MICROSOFT CORPORATION – PARTNER INVESTMENTS
Streamlining Partner Investment Operations
Through Intuitive Tooling

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Microsoft is a technology company whose mission is "to empower every person and every organization on the planet to achieve more." For commercial customers, Microsoft furthers this mission and impact by selling through partners—companies who drive adoption of Microsoft technologies like Azure Cloud computing. Partner activity is significant: last year, 95% of Microsoft's commercial revenue was earned through partners. In 2017, Microsoft established the One Commercial Partner (OCP) division to centralize teams that recruit, grow, and interface with Microsoft Partners.

Currently, OCP manages a large portion of the partner investment pipeline through "OCP Investments," an internal web-based tool that permits partner-facing roles to request investments on behalf of partners. While OCP Investments was originally designed for a single investment type, it has expanded to accommodate other funding sources and is anticipated to scale further. During the project's scoping phase, the Tauber team identified OCP Investments as a strategically important aspect in the overall investment process with impact on the request development pipeline, investment timing, and data management policies both corporately and globally.

The team established a baseline of the user experience and backend operations through a series of 23 interviews, survey of partner-facing stakeholders, and engagement with the operations division to define pain points, elevate best practices, and quantify the process timeline. Concurrently, the team analyzed performance data from requests submitted through OCP Investments. The team proposed and piloted three areas for improvement to solve users' largest issues of getting to and through the investment process. These include 1) developing a central landing page to direct requesters to the correct funding tool or function, 2) designing an improved process flow within OCP Investments to intuitively guide users through the application process and mitigate opportunities for user error, and 3) integrating a monitoring system within OCP Investments to provide performance feedback to managers, operations, and users.

The project expects to shorten the average investment development and approval timeline by 31 days with a total increase in revenue at fiscal year close of over $30M. Improvements to the request development process would result in projected annual labor savings of $260,000. These recommendations underpin visibility on the new process globally, which will help to increase the pipeline of potential investments, and a single-entry point to allow for better evaluation of investments and more informed strategic decisions made by OCP leadership.