

MSA Partner/Channel Marketing Manager (PCMM) FY17 Role Excellence Profile (REP)

Introduction to the MSA Partner/Channel Marketing Manager Role Excellence Profile

The Role Excellence Profile is a role development tool for growth mindset and not a substitute for role priorities or used as a direct measure of performance. This profile focuses on what exemplary performers produce, the actions they take, and how they measure success above and beyond role priorities. The REP is a composite profile comprised of Primary Accomplishments (PAs). For each PA, there are a set of relevant Key Actions (KAs) and Excellence Indicators (EIs) or leading indicators of success.

Note: Based on your individual Partner Channel Marketing Manager role focus (i.e., partner, channel, lifecycle), only a sub-set of key actions and Excellence Indicators will be applicable. This Role Excellence Profile is not one-size-fits-all.

The REP is based on the following:

- Interviews with high performers who have a sustained track record of success
- Input from Leadership
- Feedback and input from key internal stakeholder groups

The REP is the foundation for all execution support materials:

- Foundation for hiring guides, onboarding kits and readiness
- Role guidance for individual contributors and managers
- Role development discussions

Overall Role Accomplishment: High impact marketing plans and programs that drive strong partner/channel engagement and satisfaction through the full customer lifecycle that contribute to Bing Ads brand and all-up Search business goals

Primary Accomplishments
A. Partner/channel/lifecycle marketing strategy, program and plans
B. Marketing programs, initiatives or campaign execution that maximizes revenue and marketing ROI
C. Effective day-to-day partner/channel operations and performance
D. Trusted internal stakeholders and external senior-level partner/channel relationships
E. Partner/business/industry expertise and continuous learning with a growth mindset

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Definition of Terms - The below terms are used in this document. Definitions are provided to drive clarify of terms.

Term	Definition
Audience	<u>In the context of Bing traffic</u> : profile of Bing users <u>In the context of Bing Ads Marketing</u> : defines the various core personas we target either from a customer or an industry perspective, (e.g., Executive, Budget/Business Decision Maker, Daily doer/SEM Pro, SMB, journalists, trade bodies, influencers)
Campaign	A marketing campaign is a coordinated series of brand messages that promote a service/product through different mediums (e.g., social, television, radio, print, online) using a variety of different types of advertising).
Channel – Marketing	A set of standard practices or activities to convey the Bing Ads brand and/or products unique value proposition to the industry, customers or partners (e.g., industry events, web, social, webcast, media, CRM).
Channel – Consumer	Various ways (including at-scale and programmatic) to have your product/service (Bing) reach the end consumer (e.g., browser search, Bing App, syndicator's website, Siri. organic online, paid online). For a company like MSFT, a consumer channel would be our proprietary store vs. Best Buy
Channel – Customer	First party (MSFT direct sales force) or third party/intermediaries between MSFT and final customers (businesses) to drive specific sales/service call to action (e.g., direct sales, agencies, resellers, tele sales, CSS).
Co-marketing	Marketing programs with 3 rd party partners to help drive business goals (e.g., revenue, brand, new customers, etc.) <u>In the context of partner marketing</u> : account/joint marketing plans with a partner where both Microsoft and the partner invest resources, also called “through partner” marketing.
Customer Lifecycle	Individual evolution of a customer through the different stages of its engagement with Bing Ads, from a prospect to performing advertiser. By extension, describes the marketing motions, at scale or through sales and services, driving positive behaviors towards Bing Ads during these various stages to increase lifetime value.
Partners	3 rd party/intermediaries who transact with managed or unmanaged customers (advertisers) - including: agencies, SMB channel partners (a.k.a. resellers) and technology providers.
Partner Marketing	One-to-one and scaled marketing activities and initiatives targeted to key partner types (e.g., resellers, agencies and tech partners.)
Search ecosystem	The network or system of search-related sources (internal and external – people, data, hardware, software, services) impacting the behaviors of search advertising: primarily the advertisers, the search engine and the searchers, but includes secondary influential contributors like partners, tool providers, trade bodies, media and journalists, influencers.
Stakeholders	Key internal roles who need to be involved in a specific project either to consult, input, action, decide and/or review a given project.

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Primary Accomplishment A: Partner/channel/lifecycle marketing strategy, program and plans

Summary: Key actions the PCMM takes to develop marketing/program strategy, socialize with leadership and stakeholders and evolve over time.

Key Actions (Core and critical actions that combined contribute to the achievement of the Excellence Indicators. Numbered for reference, does not indicate priority or chronology.)

1. Shape overall partner/lifecycle program strategy and framework by understanding customer business goals, regional specifics and overall market dynamics, to inform program strategy development. *(applicable to partner/lifecycle roles)*
2. Lead the partner/lifecycle program structure and benefits with all the stakeholders required to implement the benefits and obtain confirmation they are on-board and able to execute and unlock such benefits in a scalable way (e.g. legal, PR, finance, social, customer first program, other marketing teams, etc. *(applicable to partner/lifecycle – tbd roles)*
3. Develop channel/partner(s) strategic investment and development plan on an annual basis or as the business demands.
4. Develop an understanding of other channel/partner's marketing plans engaging peers and colleagues (e.g., global-to-local, local-to-global, other channels) to leverage relevant plan aspects, maximize investment and avoid duplicating efforts.
5. Scope the downstream impact and upstream dependencies of successfully executing the strategy.
6. Determine partner/channel's investment focus areas and marketing priorities through customer lifecycle to ensure appropriate ROI and then track goals and marketing fund budget.
7. Socialize the marketing strategy and KPIs with leadership and key stakeholders to ensure alignment and buy-in.
8. Seek global and local feedback, learnings and best practices to evolve the strategy / plan.

Excellence Indicators (EIs) (Observable and/or measurable leading indicators/outcomes of excellence)

- a. Partner program consists of levels/tiers, to-and-through tactics, and scalable benefits and incentives per tier *(applicable to partner role)*
- b. Lifecycle program differentiated on sub-segmentation and scalable engagement and services per tier *(applicable to lifecycle role)*
- c. Program benefits are measurable, scalable, confirmed with all stakeholders
- d. Partner/channel marketing plan aligned to sales team goals and business targets and/or account plans or joint partner plans (with clear partner marketing gives/gets), customer / channel rhythm, competitive dynamics, and revise based on input from check points (e.g., customer QBRs or internal MBUs)
- e. KPIs and tracking mechanism to evaluate strategy and plan success in place
- f. Formal or informal internal stakeholder feedback that PCMM is positively enabling the sales team to support managed customers

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Primary AccomplishmentB: Marketing programs, initiatives or campaign execution that maximizes revenue and marketing ROI

Summary: Key actions the PCMM takes to successfully execute marketing programs, initiatives or campaigns.

Key Actions(Core and critical actions that combined contribute to the achievement of the Excellence Indicators. Numbered for reference, does not indicate priority or chronology.)

1. Develop or curate marketing program, initiative, or campaign pertaining to customer channel (e.g., program benefits, content creation, messaging, data, list management, events and execution actions).
2. Manage internal and external relationships (e.g., partner, agency, sales team, global/local counterparts, finance, legal, etc.) for alignment and execution of marketing campaigns.
3. Track performance (for impact and ROI), analyze results, share learning with global/ local stakeholders, course correct (as needed), re-deploy and iterate (i.e., a reinforcing loop), as appropriate.
4. Deliver marketing document guidance to local partner/channel for localization purposes. *(applicable for global roles)*
5. Seek execution expertise from the local partner/channel marketing manager in execution efforts to support the global motion. *(applicable for global partner/channel roles)*
6. Seek execution expertise from the global partner/channel marketing manager to run/execute the local efforts in alignment with the global strategy. *(applicable for local partner/channel roles)*

Excellence Indicators (EIs)(Observable and/or measurable leading indicators/outcomes of excellence)

- a. Programs within budget, timing and aligned to internal operations execution (benefits redemption feasibility), as defined in the plan
- b. Key stakeholder feedback incorporated into the plan
- c. Complete and detailed program documentation in place that meets stakeholders' needs
- d. Meet or exceed joint MSA/partner business objectives as defined in the plan (e.g., customer experience survey, engagements, ROI/spend lift, gives/gets)
- e. Initiative post mortem/internal feedback learnings

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Primary Accomplishment C: Effectiveday-to-day partner/channel operations and performance

Summary: *Key actions PCMMstake to ensure optimal and effective operations of the partner/channel/lifecycle programs, initiatives or campaigns.*

Key Actions *(Core and critical actions that combined contribute to the achievement of the Excellence Indicators. Numbered for reference, does not indicate priority or chronology.)*

1. Lead communication and/or leverage existing communication rhythms for weekly/monthly/ quarterly performance providing marketing updates and insights on partner/channel activities to internal (MBUs/QBUs) and external stakeholders and partners (partner QBRs).
2. Own accountability for monthly acquisition and/or spend increase targets that roll up to the Microsoft Search Advertising scorecard and/or support to partner goal.
3. Lead adhoc activities to pilot/test new models and boost performance in a compliant, fair, efficient and consistency way (e.g. new Sales Promotion Incentive Fund process, incentive structure, lifecycle pilots).
4. Coordinate with other marketing managers to ensure consistency of messaging to communication to shared audiences.
5. Participate in various partner and customer engagement activities (e.g., in-person, phone, trainings, etc.).

Excellence Indicators (EIs) *(Observable and/or measurable leading indicators/outcomes of excellence)*

- a. Meet or exceed monthly acquisition targets that roll up to the Microsoft Search Advertising scorecard
- b. Timely input (commentary and analysis against targets) to support internal and external business reviews
- c. Growth opportunities to drive further performance of channel lifecycle or partner relationship
- d. Test/pilot efforts that drove learning or could be launched based on performance results and scalability
- e. Positive informal or formal feedback from stakeholders and partners on PCMM's effective communication (e.g., engaging at the right frequency - with the right partners, effective management of internal/external communications, sharing channel performance in a timely manner)
- f. High-quality, on-time partner/customer engagement (e.g. EBC score above 85% satisfaction)

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Primary Accomplishment D: Trusted internal stakeholders and external senior-level partner/channel relationships

Summary: *Key actions PCMM stake to develop and maintain trusted relationships internally and externally.*

Key Actions *(Core and critical actions that combined contribute to the achievement of the Excellence Indicators. Numbered for reference, does not indicate priority or chronology.) [Erin]*

1. Build and provide to internal business leadership and partners a vision for mutual marketing success globally and across the regions.
2. Advocate for the Microsoft Search Advertising partner/channel relationship (both internally and externally) to foster better business outcomes.
3. Gather proactive and reactive inputs from sales and partners to drive actions that result in incremental revenue and performance locally.

Excellence Indicators (EIs) *(Observable and/or measurable leading indicators/outcomes of excellence)*

- a. Meet or exceed customer satisfaction goals as measured by customer satisfaction survey (measured currently in UK and US by CX survey)
- b. Positive formal or informal feedback from sales team and partners (agency, reseller, etc.) on PCMM as a valued resource and trusted advisor
- c. Meet or exceed channel/partner targets
- d. PCMM has proactive engagement from internal stakeholders and 'open-access' to key partners or channel executives/leaders

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Primary AccomplishmentE: Partner/business/ industry expertise and continuous learning with a growth mindset

Summary: Key actions PCMMs take to “stay at the top of their game”so they can drive impact to the business and represent the best interests of customers and internal stakeholders.

Key Actions *(Core and critical actions that combined contribute to the achievement of the Excellence Indicators. Numbered for reference, does not indicate priority or chronology.)*

1. Actively participate in the broader search ecosystem in some fashion (e.g., sitting on advertising panels/boards, speaking at conferences/ industry events, representing Bing at vertical/industry events, social media presence, writing blogs, producing white papers, etc.).
2. Develop and maintain an expert level understanding of your specific marketing competency (e.g. channel, partner, lifecycle).
3. Develop and maintain a working knowledge of the search industry, trends, competition and audience dynamics customers are facing.
4. Develop and execute a professional development plan (e.g., competency development, desired experiences, stretch assignments, mentee/mentor, formal trainings, etc.).
5. Attend relevant/required readiness trainings extending beyond PCMM’s professional development plan (e.g., Fast Start, Bing-related trainings).
6. Participate in the local / global MSA community (e.g., Bing Ping Live; Global Standup, Yammer, etc.) to stay informed, share and scale best practices and provide feedback on how to make these forums more impactful to the business.
7. Demonstrate excellence in budget and vendor management practices in compliance with Microsoft’s guidelines.
8. Cultivate channel-specific ecosystem insights using a One Microsoft approach, by proactively seeking learnings from various sources and individuals, internally and externally, (e.g., reading industry information, competitive landscape, trends, sharing current best practices, meeting with clients/partners, etc.) and then leverage those insights in planning and execution activities.

Excellence Indicators (EIs) *(Observable and/or measurable leading indicators/outcomes of excellence)*

- a. Participation in a set number of customer-facing events per fiscal (as defined by local management)
- b. Others proactively engage Partner Channel Marketing Manager (PCMM0 for insights and advice as a coach/mentor
- c. Continual progress made against professional development plan
- d. Customers and/or co-workers recognize PCMM as a subject matter expert in his/her area of expertise and solicit opinions and advice on the industry, marketplace, strategy and competition
- e. Other PCMMs adapt / adopt the PCMM’s personal best practices
- f. Campaigns/programs forecast within approved budget and in adherence with QFA (quarterly forecast accountability)
- g. Management of suppliers in compliance with MS Policy and marketing spend guidelines