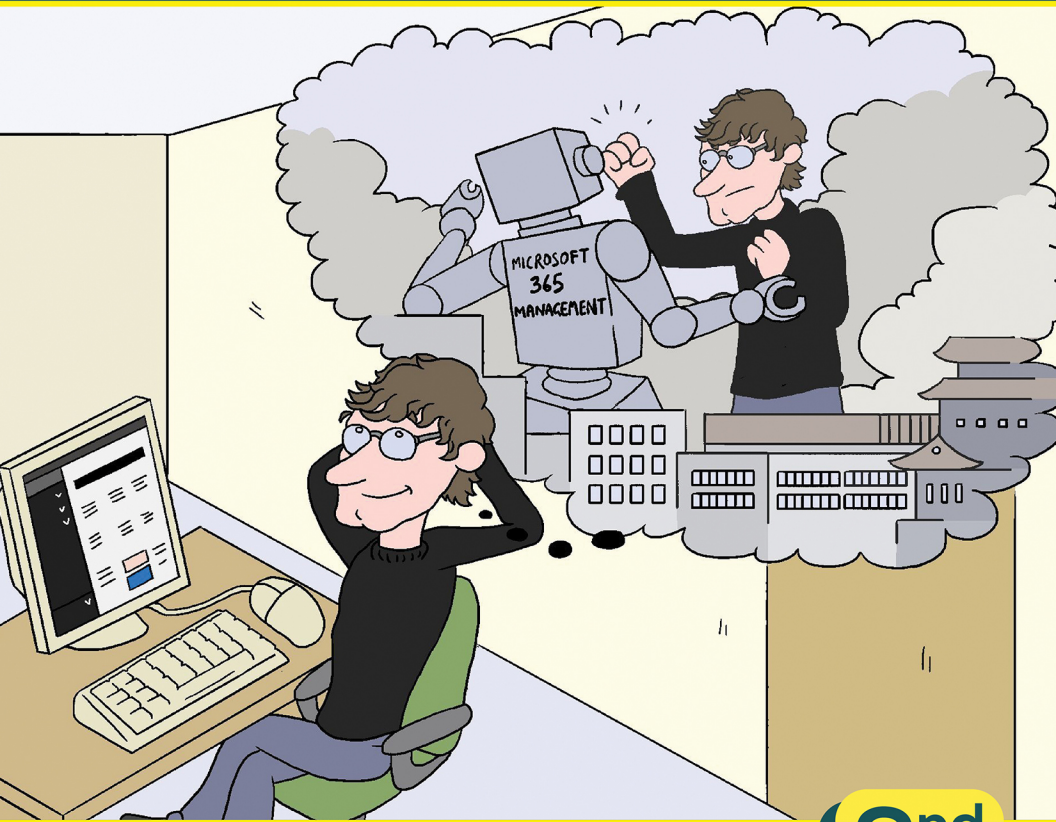




ConversationalGeek®

Conversational Microsoft 365 Management

By J. Peter Bruzzese (8x Awarded Microsoft MVP)



**In this
book, you
will learn:**

- Opportunity costs through licensing management of Microsoft 365
- The difficulties of managing Microsoft 365 through multiple admin consoles
- The value of a SaaS Management Platform (SMP) to enhance Microsoft 365 management

**2nd
Edition**

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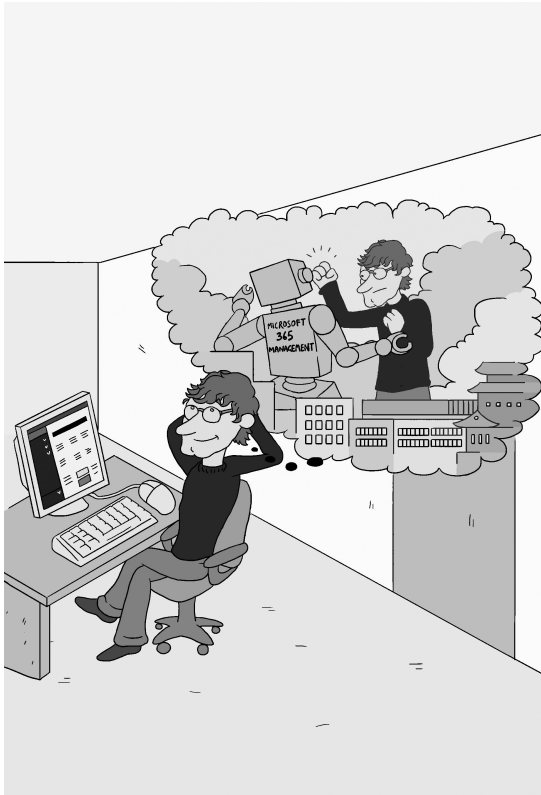


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Note from the Author

Greetings!

Believe it or not, I was once “Mr. Anti-Cloud”. It’s true. Perhaps many of you reading this book were of a similar sentiment – *Stay out of the cloud*. Security breaches and outages were all you heard about during the early days of cloud adoption, whether they involved SaaS, IaaS, or PaaS.

But with time and greater stability, I was slowly won over. Seeing the value of solution suites like Microsoft 365 and what they had to offer in the form of 21st century communication and collaboration tools caused me to rethink my “on-prem only” mindset and embrace the cloud and Microsoft 365 especially.

Nevertheless, just as on-premises solutions from Microsoft always left the door open for an ecosystem to spring up around them and enhance what they did out of the box, Microsoft 365 opens the door for new cloud-based solutions to take what is built-in and make it better, giving us more options.

One area where I can see this being valuable is in our management of Microsoft 365. There are solutions in the marketplace that help improve onboarding and offboarding, provide greater insight into the services being used, provide license management, automate things that you would typically have to do manually (or through a script that you have to take the time to figure out and build) and more.

In this book we’ll explore the value of SaaS Management and Microsoft 365.

J. Peter Bruzzese



The “Conversational” Method

We have two objectives when we create a “Conversational” book: First, to make sure it’s written in a conversational tone, so it’s fun and easy to read. Second, to make sure you, the reader, can immediately take what you read and include it in your own conversations (personal or business-focused) with confidence.

These books are meant to increase your understanding of the subject. Terminology, conceptual ideas, trends in the market, and even fringe subject matter are brought together to ensure you can engage your customer, team, co-worker, friend and even the know-it-all Best Buy geek on a level playing field.

“Geek in the Mirror” Boxes

We infuse humor into our books through both cartoons and light banter from the author. When you see one of these boxes, it’s the author stepping outside the dialog to speak directly to you. It might be an anecdote, it might be a personal experience or gut reaction and analysis, it might just be a sarcastic quip, but these “geek in the mirror” boxes are not to be skipped.



Greetings. They call me J. the Geek. Within these boxes I can share just about anything on the subject at hand. Read 'em!

Native Microsoft 365 Management



Through 2020 and into 2021, with the pandemic forcing organizations to rely further on cloud-based communication and collaboration solutions like Microsoft 365, the number of active users has grown at a rapid pace. At the time of writing, Microsoft's commercial cloud revenue was up by 33% from the same time last year. And CEO Satya Nadella said "digital adoption curves aren't slowing down. They're accelerating."



Details regarding M365 are based around FY21 Q3 results. www.microsoft.com/en-us/Investor/earnings/FY-21-Q3/press-release-webcast

Microsoft Teams alone had increased to nearly 150M active users (and it's no doubt higher now). And with such large volumes of users utilizing Microsoft's premier communications and collaboration platform, there comes the need for IT to manage this environment to meet the specific needs of each customer organization. As Microsoft did with their legacy on-premises solutions, they've also done with Microsoft 365; they've provided us with a variety of tools used to address daily and one-off administrative needs.

But, similarly, it's understood that Microsoft has so many customers with such varying needs, that it's impossible for their management capabilities to be comprehensive. As you'll see, Microsoft has put thought into what kinds of management are possible natively, but some more advanced functionality either requires customization, scripting, or third-party help.

Let's begin by taking a look at what comes right "out of the cloud".

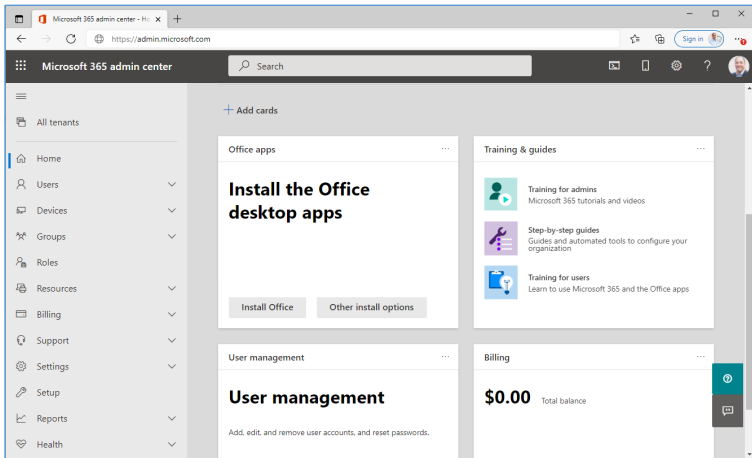
Native Microsoft 365 Administration Tools

Microsoft provides a basic set of admin tools through administrative consoles that, where applicable, port back to their on-premises counterparts.

For example, when working with specific features of Microsoft 365, like Exchange Online, an admin will have the ability to work with a web-based portal solution similar to what they use on-premises.

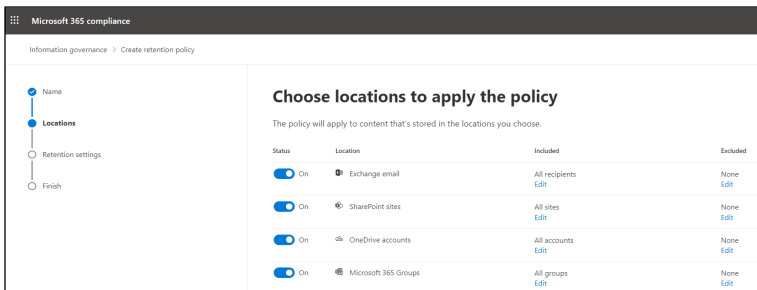
More and more, however, Microsoft is working to create new dashboards that help to surface specific management tools so that admins can find them based on subject, and manage them across different parts of the platform. Granted, it's not ideal to develop this way but they're starting from a disparate server scenario and trying to merge architectures together

(Exchange, SharePoint) while building new solutions on top (Microsoft Teams).



The Microsoft 365 Admin Center

A perfect example of this is the effort to pool together Security or Compliance for the entire platform into one dashboard. From within these consoles (the Security and/or Compliance console), you can establish settings for multiple built-in solutions. For example, a retention policy that applies to email, SharePoint sites, OneDrive accounts, Teams, and more.



In addition, you can establish a remote PowerShell connection to Microsoft 365 and perform most (but not all) tasks through the command-line as you would through the GUI.



Although PowerShell is a great tool for command-based administration, some IT admins would prefer to avoid the heavy lifting involved with scripting and such in favour of a more automated approach.

Some smaller organizations might look at what Microsoft 365 offers and say it's "good enough" for their needs. Others might want greater transparency and visibility into reporting, license administration, role-based access control (RBAC) features, and more.

It's not a slight against Microsoft (or any other SaaS vendor for that matter) to say the native, built-in administrative consoles and features might not fully satisfy the management requirements of an organization – especially a large shop. But you can't let that deter you from pursuing the valuable communication and collaboration services platform provided through Microsoft 365. Microsoft has always left gaps for third parties to fill in – and Microsoft 365 is no exception.

The Microsoft 365 Management Battlefield

There are aspects to Microsoft 365 management that are both time-consuming and prone to error. Let's consider a few:

- **Provisioning** users is a clear example. First, you need to determine if you have enough licenses (and the right ones for the users), which isn't entirely an intuitive task. The Microsoft 365 Admin Center console will have you searching for the Licenses page (under Billing – Licenses). You can assign licenses from here or you can go back to the Active Users page (under Users) and

begin the process of manually provisioning each user. Scripting the onboard process for bulk user provisioning can be done through a remote PowerShell connection with a lot of research and trial and error.

- **Deprovisioning** is an even bigger issue, especially due to the security threat posed should a terminated user not be deprovisioned properly. Admins typically have a list of deprovisioning steps in mind provided by Microsoft that includes saving the contents of a former employee's mailbox (either through export to .PST or by converting the mailbox to "inactive"), forwarding their email, wiping and blocking their mobile device, blocking access to their mailbox and data, moving their OneDrive content, removing the license, and deleting the account. And to accomplish all of this, you're moving from one Admin Center to another (e.g., from the M365 Admin Center to Exchange to SharePoint).



I'm assuming you understand the difficulty of having different Admin Centers (roughly 15 at the moment). Some are on-prem centers that are now cloud-based and include a wide array of configuration options. Others are less intense. The point is that there is a unique complexity to each Admin Center.

And using each one requires an administrative skillset that isn't intuitive once you get below the surface and start diving into the real administrative side to Microsoft 365, as larger shops would.

- The onboard/offboard process taps into the **license management** side of Microsoft 365, which is yet another cause for angst. When first getting started with Microsoft 365, many IT admins will scan the different license plans, see the features connected

with each plan (E1 / E3 / E5), and make quick decisions on the number of licenses they need based on the end-user count and perceived use of services. Done! *But is it really?* Every plan has a base of services that, in a buffet license arrangement, may feel right for a swath of your end-users so you may think “I’ll level up or down” depending on your needs. But the challenge is first finding out what you need *before* you can right size. Unfortunately, Microsoft 365 isn’t incredibly transparent in this regard.



I often see environments where the licensing is either oversized (perhaps you’ve bought more applications than your users need) or underutilized (due to a lack of adoption).

- **Security** insight and management is another key aspect of Microsoft 365. Microsoft now provides its Secure Score report (through the Security and Compliance Admin Center) which will tell you, from a very high-level point of view, where you need to bolster security (*hint: a large part of your score is based on multi-factor authentication (MFA) for all users*). From the Secure Score dashboard, you can quickly select remediation options, and you’re taken to the Azure dashboard (yet another interface) for policy enablement.
- **PowerShell** is used to manage policies and feature options and to provide visibility into Microsoft 365 (bit.ly/2RPe7J0). Granted, in some cases, this is simply the more efficient way to do something (just like with on-prem environments). Legacy admins don’t mind getting their hands dirty to perform a little scripting. There are other situations that actually *require* PowerShell, because it’s the *only* way to accomplish the task. For example, PowerShell is sometimes the

only way to obtain information that isn't available anywhere in the M365 Admin Center. One example is the Deleted Item Retention Time. By default, it's 14 days, but you can adjust it up to 30 days through a remote PowerShell connection and the *Set-Mailbox -RetainDeletedItemsFor* command. PowerShell is also necessary for reporting on anything that spans the suite of products by collating and combining that information.

We could go on, but the point is clear that organizations of all sizes will appreciate the services that Microsoft provides through Microsoft 365, but not necessarily the management tools provided along with those services.

This is one of the reasons Gartner has defined a new market of solutions – the *SaaS Management Platform (SMP)* – which are designed to help with the day-to-day operations of managing SaaS applications. According to Gartner ([gtnr.it/3wOyHNx](https://www.gartner.com/en/newsroom/press-releases/2018-09-11-gartner-identifies-saas-management-platform-as-emerging-market)):

While SaaS applications have their own native management consoles, the depth of their capabilities often doesn't completely meet enterprise requirements.

SaaS Management Platforms and Microsoft 365

A relatively newly coined phrase, SaaS Management Platforms (SMP) step in and fill the gaps that native SaaS platforms (like Microsoft 365) have left open with regard to the depth of their capabilities. As we've discussed with Microsoft 365, Microsoft uses a bevy of different SaaS applications and management consoles that are Frankenstein'd together. SMP solutions see Microsoft 365 as an opportunity to benefit from the services through a consolidation of their management aspects.

According to Gartner, there are six major functional SMP categories: *administration, IT role-based access control, policy*

management, license management, workflow automation, and reporting. The major players in this space will hit some or all of these categories (and perhaps a few additional ones where they feel the native SaaS platform needs a boost, like security and compliance needs). The market direction, according to Gartner, is for SMPs to focus on “tactical IT administrative challenges in the native SaaS administrative consoles”.



According to Gartner, “Nearly all successful attacks on cloud services are the result of customer misconfiguration, mismanagement, and mistakes”.

Compliance regulations, like GDPR, PCI, and HIPAA, make for another argument in favor of an SMP solution to assist with improved monitoring, reporting, and analytics.

Here are some places I see an SMP being of value to organizations large and small that are feeling the pain of managing Microsoft 365.

Single Pane of Glass

In the native Microsoft 365 Admin Center, there are a variety of different dashboards and management tools to access reporting, service information, and so on, adding to the complexity in trying to administer what are essentially massive server solutions stitched together with their individual consoles. Keep in mind, if Microsoft was starting all of this from scratch, they would have designed that unified console from the beginning, but that’s not how Microsoft 365 was built. It started as on-premises endpoint and server solutions that are now cloud-based, hosted solutions, so the single pane of glass simply doesn’t exist. Here is an area where an SMP solution can provide assistance: offering up a single dashboard with the

ability to perform administration and reporting, and to handle permissions and such, that can make it easier to manage Microsoft 365 as well as provide visibility into the use of the solution.

Workflow Process Automation

You can use the various Admin Center UIs to accomplish the basic administrative tasks. And you can resort to PowerShell (command-line) to accomplish deeper bulk administrative functions. However, the amount of time wasted and the degree of error or missed steps make the native consoles less than ideal.

Automation is one of those areas third-party solutions tend to focus on. Why should every admin in every organization have to research, build, test, and deploy PowerShell scripts for the basic process automation of their environment? Having access to one-click, GUI-based options makes much more sense and helps eliminate the user error that comes from poor execution of home-grown scripting solutions.

Another area of concern is policy management and proper service configurations. While it's easy to get Microsoft 365 up and running with the basic settings, the deeper configuration and management sides to it require a great deal of effort for admins to research, test, and deploy (rinse/repeat). Having an easier means of deploying services with best practices in mind through default policy controls would prevent misconfigured accounts.

Role-Based Access Control (RBAC)

The concept of least privilege is an important security principle that requires that RBAC be implemented properly. Microsoft 365 does offer a variety of admin roles, but they paint with a very wide brush (bit.ly/301KYNE).

If you scan the different admin roles, there is a *global administrator* (which can do pretty much anything... including handle services like Exchange, SharePoint, Teams, and so on). On the lower end, there are *global readers* (which have read-only access to admin centers). There is a *helpdesk admin* for password resets, support ticket management, and service health. There are also *service admins* (like for Exchange, SharePoint, and Teams). And then there are category-focused roles for collaboration, devices, identity, read-only, security and compliance, and a few additional ones. The problem, however, is that even though the roles might narrow control, these are *global* credentials. Perhaps in small shops, that kind of approach works, but in global environments where you have different teams and tiers, a granular approach that allows the management of specific groups, departments, geos, etc. is needed.



Despite Microsoft recommending you limit the number of folks who have global admin access, even when you restrict what a Microsoft 365 admin can do, they still have global credentials.

License Management

There are plenty of times organizations eliminate a position or fire an employee and do *not* reduce the number of Microsoft 365 licenses. This mismanagement of licenses can become very costly if not addressed.

Additionally, there are situations where licenses are underutilized. For example, what if you have an E3 plan for all your users but find, through reporting, that several hundred do not have Office desktop applications installed on-premises because they're still using a legacy version of Office on their system?

Situations such as this create *oversized licenses* issues that should be addressed. An E1 license (which would be the correctly-sized license) would save the company money and might better suit your needs. Alternatively, you might want to review software deployment to get everyone onto Office desktop applications or turn on the archive features to ensure you're getting every last bit of that license.

Right-sizing licensing ports to opportunity costs and the "opportunity" can go either way. There are two ways to address the issue of oversized licenses: you can either attempt to drive adoption, or downsize to the proper license. Using the native tools, it's very difficult to pinpoint your users' exact consumption levels. This means you're most likely wasting license fees within your tenant. Having optics on the adoption and consumption of your licensing and usage can ensure your money is better spent by right-sizing software spend. SMPs providing granular visibility into license usage can assist in the identification portion of these kinds of scenarios, as well as the downsizing of licensing.



Personally, I've bought into the M365 communication and collaboration, 21st-century modern workplace story. I believe the key to it is not necessarily right-sizing by altering the license but through increased adoption. Help your users embrace the tools you've given them.

Adoption

You may be shocked to find out that, within many organizations, less than 50% of the services are adopted. And when analyzed, it's often found that a large percentage of paid-for licenses are unassigned or inactive.

Now, should you want to drive the adoption of more of Microsoft 365, there are some basic links off the Microsoft 365 Admin Center home page that can help you improve adoption (aka *consumption*) through training. There is a “Train yourself” section for admins and a “Train your people” section for end-users. Included are a variety of different cheat sheets, infographics, and training videos.

On the home page, you can also find options to push out training on a variety of subjects (such as Teams) to end-users. However, the training resources are somewhat light compared to the task at hand – that of taking 20th-century end users and bringing them up to 21st century SaaS communication and collaboration levels. You can’t just assume the end-users will “figure it out”. They won’t.

Here again, is where having improved reporting on unused or underused apps can provide insight into the level of adoption within your organization that will allow you to then pursue a targeted approach toward training. You’d likely want to run campaigns that will drive adoption, for example, email reminders to help users to keep the new tools top of mind.

Key Takeaways

Microsoft has done an incredible job of building a 21st century communication, collaboration and cooperation solution for the modern workplace. Microsoft 365 is being utilized by millions and is evolving in many ways, visually to the end-user as well as behind the scenes for the administrators. One of the key challenges to moving on-premises solutions to the cloud, tying them together, and adding new solutions to the mix is the lack of a clear set of administrative tools.

Legacy dashboards that do not provide a single pane of glass may not be super confusing for seasoned on-prem admins but with next-gen admins or non-IT admins being thrust into administrative roles it can be challenging. We see Microsoft working to create new dashboards that combine stories across solutions (for security and compliance needs, as an example).

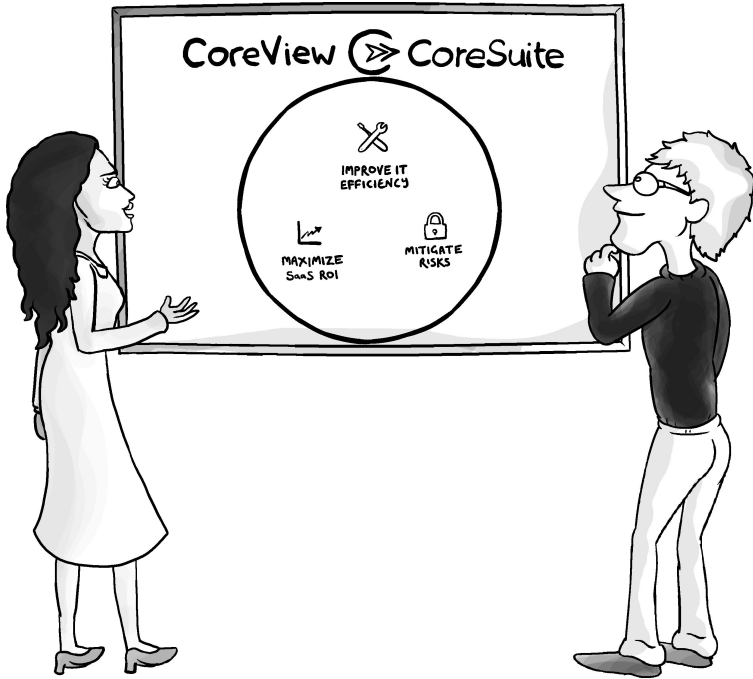
Additional "battlefield" issues revolve around provisioning and deprovisioning of users. Since some of the core solutions for M365 were silo'd and users were provisioned per service it's been a challenge to ensure you can spin up a user with multiple services upon entry into an organization and deprovision those same services smoothly upon exit.

License management and license right-sizing is yet another factor to ponder either from a cost perspective or an adoption perspective. And then there are the nitty gritty administrative aspects that require admins use the command-line PowerShell remote connection options to configure, which is an added complexity with added room for user error.

The end result is a new ecosystem category of solutions called SaaS Management Platforms (SMP) that assists in M365 administration by providing the missing gaps of the story. A single pane of glass dashboard for multiple solutions, easy onboarding/deprovisioning, license management, adoption reporting and more. These SMP solutions are helping

organizations (especially those on the larger side) to save money, administrate M365 in a smoother manner, increase adoption of M365 solutions amongst end-users and more.

Vendor Sponsor: CoreView's CoreSuite



CoreView is a leading SaaS Management Platform solution provider that improves IT efficiency, maximizes SaaS ROI, and mitigates risk. CoreView provides organizations with an SMP solution focused on tackling the shortcomings in Microsoft 365 native management.

Their primary offering is called CoreSuite. The goal is to help you See, Manage, and Automate!

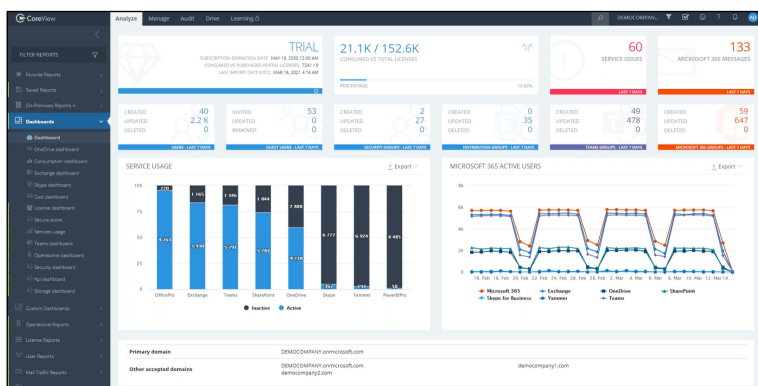
Let's dive in!

See, Manage, Automate

CoreSuite provides a set of dashboards that focus on four main subjects: Analyze, Manage, Audit, and Drive.

Analyze

The Analyze dashboard takes the gaps discussed in the previous section revolving around issues with a license over/under commit, RBAC, and such, and offers mitigation through license lifecycle management, virtual tenants, and other features.



The Coreview Analyze dashboard

Microsoft 365 has an endless number of license and service configurations thanks to set plans and *a la carte* combinations. It can become convoluted and expensive, especially with larger, distributed organizations and/or government entities. With CoreSuite, you can spot unused, unassigned, or underused licenses, and enjoy an average savings of 30% on license costs.



We mentioned the stress of having multiple admin consoles in M365 instead of a single pane of glass, but CoreSuite provides that single pane, replacing multiple admin center interfaces.

Additionally, you can set up license pools for better management, tracking, chargebacks, etc. The license pools

allow you to delegate to different business units through virtual tenants. This proactive license management helps you to better control the assignment of licenses (and who is paying for those licenses). In addition, it provides license usage reporting on the use of those accounts broken down by group.

Using Microsoft Graph APIs, another key part of the Analyze options is the Teams Reports that can help you see user activity, call quality and other telephony elements, inactive users, and more. This kind of data can assist with the adoption side of management.

Audit

With millions of users, Microsoft has a tremendous amount of threat intel that can be of benefit to them, and your organization. CoreSuite provides forensic analysis and auditing with long-term, full-year storage of activity logs (Microsoft only stores logs for 90 days). Data can be mined and surfaced back in compliance reports that can be analyzed by department, business unit, country, and so on. This will help you see where breaches are occurring. You're able to create custom, real-time alerts to allow for faster response times for your IT staff (which is great for inappropriate file access or sharing and false log-in attempts).

File auditing and data analysis can really help an organization to see user behavior throughout their Microsoft 365 environment. CoreSuite has 200+ customizable reports to assist you with monitoring usage and end-user activity to ensure you're fully compliant with company/governmental policies.



CoreView calls their audit logs “human-readable”, which is rare, as you know if you’re ever seen some of the log data IT folks have to parse through. Very human unreadable most of the time.

There is a health check service that provides a full report back on license utilization, vulnerabilities, security and compliance risks, and usage activities. The results are organized into four categories: license management, security and compliance, change management and adoption, and an action plan.

For example, the assessment might report that you are not using MFA within your environment (or perhaps it hasn’t been enabled for all users to take advantage of). Through CoreSuite, you can easily set and enforce MFA policies. The same is true of password policies. You can also monitor and enforce appropriate password policies for your organization.

That’s not to imply that CoreSuite is an intrusion detection system. Rather, it provides insight into dangerous user behavior and misconfiguration of your Microsoft 365 tenant.

Manage

It’s great to be able to see information and reports but it’s even better to be able to fix problems or change things from the report itself. CoreSuite allows you to break up your Microsoft 365 tenant into smaller sub-tenants or virtual tenants (v-tenants). The granular, easy-to-use aspects of role-based access control options are valuable; they help fill the gaps of Microsoft 365 administration by giving admins specific permissions to perform only those tasks they’re assigned and only over those users they’re assigned. So, you’re able to have local admins, or assign admins to departments, and limit who the admin manages, and what management functions they can perform. Wait... that sounds like... you’ve got it... real RBAC.

This is in stark contrast to the global permission allowances given to IT admins because it's a bit of a nightmare to try and box them in using the built-in roles provided.

Workflow automation, another important aspect of CoreSuite, helps optimize the execution of common tasks while removing human error with repetitive tasks like user provisioning and de-provisioning.

Drive

If the goal is getting users to truly adopt Microsoft 365 it's important to be able to take the graph data that shows you where there are weaknesses in that adoption and combine it with CoreSuite's Drive, where you have a communication engine to drive adoption. Email reminders to those users are a key to the adoption of underused apps such as Microsoft Teams, CoreSuite allows you to set up email campaigns that help to drive adoption.

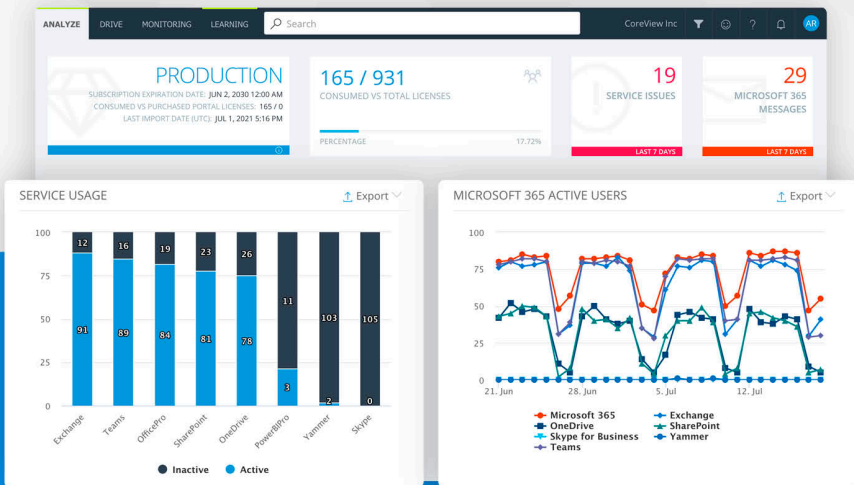
In Conclusion

CoreView's CoreSuite is an enterprise-grade Microsoft 365 SaaS Management Platform (SMP) with a heavy focus on improved administration, RBAC, policy management, license insights, workflow automation, reporting, and adoption. Through its centralized approach to managing Microsoft 365, it provides organizations with an ability to simplify the work of increasing the overall adoption of Microsoft 365, improving end-user productivity, centralizing IT's control, and enhancing the organization's security and compliance stance – all while lowering the overall cost of owning Microsoft 365.

Notes

CoreView Is the #1 SaaS Management Platform

Gain unparalleled insight around your organizations Microsoft 365 tech stack



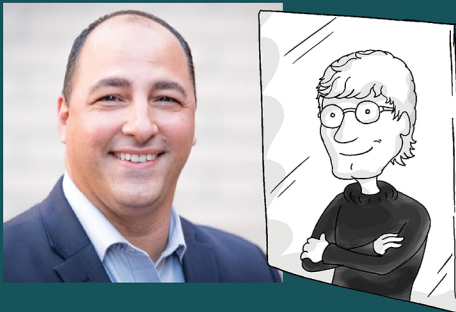
- ✓ Continuously improve your efficiency
- ✓ Track how your company uses licenses
- ✓ Identify and reduce security risks

Request a demo at
www.coreview.com/request-a-demo/



Quickly become conversational about Microsoft 365 Management in any setting

With Microsoft 365 moving toward half a billion corporate users globally, enterprise organizations need help in managing, securing, and optimizing their M365 tenants. Disparate admin centers, cumbersome workflow process automation, simplistic RBAC options, wrong-sized licensing, and poor adoption create frustrations. In this book, we'll discuss the challenges of managing Microsoft 365 and look at how SaaS Management Platform (SMP) solutions have arisen to simplify, improve, and optimize Microsoft 365 management.



About J. Peter Bruzzese

J. Peter Bruzzese (8x Awarded Microsoft MVP - 2010 to 2019) is an internationally published author and speaker, well-known journalist, and co-founder of both ClipTraining and Conversational Geek. Follow him on Twitter at @JPBruzzese



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