|  |
| --- |
| **MBS STU Lead / Specialist Sales Manager (SSM) Profile of Excellence (PoE)** |
| **MBS STU Lead / Specialist Sales Manager (SSM) Execution Practices** |
| 1. Evolving business strategy, plans and resource alignment 2. Healthy pipeline and accurate forecast 3. World class sales execution to win the business 4. Customer and partner relationships to drive mutual success. 5. Integration of Dynamics into overall OneMicrosoft strategy 6. High performing SSPs and/or specialty sales teams 7. Continuous learning and professional growth |

Notes:

Use of the reference “STU Lead / SSM” is to include all geographies and the variation in role terminology across the globe.

For Multi Sub STU Lead – apply each practice to each country within your Area and ensure country leads are completing key actions below.

For STU Leads apply “specialty sales teams” in practice F.

For Specialist Sales Managers apply “SSPs” in practice F.

|  |
| --- |
| **Execution Practice A:** Evolving business strategy, plans and resource alignment |
|  |
| **Key Actions** |
| 1. Work with the Dynamics Leads, Marketing Team Leads and PTU to identify gaps and challenges. 2. Engage in planning with EPG and SMS&P leads to understand their priorities and how to best align SSP resources to support the segments’ business goals. 3. Conduct integrated planning with segments’ partner, industry and marketing teams and align resources accordingly within SSPs territory plans and MBS GTM Scenarios. 4. Allocate depth sales quota appropriately across team members. 5. Provide inputs into partner capacity planning for the subsidiary and ensure that Dynamics Specialist Sales Team members are supporting partner enablement and readiness as needed. 6. Participate in EPG and SMS&P Deal Factory and Account Planning to ensure inclusion of Dynamics targets in the targeting and prioritization of accounts. 7. Align internal sponsorship and team resources with must win opportunities. 8. Establish regular rhythm for team members to engage with segments in order to collaborate on planning, training and marketing and ensure the Subsidiary is focused on strategic profiling of Dynamics opportunities within targeted industries and accounts. |
|  |
| **Excellence Indicators (EIs)** |
| * The Specialist Sales team strategy incorporates both the short-term (fiscal year) and long-term (3-year) MBS solution vision. * Territory resources are aligned to EPG and SMS&P teams and industries relevant to the subsidiary. * 100% completion of SSP territory plans identifying must win opportunities and go-to partners. * SAW Prioritization includes Dynamics CRM & ERP Solutions in both EPG and SMS&P. |

|  |
| --- |
| **Execution Practice B:** Healthy pipeline and accurate forecast |
|  |
| **Key Actions** |
| 1. Work with SSPs to leverage all known promotions, campaigns, events, etc. outlined in territory plans to generate demand and build pipeline. 2. Ensure the Specialist Sales team follows the Microsoft Dynamics Depth Sales Process for must-win deals and uses appropriate exit criteria to accurately forecast sales stages. 3. With SSPs establish a regular rhythm to measure and validate both the all-up pipeline and individual team member’s pipelines to ensure deal amount and sales cycle stage accuracy. 4. Coach SSPs to ensure pipeline reflects a mix of diverse portfolio with mix of EPG and SMS&P opportunities that will enable them to achieve quarterly target. 5. Provide weekly pipeline update to manager of any needed sales data not already supplied in the sales tools. 6. Coach CRM SSPs to lead and seed must-win accounts with high growth potential with CRM Online, Partner Hosted and SPLA and drive EA attach and adoption. 7. Support teams in orchestrating the necessary resources to advance opportunities and close pipeline gaps. |
|  |
| **Excellence Indicators (EIs)** |
| * Increase in Dynamics EA attach rate in EPG and SMS&P CA. (CRM) * MSSP percentages spread over the pipeline are balanced and sufficient to deliver quota. * Minimal slips in month to month forecast based on +/- 10% forecast and pipeline accuracy. * GSX/CRM/Seibel is maintained in detail and reflects accurate sales stages for all SSP assigned deals. * Increased # of deals presented at Deal Factory where applicable. (CRM) |

|  |
| --- |
| **Execution Practice C:** World class sales execution to win the business |
|  |
| **Key Actions** |
| 1. Regularly review opportunities with SSPs utilizing the “Dynamics Depth Opportunity Plan” to drive detailed Opportunity Reviews on must win deals. 2. Coach the team to build a compete strategy leveraging key resources such as CompHot and Lighthouse and identify competitive wins in the region to create local customer evidence stories. 3. Establish a regular rhythm of formal top opportunity review sessions with entire specialty sales team and virtual team to gain constructive feedback and ensure the right sales and competitive strategy. 4. Coach SSPs to build needed knowledge of their customers’ industry, business, buying process and decision making criteria to define what success looks like for each customer. 5. Ensure SSPs focus on creating a strong value proposition which quantifies economic value of Dynamics solutions to the business. 6. Provide necessary level of executive business acumen to highly competitive or high-impact customer conversations and leverage MS execs appropriately in the sales cycle. 7. Coach SSPs on reference based selling to ensure that they are fully leveraging existing MS references in sales cycle. 8. Model and coach clear articulation of the benefit of the entire MS stack supporting either ERP or CRM solutions as a way to build competitive differentiation and gain market share. |
|  |
| **Excellence Indicators (EIs)** |
| * 100% completion of opportunity plans for must win deals. * Seat adds, revenue and quarterly budget targets are exceeded. * Improvement in annual EA attach rate. * SSPs leverage SSM/Sales Lead to elevate the level of customer conversations. * SSPs create WinWires and reference case studies when relevant funding is available. |

|  |
| --- |
| **Execution Practice D:** Customer and partner relationships to drive mutual success |
|  |
| **Key Actions** |
| 1. Build and maintain executive relationships in must win opportunities and key partner organizations leveraging strong executive and business acumen to build trusted advisor status. 2. Establish a rhythm for maintaining consistent customer and partner contact and solicit, analyze and act upon formal and informal customer and partner feedback. 3. Communicate MBS’ position on trends, vision and product/industry direction to key customers and partners. 4. Attend and/or speak at local customer, partner and industry engagements and events as applicable for the geography. 5. Develop and maintain an internal network to enable resources and or investments that will help drive (customer & partner) business objectives. 6. Within top opportunities Identify risk factors to engagement and develop a plan for risk mitigation or escalation before they impact success and satisfaction. |
|  |
| **Excellence Indicators (EIs)** |
| * Customers include SSM/Sales Lead in their business strategy and planning sessions. * Customers and partners confirm SSM/Sales Lead’s ability to lead in executive settings within customer and partner organizations. * Year-over-year increase in customer and partner satisfaction CPE as measured by NSAT scores. * SSM/Sales Lead is considered a role model for customer face-to-face time. * Partners ask SSM/Sales Lead to engage with their top opportunities. |

|  |
| --- |
| **Execution Practice E:** Integration of Dynamics into overall OneMicrosoft Strategy |
|  |
| **Key Actions** |
| 1. Meet regularly (formally and informally) with Dynamics and subsidiary Leadership Team members and review business plans to ensure goals are being met with mutual accountability for promises made. Planning 2. Contribute in pipeline and opportunity/deal reviews with Dynamics Leadership team and consistently reinforce Dynamics Value proposition. 3. Reach out to ATU teams and MCS resources (if available) to collaborate on industry specific opportunities for Dynamics. 4. Regularly review business plan with peers and leadership to obtain buy-off that portfolio satisfies requirements to meet quota and scorecard metrics. 5. Prepare MBS sales data for the Dynamics Lead’s Mid-Year Reviews and ROB meetings (and participate in meetings as needed.) 6. Continuously assesses the health of the integration of Dynamics in the subsidiary by proactively soliciting feedback from internal and external stakeholders and holding tough conversations when needed. 7. When requested provide inputs and feedback to product and industry groups on what’s working or not working in the SSM/Sales Lead’s local geography. 8. Question management on decisions where a business case exists for an alternative approach in the best interest of MBS. |
|  |
| **Excellence Indicators (EIs)** |
| * Issues are resolved in a timely fashion and with minimal distraction to individual contributors. * Subsidiary and corporate Leadership confirm SSM/Sales Lead’s solid understanding of internal stakeholders’ businesses, commitments and objectives. * Segment leadership in the sub understands and leverages the Dynamics value proposition in overall strategies and follows through on promises that are in line with top down strategy. * EPG Lead confirms SSM/Sales Lead is a strategic business partner. * CRM and ERP solutions are integrated into the EPG and SMS&P CA Sales Processes. |

|  |
| --- |
| **Execution Practice F:** High performing SSPs and/or specialty sales teams |
|  |
| **Key Actions** |
| 1. Regularly review the vision, mission and strategy with the specialty sales team and set expectations for each member’s responsibility and contribution to accomplishing the mission and deliverables. 2. Lead change in the organization by building awareness amongst specialty sales team members of new strategies and new processes and set expectations for behavior change and provide adequate follow through on execution. 3. Conduct regular team and individual meetings, modeling active listening throughout, and maintain a trustworthy and trusting climate that values diverse perspectives and supports open and honest dialogue. 4. Provide individual coaching by learning team members’ strengths, capabilities and developmental requirements and ensure team members have appropriate career path. 5. Evangelize individual and team accomplishments to corporate leadership, area leadership and sales teams. 6. Constantly seek and attract new talent, promote ready-talent and effectively manage underperformance within the team. 7. Ensure relevant information reaches team in timely manner while shielding team from unnecessary distractions where possible. 8. Provide high level of business and sales acumen coaching to the team and leverage individual team member’s strengths to coach and develop the team as a whole. |
|  |
| **Excellence Indicators (EIs)** |
| * Team members meet or exceed their targets and are seen as suitable for nomination and/or selection for awards both within the subsidiary team and at the Area (if applicable), Regional or Corporate levels. * Hiring decisions are aligned with corporate blueprint recommendations and key stakeholders are included in the interview loop for key hires. * Succession plans include cross-segment candidates and roles, and are vetted by key stakeholders on a semi-annual basis. * Sustained positive feedback and year-over-year increase in Manager Feedback in “Management” category, MS Poll and WHI. (single sub) * Specialty team is recognized at the Area (if applicable), Regional or Corporate levels as early adopters of organizational changes and strategies. |

|  |
| --- |
| **Execution Practice G:** Continuous learning and professional growth |
|  |
| **Key Actions** |
| 1. Maintain 300 level knowledge of leadership, interpersonal awareness and people management. 2. Develop 100-200 level knowledge of the industry drivers, challenges and opportunities faced by customers in the subsidiary and attend MS industry-led trainings such as ISU. 3. Maintain 200 level knowledge of Microsoft Dynamics CRM, Dynamics ERP solutions as well as basic Microsoft platform technologies, both online and on-premise, and keep up to date with key major releases. 4. Develop 200 level knowledge of Microsoft Licensing. 5. Develop 100 level knowledge of the business value of key partner ERP and CRM solutions, including Local/Regional partners. 6. Develop 100-200 level knowledge of competitors, their business models and their value propositions, including Local/Regional competitors. |
|  |
| **Excellence Indicators (EIs)** |
| * Peers and manager relay SSM/Sales Lead’s influence and participation in building excellence across peer and larger community through sharing learnings and best practices. * Partner contacts seek input from the SSM/Sales Lead on industry and business-related topics. * Competitive insights of the SSM/Sales Lead shape long-term planning and day-to-day decision-making for the overall specialty team. * Specialty team members seek out SSM/Sales Lead for insight and coaching. |