



Case Study Background

Microsoft EPG Global Account Management Team
Global Account Managers Improve Collaboration,
Save Time and Money with SLATE Reporting Tool

Solution Overview

Development of Microsoft
Global Accounts Service Level
Agreement Team Environment
(SLATE) Reporting Tool, using
SharePoint and Silverlight

Industry

High-Tech

Practice

Business Consulting

Client

Microsoft EPG Global Account
Management: Ward Lawrence,
Sales Excellence Director; Cof-
fee Cheung, Sales Operations
Manager

Testimonial

“When we white-boarded the requirements and design, I was expecting a somewhat crude interface from Sharepoint lists. That’s all I was accustomed to seeing. I was blown away when I saw the interface that was available through the “out-of-the-box” experience that was developed on our requirements. The team responded quickly to our needs and change requests and worked under a tight timeline to deliver a great tool that continues to receive praise from the user community. The interface is so intuitive that we did not even have to conduct a formal training session to enable our 400+ users to get off of Excel and onto SLATE. My expectations were exceeded to the point that we are now reviewing all of our processes to see how we can use Opal solutions to streamline other global processes.” -Ward Lawrence, Microsoft Sales Excellence Director

Situation

The Microsoft Global Account Management (GA) team oversees approximately 100 key Microsoft customers that requires coordination across 85 countries. In the past, to manage this level of business effectively, the GA team held an annual week-long account planning session. With more than 450 global and regional account managers, global business managers, and downstream account personnel in attendance, the event cost the company an average over \$1 million each year. To collaborate, the team was entering data into an Excel spreadsheet and using a SharePoint site to share the information and maintain version control. This reporting system proved inefficient due to high-level requirements, such as account data filters, user access and update problems, and original design elements. To facilitate management responsibilities and improve business productivity, the GA team needed an effective and reliable portal that global and regional managers could easily access to report the real-time status and trends of current accounts across subsidiaries.

Solution

Between February and April 2009, using Microsoft Silverlight software and Sharepoint Web services, Opal Enterprises built an interactive, user-friendly reporting tool (Service Level Agreement Team Environment – SLATE) for the GA team. The solution allows global and regional business managers to access and enter account information in one central location. Through this portal, they can review and communicate account status, objectives, and action items – all in real time.

Benefits

By creating a customized online SharePoint solution for real-time team collaboration, at a fraction of the cost of the annual GA team account planning meeting, Opal Enterprises helped Microsoft significantly reduce expenses. In today’s challenging economy, this savings is more important than ever. The portal solution leverages list data and managed code to handle data manipulation, and uses an asynchronous UX and rich UI to produce an efficient, intuitive user experience. Additionally, the site enables a collaborative service level agreement (SLA) creation process, ongoing tracking of action items, and quarterly status updates and reports. It also gives the GA team visibility into the current status and trends of SLAs for global accounts.

For Microsoft users view the solution at: http://sharepoint/sites/ga_reporting_site/default.aspx.



Before and After

Before

This screenshot shows a SharePoint site titled "Microsoft Global Accounts Reporting". The layout is cluttered with several sections:

- Left Navigation:** Includes "View All Site Content", "Documents" (RBM Reports, GBM Reports, Consolidated Pivot, Scorecards), "Lists" (Calendar, Tasks, Archive Links), "Discussions" (Team Discussion), and "Sites" (Recycle Bin).
- Main Content Area:**
 - RBM Team Monthly Reporting:** A section with a heading "RBM Team Reporting" and text: "Use this template for your Monthly Report Purpose: to provide account specific updates on activities impacting worldwide scorecard initiatives. Complete step-by-step information on how to fill out the report is included in the template. Please save your report using the following naming convention: alias_role_month (example: Jennvog_RBM_Japan_October)".
 - GBM Team Quarterly Reports:** A section with a heading "GBM Team Quarterly Reports" and text: "Use this template for your quarterly reports Purpose: To provide account specific updates on activities impacting worldwide scorecard initiatives. Complete step-by-step information on how to fill out the report is included in the template. Please save your report using the following naming convention: Account Name_Quarter_alias (example: Unilever_Q1_Wardl)".
 - Win:** A section titled "Win" with text: "Wins are those activities that drive results towards Notes Compete, Search, App Plat, MDOP, Virtualization and other key initiatives. Examples include: Closing EA, Enterprise Search Design wins, Oracle compete wins, MDOP or ECAL attach to an EA, Notes switches, etc."
 - Reporting Due Dates:** A section titled "RBM Reporting Due Dates" with text: "There are currently no upcoming events. To add a new event, click 'Add new event' below." and "Add new event". Below it is a section for "GBM Reporting Due Dates" with a table:

Title	Assigned To
Q4 GBM Reports Due Friday August 1st	
 - Post your Report HERE!!:** A section with a list:
 - GBM Q1 FY09 Reports
 - GBM Q2 Reports
 - RBM January Reports

After

This screenshot shows a more streamlined SharePoint site titled "Microsoft SLATE EPG Global Accounts". The layout is cleaner and more focused:

- Left Navigation:** Includes "View All Site Content", "SLA Reports Tools" (Master SLA Report, Quarterly Report), "Discussions" (Team Discussion), and "Sites" (Recycle Bin).
- Main Content Area:**
 - Welcome to the Global Accounts Services Level Agreement Team Environment (SLATE) portal!** This is the ultimate tool for our GBM community to manage the SLAs with the Global teams. This tool provides an overview of the master FY10 SLAs, allows you to provide inputs to the quarterly SLA status and enables you to run reports by multiple perspectives to suit to your needs. All accounts using global allocation are required to follow the SLA process, however, we encourage all accounts to follow the process to ensure tight alignment between the HQ and downstream locations.
 - Master SLA Report:** A section with text: "Use this report section to see all of the SLAs for a subsidiary or account. This can be used by GBMs and DS AMs during monthly / quarterly calls to check progress." Below it is a button "MASTER SLA REPORT TOOL" and a link "Create New SLA Report".
 - Quarterly Report:** A section with text: "GBMs use this report section to easily review their inputs into each of their quarterly reviews and see the commentary posted as follow up from RBMs. RBMs get a view of performance." Below it is a button "QUARTERLY REPORT TOOL" and a link "Create New Quarterly Report".
 - Global Accounts Reporting Tool:** A section with text: "RBMs, GBMs and Client Directors are required to post reports of activity in their account/territory. RBMs post monthly reports while the GBM and Client Director teams post quarterly reports. The reports are consolidated together and made available here for researching best practices, sharing activity in downstream locations and analyzing industry specific activities." Below it are two boxes:
 - One with links: "RBM Reports", "RBM Template", "RBM Month reports", "RBM Consolidated reports".
 - Another with links: "GBM / Client Director Reports", "GBM / Client Director Reports Template", "Q3 Reports Due April 10th".
 - Announcement:** "IT IS TIME TO CREATE FY10 SLAs! As part of Virtual Connect 2009, IT IS TIME TO CREATE FY10 SLAs!! Instead of creating your SLAs in Excel or Word, enter them directly into SLATE!!"
 - SLA Objectives:**
 - Ensure GBMs and downstream AMs are in sync with objectives/deliverables for the current Fiscal Year
 - Ensure GBMs receive return on their investment in the downstream accounts
 - Quarterly SLA Review Objectives:**
 - Ensure Downstream Account Managers are on track against their SLA commitments
 - Provide 2-way status update to ensure communication
 - Provide a control mechanism for correction and for decision in accordance of the Accountability policy
 - Accountability for each piece of the SLA Process:**

Role	Responsibilities
GBM	Review and finalize FY10 SLAs Conduct quarterly SLA discussion with your downstream account managers Provide quarterly SLA status
Downstream Account Manager	Provide initial inputs to the FY10 SLAs