



## A&O Account Manager Profile of Excellence



### Practice Area Relationship Builder

Impact of Practice Area  
Build Intentional Relationships

#### Excellence in Action

1. Strategize with the AE to develop a relationship map for the account to ensure effective contact coverage, and collaborate to build those relationships within the account (internally and externally).
2. Establish yourself as point person for day-to-day account issues and concerns with creative.
3. Conduct proactive meetings with agency/advertiser to improve business understanding and develop/foster relationships.
4. Provide flawless execution of orders across platforms, working with agencies/advertisers to understand satisfaction drivers, and ensure delivery meets each agency/advertiser's needs.
5. Identify contributing factors to winning/losing key business over competitors and share this information and best practices with others (i.e. talking to other AM's that have that competitor, best wins/losses of month in monthly AM meetings).
6. Drive a One Microsoft approach in proactive/reactive communications with agency/advertiser by making connections to other internal contacts, and through campaign performance discussions as well as identifying options and recommendations for future campaigns.



### Practice Area Solution Innovator

Impact of Practice Area  
Build Innovative Solution Proposals

#### Excellence in Action

1. Engage with AE in the building of Requests for Proposals (RFPs), brainstorm recommendations in partnership with key stakeholders (AE, opportunity team, product specialist, etc.), and provide recommendations and insight based on client history, past performance, industry, customer and business knowledge (where applicable).
2. Own and respond to RFP's for renewals of annuity campaigns based on collaboration and customer planning set forth by the AE.
3. Partner with internal teams to gain creative insights (i.e. rich media developer, vendor) and leverage these insights in correspondence to client.
4. Participate in meetings with agency/advertiser to provide insights and discuss future products/opportunities (join AE in meetings, general performance, insights, etc.).
5. Present creative and customizable up-sell opportunities to agency/advertiser outside of a campaign.



### Practice Area Smart Collaborator

Impact of Practice Area  
Collaborative & High-Performing Team

#### Excellence in Action

1. Develop and grow mutually beneficial working relationships with your AE and members of the account team, resulting in seamless account management and a united front to customers.
2. Contribute to account team meetings, as outlined in account ROB, to ensure cross team collaboration, awareness of pre-sale activities before IO delivered, and status of campaign performance as well as ensuring the best outcome concerning solution admix, revenue and customer satisfaction.
3. Touch base with account team on a regular basis (i.e. informal daily greetings, communication) to ensure the relationship is working, and be open to giving and receiving feedback for the benefit of growing the relationship.
4. Build and maintain a network of key Microsoft internal contacts to secure strong cross-group collaboration that allows Microsoft to quickly respond to customer requests or escalations.
5. Relay external market needs and agency/advertiser feedback to the appropriate internal roles in the organization (i.e. such as competitors' pricing to the pricing manager, emerging trends to leadership, etc.)
6. Work with AE on customer relationship building activities and agency/advertiser engagement activities that personalize Microsoft voice to the customer.





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### Practice Area Disciplined Operator

### Impact of Practice Area Campaign Optimization

#### Excellence in Action

1. Lead ongoing campaign management efforts through regular meetings/communication with the AE, customer and the account team.
2. Proactive management of campaigns to ensure contractual obligations are met, credits are minimized and appropriate action taken when needed based on regular reporting and data analysis.
3. Drive incremental revenue throughout campaign by identifying potential cross-sell, upsell, renewal, optimizations or new business within existing deals and partnering with AE and to tell the Microsoft story using data/analytics (where applicable).
4. Provide regular updates to the agency/advertiser per customer plan on campaign performance (i.e. delivery, under-delivery, optimization suggestions, and other details on campaign).
5. Identify and communicate under-performing campaigns to fulfill contracts, defend revenue and/or make goods, as needed.
6. Proactively conduct regular audits of billing cycle and partner with agency/advertiser and internal teams to minimize necessary credits with billing discrepancies.



### Practice Area Strategic Planner

### Impact of Practice Area Builds Winning Customer Plans

#### Excellence in Action

1. Utilize data analytics and insights (i.e. MAS analytics and other tools, best practices, historical performance data, and client campaign history) to enhance account team and client knowledge, inform customer plans and drive a sales strategy.
2. Drive strategic, effective and actionable customer plans to increase or maintain results through quarterly updates to internal leadership teams.
3. Ensure consistent customer conversations are taking place for Tier 1-2 accounts, which meet the quality standards as defined by Sales management, and are included as part of a comprehensive, up-to-date customer plan.
4. Perform regular internal/external status updates and reviews (team calls) as part of account rhythm of the business (ROB), including extended team when necessary.
5. Hold customer conversations with agency/advertiser to discuss criteria to be included in customer planning