

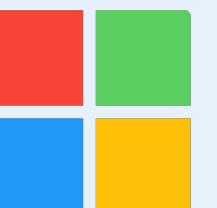
Some content in this case study is obscured for NDA agreements

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.



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.

Timeline & Team

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

Deliverables

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

Impact

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

Microsoft

Licensing ▾



Enterprise Agreement

The Microsoft Enterprise Agreement offers the best value to organizations with 500 or more users or devices that want a manageable volume licensing program that gives them the flexibility to buy cloud services and software licenses under one agreement.

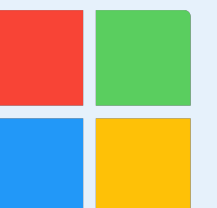
Multi-year Enterprise Agreements simplify software technology licensing and lock in stable pricing for a minimum of 3 years.

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**

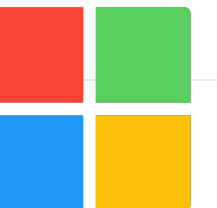
Research Objectives:

- 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.

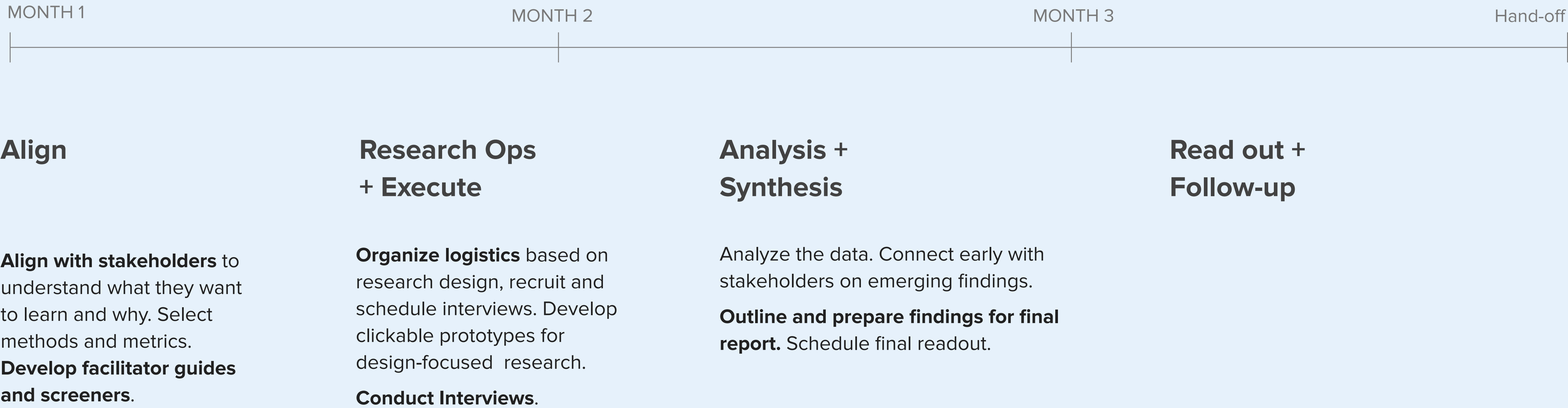


Product Team's Goal: Who are the key business personas, their goals, tools, processes? What blocks them from efficiently engaging and building multi-year contracts?

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.



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.* ”

Multi-NDA Specialist, Microsoft
Support Sales - Munich, Germany
NDA



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

1. Multi-year deals are strategically crafted for more mature clients.

- **Definition:** Multi-years are deals that last more than 18 months or have two base packages.
- **Advantages:** Customer benefits from locked-in rates and price predictability. Microsoft benefits from deeper customer relationships and longer sales cycles.
- **Pain Points:**
 1. Fragmentation of pricing tools (up to 19)
 2. NDA to not generate multi-year contract language

 **Fosters long-term partnership with customer:**

So I think [multi-year deals] foster more of that partnership relationship that we're trying to have with customers and being able to talk with them over a longer period of time, like projecting into the future "like what do you think you're going to be doing 2 years from now, 3 years from now?" in order to have more of that bigger picture conversation...

- P1, NDA

2. NDA work with the Core Account Team – esp. Licensing - to map out the multi-year deal. Licensing is parallel and continuous.

What we know:

- The Account Team continuously consults w/ customer's evolving needs, resulting in evolving licensing agreements.
- Licensing agreements determine base pricing, so pricing also continues to evolve throughout the year.
- **NDA** ("licensing") owns licensing purchase process which is recorded on a **NDA** (CPS)

Collaboration with C **NDA**

So I need to collaborate with the Com **NDA** to determine if the calculation of the Unified contract [base package] is correctly calculated and to know what kind of products are in there to determine what should we sell for add-ons or proactive services....

-P7, NDA

 **Alignment to Account Team, esp. to Licensing (Commercial Exec):**

If you do multi-years, you will have some kind of interrelation or connection to licensing. It's very rare that you do a multi-year deal without a connection to the licensing. - P11, NDA

So typically we're working with the license team and getting and vetting it with the customer on, you know, what, year two through year five might look like. -P6, NDA

NDA

 **NDA** **As with Account Team (License):**

When it comes to a multi-year, usually 2nd year and 3rd year need to have a higher price because you have to add the true up, and a percentage to the licensing spend for the 3 parts that compose the Unified price...because maybe the customer will add some extra licenses in the meantime...-P4, **NDA** Seller Study (Sept 2023)

NDA

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3. Conversations with Account Team & C NDA **Sheet**
(C NDA **are key sources of intelligence for multi-year pricing.**

Example Customer **NDA**

SECTION 2 - Monthly Subscriptions									
Prising & Usage Year 1									
Product/Description	Part Number	Usage Indicator	Usage Start Date	Unit of Measure	Unit Quantity	Net Unit Price (\$/Unit)	Licensor Quantity	Usage Country	Extended Amount
NDA	NDA	NDA	NDA	Monthly	12	48.00	744	Canada	24.00
				Monthly	12	48.00	744	India	10.00
				Monthly	12	31.45	3,288	United States	2,88.00
				Monthly	12	48.00	4,440	United States	2,88.00
				Monthly	12	48.00	5	United States	0.00
				Monthly	12	48.00	5	United States	0.00
				Monthly	12	48.00	5	United States	0.00
				Monthly	12	48.00	5	United States	0.00
				Monthly	12	48.00	5	United States	0.00
				Monthly	12	48.00	5	United States	0.00
NDA	NDA	NDA	NDA	Monthly	12	3.75	360	Canada	4.50
				Monthly	12	6.75	360	Canada	4.50
				Monthly	12	6.75	360	Canada	4.50
				Monthly	12	6.75	360	Canada	4.50

 **Multi-year pricing originates from CPS:**

So typically, these (pricing data) are gonna come from a CPS that the Account Team has provided, where we'll have to go through and align each SKU to the product category that is aligned to the unified pricing model of server user and Azure. So they can change frequently throughout the course of the deal."

- P8, NDA

10. The D NDA experience tool flags when the true-up process should begin, but there is no reminder in C NDA one for sellers.

S **NDA** usually track when true-ups are due because there is no reminder in **NDA**

I guess within **NDA** there aren't any reminders for them to do [the true-up], so it's based off them remembering. Some sellers have their own like internal trackers and everything, and I think that's great.

But if you have turnover, the new person coming in is like, I didn't even realize this customer had a true up because I didn't sell them the multi year deal and there's nothing in my system to tell me go and reprofile this and check to see if there's a true up.

- P3, Bl NDA

Experience:

So the **NDA** the one who's supposed to be doing this and trying to figure out whether or not the true up is out there. So the **NDA** it their own internal **NDA** that they calculate that on. We as sellers and as black belts, we use an Excel calculator that basically accomplishes the same thing.

- P4 S NDA

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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)

1

2

Primary Persona | Support Specialist (CE&S)*

Support Specialist (SP)

I work with the broader Account Team to align Unified Base Support and Enhanced Solutions to the strategic objectives of my customers.

"I align to my client's goals which I learn about through coordination with the larger Account Team. I don't sell products. I sell people and their expertise."

– Support Specialist, Life Sciences & Healthcare

"My job is to right size the support contract to my diverse customers' needs. I focus on selling Unified to net new customers and transitioning them to renewals."

Key User Goals

- I work with the Account Team to identify and drive support solutions for customers.
- I ensure net new and renewal support contracts align to customers' strategic priorities.
- I orchestrate opportunities with internal stakeholders to cross-sell Enhanced Support Solutions.

Primary Jobs to Be Done (JTBD)

- Coordinates with Account Teams (AEs, CEs, ATS, STU, CSAMS) to align on client strategic priorities
- In alignment to license posture, initiates contract and United Support Pricing base package.
- In conversation with client strategic priorities, shapes support with add-on packages for incremental, customized support.
- With Account Team, implements complex pricing for multiyear deals including the yearly pricing recalculation process, known as True ups.
- Implements close plans (maps timeline, engagement with customer, customer buy-in) to drive deal closure.
- Works with United Support Pricing and tools (with support from DCAs) to draft base + add on pricing in preparation for contract signature

Pain Points

- Accurate Pricing (USP)** – The data is not validated in USP and I have to go on a "wild goose chase" to ensure accuracy. I cannot proceed without accurate price.
- Base pricing is dependent on licensing posture and I do not have access to that data** – Licensing data is not reflected in my tools. I have to track down the Commercial Executive who is very busy.
- Hands tied at pricing** – I cannot progress the deal without pricing. Meanwhile the customer also has deadlines. I am at risk for losing revenue.

Fragmentation

Poor collaboration

Manual tasks

Lacks Empowerment

Mistrusts tools

This profile is from Sept 2022 "SSS" study and Apr 2022 "Profile to Quote" Study by K for (COE) and is validated in the current study.

3

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WIP

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

Sept 2023

Who is the Core Account Team?

See [Account Orchestration Guide 2023](#) for more details

Account Executive (AE) Leads & influences a customer first journey, building trust & communicating effectively about complex business solutions to support the customer's vision.

Account Technology Strategist (ATS) Leads technology & innovation strategy. **Orchestrates** technology sales, mapping business value to technology capability.

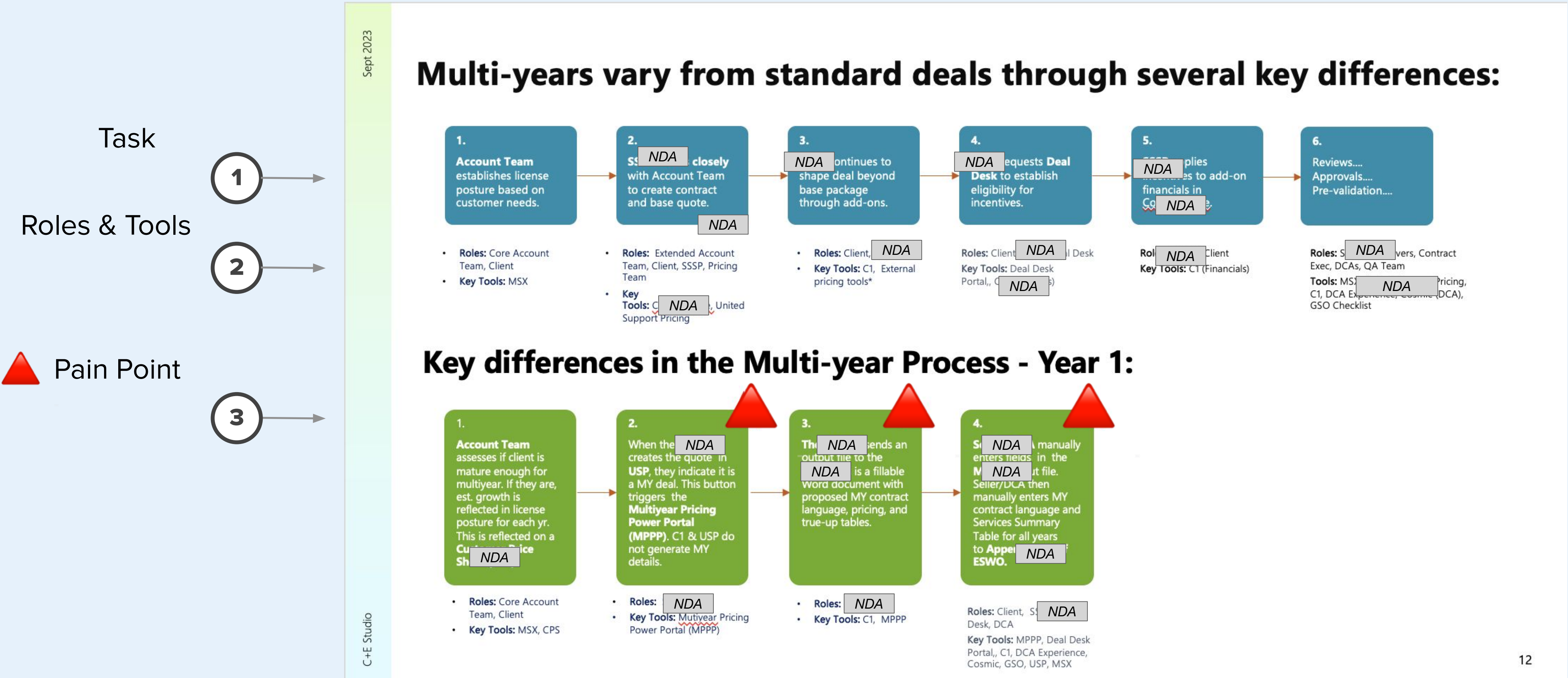
Customer Success Account Manager (CSAM) leads delivery execution and Support team. **Orchestrates** Customer Success Plans, delivery projects, and milestones

Support Specialist (SSSP) assesses support services that are not addressed in the base package ("add-on packages").

C+E Studio

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



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.

Tactical Feedback

Screen-by-Screen Recommendations

3. Confusion in "Copies" panel

Co NDA

Retain the following: ☒ List rate to Bill rate ☒ Adjustments ☐ SAB ☐ Funding sources

Errors	Type	Package name	Geography	Start date	End date	Actions
		USP Base Package Name 2023-24	USA - Retail - West	25-Aug-2023	24-Aug-2024	
		NDA	USA - Retail - West	25-Aug-2024	24-Aug-2025	

RECOMMENDATIONS:

- ✓ Consider adding Tool Tip with icon to describe new copy functionality
- ✓ Consider changing "Copy" to "Add"

Copy

Cancel

- Users did not see the copy icon
- Users did not know what the icon did
- Request to add a Tool Tip to teach new users about the Copy functionality – specifically, that they can multiple copies and each will move the Start/End dates forward.

- Copy button at the bottom of the page is confusing – some clicked it to make copies of packages.
- Consider changing text to "Add"

Themes & Quotes

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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.

