Some content in this case study is obscured for NDA agreements

Streamlining Microsoft Multi-year Deals (2024)

An In-depth Qualitative Research Study that Uncovered Key Opportunities to Drive Multi-Year Enterprise Agreements, Locking-in Revenue for Microsoft and Volume Discounts for Clients

Microsoft Commerce + Ecosystems, 2024

Full case study available on request

Microsoft's Commerce + Ecosystems (C+E) Studio is a core team of UX professionals providing user insights across the company's vast range of business tools and processes, serving strategic industry clients for licensing and Enterprise Agreements.

Photo by [Sam Torres] on [Unsplash]

Streamlining Microsoft Contract Configuration for Multi-year Enterprise Agreements

Project Summary

I led this Generative Research study, managing complex stakeholder alignment, research design, interviews, and early stage prototype feedback.

Deliverables

- Comprehensive research readout
- Executive summary
- 6 new research artifacts
- Actionable recommendations

Timeline & Team

Independently-led all aspects of research, including 12, 90-min interviews across 3 continents

Impact

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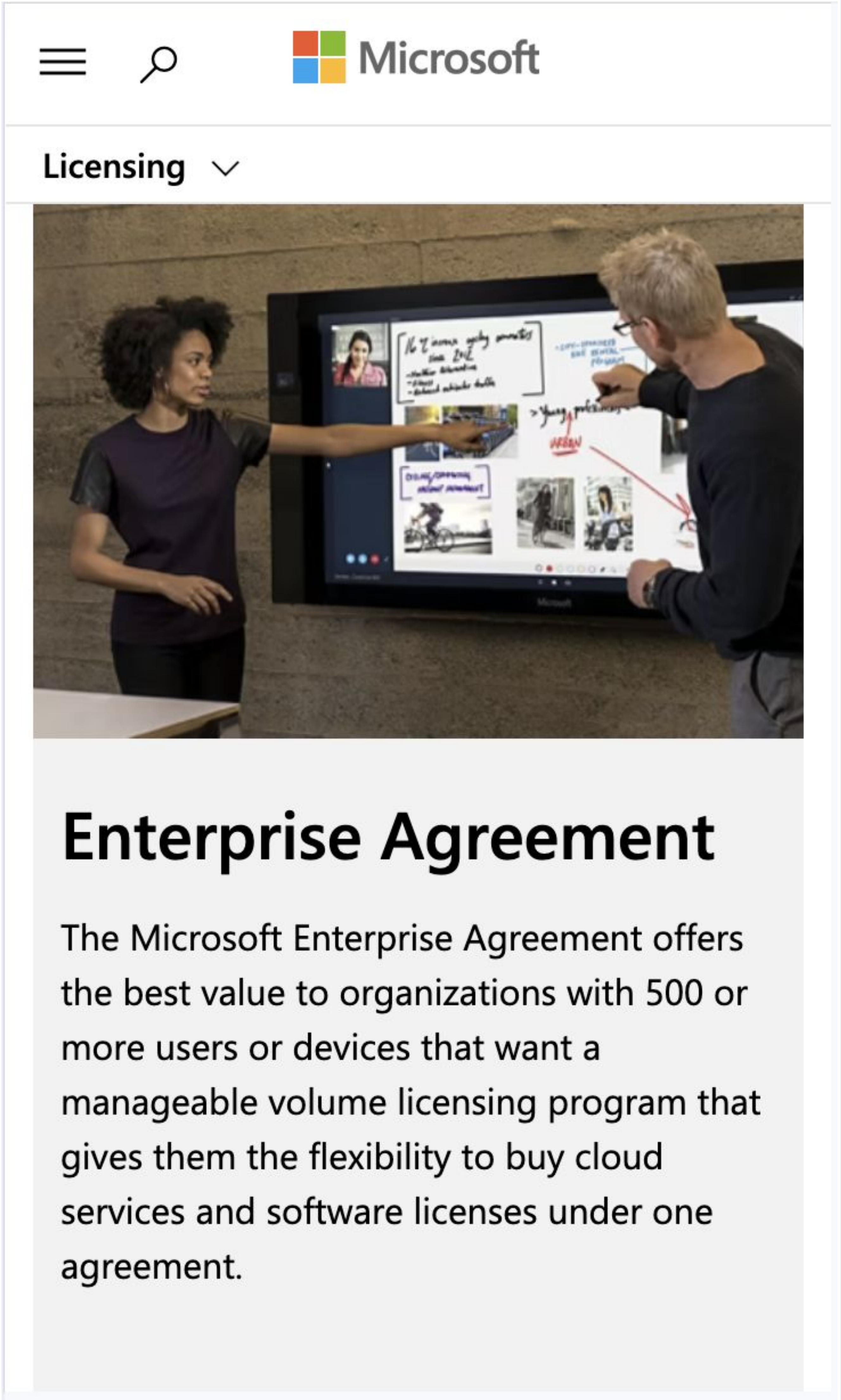


Multi-year Enterprise Agreements simplify software technology licensing and lock in stable pricing for a minimum of 3 years.

Core Business Problem: ⚡

- **Lack of clarity** on fundamentals of multi-year deals: processes, roles, tools
- **Complex financial, regulatory, risk**, and regional factors obscured key problems to solve
- Poor insight **compromised Microsoft's highest-value engagements**

Research Objectives: 🔎

- Understand Microsoft's current process and tools for building multi-year deals with strategic clients.
- Understand the key user personas' goals, tasks, processes, and pain points.
- Gather feedback on an early-stage prototype for a multi-year pricing tool.

Product Team's Goal: Who are the key business personas, their goals, tools, processes? What blocks them from efficiently engaging and building multi-year contracts?

Business Partners' Goal: Strengthen Microsoft's ability to secure and manage significant revenue from multi-year deals with strategic clients.

I led this 12-week study, managing stakeholders, designing and executing research through eleven, 90-min remote interviews with internal business roles across 3 continents.

MONTH 1 | MONTH 2 | MONTH 3 | Hand-off

Align

Align with stakeholders to understand what they want to learn and why. Select methods and metrics. **Develop facilitator guides and screeners**.

Research Ops + Execute

Organize logistics based on research design, recruit and schedule interviews. Develop clickable prototypes for design-focused research.

Conduct Interviews.

Analysis + Synthesis

Analyze the data. Connect early with stakeholders on emerging findings.

Outline and prepare findings for final report. Schedule final readout.

Read out + Follow-up

I designed a generative research study using in-depth interviews and incorporating formative research elements by having participants interact with an early prototype of a multi-year pricing tool.

Generative Research

Methods

- Desk Review, In-depth interviews + Cognitive Walkthroughs

Core Questions:

1. What are users trying to achieve (their ultimate goals)?
2. What "jobs" are they trying to get done?
3. What are their pain points, challenges, and frustrations?

Formative Research

Methods

- Prototype / Concept Testing
- Observe users complete tasks while thinking aloud

Core Questions:

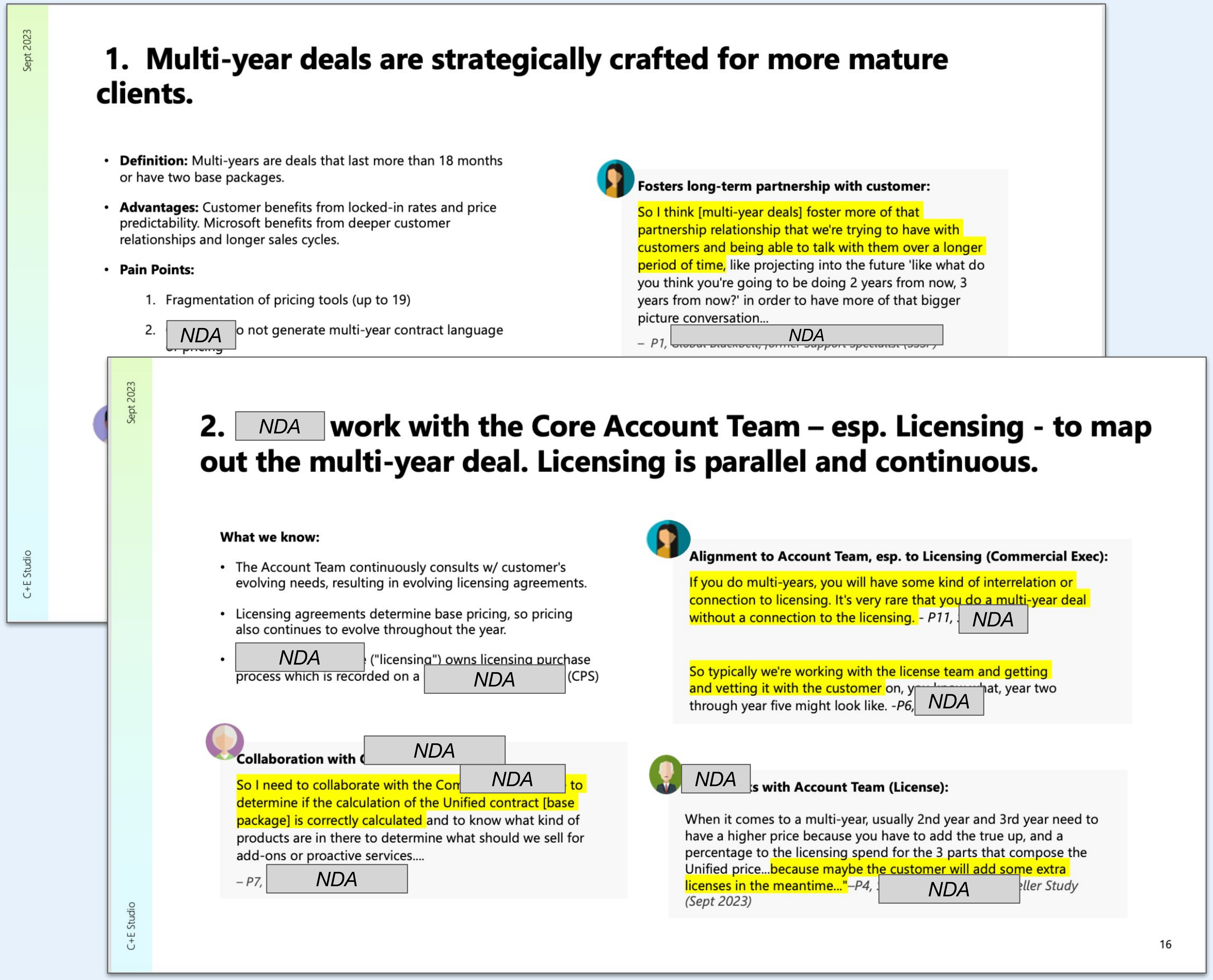
1. Can users complete the tasks?
2. Did they find the tool usable, useful, and trustworthy?
3. Where were they confused? How can we improve?

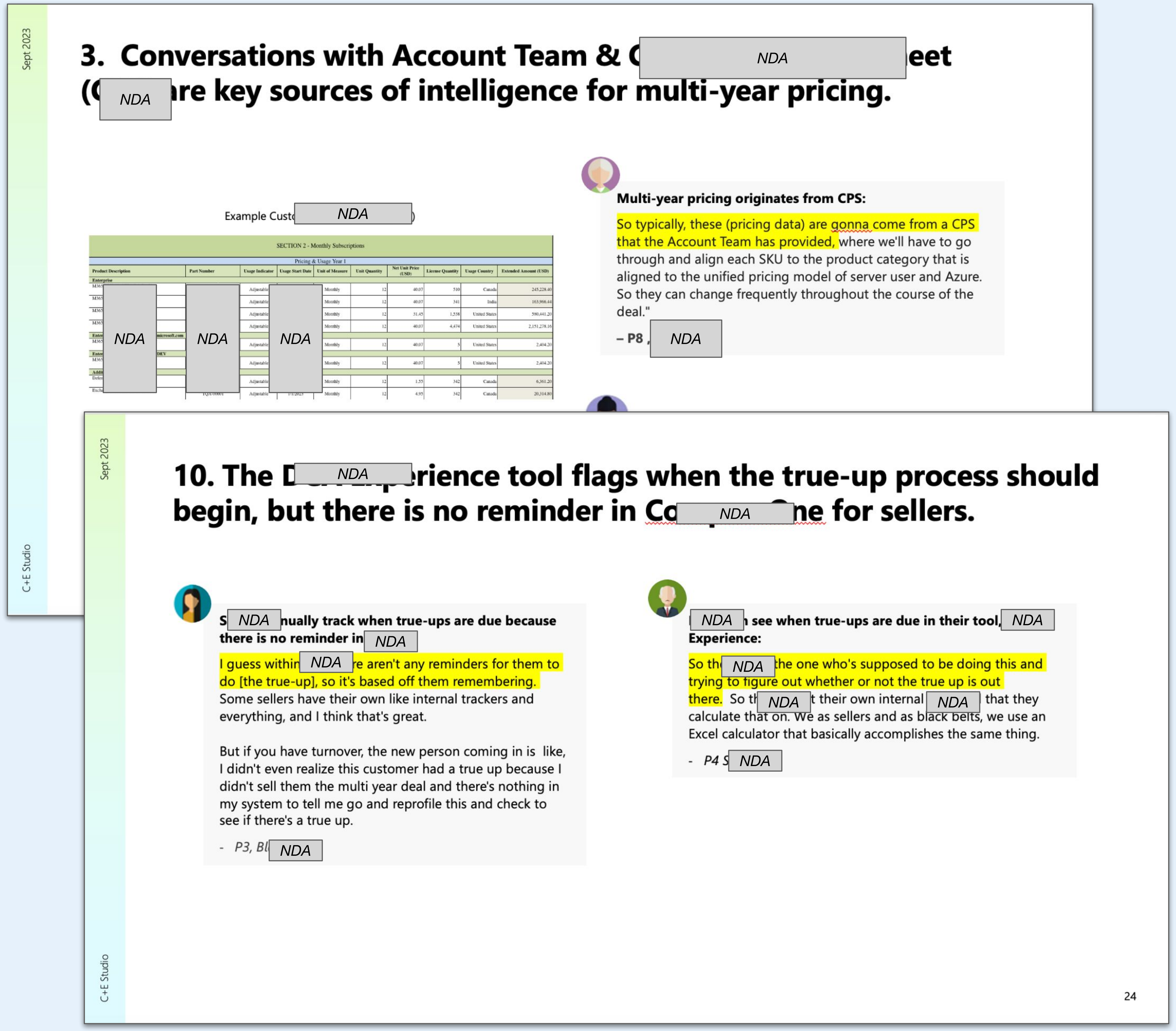
I produced six UX research outputs:

1. Comprehensive Research Readout, including:
2. Executive Summary, Key Findings, Recommendations
3. User Personas and Relationship Map
4. Workflow Diagrams
5. Key Pain Points
6. Prototype Feedback

> *“Multi-year Enterprise Agreements take up 80% of my time even though only 2-3 of my [8-10] clients have them.*
>
> Mul NDA alist, Microsoft
> Sup NDA s - Munich, Germany

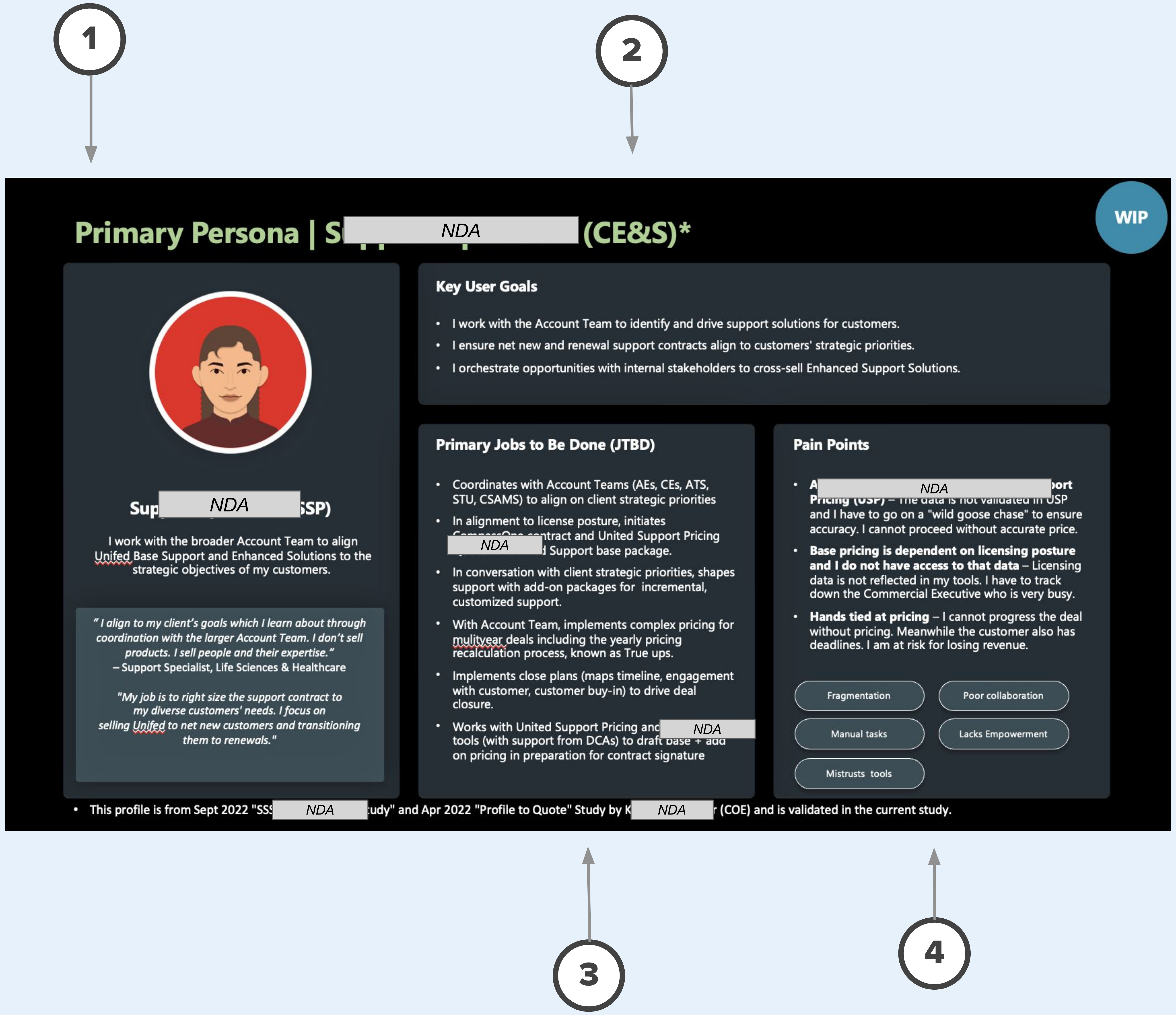
I clarified user experiences, preferences, and needs through **detailed thematic findings**, amplified by rich quotations that centered user voice.



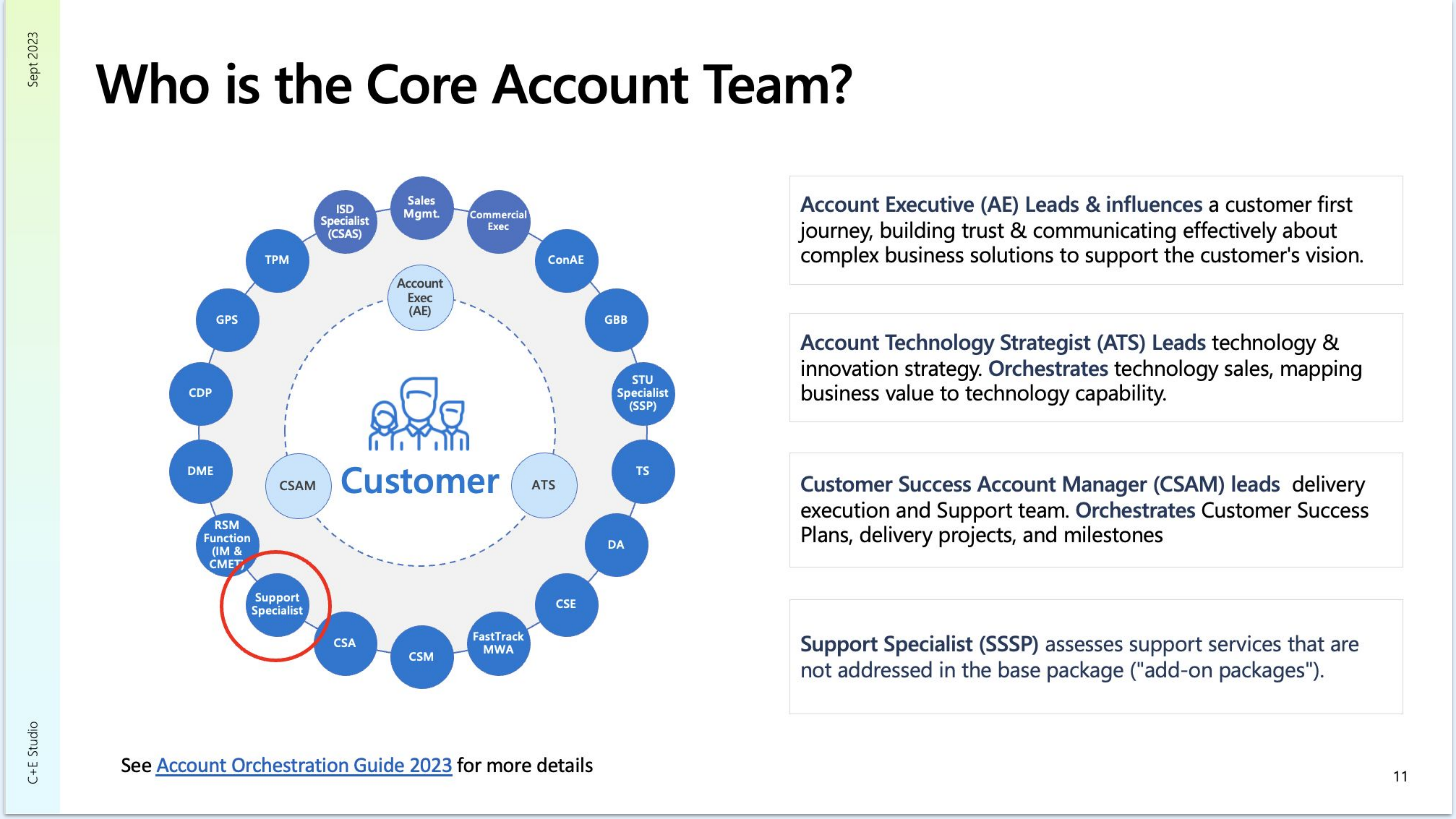


I created **3 new user personas** that clarified user goals, tools, processes, and pain points. These became key artifacts for the C+E Studio.

1. Role Description & Sentiment Statement
2. Key Goals
3. Primary Tasks
4. Pain Points (cont. next)
5. Key Collaborators (reverse side - not shown NDA)
6. Key Tools (reverse side - not shown NDA)



Once I established who our key user personas were, **I mapped them in an ecosystem of collaborator networks involved in multi-year deals.**



I created key user workflows into clear, simple process diagrams, detailing each step, roles involved, and tools used.

Task

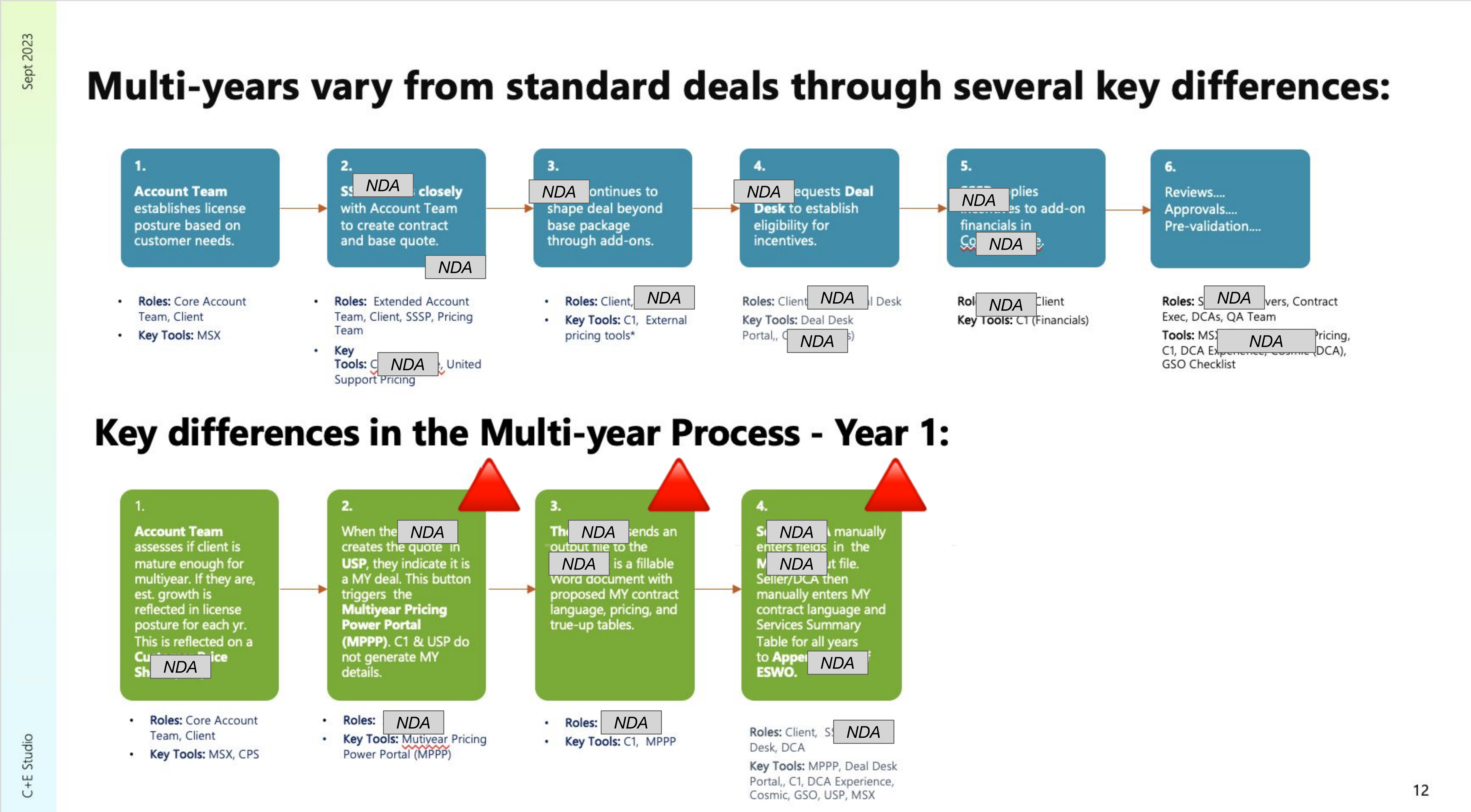
1

Roles & Tools

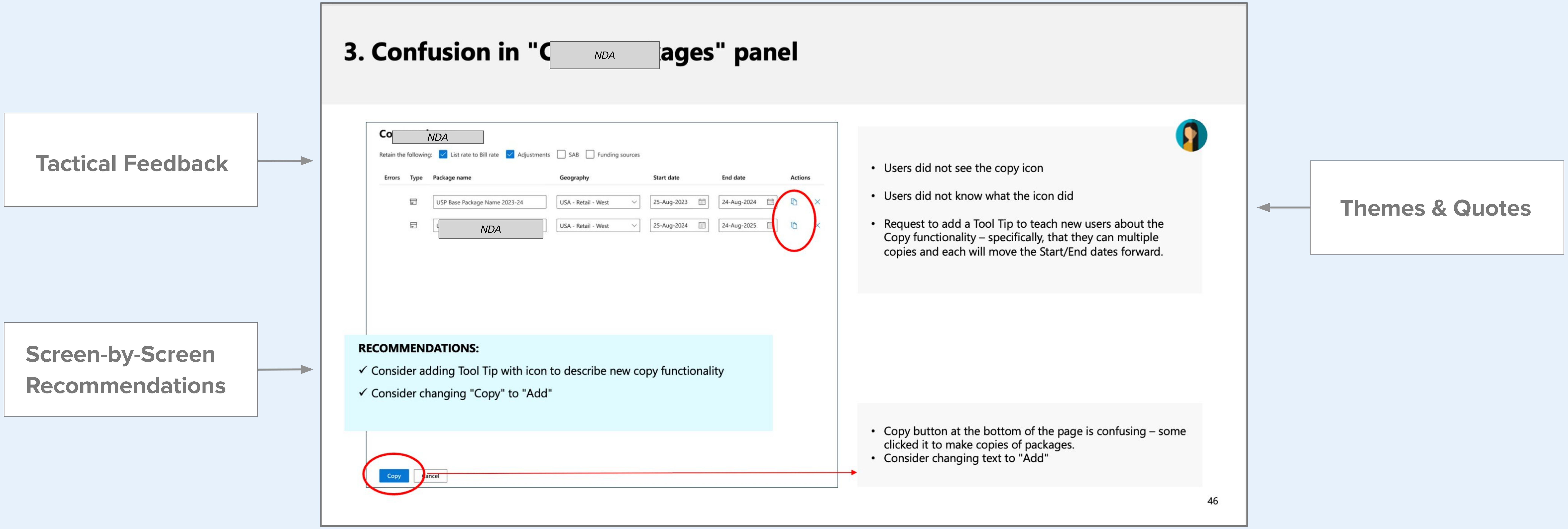
2

Pain Point

3



I conducted a **Concept Test** using an early-stage pricing tool prototype. This provided crucial early feedback, validating our design direction and offering usability insights for the next iteration.



Research Topline:

Key Finding: Most inaccuracies in the contract configuration process occurred during a critical step: users would manually re-enter financial calculations from an external tool back into the primary system.

Key Recommendation: Validated by user feedback, we progressed the pricing tool prototype to higher fidelity for in-tool feature development to keep all financial modeling within the primary tool system.

Business Impact: By creating a one-tool process, Microsoft could increase deal velocity and reduce errors in Multiyear Enterprise Agreements.

IMPACT

My role as lead UX Researcher was to unravel the complexities behind Microsoft's multi-year Enterprise Agreements (EAs). These high-value contracts, (up to $250 million / year), are crucial for Microsoft's revenue, yet the internal processes, roles, and tools involved were poorly understood.

My research illuminated critical pain points, particularly around financial modeling. The insights gained led directly to clear design recommendations for our primary tools, aiming to reduce friction, accelerate deal velocity, minimize errors, and enhance customer relationship satisfaction—all contributing to potential significant increase in Microsoft's bottom line.

REFLECTION

The Power of “Who?”: In a study with many unknowns, the most impactful question turned out to be "Who?" rather than "What?" Starting with a small list of potential users, I systematically asked each interviewee, "Who do you think I should speak to?", "Who else do you collaborate with?", and "Who do you trust to represent your needs?"

This iterative approach unveiled a close-knit community of internal business roles crucial to high-stakes, multi-year agreements. I gained access to senior-level managers with broader perspectives and was able to participate in their community calls and briefings. This strategy provided a much deeper understanding of our target users enabling me to build empathy and confidently pinpoint areas where our product team could make meaningful improvements.