the DSS either connecting remotely to the customer’s environment or visiting on site. Deployment (or Upgrade) then runs according to the agreed Service Proposal. After the DSS is done with the service execution, s/he tests whether the ESET products in the customer’s environment are set up/upgraded correctly. Signing of the Acceptance Protocol is a very important step and is carried out typically by the DSS right after the service execution in order to obtain the customer’s consent to the scope and extent of the delivered service.

### Post Deployment Phase

Is typically connected with finalization of billing and invoicing (if not done earlier in the process). The DSS or the Professional Services Team at HQ might ask for feedback on the executed service. If the D&U service was sold to the customer as a standalone service (as opposed to ESET Premium Support Advanced service bundle), the post-deployment phase is also a very good opportunity for upselling activities. ESET Premium Support Essential is a great service to suggest to customers in order to achieve seamless operation of their freshly deployed ESET products. The D&U service is a great starting point to present our capabilities to customers and can serve as a strong teaser for purchasing our other services.

Reading the diagram together with its description, the reader of this service bulletin might have noticed that the last row of the diagram is for ESET HQ Product Specialist activities (Tier 3/ Level 3). In order not to put too much bureaucratic pressure on our partners, ESET HQ gets involved only in a couple of special cases, usually depending on the size of the customer. In general, ESET HQ assists the Partner with:

* assembling ESET Service Proposals for customers with more than 5000 seats
* reviewing ESET Service Proposals for customers with more than 1000 seats
* overseeing Deployment & Upgrade service execution for customers with more than 1000 seats

# List of products eligible for Deployment & Upgrade

*As of June 1, 2020*

|  |  |
| --- | --- |
| ESET Cloud Administrator | ESET Full Disk Encryption |
| ESET Cloud Office Security\* | ESET Full Disk Encryption for ECA |
| ESET Endpoint Antivirus for Linux | ESET Gateway Security for Linux |
| ESET Endpoint Antivirus for Mac OS X | ESET Mail Security for IBM Lotus Domino |
| ESET Endpoint Antivirus for Windows | ESET Mail Security for Linux |
| ESET Endpoint Encryption | ESET Mail Security for Microsoft Exchange Server |
| ESET Endpoint Security for Android | ESET Secure Authentication |
| ESET Endpoint Security for Mac OS X | ESET Security for Microsoft SharePoint |
| ESET Endpoint Security for Windows | ESET Security for Microsoft SharePoint Server |
| ESET Enterprise Inspector | ESET Security Management Center |
| ESET File Security for Linux | ESET Virtualization Security |
| ESET File Security for Microsoft Windows Server | ESET Security Management Center Cloud\* |

\* not yet released

Since ESET’s product portfolio is dynamic and our offering may change over time, it is strongly advised to always verify the list of products eligible for the Deployment & Upgrade service against our [End Of Life policy (EOL)](https://support.eset.com/en/kb3592-is-my-eset-product-supported-eset-end-of-life-policy-business-products). The list of products in the above table reflects our current business products offering, but to obtain fresh information regarding supported versions, always visit our EOL website.

# Human resources requirements for successful delivery

The goal of the ESET Deployment & Upgrade Service is to have the customer’s environment certified and as such to lower the need for sending requests to various channels (for example to Technical Support or Customer Care) while setting up ESET products in their environments and to ensure that the environment is set up correctly.

ESET Deployment Services Specialists (DSS) are Technical Support Engineers (or similar) who are eligible to perform this task and who propose and deliver complex solutions to customers based on their requirements. The DSSs are experts for several products of which they have in-depth knowledge, with several years of experience (ideally) with ESET products on a technical position. They primarily take care of tasks within their expertise but have also good knowledge of other products. The DSS must cooperate and communicate with customers and other teams effectively, which requires very good communication skills and the ability to work in complex environments. The following key characteristics are required:

* Know and properly use all the tools and processes relevant for the tasks
* Prepare testing environments; reproduce reported issues and cooperate with ESET HQ while searching for solutions
* Provide on-site/remote installation for selected customers
* Perform conceptual, systematic, creative and methodical activities
* Visit/call selected customers to gather the necessary data and to deliver the required services
* Develop further improvements to the services’ guides and processes
* Propose solutions and execute them in customers’ environments
* Manage projects related to services (per customers, tracking the related activities)
* Plan the services by using existing systems

To reach global consistency in quality assurance of service delivery towards customers, ESET HQ requires the following certifications to be fulfilled by Partners’ DSS staff according to the tier/level they aspire to offer:

### Tier 1/ Level 1 Deployment Service Specialist

|  |  |
| --- | --- |
| Course Code | Course Name |
| HQ-TT | ETT | ESET Technologies Training |
| HQ-POT | EPOT | ESET Product Overview Training (Business part only) |
| HQ-EES | EES01 | ESET Endpoint Security Training\* |
| HQ-ESMC\_7 | ESMC01 | ESET Security Management Center Basic Training |
| HQ-ESMC\_7-2 | ESMC02| ESET Security Management Center Advanced Training |
| HQ-EFS\_7 | EFS01 | ESET File Security Training\* |
| HQ-TSS | TS01 | ESET Technical Support Training |
| HQ-ESMC\_7\_MSP | MSP02 | ESET Security Management Center for MSP Environments Training (some topics) |
| HQ-TT | ETT | ESET Technologies Training |
| HQ-POT | EPOT | ESET Product Overview Training (Business part only) |
| HQ-EES | EES01 | ESET Endpoint Security Training\* |

\*The training is not yet available  
\*\*The training is not yet available; it will contain an explanation of the processes and requirements regarding the available services

### Tier 2/ Level 2 Deployment Service Specialist

|  |  |
| --- | --- |
| Course Code | Course Name |
| HQ-EEI\_1.2 | ENT02 | ESET Enterprise Inspector Deployment Training |

### Tier 3/ Level 3 Deployment Service Specialist

|  |  |
| --- | --- |
| Course Code | Course Name |
| HQ-EMSX\_7 | EMSX01 | ESET Mail Security for MS Exchange Training |