



Enquiry

Good for Business?

*An enquiry into the impact of Microsoft's
investment in partnership brokers training*

“Partnerships come in all shapes and sizes. In the private sector, many so-called ‘development partnerships’ are essentially transactional and tactical involving philanthropy on the one hand or service-type contractual arrangements on the other. However, we came to realise in Microsoft that a true partnership approach is something very different. A better managed and understood partnering process can lead to genuine win-win collaboration—where the conversation moves from ‘here’s some money, this is what we expect you to deliver’ to ‘this is the problem/challenge, how can we solve it together?’

To move from the former to the latter requires a very different mind-set and range of competencies than we were used to in order to move from vendor to partner. To make this shift, we recognised that we had to build new skills in those employees who were responsible for brokering our key partner relationships. This is what prompted our investment in partnership brokers training.

We believe the results are significant—for our employees, our partnerships, our business and wider society—but we wanted to be sure...hence this enquiry.

I hope you enjoy learning from it, and find in it some useful ideas to help build your own partnering approach, your organisation’s partnering culture and more systematic collaborative approaches to the current challenges we all face.”

Greg Butler

Senior Director Education Strategic Partnerships

Microsoft

November 2012



Introduction

The Microsoft context

Microsoft is an international company with over 90,000 full time employees plus many contractors and consultants operating in over 100 countries. It is consistently rated as one of the most successful corporations globally and reported annual revenues of almost \$70 billion in 2011. It is an entity with huge impact on global communications—not least in its influence on education. Microsoft’s business model involves selling through other organisations rather than directly to the consumer—so the very foundation of its operations worldwide is a relationship-based/partnership approach.

Recognising the scale of opportunity in less developed countries, together with a growing understanding of the very considerable value of its products for the development process, Microsoft has been actively involved in development (as opposed to simply commercial) partnerships for many years. The result is engagement in literally hundreds of partnerships for development across the world—with governments, civil society, academia and other private sector organisations. Collaborating with others has become the company’s way of doing business.

More recently, however, a specific emphasis has been placed on partnering with those in the education sector—this is being seen as wholly in line with the company’s corporate ambitions as opposed to a more arbitrary and disconnected series of philanthropic and one-off activities. Microsoft aspires to be a “true partner in education” and to this end, aims to use its technology to work with other education stakeholders in transforming education through digital inclusion and ICT adapted to educational needs. Some large-scale, company-wide education-focused partnership programmes are now well established and appear to have made some real breakthroughs. Two such programmes are: *Partners in Learning* that has had nearly \$500M invested by the company in education initiatives and *Shape the Future* which brings different stakeholders together to create a global digital inclusion movement.

To date Microsoft has invested approximately \$1M into partnering capacity building and the adoption of business processes that incorporate partnering more centrally. Of this some 30% was allocated over a two-year period to intensive training for 80 key staff in partnership brokering skills.

Why the focus on partnership brokering?

Whilst it had become clear to the company that there was a sound business case and rationale for engaging more deeply with education stakeholders, it took some time to recognise that a partnering approach was required and that for this to be successful, new skills and competencies were needed. Moving from a vendor to a partnering mind-set takes more than good intentions! Small steps were taken in this direction but did not bring about the changes sought.

One of the senior managers involved in this work searched for ways of building a stronger partnering culture within the company and discovered first the Post-graduate Certificate in Cross-sector Partnership, and then the Partnership Brokers Training. Having completed both courses, it was decided to introduce the partnership brokers training course into the company in a systematic way. The decision to focus on partnership *brokering* was due to the fact that those fronting Microsoft partnerships were very often taking on the dual role of Microsoft representative to the partnership whilst also driving the partnering process forward to help it to add value to all parties.¹

Summary of the partnership brokering training interventions

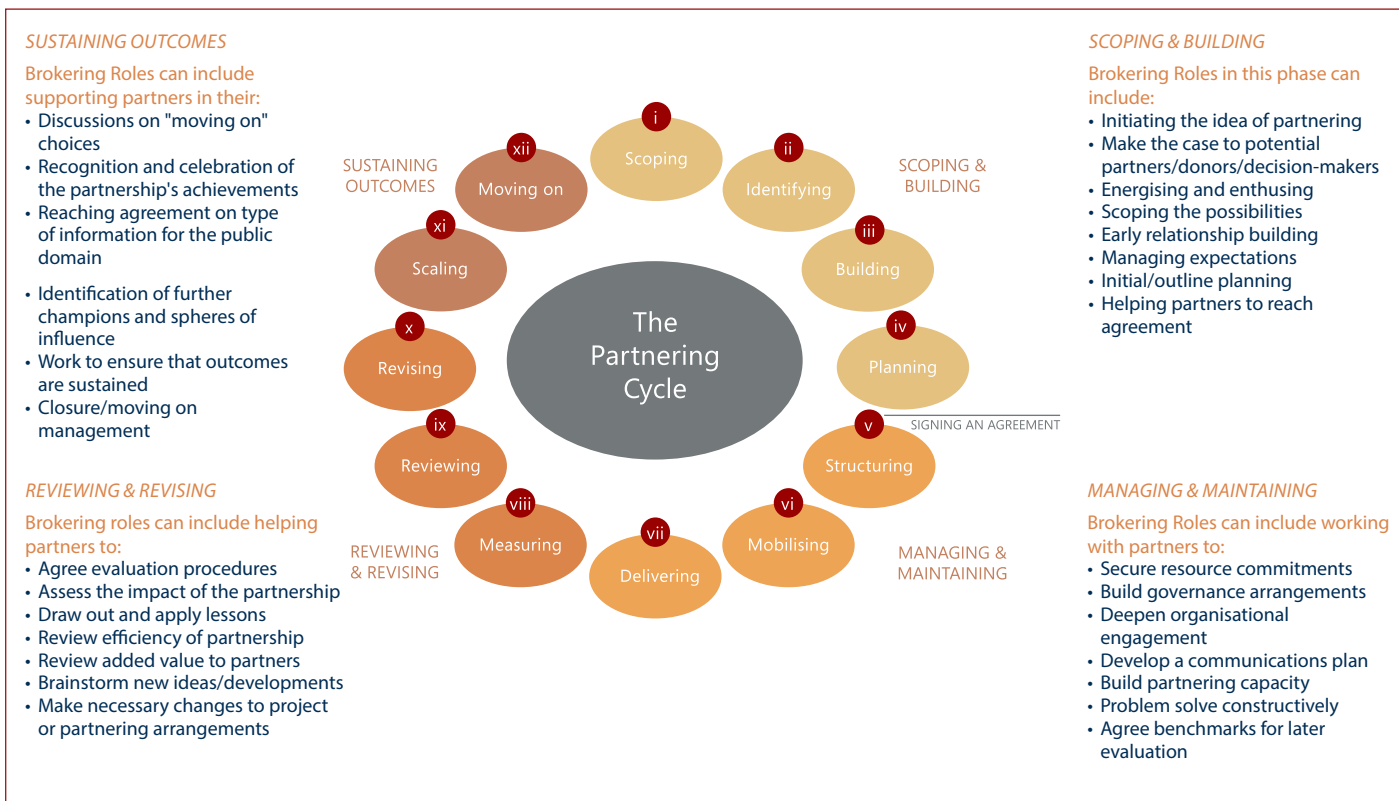
The Training Course:

- The course takes place over four days, with groups of between 12-25 people and a ratio of 1:8 trainers to participants to ensure maximum focus and attention to individual training needs.
- Course content follows a typical partnering cycle (see Box 1 below) and includes skills building in interest-based negotiation, relationship-management, facilitation, communications, review & evaluation.
- There is a strong focus on experiential learning—including role-play exercises, group work and games, as well as more formal presentations together with opportunities for creative thinking and reflection.
- The course ends with some focused individual action planning as well as some shared action planning for teams and regions built on priorities identified by the group.
- Participants received a copy of *The Brokering Guidebook*², as well as handouts and copies of all the materials used (including those co-created by the group during the training).

1. The fact that the training gave them skills in managing this dual role was one of the values of the training commented on frequently by the staff who took the training.

2. *The Brokering Guidebook* written by Ros Tennyson—available from www.ThePartneringInitiative.org.

Box: 1: Partnership Brokering activities throughout the Partnering Cycle³



Participants and places

Six Partnership Brokers Training courses were conducted for Microsoft between May 2010 and November 2011⁴. The courses were held in Washington DC (twice for those based in the Americas), Indonesia (SE Asia and Australia based group), Poland (European and FSU group with some participants from the Middle East), Dubai (Middle East and Africa based group) and one in Seattle (HQ based group).

Completing the training were 94 Microsoft staff—predominantly from the Partners in Learning programme where Microsoft staff broker partnerships with a range of education stakeholders⁵ who work together to build ICT into the education system. Their partnership brokering remit is to:

- Contribute to profitable business and tangible business outcomes
- Position Microsoft in a leadership position with regard to educational ICT

As word spread about the course within the company a number of additional participants asked to attend the later courses from other departments including communication, HR and government relations.

All those who completed the training joined the global network of course alumni (800+) who had completed other cohorts—giving them access to other partnering perspectives and others operating as partnership brokers in very different contexts.

- Build coalitions and partnerships that will transform education
- Assist Microsoft in becoming a partner of choice for educational stakeholders worldwide

3. Central Partnering Cycle diagram, © The Partnering Initiative.
 4. A series of new courses are planned for Microsoft and partners starting in November 2012 and running through 2013.
 5. Stakeholders include: Ministries of Education, other businesses in related fields, local government, NGOs, schools, teachers and students.

Advanced partnership brokers training

Of the 94 graduates from the partnership brokers training 14 have, to date, taken one of two advanced training options.

- **Professional Accreditation**—a three-month period of mentored and examined professional practice⁶
- **Training Certificate**—an intensive five-day course designed for those needing to train others (in their organisations or their partnerships) in partnership brokering skills and good practice⁷

Other factors

In addition to the formal training, Microsoft developed a number of other elements to consolidate and build internal partnering and partnership brokering capacity. These include:

- **Integrating the partnership/partnership brokering approach** systematically into the business by:
 - Integrating the partnership development work into business planning processes
 - Developing a scorecard metric on active/strong partnerships
 - Including Conditions of Satisfaction for every partnership
 - Providing access to standard collaboration agreements, pre-approved by the legal department
 - Requiring that partnership reviews are included in quarterly business updates
- **An online module on partnering basics** “Partnering 101” was available to others in the company who had not had the benefit of the in-depth partnership brokers training⁸
- **On-line communities** were set up for each training cohort providing access to the materials and making links to other cohorts within the company
- **A community of practice** was established that was designed to offer opportunities for exchanging experiences and seeking advice

6. To date, ten people have completed this option.
 7. To date four people have completed this option.
 8. Developed in 2009 by Microsoft in collaboration with The Partnering Initiative.

Scope of this enquiry

One of the features of the working relationship between the Partnership Brokers Association and Microsoft has been its evolution as a collaboration rather than simply a contract for services. This is reflected in the eagerness to optimise the learning from the work for the benefit of both Microsoft and the Association. The design and delivery of this research enquiry has been consultative with both parties being concerned that the findings will be thorough and be accessible (in terms of content and dissemination channels) to their different constituencies and stakeholders.

Box 2: Scope of this enquiry from the perspective of both parties

Perspective	
Microsoft	Partnership Brokers Association
Assess the impact of training key staff in partnership brokering skills in terms of tangible business outcomes, as well as benefits to partners and wider society	Explore to what extent investment in partnership brokers training yields tangible added value for commercial or non-commercial organisations involved in partnerships

This enquiry is built from:

- A review of the post-training feedback forms
- Data from an online survey⁹ of course participants exploring the longer-term impacts of the course from their perspective
- Sixteen in-depth interviews
- A comparison of emerging findings with earlier research, to compare outcomes and impacts from the Microsoft experience with the wider experience of accredited partnership brokers in a range of sectors¹⁰

The enquiry was designed to understand the impact of partnership brokers training on the company and to capture the perspectives of those in the company on its wider impact.¹¹

9. The full survey report is available on request.
 10. *What Do Partnership Brokers Do? An Enquiry into Practice* published by the Partnership Brokers Association, January 2012.
 11. It is clear that whilst partners would undoubtedly have valuable things to say about Microsoft as a partner, they would not have been able to relate their views to the value of the partnership brokers training per se.

An assessment of impact

Impact of the training on individual employees

Learning how to broker partnerships systematically, combined with enhancing abilities to listen, empathise and think through decisions is perceived to have built professional competencies and confidence quite considerably.

- The training helped build capacity by providing understanding and practice of a holistic approach to partnering work, as well as specific skills, frameworks and tools.
- By providing clarity on what their role involves and how to perform the role effectively, participants gained confidence and were able to make better partnership brokering and partnership decisions—this was felt by both seasoned partnership practitioners and those new to partnership.
- Some 18.5% said they were somewhat better equipped to do their job; 81.5% said they were much better equipped; 0% said there was no change in their ability to their job or that the training had any kind of detrimental effect.
- The training created a greater sense of self-awareness amongst practitioners, the choices available to them, the partnering process and how to achieve excellence within that process to continually improve performance.
- By building individual capacity to broker the partnering process, the training increased the ability of employees to represent Microsoft's interests at the partnering table.
- The training built strong bonds of solidarity and support within each cohort, between people performing similar roles who didn't previously know each other. Many reported on the benefits of learning together about how to improve the Microsoft partnering approach. For some, contact remains strong even where individuals have left the company. One referred to those who have completed the training as a "tribe."
- There was a reported increase in self-knowledge from the training: greater understanding of their own value and personality type and, therefore, their individual brokering style and strengths.
- One informant believed that, tracked over time, there would be evidence of an accelerated progression by whatever benchmark used, e.g. job title, job satisfaction.
- The most frequently cited change in skill and behaviour was said to be participants' ability to listen, which had a ripple effect increasing their ability to perform other partnership activities.

Participant Feedback

"Probably the best course I've done at Microsoft in ten years because it didn't just tell you what and how to broker, but the underlying why and how to personalise it. The 'why collaborate?' is important because it leads to clarity about what to do."

"The best professional development training I have done. It was comprehensive and valuable."

"I can't say enough how good the course was."

"It really touched me!"

"I had my doubts that the training could provide any new value but I realised that I was missing a lot of critical components for deciding whether to join a partnership, how to maintain it or when to close it."

"Helped me think through the complex relationships required to make partnerships successful, improved ability to understand value of listening, to absorb more and reflect. Helped me to drive the relationship along from truly listening to what the others really want and need from the partnership."

"The training helped me find ways to reflect on my own performance."

"Without a doubt the best training I have done since joining Microsoft."

"Really powerful."

"It changed my mind set—by shutting the old mind-set down and rebooting it."

"The training gave me a set of tools and a way of working that has now become part of the way I work."

"The training helped me put a process around something I have been doing unconsciously for over a decade."

"Our sales staff has 'away days' to brainstorm and share approaches. It was fantastic to be in the company of like-minded people within the company."

"I now feel very confident walking into any meeting regardless of who the attendees are or what the conversation is about. I'm able to immediately begin structuring the conversation, if I'm the lead, and to help partners move along in a logical manner."

"I have reviewed progress and acted on my findings more purposefully—inviting all the parties to collaborate for greater success."

Enhanced skills/insights/abilities gained as a result of the training include:

- Listening
- Greater insight and empathy for those from very different organisational and cultural backgrounds
- Working with a partnership brokering road map providing a systematic, rather than ad hoc, approach
- Understanding of a partnering process management and use of tools and frameworks
- Managing more effective conversations
- More efficient and effective meeting management
- Ability to find more appropriate solutions
- Greater awareness of the impact of “Microsoft behaviour” on partners
- Acknowledging and working with complexity (rather than ignoring it)
- Ability to make more informed decisions
- Ability to steer the partnerships towards a win-win scenario for all partners
- Better management of conflicts and breaking through barriers
- Greater success at mobilising other types of resource contributions from partners
- Increased confidence in professional competencies
- Collaborative leadership

Whilst participants noted that skilful partnering does take up more time, they also said they use their time more efficiently.

Participant Feedback

“When I meet with Government and NGOs, although they have different goals to me, I now understand better how to find the sweet spot.”

“Provided me with a much bigger array of tools, ideas and approaches in managing partnerships.”

“My time was more efficiently invested, it was easier to realise if the proposed partnerships could be successful or were just a signed paper.”

“I have changed my time management approach and structure my calendar differently/delegate activity better/make others more accountable.”

“I am able to identify far more quickly and efficiently where partnerships can be brokered and where they simply should be a relationship transaction. That saves time, money and the strength of relationships.”

“The training helped make it easier and clearer to put a name to what I do—a light switched on.”

“It highlights that often one size fits does not work and that a range of competencies are necessary to develop real partnerships.”

“Ok, that’s what I do! Let’s look at how I do it and how I could do it better.”

“Respect of other cultural behaviour and better understanding of how other people see my behaviour”

“The partnership brokers training gave me the tools to manage the complexity of multi-partner arrangements with stakeholders from different types of organisations; the confidence to listen to partners more carefully and to think more deeply about our partnerships and their value to the company, to education and to wider society.”

Participant Feedback

"Now I feel like I have a plan of action going into EVERY meeting that involves brokering. Being able to define objectives, keep the conversation on track, and manage expectations has been phenomenal."

"Checking on the partnership, follow-ups, engagements and also commitments have improved a lot."

"The training has really changed the way I deal with some difficult people in the partnership."

"The course enabled me to take a 360-degree view of the partnership and better understand the 'political' components. Questions like: Is this really a common goal for all? Is it really aligned to their personal goals? Will this person give and get the momentum and support needed to drive this within their organisation?"

"I've begun to clearly define my partnerships and/or relationships that are not quite partnerships. Making sure that partnerships have goals and outcomes as opposed to just being in a relationship."

"We pulled together the right resources, valued at \$85 million (Australian) by leveraging what was already there. This can't be done by telling people what to do, it doesn't work that way."

"I have been able to better manage partner expectations at meetings."

"Current partnerships are not impulsive and have a better level of predictability. I apply the good practice principles of partnership brokering much more."

"Partnering is not just about being nice, sometimes you have to be tough to get to the best outcomes. Most people are adverse to conflict, but if engaged in a healthy way, conflict is not disrespectful but challenging, and leads to innovation, and breaks through issues, enabling them to be tackled in a fresh way, and actually deals with the root cause."

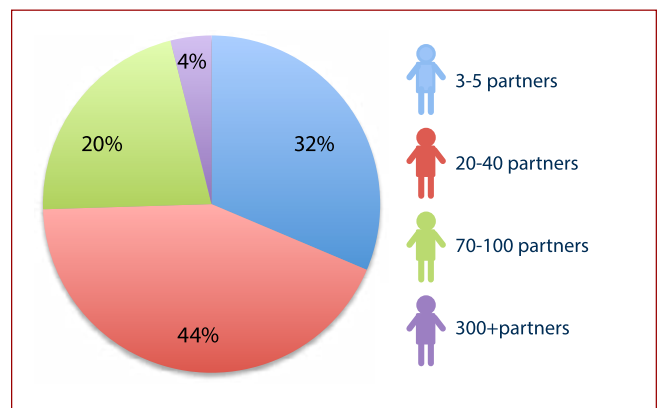
"Much better at reading the potential roles people can play and using that knowledge to get better contributions from individuals and better federation of effort."

Impact of the training on Microsoft's partnerships

Working with external agencies (partners) is a complex daily reality. Efficiencies and inefficiencies are multiplied through the sheer volume of partnership work being undertaken. The survey revealed that of those who have completed the training:

- Almost 52% of respondents had worked on more than five partnerships in the last 12 months, and none were working on only one partnership
- 32% had direct contact with 3-15 partners
- 44% had direct contact with 20-40 partners
- 20% had direct contact with 70-100+ partners
- 4% had direct contact with over 300 partners

Chart 1: Respondent's range of direct contact with Partners



Microsoft staff report that this training has had significant impact on partnerships from their perspective. It is summarised below:

- When asked "To what extent do you feel your partnerships are more effective after the partnership brokers training?" 100% said somewhat more effective, of which 76.2% said much more effective.
- Improvements in listening, empathy and reflection, combined with process and hard tools such as interest based negotiation, enabled employees to better manage the dynamics of collaboration and steer towards win-win arrangements that reaped value for all parties.
- An increased ability to conduct effective/productive conversations lead to a myriad of efficiencies in the partnering process, as well as increase the overall value from the relationship.
- The training helped change the tone and focus of conversations with NGOs and other partners—many of whom approach Microsoft as a "rich company that is going to give them money".

- The training enabled better conversations around resources and resource mobilisation, and provided a structured process for “getting away from money”. This led to more appropriate and large-scale resource mobilisation. Effects of this change were seen to be a broader selection of resources shifting focus away from money, a larger pot of resources to play with, attracting the right partners to the table and a greater sense of equity in the partnership.
- The training helped staff know how to lead a collaboration process in which everyone contributes, thereby demonstrating leadership without being dominant, ensuring participation, earning trust and improving Microsoft’s standing with partners
- Participants gained greater clarity on how to mitigate the potentially adverse effects of Microsoft’s presence at the partnering table given it is such a large global player and can upset the power dynamic of the partnership.
- By learning how to facilitate active participation from all partners and ensure appropriate follow up, employees were able to maintain momentum and ensure progress rather than wasting time and effort in inefficient meetings
- The training helped participants understand the value to be gained from surfacing challenges and potential areas of conflict rather than avoiding the difficult conversations. This in turn helped some turn around difficult relationships.
- Participants felt better equipped and more confident to approach others as an agent of change, creating linkages, opening doors, and suggesting new ways of working.
- The process, tools and frameworks provided to participants were deemed to be user-friendly and useful, with specific emphasis placed on the value of the partnership cycle, resource mapping, partnership agreements and the methodology for conducting a partnership review which employees used directly with their partners.
- Learning how to act as a ‘neutral broker’ helped employees shift from a vested interest to a neutral position when the partnership required it. Examples given include deadlocked situations or the need for a neutral committee.
- Participants reported that using a brokering approach led to better partnership solutions either in quality, scale/reach, satisfaction or technological relevance.
- Participants felt able to make faster assessments of the viability of partnerships through their improved ability to have an effective conversation to understand each partner’s drivers.
- Employees specified that they were better able to know how and when to exit or close a partnership down.

Participant Feedback

“It is good to be able to provide a framework for all partners to assess partnership value and know when to close a partnership down whilst maintaining good on-going relations.”

“The training helped me listen better, bring things and interests into context and helped me work on better solutions for everyone.”

“Puts the development of a team and/or group of diverse and organisations and people at the centre.”

“Awareness of group dynamics makes initiatives easier to drive.”

“To be open and critical in a constructive way.”

“I better understand my role within the partnership which helps me to perform better within those partnership and support quality partnership.”

“I need to be able to foster trust and bring people and organisations to invest their time and resources in smaller and larger partnerships.”

“I feel (I have got) much better partnership results. Much deeper relationships, more alignment of vision and outcomes, more ability to access resources.”

“Helped me understand why some of my partnerships did not work well in the past.”

Wider impact of the partnership brokers training

In general terms, many commented on the fact that the training enabled them to conduct more complex and comprehensive conversations that led to deeper and multilevel engagement as well as a wider range of benefits:

"We are trying to set up a movement. Partners need to know what's in it for them, and it's important that they get benefit, not just the end customer/beneficiaries."

Specifically, the training enabled the Microsoft partnership brokers to deliver three key things:

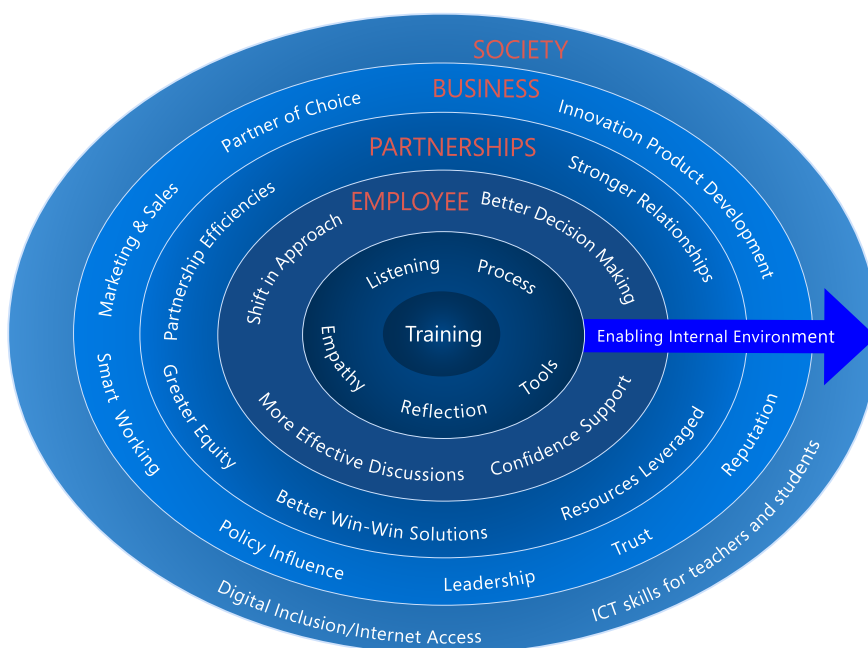
1. To move the relationship to 'beyond money' and thereby access the necessary resources and innovation for solving development challenges:

"When NGOs see Microsoft, their eyeballs turn to dollar signs, but improving education doesn't start with dollars but with what can each partner bring to the education table. The training helped us to coach others about the values of partnering."

2. To enhance performance by ensuring greater efficiencies within and between partner organisations:

"I was able to bring many of the partnership brokering tools from the training to the table that worked and that the partnerships then adopted as day-to-day practice because they saw that they worked"

Box 3: Schematic summary of the waves of value resulting from the partnership brokering training as reported by Microsoft's partnership brokers:



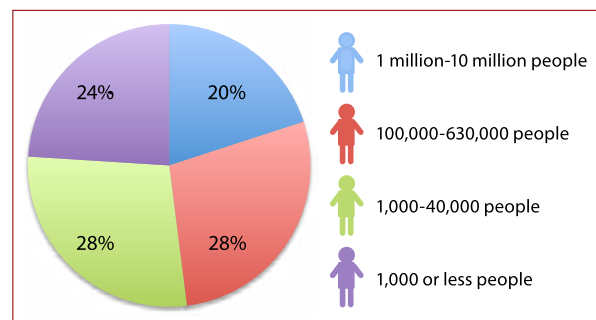
3. To craft partnership solutions with greater scale and reach:

Many were able to pinpoint how revising their brokering approach led to an increase in the number of partnership beneficiaries. Examples include greater scale coming from skilful selection of partners, and from facilitated problem solving. Changing the way employees went about their external relations work they were better able to harness the added value of a partnership approach, and create a bigger pie for all.

The scale of the pie is not marginal; when employees were asked to estimate the number of recipients of their partnerships they reported as follows:

- 20% estimated millions, of which one estimated 10 million¹²
- 28% estimated 100,000-630,000 people
- 28% estimated 1,000-40,000 people
- The remaining 24% estimated their partnerships reach out to 1,000 or less people

Chart 2: Estimated number of beneficiaries of partnerships



12. This scale was attributed to working with and through Ministries of Education at a national level.

Impact on the business

The killer question for Microsoft is:

Has the investment in partnership brokering training been good for business?¹³

This enquiry has revealed that adopting a partnership brokering approach has helped Microsoft employees to generate a number of positive business benefits that constitute significant value for Microsoft and that contribute to immediate business growth/ outcomes and to establishing an enhanced position in the market as the technology partner of choice.

Interestingly, a 2012 longitudinal independent internal market study of 1000 global education leaders indicates that *favourability* comes from trust, leadership and relevant products¹⁴ all of which have emerged from this study as outcomes of skilled partnership brokering within Microsoft.

The change in employee behaviour and approaches is seen to have had an impact on a variety of factors that contribute to Microsoft's market position, these have been outlined below as a number of distinct categories, however, it should be noted that there can be considerable overlap between the categories—with one influencing and adding value to another.

Creating stronger customer/stakeholder relationships

Understanding how to better manage relationships has provided opportunities to enter into longer term and/or deeper relationships with potential customers and partners and enabled conversations around creating greater value as opposed to short-term transactions or sales. This has resulted in much higher customer and partner satisfaction.

"In my current role I have used this knowledge to increase trust and build relationships with customers to develop long-term projects and sales opportunities."

"Seeing partners as having equal value in the partnership and not 'dictating' what we want has been valuable to gain trust with governments and NGOs."

A survey of Education Leaders¹⁵ showed that the most important criteria when a government buys computer technology for use in its education system is that it includes effective training and support. This demonstrates that key education stakeholders favour longer-term technical relationships over short-term sales transactions.

"I understand why partnership is a long term trust-winning process vs. sales which is a short term winning process that may not repeat, if not sustained by empathy and fairness."

13. The 'killer question' for the PBA when reviewing the impact of an organisation's investment in partnership brokering training (whether business, multi or bi-lateral agency, NGO or government) is always: Did the training make a measurable difference to the organisation achieving its core mission?

14. EduTracker 2012, a longitudinal independent internal market study of 1000 global education leaders.

15. Ibid.

In a more specific example, respondents stated that the training had helped improve relationships with key partners and customers. Two examples cited were transforming a previously adversarial relationship with a UN Agency; and an instance where the company was invited to contribute advice in regional government meetings.

Building trust and enhancing reputation

Employees have described how brokering a partnership approach over time earns trust and enhances the company's reputation as well as positioning Microsoft in a leadership position in this field. This combined with a willingness to help partners find solutions were seen as directly leading to Microsoft becoming the technical partner of choice.

"I am now able to get the partnerships to work more effectively, grow Microsoft perceptions and thought leadership. Because of our expertise and the trust this model builds we are brought to the table more often at critical times to make the most of national and global opportunities."

Trust was cited spontaneously in many interviews as being a significant benefit from brokering a more systematic partnering approach.

Microsoft aspires quite openly to be a trusted advisor and those interviewed cited numerous examples of how the company was able to earn this status through skilful brokering.

"We are being invited to act as advisors on some educational projects that are outside of the scope of the original MOU."

"Partners, customers and internal teams seek my guidance and it is because I am seen as being able to manage complex relationships."

"This training has positioned me within US Education as the person to go to for digital inclusion."

Some observed that whilst trust takes time to build, it then significantly speeds up business processes:

"I am better tooled to develop trust and strength of trust definitely affects how quickly we can move with partners and customers."

"Low efficiency at the start during the set-up phase. Efficiency becomes visible once the partnership mechanism works and trusting relationships have been built."

Additionally, as a fiercely competitive business, Microsoft can be perceived as difficult to partner with (a fact that many respondents acknowledge), the advent of more skilful partnership brokering was seen by many as positioning Microsoft in a new user-friendly way:

"Microsoft can be perceived as 'loud', with staff having a tendency to tell people what to do. Partnership brokering behaviours have helped us change and change this perception."

"People don't expect Microsoft to listen or to understand others' perspectives, but using brokering skills has eliminated some of the antagonism and difficult conversations with partners."

Competence in brokering the partnering process has also enabled Microsoft to demonstrate a form of ‘facilitative leadership’— helping to move the partnership forward without dominating the other partners. Many reported that this was crucial for winning trust and building quality relationships as well as enabling Microsoft to get more tangible value.

“The course taught me to listen more, step back and watch the dynamic to see what is going on leading to each partner doing what they do best, rather than me doing it all. Being quiet allows this to happen.”

By modelling collaborative leadership, the company has been able to mitigate the risk of being perceived as too dominant and “enable other partners to take on leadership roles” whilst also “leading the partnership in the direction that helps everyone achieve goals.”

Well-crafted, win-win partnerships that demonstrate leadership and have wide-ranging impact on society have been shown to get high visibility and public recognition, including from key opinion formers, in one instance even meriting recognition from the president of the USA.

“There is huge business value for this type of partnership, we gain credibility in development world by going down this path.”

Employees describe situations where the shift in approach and change in perception has led to partners seeking out the company to explore new opportunities. Microsoft appears to be increasingly seen as a ‘partner of choice’.

“I think because I’m modelling a different and more thoughtful approach— it changes the tone of the meeting and customers see our company— perhaps—as more of a thought leader rather than over motivated sellers.”

“I know for a fact that Microsoft ended up with a better reputation amongst the partners involved because we showed up differently in the conversation.”

“Perceptions have increased that Microsoft understands and enables success for everyone and isn’t there just for themselves.”

Marketing better and increasing sales

Microsoft is a business and needs to be profitable by making sales. Many of the large international organisations with which Microsoft partners are also clients who buy products. Microsoft partnership brokers report on both the need and the increased opportunity to have impact on sales and marketing.

“Our field people can be very transactional, focusing on quarterly results, the more they can see the bigger picture, the better their business development will be.”

“Everything I do is partnering. I work with stakeholders to drive revenue. Our business model is to create a partnership ecosystem. Through Partners in Learning, we always bring different people together to drive results.”

Partnering provides a new language with which to approach and understand stakeholders (whether customers or partners) by helping Microsoft staff to “move beyond the ‘tech-speak’ which can

be alienating to customers, and teaches the sales team a different language which is more about a customer’s need, feelings and solutions.”

Development Partnerships are being used as an alternative approach that both drives commercial gains and adds value for customers.

“It has helped to develop strategic relationships where there were none before and it is starting to lead to revenue.”

Working skilfully and collaboratively alongside partners/ customers has provided better opportunities for targeted marketing messages; demonstrating product relevance in situ; market testing and communicating the relevance of products to new customers.

“I implemented a process-based approach that quickly gets to the core of what partners want, what they are willing to do to get it, as well as what they are not willing to do.”

“Rather than say, I’m here to sell you stuff, I say what can we do programmatically. It is packaged differently and helps me reach scale. I am being pulled into things nationally because I’m now driving a different conversation.”

Large scale high-visibility partnerships enhance the company’s position in the marketplace, especially with key stakeholders, and have been proven to lead to sales.

“A successful and fruitful partnering relationship with the client, built on trust and mutual benefit, improves favourability on purchasing decisions, not just for the client itself but also for their clients. This is not about an unfair advantage in the tendering process, it is about a positive track record established over time.”

In one instance the new approach led to the redesign of the delivery mechanism of a commercial partnership. The new mechanism led not only to greater satisfaction from all participating businesses, but also a 300% increase in sales for Microsoft.

“This approach has huge impact on our overall business model and how we go to market. Greater focus on partnerships (win/win) as a sales mechanism, as well as driving development benefits.”

Accessing new markets and customers

Supporting digital inclusion as part of development efforts also extends company reach to new demographics and markets.

Examples include:

“The Shape the Future partnerships have allowed us to deliver significant device sales in an environment where the normal model of a national deal is never going to happen, because the government has devolved funding and decision making out to individual schools.”

“I was able to broker a partnership that involved no exchange of money but just of value to both organisations with access to over 300,000 students we normally wouldn’t be able to talk to.”

Innovating & product development

A skilled approach to partnering helps employees move beyond usual business conversations and explore new avenues. Engaging in collaborative problem-solving has in some instances led to new products and services being developed that are tailored to customer need and have an immediate market.

"Usually the conversation runs along surface level sales lines—if public customer gets what they want at the price they want, and Microsoft has made a sale over another company—then a deal is made and a partnership is said to have been struck. But the full potential of the collaboration has not been realised. The course makes a different conversation possible, one of continuing efforts to dive deeper and understand the drivers for working together, understand what they want to get out. And then to think through the different scenarios for making that happen."

Influencing policy

Skilled partnering with public stakeholders that demonstrated value for all parties was felt to build the credibility, trust and license to participate in policy-making in the education technology sphere.

"Transform the perception of (Microsoft as) just a vendor into a trusted advisor in education."

Public sector organisations cannot be seen to be favouring a particular brand, however unsolicited endorsements of the benefit of working with Microsoft have undoubtedly had a positive impact and influence on key stakeholders.

"At least two of my strategic partnerships regularly endorse Microsoft and our partnering efforts in key places."

"Computer Science partnerships have changed government policy and the Digital Inclusion partnerships are enabling a seat at tables we would not have been at before."

Increasing smarter working between internal business units

Microsoft's corporate structure is such that different units draw on internal expertise to improve effectiveness and delivery of core business. As well as building capacity in key management skills such as people skills, meeting management and problem-solving, the training has helped harness the potential of other Microsoft business units by improving across-team and across-group business performance, for core commercial activity as well as for partnership activities.

"Most people in Microsoft work in silos. The course is a really valuable opportunity for enabling different parts of the business to pursue commercial partnerships more successfully."

This enhanced ability to work across the organisation was reported to have specific value in the light of recent budget cuts. From an HR perspective, the training has helped to set a benchmark for internal excellence in co-working; efficiency in meeting management and in people/relationship-management skills. It is also seen as helping employees put corporate values into practice: honesty, integrity, and respect.

"The project was dependent internally on those who did not have a job description to help—but who helped anyway."

The evidence cited above points to a high level of individual employee satisfaction; a significant level of positive influences on Microsoft's partnerships and a considerable reach into (and therefore some impact on) education in many parts of the world.

Box 4: Map illustrating where Microsoft's partnership brokers are active



Summary of findings

This enquiry has attempted to do two things:

1. Assess the impact of training key staff in partnership brokering skills in terms of tangible business outcomes as well as benefits to partners and wider society (the Microsoft perspective)
2. Explore to what extent investment in partnership brokers training yields tangible added value for commercial or non-commercial organisations involved in partnerships (the Partnership Brokers Association perspective).

What follows is a summary of the findings from the perspective of both entities:

For Microsoft

- A partnership brokering skill set can demonstrably enhance business performance.
- This skill set has wide-reaching relevance beyond the initial partnership focus (education) for a wide range of key relationships and issues including health, citizenship and government relations.
- It has enabled the company to get closer to its aspiration of being a trusted adviser to governments and education institutions.
- The addition of a partnership brokering approach and a partnership context can be highly beneficial for marketing and for sales.
- Where there is senior management leadership/support for this approach it becomes more embedded and central to the way the company works.
- The additional time and training required to partner effectively pays off in terms of soft benefits (reputation, sustainability, influence) and hard benefits (sales) and this can be demonstrated when aligned with individual performance metrics, planning and reporting processes.
- Internal communities of practice for those who had completed the training can enable ongoing support, joint problem-solving and sharing experiences.
- The training (in a retreat environment with a ban on technology in the session room) has offered a new internal training model that had deeper impact on individuals and their competencies and confidence.
- Further investment in this training would be highly likely to increase impacts and corporate benefits.
- Opportunities for joint training with partners would raise standards and provide new opportunities for optimising every partnership.

For the Partnership Brokers Association¹⁶

- The advantage of the training being delivered on a commissioned basis within individual organisations is that it can lead to the approach becoming more deeply embedded in the culture and practices of the organisations (by way of learning alongside colleagues, sharing learning and experience, and developing a common language). It is also cheaper to commission an internal cohort than to send equivalent numbers to an open cohort¹⁷.
- These findings help the Association make the case to organisations that the investment in partnership brokers training is worth the costs involved because it can radically improve partnering practices and organisational benefits.
- It is possible to assess tangible as well as intangible benefits.
- Partnership brokering competencies can usefully be applied internally to improve effective collaboration across traditional 'silos' and can enhance an organisation to live its values more fully.
- PB level 1 training helps to change mind-sets to be more in line with the 21st century need for employees with an ability to work constructively with all kinds of people and organisations to create shared value.
- The training helps to change mind-sets to be more in line with the 21st century need for employees with an ability to work constructively with all kinds of people and organisations to create shared value.
- It is highly likely that in tomorrow's successful and influential organisation, partnership brokering skills will become a "must have" not a "nice to have" if the demands of the modern world are to be met equitably, sustainably and inclusively.

16. At the time of writing, two non-commercial organisations (one a government department and one an international NGO) that have used the partnership brokers training extensively to enhance their partnering work are considering working on a similar enquiry.

17. The disadvantage, however, is that those taking the training do not get the same exposure to others types of partnership and to different sectoral perspectives and values.

PBA information

The Partnership Brokers Association has been created as the global professional body for those operating as partnership brokers—whether as individuals or organisations.

Its three focus areas are:

- To understand, articulate and disseminate knowledge about partnership brokering and the work of partnership brokers
- To develop and deliver a portfolio of courses to build partnership brokering capacity for individuals and organisations
- To promote partnership brokering as a critical intervention in partnerships for an equitable and sustainable world

Our research into partnership brokering is action-oriented and practitioner-led, with the aim of developing, and providing a platform for, new thinking in the field.

www.partnershipbrokers.org

Report credits

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Joanna managed corporate-community partnerships in the UK and Europe for Business in the Community (a UK-based NGO focused on promoting corporate social responsibility). Since 2007 she has been an associate of The Partnering Initiative conducting partnership training, research, evaluation and strategy formulation for a variety of organisations in many different parts of the world. She completed the Partnership Brokers training course in 2005 and has been an accredited Partnership Broker since 2006. Now based in India, she is working with the Partnership Brokers Association to promote partnership brokering and deliver training in South Asia.

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The Partnership Brokers Association wishes to acknowledge the openness and enthusiasm with which Microsoft has welcomed this review and to thank all the Microsoft staff involved in the research for their willingness to share their experiences and insights into the value and impact of their partnership brokers training.

"Since our inception, Microsoft has always seen the value of partnering as a way to work together with our business partners to drive new opportunities and prosperity. With this approach in our DNA, it made perfect sense that we would want to look for better ways to engage our government education customers through cross-sector partnerships. Over the last eight years through our Partners in Learning initiatives and Education Alliance Agreements we have created several hundred win/win partnerships with governments, inter-governmental organisations, NGO, academia and other business partners. And the impact of these partnerships has been enormous in extending and improving educational opportunities for students and teachers in every country where we do business.

With all of this activity around partnerships we have learned that creating and managing highly effective partnerships require a set of complex partnership brokering skills. When our education team members have these skills they are better able to add value, generate innovations and deliver improved outcomes for our customers and Microsoft. I have been extremely supportive of our efforts to break new ground in this field, and make a significant investment in my education teams around the world through an innovative partnership with the Partnership Brokers Association.

This report details the commitment and extra effort that Microsoft's education staff around the world have invested to develop new skills and knowledge in the cutting edge area of Partnership Brokering, and the resulting impact this is having in education systems and classrooms around the world. I hope you take time to learn from our experiences in how you can effectively create win/win business opportunities that yield both commercial and development benefit."

Anthony Salcito
Worldwide Education Vice President
Microsoft

