Microsoft Advisor Program

FY13 Field Guidance and Playbook
Worldwide Retail Services
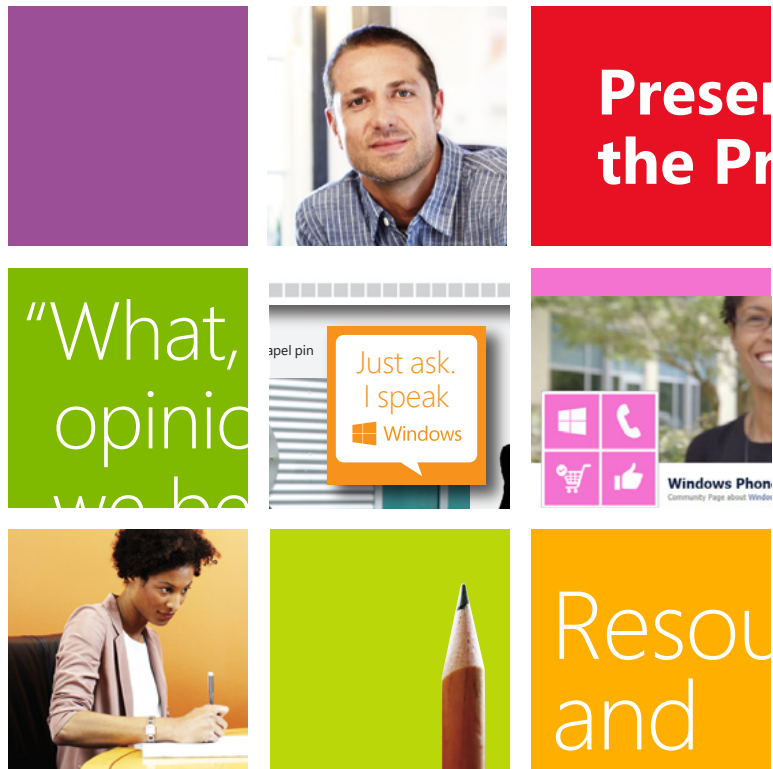
Ask me.

Microsoft

Contents

Introduction

Purpose of This Document

This Playbook provides the information and tools you need to plan and execute a successful version of the Microsoft Advisor program in your market.

Audience for This Document

This Playbook is designed to give guidance and support to people managing Microsoft Advisor programs in the field.

Why is the Microsoft Advisor program important?

Given the number of major product launches coming in FY13, it is critical that we lay the foundation for success at retail. While our field labor teams in every market are highly capable, they can only support a finite number of retail stores. Building a corps of engaged, motivated retail pros—*Microsoft Advisors*—will give us the scale we need to create a favorable retail sales environment for Microsoft products, and allow customers to discover the right Microsoft solution.

What are my next steps?

- Read this document
- Become familiar with the components of a successful Microsoft Advisor program
- Identify the primary retail launch partner in your market (GTA, reference mobile, operator, etc.)
- Follow the guidance in this document to plan, launch, and support an Advisor program with your targeted retail partner
- Contact Bill Bush (billbush@microsoft.com) on the Worldwide Retail Team if you have questions about the guidance in this document or the overall Advisor program

Microsoft Advisor Program Overview

Microsoft Advisor Program Overview

What is the Microsoft Advisor Program?

The Microsoft Advisor program creates and sustains retail brand champions for Microsoft products. Retail sales pros (RSPs) employed by our retail partners (consumer electronics stores, mobile operator retail stores, game stores, etc.) are identified and selected as Microsoft Advisors and then actively supported so they will maintain their knowledge and enthusiasm for Microsoft retail brands. The result is a substantial increase in recommendation rates for Microsoft brands.

What is a Microsoft Advisor?
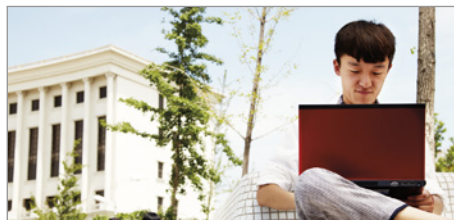
Microsoft Advisors are top RSPs who serve as in-store experts and brand champions for Microsoft retail products. Advisors are skilled at communicating the value of the Microsoft brand, influencing their colleagues, and even changing the culture of an entire store. A Microsoft Advisor should be the primary ambassador for Microsoft in a retail store.

A Microsoft Advisor should be:

• An in-store expert

• The voice of the brand

• The customer and colleague go-to person and influencer

• Up to speed with the latest training and guidance

• Prepared to debate about the competition

• A challenger of entrenched beliefs

Each Advisor should be committed to and successful at educating and influencing colleagues, increasing sales of Microsoft products, and improving the retail experience for customers.

What is the mission of the Advisor Program?

The mission of the Microsoft Advisor program is to influence recommendation rates in retail stores. RSP recommendation is consistently proven to be one of the most critical factors in determining consumer purchase decisions. Microsoft Advisors influence customer purchase decisions in several ways:

- By serving as the in-store go-to expert for Microsoft products, answering questions for peers and customers

- By providing to customers top quality demos that showcase the best and most relevant features of Microsoft products

- By recommending the right Microsoft products to the right customers (i.e., not *only* Microsoft products to *every* customer)

- By influencing peers and managers who may have affinity for other competing brands

    - Transferring knowledge to teammates to increase colleagues' expertise about and confidence in selling the entire product portfolio

    - Understanding competitors' portfolios, in order to effectively communicate Microsoft's advantages

    - Developing and encouraging "attach to sale" performance

    - Staying in the know about Microsoft's future in order to successfully recommend solutions, not just products

In the US, at Staples and Best Buy, we saw a 50% uplift year-over-year in recommendation rate for Windows PCs following the deployment of the Advisor program across their entire retail chain.

— **Windows Retail Tracker Study, FY12**

What benefits does the Microsoft Advisor program provide?

Sales data from a US mobile operator showed a 39% increase in sales of Windows Phones in stores that had at least one Microsoft Advisor on staff—and an overall sales increase of more than 2% across all mobile devices.

— **Microsoft analysis of partner sell-through data, FY12 Q3**

The Advisor program is designed to be a win-win-win for partners, Advisors, and Microsoft.

For Advisors	For Microsoft	For Partners
Professional advancement	Sell more vs. competitors	Increase sales, basket price, attach rate; decrease returns
Validation of expertise	Drive the ecosystem	Improve customer in-store experience
First to know	Increase scale and impact of retail programs	Increase value of existing investment in employee training and development
Strong connection to Microsoft	Support partners through targeted retail program investment	Increase employee satisfaction and retention
Chance to lead and have an impact		

Where should we deploy the Microsoft Advisor program?

The Microsoft Advisor program is scalable, but it does require incremental funding and significant local support to be executed properly. Accordingly, the program is targeted for execution in FY13 by only a core group of markets with sufficient resources. In FY13 this includes:

• Windows GTA accounts in developed markets

• Windows Phone reference mobile carriers (US, UK, FR and DE)

If your market is outside these two categories, the guidance and direction included in this Playbook may be informative and helpful, but it will not substantively impact your work.

Retail Partner Sell-In and Launch details are explained later in this Playbook.

What are the qualifications to be a Microsoft Advisor?

The success of your Advisor program depends on selecting highly capable, top retail pros to serve in the role of Advisors. You should work with your retail partner to define specific criteria for the program in your market, but as a starting point we propose the following selection criteria for Advisors:

• At least one year of experience in retail, in a primary, front-line selling role

– *Not* tech bench staff

– *Not* managers

• Consistently ranked as top sellers

• Identified as go-to in-store experts by peers, managers, and customers

> Being the expert and having the Advisor title proves that you are helpful not only toward customers but your fellow employees! That is my favorite, being the go to guy when there is a problem, questions, troubleshoot, etc...
>
> **— Mateo N.**
> **Microsoft Advisor, T-Mobile USA**

What is the level of product knowledge required of Microsoft Advisors?

Each Microsoft Advisor should be a Microsoft product and brand expert whose guidance, positive attitude, and consistent advocacy influences peers and customers.

• RSPs in newly established Advisor programs may not initially have direct retail experience and knowledge across all product categories

• Microsoft Advisors are expected to be experts and advocates. Over the course of their participation in the program, they should come to possess the knowledge and skills taught via Associate and Pro Accreditation and the Silver and Gold Learning Plans.

• Each Advisor will also develop a market-specific and store-specific set of skills and expertise through auxiliary training opportunities, peer-to-peer influence, and the wide variety of interactive experiences they will have with customers, trainers, managers, peers, and Microsoft experts

• Complete Advisor training milestones are described in the "Advisor Onboarding" section of this document

Retail Partner Sell-In and Launch

Retail Partner Sell-In and Launch

Five-Step Process

| 1. Present the Program | 2. Determine Scale | 3. Partner Agreement | 4. HR Alignment | 5. Launch |
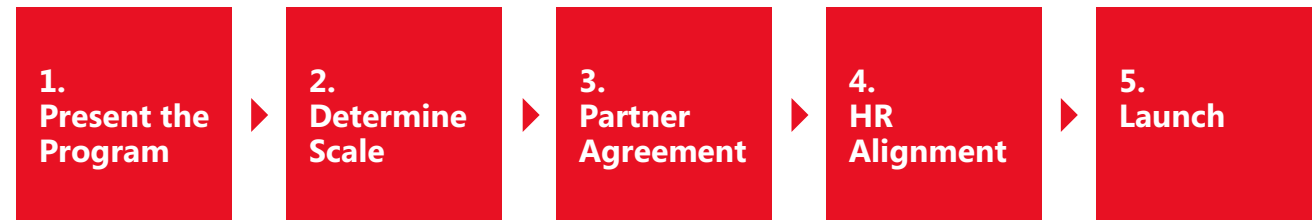
Links to

▸ **Partner Overview presentation**

▸ **Sample job description**

Landing the Advisor program requires close collaboration with partners. Additionally, you should work with Microsoft LCA to discover and resolve any legal concerns related to developing the program in your market.

We suggest a five-step process of sell-in and alignment:

1. Present the program to the targeted retail partner in your market

- Confirm the priority partners in your market (GTA or reference MO) with your respective BG counterparts
- Use the Microsoft Advisor Partner Overview presentation to outline benefits and required actions

2. Work with partner to determine scale of deployment

- Ideally, a program will deploy one Advisor in each retail store
- If necessary due to budget or partner constraints, a reduced deployment of one Advisor in the top 30 to 50 percent of stores can be considered. This should be seen as a much less desirable secondary option.

3. Formalize an Advisor program agreement with your partner

- Your plan can be integrated into an existing partner JMA or MOU

- In the alternative, the Advisor program details can be described and agreed to in a separate agreement, if appropriate

! - **It is critical that your partner agree to provide store and RSP-level sales data.** Without this it is much more difficult to confirm impact and value, and impossible to demonstrate actual ROI

- Include in your formal agreement with your partner specific details on how much and how often Microsoft can engage with Advisors using a selection of tactics described in the "Sustaining Engagement" section of this Playbook

- Also include in your partner agreement provisions for replacing or adding new Advisors as necessary based on attrition or new store openings. We suggest a quarterly onboarding process to add or replace Advisors as necessary.

- Target program duration of 12 months, or at minimum six months. Many partners will seek to limit the Advisor program to a shorter window of time, usually aligned to a product launch. However, given the scale of investment, and the potential benefit for sustained sales, we strongly suggest that programs last a full fiscal year, or at minimum 6+ months.

4. Determine and address any human resources/personnel issues

- Work with your partner to identify and resolve any legal or personnel issues that will impact program timing or scope

- Some partners may decide to set up a separate job code due to HR or labor issues. If so, you can provide them with a sample Advisor job description (see link above)

5. Launch the program

- Use the guidance and assets provided in this document to launch the program

Selecting Advisors

Selecting Advisors

The success of your Advisor program depends on selecting highly capable retail pros to serve in the role of Advisors. You should work with your retail partner to define specific criteria for the program in your market. As a starting point we propose the following selection criteria for Advisors:

- At least one year of experience in retail, in a primary, front-line selling role

    – *Not* tech bench staff

    – *Not* managers

- Consistently ranked as top sellers
- Identified as go-to in-store experts by peers, managers, and customers

Two paths to selecting Advisors: Through-Partner vs. Microsoft-Direct

There are two pathways to select Advisors: working through partners, and directly by Microsoft.

- In a *Through-Partner* model, you will work closely with your GTA or reference MO partner to define criteria for Advisors, and then your partner will provide a list of selected RSPs to serve in this role
- In a *Microsoft-Direct* model, you will select and identify Advisors through MS-led recruitment methods (ExpertZone, field labor)
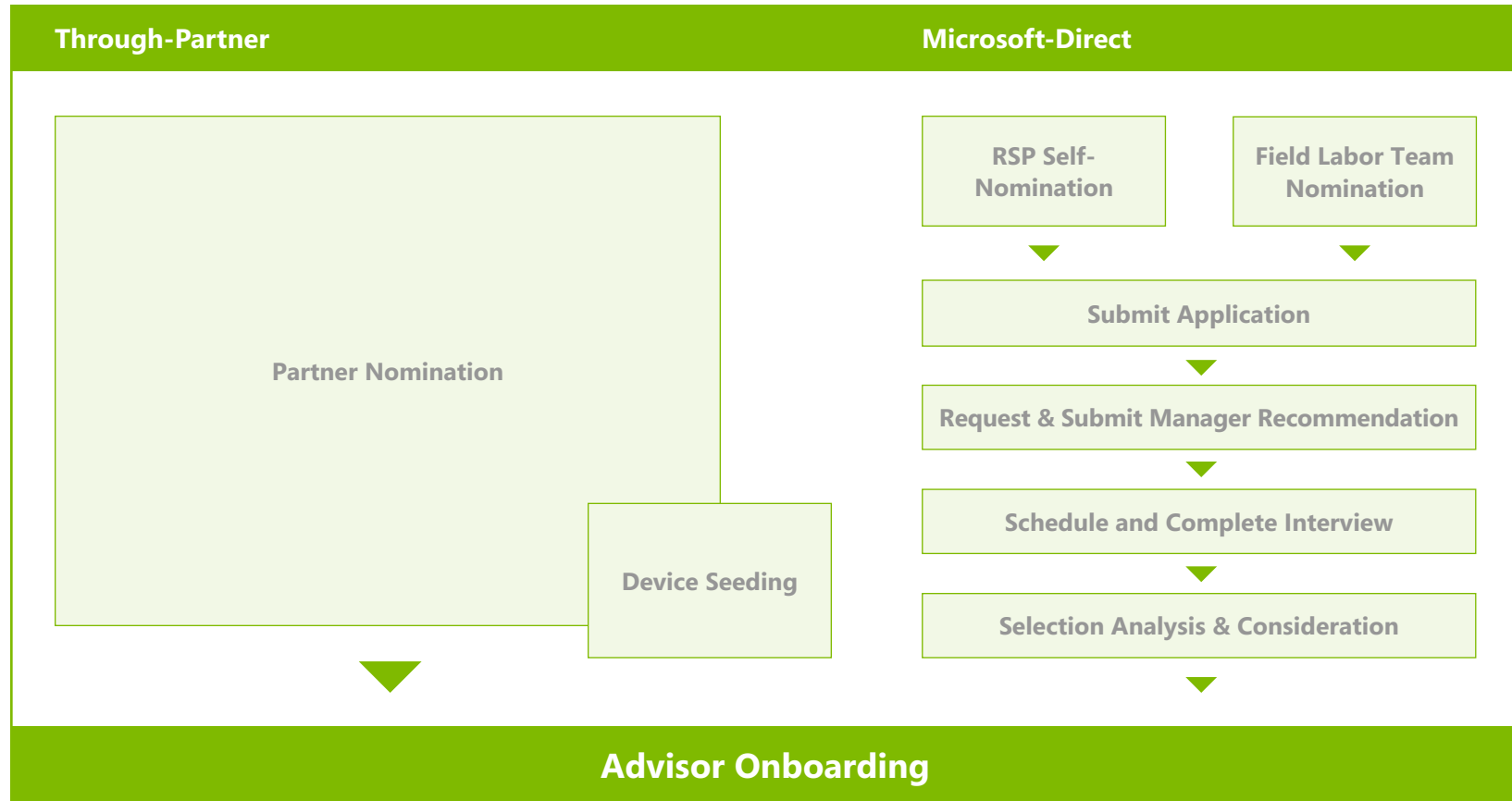
The details and tradeoffs of these approaches are outlined in the following sections. **In general, Through-Partner Selection is the preferred method of Advisor selection.** Working through partners, you will be able to scale your program, work with your partner's official approval and support, and be more likely to obtain sales data for ROI analysis. When partners are not interested in supporting or collaborating to build in-store champions, the methods outlined for Microsoft-Direct Advisor Selection can enable you to start building an Advisor program despite the lack of partner support.

Following selection of RSPs, the onboarding process for Advisors selected from either of the methods is intended to be identical.

Flowchart: Advisor Selection Paths

Through-Partner

Microsoft-Direct

Partner Nomination

Device Seeding

RSP Self-Nomination

Field Labor Team Nomination

Submit Application

Request & Submit Manager Recommendation

Schedule and Complete Interview

Selection Analysis & Consideration

Advisor Onboarding

Through-Partner Advisor Selection

In most instances, Through-Partner Selection is the best and easiest pathway to establishing an Advisor program. The primary type of Through-Partner Selection is Partner Nomination, in which partners provide a list of RSPs who will be Advisors. A secondary method is through device seeding, in which Advisors are selected based on the distribution of OEM devices (this is most common in mobile operator stores selling Windows Phones).

Partner Nomination

A partner selects the RSPs who will serve as Advisors in targeted stores. After the selection process is complete, the partner will communicate the honor to each selected RSP, and the entire list of selected Advisors will be shared with you. Advisors nominated in collaboration with a partner will have an inherent, employer-mandated commitment to the program's success. You should work with your partner to make sure that the selection criteria and requisite capabilities are clearly defined. See the "What are the qualifications for being a Microsoft Advisor?" and the "What is the level of product knowledge required of Microsoft Advisors?" sections, above, for more details.

Benefits
Head-office support; less need to sell program into store management
Scale: you will be able to immediately deploy Advisors in all or many partner stores
Integration: you can use existing partner systems and tools to drive the program
Sales data: partners will be more willing to provide this information for a program they have "cosponsored"

Trade-offs
Partner dependency: the execution of the program will be limited by partner-directed conditions
Prioritization: partners are often balancing multiple obligations and initiatives
Speed: It may require some time to establish streamlined collaborative processes

Device Seeding

For many mobile operators, it is typical to select in-store "champions" for a particular device or OS for a particular period of time. You can use this as an opportunity to land the Advisor program as a "value-added" layer on top of OEM device seeding.

Once it is determined which RSPs will receive OEM-seeded phones, reach out to these RSPs to onboard them into the Advisor program, or work with your retail partner to send a communication to this list.

Microsoft-Direct Advisor Selection

Links to

‣ **Application**

‣ **Manager recommendation**

‣ **Sample interview questions**

In Microsoft-Direct Advisor Selection, you will lead and finance the process of identifying, recruiting, and selecting RSPs. In this approach, RSPs can become Advisors via self-nomination or by field team nomination.

Benefits
Greater flexibility
Grassroots approach
Strong connection with field labor

Trade-offs
Partners may prohibit their employees from participating
Harder to scale
Microsoft bears the entire cost

RSP Self-Nomination

RSPs may discover the Advisor program in their market through participation on ExpertZone/Pro communities (if available), other direct-from-Microsoft communities, and events. Upon discovering the program and recognizing themselves as prospective members, RSPs may apply to enter the program by nominating themselves.

"What, in your opinion, should we be doing to beat the competiton?"

Field Labor Team Nomination

In markets with field labor teams, members of those teams may identify and recruit highly qualified RSPs who consistently prove their commitment to Microsoft products and the Microsoft brand, either online, in the field, or both.

Application Process

RSPs who are self-nominated or nominated by a field labor team member must formally apply to the Advisor program by following these three steps:

1. **Submit an application**

2. **Request and submit a manager recommendation**

3. **Schedule and complete an interview (in person, via Skype, or via conference call)**

Application and Manager Recommendation

We have developed a sample application and a manager recommendation form, which you are encouraged to use as is or modify as appropriate for your program.

Applicant Interviews

The applicant interview is the most important part of the selection process for self-nominated and field team labor-nominated RSPs. It is critical to verify whether applicants are good fits for the Advisor program and likely to excel as Advisors, and although the information provided in an application and recommendation are also essential, the interview is your best opportunity to "get to know" a candidate, validate what you've read, and get a sense of how he or she will add value to your program.

The interview is mutually beneficial: A large majority of RSPs applying to the Advisor program feel honored, respected, and rewarded when presented with the opportunity to discuss their work with Microsoft representatives. At the same time, the conversations often provide great insight into RSPs' everyday goals, successes, and challenges associated with selling Microsoft products in the field.

Selection Consideration

When considering whether or not an applicant is qualified to become a Microsoft Advisor, consider what you've learned during the interview, the information provided by the candidate in the application, and the recommendation by the candidate's manager. Keeping in mind the criteria set forth in the "What is a Microsoft Advisor" and the "What is the level of product knowledge expected of Microsoft Advisors?" sections presented earlier in this Playbook, consider the brand and product knowledge level, commitment, and passion of each applicant, among other things.
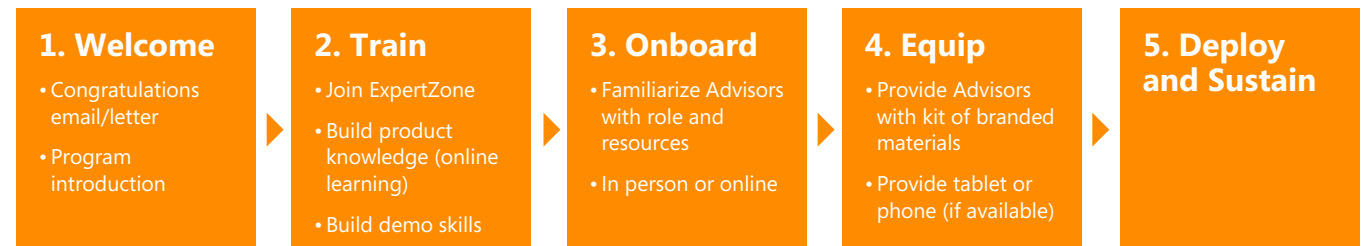
! **NOTE:** If you conduct interviews with multiple candidates at one time, it is useful to begin by asking each interviewee to introduce him- or herself. During the conversation, when you present a question, ask each RSP to answer it (perhaps in the same order each time, to keep the conversation moving and ensure efficiency).

Advisor Onboarding

Advisor Onboarding

Once you have selected Advisors, the next step is to onboard them into their role. Your process will depend on your budget,[1] the size and goals of your program, and the influence and commitment of your partners. The following tactics are recommended:

1. Welcome	2. Train	3. Onboard	4. Equip	5. Deploy and Sustain
• Congratulations email/letter • Program introduction	• Join ExpertZone • Build product knowledge (online learning) • Build demo skills	• Familiarize Advisors with role and resources • In person or online	• Provide Advisors with kit of branded materials • Provide tablet or phone (if available)	

Welcome Advisors

Links to

‣ **Welcome email**

‣ **Welcome letter**

‣ **ExpertZone/ Pro promo card**

Welcome Email and Welcome Letter

The first step in the process is to welcome new members into the program. Send each new Advisor a congratulatory email and/or letter from a single program contact. In addition to expressing excitement, praise, and thanks, the email is used to solicit the Advisor's contact information, and explain that an "Advisor kit" will soon be sent to the new member. The correspondence can also include information about training requirements, upcoming training opportunities on ExpertZone (where applicable), trainer contact information, a call to action to join exclusive Advisor forums in the Pro Community (or alternative online community, as the case may be), upcoming events, and more.

[1] Please see budget guidance at the end of this document for overall program cost and good/better/best scenarios.

Train Advisors

Microsoft Advisors are expected to have the skills and expertise to succeed in their role:

- Broad knowledge of all Microsoft retail products, digital products, and hardware (including Windows, Office, Xbox, Phone, Xbox LIVE, and Office 365), and an understanding of the Microsoft "connected story"

- Deep expertise and best-in-class demo skills in the product they primarily sell

- Expert-level customer qualification skills

Links to

▸ **Advisor Orientation Training Materials**

New Advisor (T-30)

- Join ExpertZone
- Complete Associate Accreditations and/or Silver and Gold learning plans (as appropriate)
- Optionally, complete equivalent training plan on partner LMS
- Completed within 30 days of Advisor nomination

Advisor Onboarding Session (T-0)

- In person or online
- Advanced demo skills
- Microsoft "connected" story
- Advisor role, program features, and resources
- Half-day or full-day session

Monthly Update (T+30)

- Monthly newsletter
- Tips, tricks, demos
- New apps and games
- Recognize top Advisors
- Status check on ExpertZone training; notify Advisors who have not completed requirements

Quarterly Check-In (T+90)

- Quarterly meeting
- In person or online
- Status check-in: what's working, what can we improve
- Cool new tips, tricks and product learning
- Onboard new/replacement Advisors

Annual Refresh (T+365/T-0)

- FY14 program refresh
- Onboard new Advisors
- Basic training on products for new Advisors
- Updated training on new product features for all Advisors

Onboard Advisors

The Advisor onboarding session is critical to the successful launch of Advisors into their role. The specific objectives are to:

- Familiarize Advisors with their role

- Build advanced demo skills

- Equip Advisors to be in-store leaders and peer influencers

- Connect each Advisor with a field trainer (in markets where applicable)

- Add or replace Advisors in your program as required on a quarterly basis

Equip Advisors

Links to

▸ **Advisor Branding Guidelines**

▸ **Catalog of Advisor Branded Materials**

It is critical that customers and peers be able to identify the Microsoft Advisor in their retail store, and that Advisors be able to proudly wear the brand they have been selected to represent. To make this possible, provide each new Advisor with a kit of branded collateral and merchandise.

- Advisor-branded collateral and merchandise falls into three main categories: RSP-facing collateral; customer-facing collateral; and public-facing merchandise (see examples, next)

- Access the comprehensive collection of materials on ProSource

- Define the specific contents of your kit based on the funding and scope of your program, as well as partner branding requirements.[2]

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[2] Please see budget guidance at the end of this document for overall program cost and good/better/best scenarios for Advisor kitting.

Categories and examples of Advisor collateral and merchandise

1. RSP-facing collateral

Purpose: Provide official, celebratory recognition of each RSP's entry into the Microsoft Advisor program

2. Customer-facing collateral

Purpose: Establish the Advisor as the in-store Microsoft expert while elevating the Advisor brand among customers and colleagues

3. Public-facing merchandise

Purpose: Communicate the Advisor brand in public, identify the wearer as an Advisor, and reward Advisors for their hard work and commitment to the program

Recommended Advisor Kit Configurations[3]

Basic	**Full**	**Enhanced**
Minimum assets required to support an Advisor	*Recommended configuration for typical Advsisor deployment*	*Most complete set of Advisor materials for markets with strong partner support & funding*
Shirt	Shirt (multiple shirts)	Shirt (multiple shirts in range of colors)
Lanyard and Hanging Badge	Lanyard and Hanging Badge	Lanyard and Hanging Badge
Badge Pin or Lapel Pin (based on partner)	Badge Pin	Badge Pin
	Lapel Pin	Lapel Pin
	Advisor Certificate	Advisor Certificate
	Notebook and Pen	Notebook and Pen
	ExpertZone Promo Cards	ExpertZone Promo Cards
	Tote bag or Similar	Messenger Bag or Backpack
		Business Cards
		E-Mail .sig file
		USB Stick or Similar Branded Items

Deploy and Sustain

After these steps, your Advisors will be ready to assume their role as in-store leaders and influencers. However, the journey is just beginning. It now becomes crucial that you sustain and engage with your Advisors through the remainder of the year (or the duration of your program). Tactics, tools, and processes to help you do this are outlined in the following section.

[3] See budget scenarios at the end of this document for specific cost details.

Sustaining Engagement

Sustaining Engagement

A key lesson learned from FY12 is the need for a robust program of ongoing communication and engagement with Microsoft Advisors. For FY13, we have formalized a range of tactics that will meet this opportunity. These are described in the following pages, and estimated costs are provided later in this document.[4]

! It is expected that you will select some but not all of these tactics for your Advisor program. Even in larger markets with dedicated funding for Advisor programs at GTA or reference MO accounts, we realize that funding is still constrained. You should select the mix of tactics that best align with your budget, partner requirements, and your overall FY13 execution.

Additionally, be sure to include in each negotiated retail partner agreement the permission to engage regularly with Advisors in your program and add new Advisors to your program.

Advisor Engagement Tactics for FY13

Monthly Advisor Training	**Advisor Mobile App**	**Field Trainers**	**Advisor Online Community**	**Monthly Advisor Newsletter**
Advisor Training Events	**Advisor Contests**	**Advisor Podcasts**	**Advisor In-Store Events**	**Concierge Service**

[4] Please see budget guidance at the end of this document for overall program cost and good/better/best scenarios.

Monthly Advisor Training

It is recommended that you provide new training assets/materials to Advisors as often as monthly (or in an alternative cadence that is practical based on the scope of your program). Training assets could include instructional PDFs (example: a two-page document describing how to sync media from iPhone and Android devices to new Windows Phone devices), demo videos, PowerPoint documents, etc.

The Worldwide Training team at Corp is planning to provide a new Advisor-only training PPT developed in US English asset on a monthly basis; your task is to land this and other deliverables (modified as needed for your market), which can serve as the starting point in your ongoing Advisor training cadence.

Advisor Mobile Application

Links to

‣ **Retail Insider app on Windows Phone Marketplace**

‣ **Microsoft Advisor app documentation**

We are developing a mobile application that will allow you to communicate directly to Advisors via their Windows 8 tablet or Windows Phone. This app will be based on the Windows Phone Retail Insider app, which was deployed with US English content in FY12 in 18 markets.

The app and CMS will be provided by Corp; RSM training leads will be able to manage and update content locally. There will be no cost for the app or CMS.

The Retail Insider App is being updated to focus primarily on serving Microsoft Advisors including a new Windows 8 tablet version. In late H2, this application will start to migrate and merge with the ExpertZone Mobile application so we have a single, best-in-class mobile solution for all RSPs. In the meantime, by deploying this on Advisors' Windows 8 tablets and Windows Phones, we can stay actively connected directly to Advisors in retail stores.

Features of the app include:

• A "spotlight" section with updated content and learning features

• Device information

• FAQs, how-tos, and support resources

• An "Advisor" hub with program-specific information
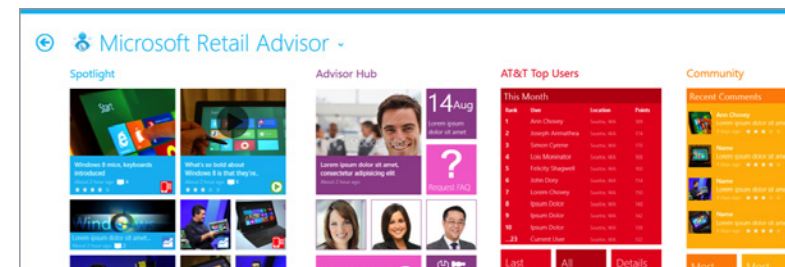
Field Trainers

An excellent way to keep in touch with Advisors is to pair them with a field trainer. This is a two-way communication channel: the Advisor is able to reach out the field trainer for answers and support, while the field trainer makes a point of checking in with the Advisor on a regular basis, meeting in person during store visits whenever possible.

This in-person contact can be augmented through online interaction in a private community as described above. This can be tracked informally through casual feedback and check-ins with the Advisor and field trainer, or more formally through a CRM system, if available.

Advisor Online Community

Links to

▸ **ExpertZone**

▸ **Pro Community Partner Overview**

By consistently engaging with your members in an online community—posing conversation topics, asking poll questions, sponsoring and managing contests, and more—you will encourage knowledge sharing, relationship building, camaraderie, and pride in the program.

Essential Elements

• Interaction and discussion

  – Best-practice sharing

  – Daily engagement

  – Peer-to-peer and Microsoft-led discussions

• Secure document sharing

• Event posting

• Collaboration

Implementation Choices for Advisor Group/Community

We have identified three options that can provide the essential elements listed above:

Pro Community on Microsoft ExpertZone— Create and manage an Advisor-specific Hub	**Yammer—** Create and manage a private social network	**Facebook—** Create and manage a private group

These options are described on the following pages.

Pro Community on Microsoft ExpertZone

Since launching in FY11, the VIP communities hosted on Microsoft ExpertZone have been the primary online location for interacting with retail advocates. Starting in FY13, we are reinventing these communities to support worldwide RSPs in any market who are members of ExpertZone. This new destination will be called the Pro Community. You have a great opportunity to connect with your Advisors by creating an exclusive Hub within the Pro Community.

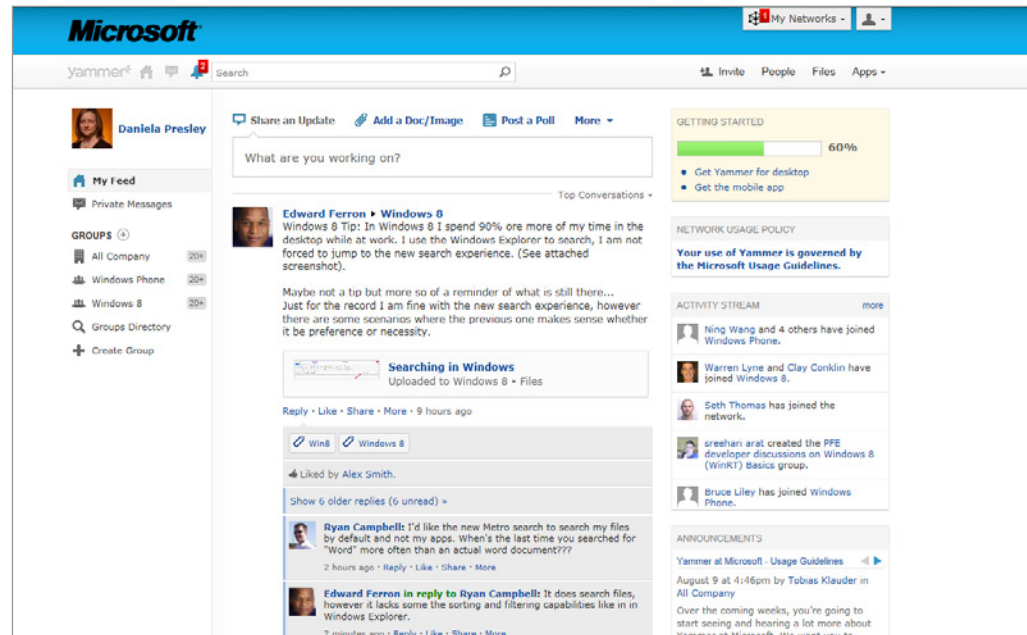| Pros	Cons
Integrated into ExpertZone	Some partners do not support their employees taking part in ExpertZone
Familiar tools and systems for most markets	Advisor group is sub-component of a larger, cross-brand overall community; not exclusive or specific to a single partner
Single database and authentication system for RSPs	New system in most markets; will have learning curve for deployment
Advisor group is part of a larger overall community with frequent, high-value content and broad opportunities for peer interaction	Platform support and feature development is defined by the resources of the ExpertZone team
	Limited mobile access in FY13 H1 and possibly through H2

Yammer (Private Social Network)

Yammer, acquired by Microsoft in the summer of 2012 as an enterprise social platform, provides another option with a strong toolset. Yammer has been used by the Canada team to manage Advisor programs at several major partners, with positive results.

Pros	Cons
Microsoft product	Separate database with no integration to ExpertZone or Advisor mobile app
Can be cobranded to appear exclusive to a single partner	New toolset/admin tools with additional learning curve
Available via browser, desktop app, and mobile app (Windows Phone, iOS, Android)	Additional cost (see https://www.yammer.com/about/pricing/)
"Enterprise"-focused tool versus general social platform	

Facebook (Private Group)

Another option is to set up a private group on Facebook.

Pros
Easy and familiar
Most RSPs are already active on Facebook
Co-brandable for specific partners

Cons
Security and privacy concerns (documents/assets stored in Facebook cloud)
Separate database with no integration to ExpertZone or Advisor mobile app
Limited feature set and reporting capabilities

Monthly Advisor Newsletter

Create monthly newsletters that contain relevant content (limited Corp guidance will be provided).

Newsletter Content (Examples)

• Deep-dive demos, tips, and tricks, including demos suggested by Advisors

• Advisor(s) of the month feature

• Leaderboard

• Event advertising and invitations

• Event coverage, including photos

• Exclusive contests

• Excerpted highlights of key discussions happening in online community

Advisor Training Events

Links to

▸ **RSP event guidance**

▸ **RSP event assets and templates**

We suggest that you schedule and host semiannual live events and quarterly online training sessions for Advisors. Depending on your budget, your audience, and your preferences, your live events can be high-end or low-key—there is no one right way to host an event. Refer to event guidance and suggested agendas on ProSource for more information.

Advisor Contests

Use monthly contests to excite and motivate Advisors. These can be simple or complex, short in duration or span several weeks or months, depending on your budget and desired outcomes.

The Retail Advisor app provides a leaderboard to track Advisor activities, which can also be used as the basis for contests as well.

Simple Contest Ideas

• Request that Advisors e-mail a photo showing the Windows demo running in their stores. Ten Advisors will be picked at random for a small value prize

• The top 10 leaders for the month on the Retail Advisor app leaderboard get a cool Microsoft T-shirt, Zune pass, or similar prize, delivered by their field trainer contact

• Request that Advisors submit their top three tips for selling Windows Phone to iPhone owners. The top ten tips are shared with all Advisors, and the Advisor who submitted them gets an Xbox Live 1-month pass

• Every Advisor who refers five new RSPs to ExpertZone (using their referral code) gets a copy of an Xbox game

• These can be structured as a series of monthly challenges so that Advisors are always looking for a hot next opportunity from Microsoft

Advanced Contest Ideas

• Over a six-month period, the top three Advisors on the mobile leaderboard win a top-of-the-line gaming PC

• The top five Advisors who refer the most new ExpertZone members over a three-month period win a trip to CES, E3, or CeBIT

Contests require planning and coordination, and most important, legally valid terms and conditions. Work with local LCA to ensure that your promotion ideas meet all relevant laws and requirements.

Advisor Podcasts (AdvisorCast)

An Advisor-focused podcast—either on a weekly or monthly basis—can help sustain interest in the Advisor program; train and educate the audience about new products, features, events, etc.; and serve as a celebration and recognition tool for top-performing Advisors who are invited to participate as guests. Podcasts give Advisors an opportunity to discuss products and features in depth, share ideas and stories, and find common ground—all while being entertained.

The Corp team is in the process of developing plans for a model podcast program. It will include information about how to recruit the right Advisor-host, how to create show themes, how to select Advisor guests, how to market podcasts in Advisor online communities, technical guidance, and more. This can serve as guidance for your market should you decide to pursue this tactic for your Advisor program.

Advisor In-Store Events

Advisors are eager to make exciting things happen in their stores. One of the best ways we can support their efforts is to give them tools to conduct in-store events for peers and customers.

A range of in-store event kits to support Advisors will be available on ProSource in Q2. Deploy these to Advisors using the right processes for your market: through field teams, through the Advisor application on Windows tablets, or through the Concierge Service (if you have this in your market).

Advisor Concierge Service

The Advisor Concierge Service is a contact method for Advisors to reach out to Microsoft for support with in-store events and activities.

These can fall into a few key categories:

• Training events for peers and customers

• Customer "demo days"

• In-store competitions such as Smoked by Windows Phone

• Peer events during or after work hours

Method to Set Up a Concierge Service

1. Identify a resource who can manage in-bound requests from Advisors

2. Produce a supply of in-store event kits using Corp-supplied templates

3. Promote the availability of this service to your Advisors

4. Track and fulfill requests

5. Require Advisors to provide documentation of in-store events

Managing Concierge Service costs

The Concierge Service tactic is relatively high-cost, but it is also quite impactful. Remember that this is just one of many possible tactics to land and sustain your Advisor program. Please balance the potential impacts and costs of each tactic you choose for your program, and reevaluate your selections regularly to find the best mix.

Tracking and Measurement

Tracking and Measurement

The Advisor program represents a significant investment of time, money, and resources by Microsoft, retail partners, and the Advisors themselves. Given this, a robust, ongoing program of measurement is imperative.

There are four methods of measurement that can be used to evaluate the impact of your Advisor program:

Mystery Shopping	**Channel Studies**	**Sales Data (Store & RSP)**	**Program KPIs**

Mystery Shopping

Mystery shopping is an excellent method for evaluating the customer experience Microsoft Advisors provide in your market.

Formal channel studies will often include mystery shopping. However, most BGs only execute formal channel studies on an annual, or at best quarterly, basis. We suggest you use informal mystery shopping on a continuing basis.

Visit partner stores with Advisors. Meet the Advisor, ask for a demo, probe their level of knowledge, and ask questions regarding competitors. If the Advisor is not there, interact with peers and coworkers and evaluate their level of knowledge, willingness to recommend, and perceptions about Microsoft brands. Field labor or Microsoft employees can supplement efforts in this area.

Capture your findings in a database (which can be as simple as an Excel file), that will allow you to track over time, and encourage the broad use of the Microsoft RSVP app for reporting in-store experiences.

Channel Studies

Formal channel studies (such as the annual Windows Channel Tracker) provide an opportunity to measure the broad, overall impact of your Advisor program. Review the methodology, questions, and coverage to ensure that results will be relevant to your Advisor program.

Items to evaluate include:

• Year-over-year recommendation rate (NPS)

• Year-over-year sales by partner

• In-store experience of mystery shopping teams

Sales Data (Store and Advisor)

Store Sales

Measure store-level sales, using partner-provided data.

- If Advisors are not deployed in 100 percent of stores, compare Advisor and non-Advisor stores of comparable size
- If Advisors are deployed in 100 percent of stores, compare sales data year-over-year

RSP Sales

If available, compare sales data at the individual RSP level.

- Compare Advisors versus other RSPs in the same store
- If Advisors are not deployed in 100 percent of stores, compare average sales per employee at Advisor versus non-Advisor stores of comparable size

Program KPIs

Set a range of performance KPIs to track the overall health and operational stability of your Advisor program.

- Advisor deployment (percentage of target coverage)
- Advisor turnover (number and frequency)
- Quarterly surveys
    - Partner feedback and satisfaction
    - Advisor feedback and satisfaction

- Advisor participation
    - ExpertZone training and community
    - Mobile application
    - Concierge
    - Advisor-only training events and webinars
    - ExpertZone referrals

Estimated Costs

Estimated Costs

Your market's available funding will influence the scope of your Advisor program.

	Item	Basic	Full	Enhanced	Notes
	Execution Scenarios				
Kitting and Setup	Shirt(s)	$25.00	$50.00	$75.00	Multiple styles/colors of shirts provided at higher costs
	Advisor Lanyard	$3.00	$3.00	$3.00	
	Advisor Pin	$5.00	$5.00	$5.00	
	Badge	$5.00	$5.00	$5.00	
	Advisor Certificate		$25.00	$25.00	Custom digital-printed with Advisor name
	Business Cards			$45.00	
	Branded Messenger Bag			$75.00	Advisor-program branded backpack or messenger bag
	Branded Incentive Items (notepads, etc.)		$15.00	$35.00	Distributed at welcome events as well as in welcome kit
	E-mail .Sig	$ —	$ —	$ —	E-mail .sig file provided to Advisor to be personally customized; no cost
	Promo Cards		$5.00	$5.00	Assumes 25 pre-printed cards distributed to Advisors in Welcome Kit
	Welcome Kit Package and Shipping	$25.00	$25.00	$25.00	
Initial Training and Onboarding	Welcome E-mail	$20.00	$20.00	$20.00	
	Welcome Letter			$20.00	
	Online Training	$ —	$ —	$ —	Delivered via ExpertZone or partner LMS
	Onboarding Event		$40.00	$75.00	Specific costs for live event (room, food/bev)
	Onboarding Webinar	$20.00	$20.00		Cost for small giveaway items
	Device (Phone or Tablet)				OEM-provided (Phone) or BG-provided direct GTA funding (Windows)
	Mobile Application for Advisors	$ —	$ —	$ —	Provided by Corp at no-cost
	Store Welcome Kit			$75.00	Package of branded gift items and training collateral sent to store to be distributed by Advisor
Ongoing Support	Quarterly Webinar	$ —	$ —	$ —	Via Microsoft Lync; cost to set-up and execute webinar covered under program management
	Monthly E-mail Update	$120.00	$120.00	$120.00	Yearly cost to create and send e-mail comm to Advisors
	Quarterly In-Person Events			$75.00	
	Collateral and Giveaways for Quarterly Events			$125.00	
	Concierge Service		$200.00	$400.00	Assumes 1 event per Advisor per quarter (Full); 2 events per Advisor/qtr (Advanced)
	Advisor-Led In-store Event Kits				Provided by Corp
	Trainer Matching	$ —	$ —	$ —	Covered under program management
	E-mail Support Alias	$ —	$ —	$ —	Covered under program management
Program Management	E-mail Support				Provided by FTE or CSG program management resource
	Mobile application content updates/mgmt.				Provided by FTE or CSG program management resource
	Training content development/localization				Provided by FTE or CSG program management resource
	Monthly training delivery				Provided by FTE or CSG program management resource
	Onboarding				Provided by FTE or CSG program management resource
	Partner sell-in				Provided by FTE or CSG program management resource
	Set-up and coordinate online or live events				Provided by FTE or CSG program management resource
TOTALS		**$223.00**	**$533.00**	**$1,208.00**	

Resources and Support

Resources and Support

Program Guidance and Support

Advisor Program Questions and Feedback

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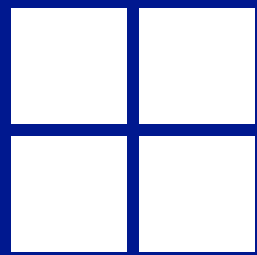### Program Sponsorship

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