Recruit, Hire, Onboard, and Retain Talent

Microsoft Practice Development Playbook
**About this Playbook**

This playbook is intended for the business and technical leadership of new and existing Microsoft partners that are developing a new or existing cloud development practice.

**Objectives**

The goal of this playbook is to help you understand how to recruit, hire, develop and retain talent in your cloud practice. The recent and continuing shift to the cloud has led to the necessity to adjust the capabilities of your teams to support customers with the evolution of technology. It is important for your leadership team to be able to adapt to the transforming cloud business and technology landscape, which involves re-training your current staff or hiring new employees. Due to the competitive nature of today’s technology-focused companies, it is becoming increasingly more challenging to find and keep talent.

This playbook outlines some of the common strategies other Microsoft partners are taking to ensure that they have the skills necessary to support their customers and includes helpful suggestions on how to retain and keep employees satisfied.

**How this playbook was made**

This playbook is part of a series of guidance written by Microsoft in collaboration with successful Microsoft partners.

To validate the guidance provided in these playbooks, we worked with MDC Research to conduct a set of surveys with 735 global partners. In addition, this playbook provides a consolidation of insights gathered from market research, partner interviews, and learnings from successful companies spanning a range of topics from how their organizations recruit, hire, compensate, and retain talent.

<table>
<thead>
<tr>
<th>CONTRIBUTING PARTNERS</th>
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<td>CDW</td>
<td>New Signature</td>
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<tr>
<td>Cloud Direct</td>
<td>Nord Cloud</td>
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<td>Dedalus</td>
<td>Opsgility</td>
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<td>Didacticum Infrastructure</td>
<td>ProServeIT</td>
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<tr>
<td>Giacom</td>
<td>Solliance</td>
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<td>Hanu Software</td>
<td>Summit7</td>
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<td>Inova Corporation</td>
<td>Vibrato</td>
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<td>Neural Impact</td>
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</table>

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Using the playbook effectively

Quickly read through the playbook to familiarize yourself with the layout and content. Each section includes an executive summary and key actions for that specific topic. Review these summaries first to decide which areas to focus on. Go over the content several times, if needed, then share with your team.

TO GET THE MOST VALUE OUT OF THIS PLAYBOOK:

- Get your team together and discuss which pieces of the strategy they are responsible for
- Share the playbook with your sales, marketing, support, technical, and managed services teams
- Leverage the resources available from Microsoft to help maximize your profitability
- Share feedback on how we can improve this and other playbooks by emailing playbookfeedback@microsoft.com
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Talent Opportunity

The demand for skills to develop and deliver a new class of solutions has created a shortage of technical skilled professionals. The ability to attract, train, and/or develop the necessary skills and then retain them are top challenge areas. To attract and keep the talent they need, transforming partners are revising their recruitment efforts, candidate evaluation processes, onboarding, training, coaching/mentoring, and their compensation structures.

Partners have shown that transforming their workforce with digital capabilities and developing a culture that fuels agility and innovation is a requisite to building and evolving a digital transformation practice (see the Microsoft Digital Transformation Series of eBooks). The resources required to deliver modern cloud services are a moving target of emerging skills and operational acumen and getting there will largely depend on your practice focus, current skillsets on your teams, and your company culture.

The pace of change is forcing both partners and their customers to quickly evolve their cultures to focus on diversity, experimentation, collaboration, agility, and learning. And those without such focus and the tools to enable the behaviors are finding it hard to attract employees with the latest skills and keep them challenged and fulfilled. Moreover, they quickly lose their ability to effectively engage their current workforce to embrace modern technologies and grow their skills.

In today’s technical job market, attracting qualified candidates for digital transformation projects may entail a critical examination of your company culture, reputation and recruitment methods. The highly sought-after skills needed means your jobs need to stand out and your recruitment process should reflect a modern approach, using the tools that candidates have come to expect. A good place to start is your company mission and vision, as candidates will assess how your leadership defines success, its goals, and its commitment to important qualities such as agility and innovation.
Digital Transformation

Your company and your customers are adapting to a new digital marketplace, and it changes all aspects of your business, both internal and external. With the cloud, you’re able to connect people, data, and processes in new ways and embrace the possibilities enabled by modern technologies. Transforming companies are bringing business and IT closer together and optimizing processes to create new value for customers.

Microsoft models these changes in four pillars:

- **Engaging Customers** -- giving them new personalized experiences that bolster acquisition and strengthen loyalty
- **Empowering Employees** -- boosting productivity with flexible workstyles and mobile solutions that enable a data-driven culture
- **Optimizing Operations** -- driving efficiencies with a cloud platform that accelerates agility
- **Transforming Products** -- create new revenue opportunities using intelligent technology to innovate new products and processes

Your customers now value innovation, creativity, and specialization, and expect integrated solutions delivered with speed, value, and limited project risk. In today’s accelerated buying environment, industry awareness, business acumen, and agility have replaced technical knowledge and product demonstrations, and have become the new differentiators.

Three trends are helping shape this profitability opportunity:

**Digital Platforms and Ecosystems**

By 2020, 60% of all enterprises will have fully articulated an organization-wide digital platform strategy and will be in the process of implementing that strategy as the new IT core for competing in the digital economy.

**Cloud**

By 2021, spending on cloud services and cloud-enabling hardware, software and services will more than double to over $530 billion, leveraging the diversifying cloud environment that is 20% at the edge, and over 90% multi-cloud.

**Hyper-Agile Applications**

By 2021, enterprise apps will shift toward hyper-agile architectures, with 80% of application development on cloud platforms (PaaS) using microservices and cloud functions, and over 95% of new microservices deployed in containers.

Ultimately, the people you hire, develop and retain will define your success. In today’s job market, you not only have to define the right positions, you must be relevant and embrace the new workstyles. Use the in-depth guidance, best practices, and examples in this playbook to build your own personnel programs, evolve, and stay relevant in a digitally transformed marketplace. This playbook provides comprehensive guidance targeted at the various phases of the hiring and onboarding journey.
Role Evolution

Digital transformation is changing how companies are recruiting, training, and developing technical skills across their organizations.

Your workforce and leadership must be synchronized and operating in a customer-centric and empowered way. This often requires a cultural shift, which can be accelerated through collaboration and communication technologies that align internal and external activities.

With digital transformation, your focus shifts from time-and-materials projects to recurring revenue streams. This can be a new model of engagement for your employees as a customer-centric, customer-for-life mentality becomes the norm. This means that you and your customers’ technology managers are shifting from becoming requirements-driven technology leaders to partners in the business, accountable for KPIs that directly impact the bottom line. Such change starts at the top and is succinctly illustrated in this comparison of CIO roles pre-cloud and cloud era found in Designed to Disrupt--Briggs, Farhat, Kassner, 2018:

<table>
<thead>
<tr>
<th>Pre-Cloud</th>
<th>Cloud Era</th>
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<tbody>
<tr>
<td>Technology leader</td>
<td>Partner to business</td>
</tr>
<tr>
<td>Requirements-driven application delivery</td>
<td>Prototyping-driven (&quot;agile&quot;) application delivery</td>
</tr>
<tr>
<td>Facilities, servers, networks</td>
<td>Subscription management with true business accountability</td>
</tr>
<tr>
<td>Capital budget management</td>
<td>Resource optimization (&quot;right-sizing&quot;)</td>
</tr>
<tr>
<td>Annual budget</td>
<td>Continuous budgeting</td>
</tr>
<tr>
<td>Upgrades and patch management</td>
<td>Services with business KPI's</td>
</tr>
<tr>
<td>Applications with uptime KPI's</td>
<td>IT integrated with business</td>
</tr>
<tr>
<td>IT isolated from business</td>
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</tbody>
</table>

Likewise, as you shift from transaction-based to solution- and outcome-based approaches, your sales and marketing activities will refocus on innovation, specialization, and customer impact. This evolution can be characterized through the following shifts:

- From transactional to consultative sales, where you are valued more for your innovation, creativity, and ideation
- From well-defined roles based on mature technical standards to specialized roles with deep domain expertise
- From stability to agility with fast delivery against evolving business outcomes

Understanding this evolution is critical to building your company’s relevancy and capturing your share of the digital transformation market opportunity. Moreover, these considerations can be key to attracting and retaining the best people. And be sure to align these strategies and priorities shifts with human resources and the hiring process. Engage HR early in the process because their role becomes strategic going forward. When your talent needs shift, it shouldn’t be a surprise to HR.
Talent Framework

The talent framework describes the key phases/recommendations for building successful recruiting, hiring, and development programs.

With a vision of the new services and offerings for your evolving practice, identify your talent needs and other blockers that currently prevent that vision. Then use the talent framework below to address those needs. Your investments may include hiring or developing new skills internally, depending on timing considerations and expected return on investment. To optimize that return, the framework also describes the steps for successful onboarding, development and retention of your key talent.

<table>
<thead>
<tr>
<th>Inventory your roles</th>
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<tbody>
<tr>
<td>Identify opportunities to optimize your roles, capabilities, and skills</td>
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Develop a hiring, onboarding, and retention plan

<table>
<thead>
<tr>
<th>1 Recruit</th>
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<tbody>
<tr>
<td>• Attract candidates with a strong company reputation, culture, and leadership</td>
</tr>
<tr>
<td>• Identify capability and skills gaps</td>
</tr>
<tr>
<td>• Decide which skills to hire, train, or leverage partnership opportunities</td>
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<table>
<thead>
<tr>
<th>2 Hire</th>
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</thead>
<tbody>
<tr>
<td>• Develop a structured candidate evaluation and hiring process</td>
</tr>
<tr>
<td>• Create a candidate evaluation process</td>
</tr>
<tr>
<td>• Leverage tracking systems</td>
</tr>
<tr>
<td>• Understand key technical and soft skills</td>
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<tr>
<td>• Define your compensation strategy</td>
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<tr>
<th>3 Onboard &amp; Develop</th>
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<tbody>
<tr>
<td>• Understand benefits of structured onboarding</td>
</tr>
<tr>
<td>• Define organizational objectives</td>
</tr>
<tr>
<td>• Develop onboarding checklists</td>
</tr>
<tr>
<td>• Prioritize learning and development opportunities</td>
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<tr>
<th>4 Evaluate, Coach &amp; Mentor</th>
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<tbody>
<tr>
<td>• Support employee empowerment</td>
</tr>
<tr>
<td>• Establish recognition methods</td>
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<tr>
<td>• Measure turnover and attrition rates</td>
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<tr>
<td>• Understand employee motivation</td>
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<tr>
<th>5 Recognize &amp; Retain</th>
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<tbody>
<tr>
<td>• Establish guidelines for evaluation</td>
</tr>
<tr>
<td>• Utilize a coaching framework</td>
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<td>• Create a mentoring program</td>
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<tr>
<td>• Share wins and case studies</td>
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</table>
Recruit

Recruit, Hire, Onboard, and Retain Talent

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Executive Summary

Competition for talent continues to increase with the scarcity of skills in the market to meet customer demand. With the speed at which technology is evolving, employees are also seeking to work for companies that provide great benefits, culture, and career growth opportunities. This chapter focuses on the key elements around defining a recruiting and hiring plan, and ways to attract talent.

Secondly, we provide guidance for defining the required members of your team and the skills they should bring to your practice. These resources are then mapped to the various partner practice areas, so you can analyze your current gaps. To support your hiring plans we provide detailed job descriptions, where to look for resources, and the non-technical qualities to look for in a job role’s skillset.

Lastly, we explore partnership opportunities and resourcing options that you can leverage to augment your organization.

Top 4 things to do

You’re crafting your gameplan to build your team, make sure you nail down these 4 tasks before you move to the next section.

- Recognize how your role definitions have evolved
- Attract candidates with a strong company reputation, culture, and leadership
- Identify capability and skills gaps
- Decide which skills to hire, train, or leverage partner opportunities

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Skills Inventory Planning

With the pace of change brought on by cloud-based digital technology, your business needs to be highly attuned to the capabilities, skills, and processes necessary from a people perspective to stay relevant and competitive.

Flexibility and agility become a critical mindset for your business. Just as you’re transitioning customers from static to dynamic IT models, you’re also shifting your business – its culture, leadership, and employees – to be more agile. And that includes your hiring practices. Your HR organization must be in lock step with the business planners to be able shift its focus on hiring for emerging skills, and plan training programs to ensure skills growth that aligns with business growth.

Digital enablement quickly highlights the importance of defining the mission of your company, setting strategic priorities, and identifying resources and investments that can create successful outcomes. You’re redefining what success looks like for your customers and your organization, and this carries over into employee recruitment.

With new skill sets and business processes emerging, your ongoing recruitment and training will evolve. To help guide these changes, business managers need to work strategically with HR to leverage data and analytics and continually assess employee strengths to identify skills gaps and develop the relevant recruiting and training.

With skills inventory planning you can more accurately plan for talent requirements, you can more efficiently build strength in one technology area, location, or vertical focus, and reduce it in others. For example, you may need to quickly develop more domain expertise in a particular vertical, such as healthcare, and hiring talent from that industry and retraining them may be the most efficient option. And that’s why your flexibility and agility are so important—it increases your options.
Attracting Candidates

Creating a digital culture to support your transformation efforts means revising your candidate profile to include both hard skills and soft skills, motivations, and attitudes to thrive in an agile, innovative, and diverse work setting.

Traditionally, recruiting and hiring were the purview of Human Resources departments, but in today’s digital marketplace, your company’s reputation and culture, embodied by your leadership, are key drivers in attracting candidates.

Establishing strong company values and priorities are essential, both internally to your organization, and externally to prospective candidates and customers. Your culture needs to reflect the focus you place on creativity and innovation and the value of helping employees develop their capabilities.

In the Microsoft Hiring and Onboarding Playbook Study, professional development, company reputation, and flexible work location were reported as the top organizational qualities when attracting talent.

<table>
<thead>
<tr>
<th>Organizational Qualities Promoted in Recruiting Efforts</th>
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<tbody>
<tr>
<td>Professional Development</td>
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<tr>
<td>Company Reputation</td>
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<tr>
<td>Flexible Work Location</td>
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<td>Benefits</td>
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<td>Leadership</td>
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<tr>
<td>Company Customers</td>
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<tr>
<td>Compensation</td>
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<tr>
<td>Office Location</td>
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<tr>
<td>Peers</td>
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<tr>
<td>Social Engagement</td>
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<tr>
<td>Other</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

Company Reputation

Just as your customers are changing how they evaluate your services in the digital age, prospective candidates are changing what they value in a company.

Prospects often find you long before you find them, and they will research your company’s reputation. For that reason, be overt in your actions and public-facing digital content about your attributes such as agility, diversity, flexibility, and culture of learning. It’s important to know how your company is perceived and how much of an impact perception can have in attracting and recruiting candidates.

As we explore later in discussions of attrition, turnover and motivation, current and past employees can share their experiences on social media platforms, so it is important to monitor your social media presence. Candidates now have access to company reviews, interview reviews and salary information which means they are more knowledgeable and prepared than they have ever been.

Other factors that can affect your company reputation include:

- Negative and positive news articles
- Financial performance
- Leadership and management
- Social media profile / online reputation
- Design and content of your web site
- Customers and industry with which you work
- Quality of products and support you provide
- Size and breadth of your company

Not only does company reputation apply to attracting talent, but also customers. Having a reputation for being the best and getting things done on-time and on-budget, results in customer satisfaction and positive referrals. As an added benefit, you are perceived as providing more value and ultimately be able to charge a premium for your services. When building your company reputation, consider establishing integrity and trust, being responsive, engaging your employees, and encouraging diversity.
Company Culture

Two key drivers of your reputation are its culture and people. Your company’s culture and leadership are essential in establishing the values and behavior of your employees. It is the human interaction element, including beliefs and behaviors, that guide interactions of employees and management. You cannot dictate your company’s culture; instead, your culture represents your behavior, values, and interactions with others. Senior leadership commonly sets the tone, by what they say, and how they act. And when evaluating prospective new hires, it is important to determine how well they will fit your company culture.

In our partner survey, attitude and organizational fit are nearly equal to work history in evaluating a new hire’s skillset.

<table>
<thead>
<tr>
<th>Top 3 Most Important Factors When Evaluating New Hire’s Skillset</th>
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<tbody>
<tr>
<td>Attitude</td>
</tr>
<tr>
<td>Work History</td>
</tr>
<tr>
<td>Organizational Culture Fit</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

A healthy company culture seeks to align the values, expectations, and goals of the company with those of its employees, and set the tone for principles such as integrity, dignity, social responsibility, diversity and inclusion.

In *Hit Refresh*, Microsoft CEO Satya Nadella states, “Cultural change starts at the top,” describing Microsoft’s cultural shift in recent years where he implores business leaders to lead by example and follow their core principles.

Company culture influences include:

- Sustaining employee enthusiasm
- Driving employee development, growth, and increased performance
- Leveraging culture as a recruiting and retention tool
- Establishing strong company loyalty
- Extending influence outside of the workplace

Employees today are very social and share their workplace experiences online via social media and through conversations with friends. These conversations all drive the impression of your company in the marketplace and ultimately how many candidates you get for your future job openings.

Company culture ultimately affects many factors that prospective employees weigh in their decision to come work for you, including dress code, business hours, office setup, benefits, turnover, and customer engagement and satisfaction. Ensuring that you have a well-defined company culture that you can easily and effectively describe to your potential candidates is an important step in the hiring profile creation process.

There are several tools available for establishing, maintaining and refining your company reputation:

- **News and Blogs:** Potential candidates want to know what is going on with your company. Having a company news or blog page where they can see what your company is doing and providing visibility to it’s thought leadership can be a very helpful tool in attracting great talent.

- **Social:** Having a strong, positive, and relevant social presence is a must for today’s digital workforce. Twitter, Facebook, LinkedIn, Instagram are all places where you should continuously maintain a company presence. If you find you don’t have time or the internal resources to do this, there are many companies, including Microsoft, that hire outside firms to manage their social media presence for them.

- **Sentiment Analysis:** 3rd party sites that provide sentiment analysis services of social media to notify you or your social media manager in real time if something negative is being generated. Some examples of these sites include Google Alerts, Trackur, and SocialMention.
CROSS CULTURE

Corporations that are global in scale and/or outsource to other partners or organizations, find they need to support more than one company culture. When multiple companies work together to support global customer initiatives, project teams tend to be more diverse with wide sets of beliefs and values. In interviewing partners, we found that most companies do not train for cross culture experiences, but the few that did tended to be smaller, growing companies that were recently expanding their practices to other countries. Conversely, we found partners that had offices in culturally diverse areas did not have a need for any type of training since the local cultures had already integrated well with each other.

As a best practice, we suggest providing diversity awareness training for geographical and cultural issues that might arise from cross-cultural work scenarios.

CULTURE OF COMMUNICATION

Openness and communication are important factors in driving employee retention and the success of your culture. Speaking openly and regularly about company performance on a yearly, quarterly, or monthly basis, and sharing the profitability picture or the staffing requirements moving forward drives inclusion across roles and levels.

If gross margin is a top priority of the company, then that is an important message to communicate regularly. Speed and efficiency are key to profitability and every employee is responsible for meeting that goal and driving the right behavior.

An environment of inclusion and trust is especially important in a workplace where much of the work is done outside the office – at home or other distributed locations. Managing people too closely – micromanaging – can be counterproductive to trust. Instead, leverage key performance indicators to keep track productivity.

Establishing, cultivating, and reinforcing a strong company culture is critical to attracting candidates and retaining employees. Some best practices include:

- Hiring employees who share your company values
- Using company culture metrics as part of the employee evaluation process
- Proactively supporting cross culture scenarios through awareness and training
- Emphasizing your cultural values as part of new employee orientation
- Regularly communicating and re-enforcing positive values to your employees
Being located in the Caribbean with African, Indian and European influences makes employees very accustomed to handle culture differences. Most employees speak at least 4 languages, a benefit of the multicultural environment of the Caribbean.

GUY SMITH
Practice Lead – Datacentre and Cloud Solutions
CDW
Sourcing Candidates

LEAD ACQUISITION

The first step to hiring someone is finding them. Ensure your company’s online profiles provide candidates with compelling reasons to apply; then respond quickly when they identify themselves. Strong professionals are seldom out of work for long.

To recruit candidates in a competitive market you must have a corporate presence and recruiting process that makes them want to work for you. Develop online job descriptions that stand out from traditional templates and ensure the role openings are visible to attract qualified candidates.

In the Microsoft Hiring and Onboarding Playbook Study, the research showed that finding applicants is the greatest challenge partners face in hiring new staff for advanced technology roles. Over half of the partners cited hiring and onboarding technical cloud service talent as a challenge, with 69% reporting a lack of qualified candidates, and 70% indicating attracting new talent, as top challenges.

![Chart showing the percentage of partners who agree with various challenges in hiring new staff.]

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
The top challenge areas for partners to find qualified candidates are cyber security, cloud computing and Analytics and Big Data.

**TOP 10 CHALLENGE AREAS FOR FINDING QUALIFIED TALENT**

<table>
<thead>
<tr>
<th>Challenge Area</th>
<th>North America</th>
<th>Latin America</th>
<th>EMEA</th>
<th>Asia-Pacific</th>
<th>Worldwide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cybersecurity</td>
<td>41%</td>
<td>35%</td>
<td>36%</td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>Cloud Computing</td>
<td>29%</td>
<td>32%</td>
<td>27%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Analytics and Big Data</td>
<td>18%</td>
<td>23%</td>
<td>19%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Infrastructure as a Service (IaaS)</td>
<td>16%</td>
<td>23%</td>
<td>20%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Networking and Wireless</td>
<td>16%</td>
<td>21%</td>
<td>17%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Application Development</td>
<td>16%</td>
<td>14%</td>
<td>16%</td>
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<tr>
<td>Enterprise Architecture</td>
<td>15%</td>
<td>17%</td>
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<tr>
<td>DevOps</td>
<td>15%</td>
<td>14%</td>
<td>14%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Software as a Service (SaaS)</td>
<td>13%</td>
<td>21%</td>
<td>16%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Leadership and Management</td>
<td>15%</td>
<td>15%</td>
<td>12%</td>
<td>17%</td>
<td>15%</td>
</tr>
</tbody>
</table>


**LEAD FILTERING**

Finding qualified leads is critical to expediting the hiring process. From the Partners interviewed, we found that most companies engaged recruiting agencies to assist with lead generation and filtering qualified candidates.

Recruiting and hiring companies are creating new tools and platform features to integrate artificial intelligence (AI) capabilities into the lead acquisition process. Microsoft Partner, Stafory’s, Robot Vera, for example, sells an AI robot trained to screen candidates, schedules online video interviews, and answers questions in a process which the company claims can find top candidates 10 times faster than a human.

Utilizing AI algorithms, you can more quickly find potential candidates that match your selection criteria. A perfect example of this is Microsoft’s recent announcement to utilize the Phenom People platform to assist in the candidate acquisition process. This is done through:

- Hyper-personalization (job views, previous searches, content clicks, social login)
- Candidate scoring (education, skills, location)
- Smart search (based on LinkedIn profile metrics)
- Integrated career bot
As the technologies have become more complex, we have had to get faster at the recruitment/hiring process and take some risks. The types of candidates we need are snapped up so quickly that we must be very agile.

HEATHER HISEY
Human Resource
ProServeIT Corp
Recruiting and Hiring Trends

According to a 2018 LinkedIn Global Recruiting Trends report, the following are the top hiring trends:

- Make hiring for diversity and inclusion a fundamental hiring practice
- Expand role criteria to include soft skills, such as leadership, communication, and collaboration.
- Apply new interviewing tools and techniques
  - Soft skills assessments
  - Understanding candidate weaknesses
  - Removing bias of interviewers
  - Reducing time of interview to offer
- Explore data analytics in hiring and onboarding
  - Increase retention
  - Evaluate skill gaps
  - Build better offers
  - Understand candidate wants/needs
  - Workflow planning
- Integrate AI capabilities to optimize the hiring and recruiting process, such as sourcing, screening, and engaging candidates.

UNIVERSITY INTERNSHIP/RECRUITMENT

Partnering with universities is a great approach to recruiting new hires and developing talent. This not only provides you an accessible list of candidates, but also is a cost prohibitive approach to hiring qualified leads versus a seasoned resource.

GOVERNMENT INITIATIVES

Explore the available the development and hiring programs available in your area to help displaced employees get trained in new fields. Some countries assist companies with the costs of re-training or provide tax benefits to hiring international talent into the country.

Microsoft has partnered with the U.S. government to re-skill and train military veterans through the Microsoft Software and Systems Academy (MSSA). This program provides transitioning service members and veterans with critical career skills required for today’s growing technology industry. It is an 18-week program for high-demand careers in cloud development, cloud administration, cybersecurity administration, or database and business intelligence administration. Program graduates gain an interview for a full-time job at Microsoft or one of the hiring partners.

HIRING INDUSTRY EXPERTISE

Consider hiring individuals with expertise in the industry or vertical into which you are expanding. Companies have found success with bringing in industry relevant knowledge to determine the right solutions to design, messaging, and customers to engage.
INTERNAL TRAINING

To bridge the skills gap for new technologies, partners are developing their own training programs, such as Hanu’s Azure ROCK U, and establishing re-training programs for emerging technologies.

Hanu’s ROCK U

Microsoft partner, Hanu, sees value and great potential in people with legacy IT skills and experience. Hanu’s in-house ROCK U is a comprehensive “realworld” training program designed to rapidly produce cloud experts. The company partnered with Ready to Work New Jersey to find IT and technology professionals who have been out of work for six or more months and train them at ROCK U to be Azure-certified rockstars.

You may also consider leveraging Microsoft Training partners such as New Horizons or Global Knowledge to understand the programs available.

A FOCUS ON WORKPLACE DIVERSITY

Diversity is a top hiring trend in 2018. In its 2018 report Diversity Matters, McKinsey & Company found diversity to be a competitive differentiator and companies in the top quartile for gender, racial and ethnic diversity are 35% more likely to have financial returns above their national industry medians.

Actively driving diversity is good for business and for society. Seeking talent across ethnic groups, experience levels, cultural backgrounds, faiths, orientation, and gender opens a breadth of knowledge, expertise, and experience. A culture of diverse ideas and shared purpose, the ability to learn and evolve, and a passion for technology and innovation, are paramount to modernizing a company.
We are actively working to attract more women applicants into traditionally male dominated roles.

We have a working group focused on this which is addressing aspects such as attending events, experience days, and gender-inclusive job descriptions.

BRETT RAYNES
Chief Executive Officer
Cloud Direct
Recruiting Resources

Sourcing skilled labor can be a challenge.

In the Microsoft Hiring and Onboarding Playbook Study, referrals (63%), website (57%) and LinkedIn (56%) were reported as the top approaches for generating leads.

<table>
<thead>
<tr>
<th>Top Candidate Lead Sources</th>
<th>Total (n=275)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referrals from employees or partnerships</td>
<td>63%</td>
</tr>
<tr>
<td>Posting on website</td>
<td>57%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>56%</td>
</tr>
<tr>
<td>Social media</td>
<td>42%</td>
</tr>
<tr>
<td>Former employees</td>
<td>36%</td>
</tr>
<tr>
<td>University recruiting</td>
<td>36%</td>
</tr>
<tr>
<td>Local technical communities</td>
<td>35%</td>
</tr>
<tr>
<td>Recruit from competitors</td>
<td>23%</td>
</tr>
<tr>
<td>Meetups</td>
<td>16%</td>
</tr>
<tr>
<td>Recruitment agency</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

REFERRALS

Referrals from other employees and friends are by far the number one source of high-quality candidates for organizations today. Companies are more likely to hire a candidate through a referral than sight unseen. In addition to referrals, 39% of companies plan to hire former employees (2018 CareerBuilder). According to the 2017 Jobvite Recruiting Funnel Benchmark Report, internal hiring is 6x more effective than other sources with referrals coming in at 5x. When looking at the turnover rate, 46% of employees hired through referral stay for 3 years or more while only 14% stay that long when hired through job boards.

While referrals rank as the top method for finding qualified talent, the Microsoft Hiring and Onboarding Playbook Study reports that only 40% of partners offer monetary incentives for referrals.

COMPANY WEB SITE

Another approach is to post your job listing to your company web site. If you have a highly visible and trafficked site, you can avoid the costs of talent acquisition career sites by receiving candidate resumes directly. In most cases, this can lead to significant costs savings. Additionally, because referrals are the number one source of high-quality candidates, ensure that your employees can easily access your job postings.

SOCIAL MEDIA

LinkedIn Parties – People want to work with those they know, and by default, trust. A relatively new method for finding candidates which is very similar to the referral method is hosting a LinkedIn party. A LinkedIn party starts by inviting all relevant current managers and executives (what some partners call their “Star Hire Council”) into a room and reviewing all job openings. Each person looks through their connections to identify potential candidates to help fill the positions.

Due to the way LinkedIn works, you are limited in your ability to see connections past 3rd degree. This is where a LinkedIn party can be helpful as it allows you to leverage the network of your company peers to find more candidates than you could find on your own.
GitHub – GitHub is the world’s largest cloud-based social coding site for open source developers. Acquired by Microsoft in June 2018, GitHub is used by many internet frameworks to host their code for review and contributions from the developer world. GitHub can be used to find talent that contribute to the various repositories based on the type of skills you are looking for. Most developers input their email address, location and blog site information. You can also see how many followers they have and what kind of contributions they have made. For example, if you are looking for very experienced .NET coders, you can browse the individuals that are contributing to the open source .NET framework repository.

UNIVERSITY RECRUITING

Partner with career development teams at colleges and universities to increase your visibility and customize effective recruiting strategies. Leverage opportunities to engage with students through on-campus programs, sponsorship opportunities, connecting with student organizations, and participating in school career events. Use internship and recruitment programs to build a pipeline of candidates, develop training programs, and build company awareness.

CAREER SITES

When you are unable to garner qualified employee referrals for a position using internal referrals and your corporate web site then the next step is to post your job listing to various job and career web sites. There are many career web sites available with different services offered. Some popular career sites include LinkedIn, StepStone.com, Monster.com / Jobs.com, Indeed.com, CareerBuilder.com, and Glassdoor.com.

Based on a 2016 Glassdoor report, job seekers say they use an average of 7.6 job sites during a job search. If you are posting your job to more than one site, you are likely to see the same candidate resumes show up so the importance of a filtering tool that can remove these duplicates can be quite helpful.

CAREER FAIRS

Career fairs enable you to meet potential candidates in-person versus simply reviewing resumes. Company culture fit is a very important factor to consider in the hiring of a candidate. Having the ability to meet individuals and evaluate their demeanor before you spend a considerable amount of time and money simply based on resumes and phone interviews is a very valuable opportunity. Career fairs tend to attract local candidates and if you are specifically looking to expand in a region, you can find a set of quality candidates that already live in the target hiring area and do not incur moving and cost-of-living expenses.

Likewise, some locations have high concentrations for certain industries, and job fairs might be an efficient way to target candidates with specific domain experience.
Internships

Internships provide opportunities for young professionals pursuing undergraduate, graduate and PHDS/JDs to get a head start on their career as it relates to their academic focus. Internships provide new ideas and vitality to corporate environments and create valuable skills, knowledge and experiences to support personal growth and business results for future workers eager to prove themselves in the workplace.

Local business schools and colleges are ideal sources of high-potential interns. With their limited experience, recent graduates are not burdened with the habits and self-limiting beliefs that plague many in today’s workforce. They don’t “know” what worked in the past, so they are more willing to experiment with new tactics and approaches. Establishing relationships with faculty, providing guest lecturers, and contributing to curriculum development will result in the referral of top students.

**INTERNSHIP PROGRAMS**

According to the 2017 Accenture GenZ study, 82% of 2017 graduates completed an apprenticeship or internship with 79% of them reporting it leading to a full-time job. This metric points to the high probability that by not offering an internship program, you may be missing out on hiring talented new candidates for your current and future job openings.

In the Microsoft Hiring and Onboarding Playbook Study, over 66% of partners surveyed reported having an internship program with most hiring 40% of those interns. Additionally, partners not only hire from local colleges (47%), but they also hire interns from their employees’ friends and family (36%).

### Intern Recruiting Sources

- Local college(s): 47%
- Employee friends and family referrals: 36%
- Online postings: 26%
- External recruitment and talent agency: 17%
- Other: 4%
- Does not have / work with interns: 31%

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

### Intern Program Structure

- Centrally managed: 45%
- Distributed: 43%
- Don’t know: 12%

(n=191)

### Intern to Full Time Employee Conversion

- More than 40%: 32%
- 10% - 39%: 29%
- Less than 10%: 22%
- Don’t know: 16%

(n=191)
Interns gain valuable experience, contacts and opportunity, while learning from experts and seasoned professionals;

**COMMON TYPES OF INTERNS**
- **Strategic**: offered a job upon graduation
- **Seasonal**: hired to work specifically on a large, complex project for a set time
- **Academic**: receive college credit for their time
- **Co-op**: temporary assignment for 4-5 months during school year

**STEPS TO CREATING AN INTERNSHIP PROGRAM**
- Research and Discover
  - Evaluate needs for intern resources
  - Ensure you have executive support
  - Identify a meaningful project or job scope
  - Understand the local government regulations regarding factors such as minimum wage, safety, termination, and benefits.
  - Determine if their work with your organization qualifies for college credit
- Plan and Design
  - Develop compensation plan (e.g. salary, relocation)
  - Define job responsibilities
  - Define start and end dates for intern programs
- Take Action
  - Post the position
  - Evaluate candidates
  - Interview, select, and hire

When building an internship program, be sure to follow some of these best practices:
- Ensure you specify if the internship is paid or unpaid (most are paid)
- Provide a welcoming orientation
- Ensure they have access to tools and training needed to complete their tasks
- Provide challenging, real world work assignments
- Provide a mentor
- Visit intern sourcing sites, career planning, and placement departments
- Encourage team involvement
- Ensure interns know they are a part of the company culture and as such they should follow the employee handbook
- Offer flexible work schedules and arrangements
- Provide feedback like how you would your regular employees
- Define start and end dates as well as durations for your program(s)
- Dedicate part of your web site specifically for intern job postings
- Provide official intern social events
- Perform an exit interview with management or an executive

**INTERNSHIP PROGRAM EXAMPLES**
According to [Vault.com](https://www.vault.com), the following companies have some of the best internship programs in the world. Review these sites as examples when designing your internship program.

- Apple Inc.
- Facebook, Inc.
- Google LLC
- Goldman Sachs & Co.
- Microsoft Corp.
Referrals of new candidates from our existing staff are an effective means of getting in contact. The tighter the labor market, the more important referrals become.

**JOS VAN ROERMUND**
Chief Information Officer
Didacticum Group
Practice-Focused Resourcing

Understanding the business objectives and priorities is a critical step in determining the resourcing requirements. There are many different practices areas and each one requires you to determine what types of project and managed services you want to offer. Your practice focus will drive what resources are required and having employees with a range of adaptable skill sets is important. Hitachi Consulting, as an example, has shifted 75% of its staff to a digital focus, but not just on the technical side; this shift encompasses areas like supply chain, ERP, and IoT. To achieve this, Hitachi created a community of practices within different regions and different teams and conducted training to prevent silos and encourage cross-pollination.

In addition to traditional technology skills, partners also recognize that the emergence of new capabilities requires new kinds of training. Emerging job roles such as data science, for example, present a new generation of skills, and with modern technology, training can be developed and consumed in different ways. Microsoft partner, Perspicuity, believes in hiring apprentices and training them accordingly.

Based on the Microsoft Hiring and Onboarding Playbook Study, the leading solution areas of focus are Cloud Infrastructure and Management, Application and Development, and Managed Services.

In addition to focus areas, the type of services you offer can also drive your talent acquisition needs. Partners generally provide some combination of product resale, project service, managed service, and each carry different staffing considerations.

### Average % of Organization’s Cloud Business

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud Infrastructure &amp; Management</td>
<td>28%</td>
</tr>
<tr>
<td>Cloud Application Development</td>
<td>20%</td>
</tr>
<tr>
<td>Cloud Managed Service Provider</td>
<td>18%</td>
</tr>
<tr>
<td>Data &amp; Analytics</td>
<td>10%</td>
</tr>
<tr>
<td>Security &amp; Compliance</td>
<td>9%</td>
</tr>
<tr>
<td>Identity Management</td>
<td>3%</td>
</tr>
<tr>
<td>Artificial Intelligence</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
</tbody>
</table>

(n=735)

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Project Services Resources

In recent Microsoft partner practice playbook development studies, the following top project services were reported by practice areas. View the specific [practice development playbooks](aka.ms/practiceplaybooks) for a comprehensive list of project services. Focus on hiring resources for the services that the industry is looking for and your specific practice focus(es). By determining your company's specific practice focus and service offerings, you can more easily map the skills required to develop a hiring plan.

### TOP PROJECT SERVICES

<table>
<thead>
<tr>
<th>Cloud Application Development</th>
<th>65%</th>
<th>Deployment Services</th>
<th>45%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proof of Concept</td>
<td>52%</td>
<td>Data Architecture Design</td>
<td>43%</td>
</tr>
<tr>
<td>Systems Integration</td>
<td>50%</td>
<td>Database Infrastructure Development</td>
<td>40%</td>
</tr>
<tr>
<td>Solution Analysis, Scope, &amp; Design</td>
<td>45%</td>
<td>Solution Support &amp; Training</td>
<td>36%</td>
</tr>
<tr>
<td>Solution Configuration/Customization</td>
<td>45%</td>
<td>Backup &amp; Storage Deployment</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016

<table>
<thead>
<tr>
<th>Data Platform and Analytics</th>
<th>Pre-Configured Dashboards</th>
<th>30%</th>
<th>External Portals for End Customer Information</th>
<th>23%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated Data Migration &amp; Integration</td>
<td>26%</td>
<td>Vertical specific functionality</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Customer Self-Serve Portals</td>
<td>26%</td>
<td>Automated Consumption Monitoring/Reporting</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Turnkey BI Portals</td>
<td>24%</td>
<td>Middleware for Hybrid Synchronization</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Automated Monitoring, Alerting, &amp; Logging</td>
<td>23%</td>
<td>Online Training &amp; Self-paced Learning</td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016

<table>
<thead>
<tr>
<th>Security</th>
<th>Cloud Migration Planning</th>
<th>64%</th>
<th>Advanced Threat Protection</th>
<th>48%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Configuration</td>
<td>63%</td>
<td>Office Client Deployment</td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td>Help-Desk Support</td>
<td>52%</td>
<td>Deployment Services</td>
<td>46%</td>
</tr>
<tr>
<td></td>
<td>Data Loss Prevention &amp; Systems Integration</td>
<td>51%</td>
<td>Data Migration Management</td>
<td>43%</td>
</tr>
<tr>
<td></td>
<td>Patch Management</td>
<td>50%</td>
<td>Enable Multi-Factor Authentication</td>
<td>43%</td>
</tr>
</tbody>
</table>

Source: Microsoft Cloud Practice Development Study, MDC Research, June 2017

<table>
<thead>
<tr>
<th>Artificial Intelligence</th>
<th>Predictive Analytics</th>
<th>47%</th>
<th>Data Solution Implementation</th>
<th>28%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Proof of Concept</td>
<td>41%</td>
<td>Strategy</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>Data Mining</td>
<td>36%</td>
<td>Chat Bots</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>Diagnostic Analytics</td>
<td>32%</td>
<td>Descriptive Analytics</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>Data Integration</td>
<td>5</td>
<td>Assessment and Planning</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: Microsoft AI Practice Development Study, MDC Research, December 2017
Managed Services Resources

With managed services, you can help your customers on a regular basis by offering white-glove services. As a managed service provider, your offerings can span from planning and enablement to day-to-day operations and support. Consider recruiting candidates with skills and project experience who can optimize your managed service offering plans.

Top managed services across the various practice focus, as reported by partners in recent Microsoft partner surveys include the following. View the specific practice development playbooks for a comprehensive list of managed services.

<table>
<thead>
<tr>
<th>TOP MANAGED SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cloud Application Development</strong></td>
</tr>
<tr>
<td>Application Lifecycle Management &amp; Support</td>
</tr>
<tr>
<td>Application Support/Help Desk</td>
</tr>
<tr>
<td>Configuration Management</td>
</tr>
<tr>
<td>Reporting and Analytics</td>
</tr>
<tr>
<td>Single Sign-On Management</td>
</tr>
</tbody>
</table>

Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016

<table>
<thead>
<tr>
<th><strong>Data Platform and Analytics</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting and Analytics</td>
</tr>
<tr>
<td>Reports and Dashboard Maintenance</td>
</tr>
<tr>
<td>Troubleshooting</td>
</tr>
<tr>
<td>Configuration Management</td>
</tr>
<tr>
<td>Application Support/Help Desk</td>
</tr>
</tbody>
</table>

Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016

<table>
<thead>
<tr>
<th><strong>Security</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration</td>
</tr>
<tr>
<td>Help-Desk Support</td>
</tr>
<tr>
<td>Desktop &amp; Device Management &amp; Support</td>
</tr>
<tr>
<td>Patch Management</td>
</tr>
<tr>
<td>Active Directory Federation &amp; Management</td>
</tr>
</tbody>
</table>

Source: Microsoft Cloud Practice Development Study, MDC Research, June 2017.

<table>
<thead>
<tr>
<th><strong>Artificial Intelligence</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Visualizations, Dashboards, Report Create/Maintain</td>
</tr>
<tr>
<td>Support</td>
</tr>
<tr>
<td>Assessment and Planning</td>
</tr>
<tr>
<td>Analytics as a Service (e.g. packaged APIs for ML models)</td>
</tr>
<tr>
<td>Troubleshooting</td>
</tr>
</tbody>
</table>

Source: Microsoft AI Practice Development Study, MDC Research, December 2017
Positions

In addition to technical roles, the following sections describe the recommended positions across leadership, sales, marketing, and support functions. In many practices that are just getting started you may not be able to fill all roles. In this situation, one person may likely be required to fulfill the duties of multiple roles. It may also be the case you simply can’t find qualified candidates, in which case you’ll need to train or outsource.

Leadership Roles

Consider the following management positions if your development effort will involve eight or more technical staff. In smaller teams, senior-level employees (e.g., lead data scientist, lead developer) sometimes take on management duties along with their other responsibilities, removing the need for dedicated managers.

The **Chief Data Officer** (CDO) drives the definition of balancing data governance, protection with data discovery and analytics. This role establishes the organization’s data analytics platform strategy, selection of appropriate technologies and focuses on strategic and timely talent acquisition. An important responsibility of the CDO is in creating a learning culture within the organization by providing for and fostering an environment for learning.

The **Data Protection Officer** assesses and advises across the company group for data protection and privacy matters related to security. This role is a subject matter expert in the handling of personal data and ensures there are policy and compliance processes to comply with local data protection legislation. Expert knowledge of global and national data protection law and practices, as well as the General Data Protection Regulation (GDPR) is a requirement, as well as the ability to fulfil the tasks referred to in Article 39 of the GDPR. Experience in conducting data privacy compliance, reviews, and audits is beneficial.

The **Product Manager** (or Product Management team) establishes and sustains the business case for the project and plays a key role in identifying and setting priorities across the target audience. This includes ensuring that business expectations are clearly articulated and understood by the project team, and that the functional specifications respond to business priorities. Product Management owns the vision statement - an informal document that communicates the expectations and assumptions on which the project is based - for the project. Product Management is also responsible for high-level project communications such as business projections, project costing, and contract negotiation, and high-level milestones to the target audience and other team members.

The **Program Manager** or Program Management team "owns" the specification for an application’s features and functionality and coordinates the day-to-day communication required to develop and deliver the application effectively and consistently within organizational standards. Program Management has a key communication and coordination role. With input from other team leads, Program Management assists Product Management in articulating the vision for the project. Using this vision, Program Management drafts the initial version of the functional specification and is considered the keeper of the functional specification. Program Management is responsible for all activities associated with analysis, specification, and architecture, and defining how the project will interoperate with external standards, maintaining external technical coordination and communication, and managing the master schedule.
Sales Roles

You have a vision for developing the next great cloud solution, but even the best products need a sales strategy to gain maximum market traction. Consider hiring for the following sales positions for broad reach.

The **Solution Sales Manager** (SSM) is a senior leader within the enterprise sales organization. The SSM leads, develops and manages a team of high performing sales and technical pre-sales/post-sales resources to drive solution opportunity revenue and market share by leveraging the Microsoft cloud offerings. Ten or more years of sales experience is required for this position. Qualifications include people management, business development, competitive selling, and ability to thrive in complex, ambiguous, and dynamic environments.

The **Cloud Solutions Sales Manager** is a solution sales leadership role that is responsible for delivering sustainable new business growth across segments; providing thought-leadership; and driving customer acceleration to cloud across the enterprise sales and marketing teams. The Solution Sales Manager is a great sales coach and leader, has a challenger mentality, is savvy in sales leadership practice, and contributes with vision and flawless execution of solution sales across workloads and solution areas.

The **Technical Sales Manager** (TSM) is a senior leader within the enterprise sales organization. A TSM drives revenue and market share by leading a team of technical sellers that provide customers with insights and solutions. The Technical Sales Manager manages, coaches, and leads the team of solution architects and tech sales professionals to uncover and support the business and IT goals of customers by driving the technical decision and providing business value with the Microsoft cloud platform, thus securing long-term sustainable growth. A computer science degree or related field is required for this role. Additional qualifications include strategic insight, project management, analytical problem solving, customer/partner relationship building, and exceptional product and technical expertise.

Marketing Roles

Marketing is a key function of a successful practice, and partners who invest in marketing resources succeed to a greater degree than those who do not. The following is a key marketing position you should consider for your practice.

The **Product Marketing Manager** complements the Product Manager, executing on key campaigns and customer outreach. This Product Marketing Manager creates the brand and accompanying messaging and owns social media as well as traditional marketing vehicles such as web sites, demos and data sheets. Product Marketing Managers create the go-to-market strategy for the company and help set pricing. Launch activities are orchestrated through this role as well as technical and industry trade show attendance. Public relations may be handled directly by the Product Marketing Manager or the role may work with an agency or centralized group.
Support Roles

A lot of effort goes on behind the scenes, or in positions that involve post-sales customer engagement. To ensure long-term success of your projects, consider hiring some of these support roles.

The **Customer Success Manager** is passionate about engaging your customers and helping them expand their use cases. They have excellent relational skills and can create win/win environments for all parties they work with. In their day-to-day responsibilities, they own the overall relationship with assigned clients, by increasing adoption and ensuring retention and satisfaction. They make a large impact on your cloud application development business by establishing a trusted and strategic advisor relationship with each assigned client, driving continued value of your products and services. The Customer Success Manager helps drive sales by working to identify or develop upsell opportunities. Additionally, they advocate customer needs and issues cross-departmentally, and program manage account escalations. Qualifications include prior experience in Customer Success, or equivalent history of increasing customer satisfaction, adoption, and retention.

The **Quality Assurance (QA) / Test Technician** is extremely thorough and detail-oriented and should work well with established processes. The primary goal of this role is to help avoid defects in your final product or solution. This person is involved throughout the development process and use their intuition to problem solve and identify technical, procedural, and ease of use concerns. They must take meticulous notes, be organized about recording process steps, and work well with others, they coordinate with your technical and management teams to ensure that the correct measures are put into place to align the final product with the initial goal.

Technical Roles

These roles form the heart of your practice(s). Hiring the right people with the right hard and soft skills can turn your vision into reality.

Job descriptions frequently focus primarily on technical and non-technical hard skills, however, soft skills are becoming a major focus for technical candidates. Partners have come to realize they must train for role skills gaps in most cases, and has increased opportunities to:

- Hire generalists who are quick to learn versus specialists that prefer to excel in only one skill
- Hire technical resources that can have business value conversations versus technology conversations

You can predict some elements of what you will need in your staff, but there are always new skill sets emerging. Technical and business process evolutions will drive a redesign of your ongoing recruitment, development and professional training. This includes initiatives for employee retention and leadership development.

You may not focus on every practice but if your consultancy does decide to move into a new practice area, consider these key technical roles when evaluating your current and future candidates. Complete job descriptions are available in the Appendix.

The **Solution Architect** drives Azure-based customer initiatives in collaboration with customers and participates in both pre and post-sales (e.g., deployment) efforts. The Solution Architect is a technical, customer facing role that is accountable for the end-to-end customer cloud deployment experience. They own the Azure technical customer engagement including architectural design sessions, specific implementation projects and/or proofs of concept, and deployment. The ideal candidate has experience in customer facing roles and success leading deep technical architecture and application design discussions with senior customer executives to drive cloud deployment. Five or more years of architecture, design implementation and/or support of distributed applications designed to run in the cloud or across hybrid cloud and on-premises environments. Experience in consultative sales, design and deployment of projects
strongly preferred. A computer science or related engineering degree is required.

The **Software Developer** enjoys the challenge of designing and building applications that solve today’s business needs. They must be willing to keep up to date with the fast-moving cloud services landscape including IaaS, SaaS, and PaaS designs to remain an effective member of the development team. A software developer should work equally well on a team or independently, given a set of project requirements or tasks. This requires the developer to possess excellent communication and collaboration skills. The developer should understand the aspects of the software development cycle, from architecture to testing. This person designs, builds, and maintains efficient, reusable, and reliable code. This person should have experience with participating in projects using agile methodologies, such as the Scrum approach to agile software development. They should also be able to effectively gather customer requirements and ask clarifying questions when needed and translate these requirements to actionable tasks they perform, or delegate to members of the team. Five plus years of experience with deep understanding of web technologies, API consumption/development, full lifecycle application development, database development (relational and/or NoSQL), and enterprise/cloud architecture. Technical BS degree in Computer Science desirable.

The **Automation Engineer** is responsible for the automation of your development and deployment activities. They must be familiar with DevOps tools such as Jenkins, Puppet, Ansible, Redgate, Azure ARM Templates, Visual Studio Online and many more. They should have the skills to implement and support your development activities via Continuous Integration (CI), Continuous Deployment and Delivery (CD) methods. They are very skilled at setting up rigorous testing mechanisms to ensure high quality automated releases are delivered to your customers.

The **Cloud Administrator** manages cloud tenants. They should be the interface with the support engineers and the cloud provider support. They deploy cloud applications based on deployment templates and DevOps processes and have deeper technical knowledge of the various cloud technologies (Networking, IaaS, PaaS, Security) than a support engineer. Cloud Administrator’s also manage the license assignments for cloud users across your various SaaS applications.

The **Security Architect** is the first line of defense in the prevention of hackers, malware, viruses and other malicious activities. They are responsible for setting up policies, procedures and guidelines for system access and ensuring that your SIEM systems are monitoring all business-critical applications. Security Architects must be familiar with all levels of the application and network communications. It is their job to implement encryption at rest, encryption in transit and ensure proper access and data loss prevention controls are in place. They interact with your Compliance Officer and Legal team to provide technical guidance on security incidents.

The **Identity Solution Engineer (ISE)** is responsible for securing your organizational identities. This includes the integration with internal and external applications. They should be familiar with identity management platforms such as Active Directory, Active Directory Federated Services (ADFS), and Azure Active Directory. They are responsible for configuring trusts and federation and understanding the various standard authentication protocols like OpenID and OAuth. They are also responsible with what and how profile information is exposed to applications.

The **Information Security Analyst** assesses and provides security advice on your cloud infrastructure, including network, service, and application components. This role conducts risk assessments, architectural reviews, provides cyber security subject matter expertise, and assists in the building and design of secure solutions. Additional duties may include network and application penetration testing, and support for cyber security investigations as well as on-call response for cyber security incidents. A computer science or related engineering degree is required, or the equivalent combination of education, professional training, or work experience.

The **Compliance Officer** or **Data Protection Officer** is responsible for ensuring that data is kept safe and secured throughout your various technology solutions. They work with internal and external data processors to ensure that legal regulations are followed. These individuals are to work with legal bodies and the internal and external legal teams when litigations via lawsuits are involved. They work hand in hand with your Security Architects and
Analysts to discover, remediate and resolve compliance issues and unauthorized data breaches.

The **Data Architect (DA)** drives customer initiatives leveraging Azure data and analytics services (e.g., ranging from SQL Server to SQL Database and SQL Data Warehouse to Cortana Intelligence Suite) to solve the biggest and most complex data challenges faced by enterprise customers. The DA is a technical, customer facing role, accountable for the end-to-end customer deployment and usage experience for Azure data services. DAs own the Azure technical customer engagement including: architectural design sessions, implementation projects and/or proofs of concept and pilots. The Data Architect is proficient in distributed computing principles and familiar with key architectures including Lambda and Kappa architectures, and has a broad experience designing solutions using a broad set of data stores (e.g., HDFS, Azure Data Lake Store, Azure Blob Storage, Azure SQL Data Warehouse, Apache HBase, Azure DocumentDB), messaging systems (e.g., Apache Kafka, Azure Event Hubs, Azure IoT Hub) and data processing engines (e.g., Apache Hadoop, Apache Spark, Azure Data Lake Analytics, Apache Storm, Azure HDInsight). The ideal candidate has three or more years’ experience working on solutions that collect, process, store and analyze huge volume of data, fast moving data or data that has significant schema variability.

The **Data Analyst** is responsible for querying your data sources using tools like Excel (PowerPivot, Power Query, Power Map), PowerBI and other reporting tools such as Tableau, SAS and Teradata. They should be familiar with data catalogs and how to build and validate data metrics from their queries. They should be familiar with caching strategies and analytic data streaming technologies. Data Analysts are in charge of getting the decision support reports and data to the executives for their periodic review.

The **Data Developer** is responsible for helping to select and implement the tools and processes required of a data processing pipeline in support of the customer requirements. The Data Developer may be a customer facing role, but the primary responsibilities include implementing ETL (extract, transform and load) pipelines, monitoring/maintaining data pipeline performance and implementing big data or advanced analytics solutions. The Data Developer is proficient in distributed computing principles and familiar with key architectures including Lambda and Kappa architectures, and has a broad experience across a set of data stores (e.g., HDFS, Azure Data Lake Store, Azure Blob Storage, Azure SQL Data Warehouse, Apache HBase, Azure DocumentDB), messaging systems (e.g., Apache Kafka, Azure Event Hubs, Azure IoT Hub) and data processing engines (e.g., Apache Hadoop, Apache Spark, Azure Data Lake Analytics, Apache Storm, Azure HDInsight). The ideal candidate experience working on solutions that collect, process, store and analyze huge volume of data, fast moving data or data that has significant schema variability.

The **Service Delivery Manager (SDM)** oversees delivering your practice(s). You may have an SDM that is focused on one vendor segment or they could be focused on the entire set of products from a single vendor. They should have both a sales and customer service mindset. They are at the front line dealing with your customer and in charge of the keeping the customer satisfaction pulse of your projects.
The **Technical Program Manager** or Program Management team "owns" the specification for an application's features and functionality and coordinates the day-to-day communication required to develop and deliver the application effectively and consistently within organizational standards. Program Management has a key communication and coordination role. With input from other team leads, Program Management assists Product Management in articulating the vision for the project. Using this vision, Program Management drafts the initial version of the functional specification and is considered the keeper of the functional specification. Program Management is responsible for all activities associated with analysis, specification, and architecture. Program Management is also responsible for defining how the project interoperates with external standards, maintaining external technical coordination and communication, and managing the master schedule.

The **Cloud Support Engineer** assists both your internal and external customers who are having technical issues with your product, or who need help realizing the full benefit of your solution to help them deliver their cloud-based workloads. They can help customers navigate the operational challenges of cloud computing, so thoroughly training them on both your product and the infrastructure on which it is built is paramount to their success, and ultimately, your customers' satisfaction. Qualifications include technical support experience and great communication and interpersonal skills (soft skills). Experience with numerous cloud technologies is a major plus.
The pace of change in digital technology is accelerating daily, and so too are the skills requirements. Your business needs to be highly attuned to the capabilities, skills, and processes necessary to keep apace of competitors.

In the Microsoft Hiring and Onboarding Playbook Study, partners reported what roles they currently have and which ones they plan to hire for in 2018-2019 year:

<table>
<thead>
<tr>
<th>Positions to be hired/trained in the next year (n=735)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud Administrator</td>
</tr>
<tr>
<td>Developer</td>
</tr>
<tr>
<td>Solution Architect</td>
</tr>
<tr>
<td>Cloud Support Engineer</td>
</tr>
<tr>
<td>Service Delivery Manager</td>
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<tr>
<td>Technical Program Manager</td>
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<tr>
<td>Security Architect</td>
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<tr>
<td>Data Developer</td>
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<tr>
<td>Data Architect</td>
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<tr>
<td>Data Engineer</td>
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<tr>
<td>Compliance Officer</td>
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<tr>
<td>Data Analyst</td>
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<tr>
<td>Automation Engineer</td>
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<tr>
<td>Security Analyst</td>
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<tr>
<td>Data Scientist</td>
</tr>
<tr>
<td>Identity Solution Engineer</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
**Career Path**

In today's technical job market, where many cloud-related roles are hard to fill, partners are finding it necessary to train and develop internal talent. This strategy is successful when they can identify clear career paths and expectations for achievement. In the Microsoft Hiring and Onboarding Playbook Study, partners told us which job titles they drew from and the capabilities needed, including certifications, for the following roles.

<table>
<thead>
<tr>
<th>Job Role</th>
<th>Previous Job Titles**</th>
<th>Top Qualities</th>
<th>Certifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automation Engineer</td>
<td>Developer (56%), IT Administrator (52%), Support Engineer (33%), Network Engineer (30%)</td>
<td>Problem Solving (78%), Highly Organized (46%), Creativity (35%)</td>
<td>ISA Certified Automation Professional (CAP) (13%), Six Sigma (11%), ISTQB Advanced Level Test Automation Engine (9%)</td>
</tr>
<tr>
<td>Cloud Support Engineer</td>
<td>Support Engineer (57%), Escalation Engineer (9%), no previous role (24%)</td>
<td>Problem Solving (67%), Highly Organized (36%), Attitude (31%)</td>
<td>MCSE Cloud Platform and Infrastructure (28%), MCSA Cloud Platform Solutions Associate (17%), MCSE Enterprise Devices and Apps (3%)</td>
</tr>
<tr>
<td>Cloud Administrator</td>
<td>IT Administrator (67%), Network Engineer (45%)</td>
<td>Problem Solving (69%), Highly Organized (41%), Integrity (28%)</td>
<td>MCSA, MCSE (38%), MCITP (14%), Cisco Certified Network Associate (CCNA) (10%), Cisco Certified Network Professional (CCNP) (9%)</td>
</tr>
<tr>
<td>Compliance Officer</td>
<td>Security Architect (31%), Technical Program Manager (26%), Solution Architect (24%)</td>
<td>Highly Organized (48%), Integrity (45%), Written Communication (36%)</td>
<td>Certified Information Security Professional (CISSP) (16%), Certified Information Systems Auditor (CISA) (12%), Certified Information Security manager (CISM) (10%)</td>
</tr>
<tr>
<td>Data Scientist</td>
<td>Developer (55%), Statistician/Mathematician (37%), No previous role (37%)</td>
<td>Problem Solving (78%), Creativity (39%), Attitude (33%)</td>
<td>MCSE In Machine Learning (24%), MCSE Data Management and Analytics (24%)</td>
</tr>
<tr>
<td>Data Engineer</td>
<td>Database administrator (54%), IT Administrator (29%), Network Engineer (21%)</td>
<td>Problem Solving (79%), Highly Organized (44%), Creativity (31%)</td>
<td>MCSE Data Management and Analytics (33%), MCSE Business Intelligence (21%), MCSE Cloud Platform and Infrastructure (21%)</td>
</tr>
<tr>
<td>Data Analyst</td>
<td>Business Analyst (58%), Developer (52%), No previous role (28%)</td>
<td>Problem Solving (76%), Creativity (36%), Attitude (32%)</td>
<td>MCSE Data Management and Analytics (24%), MCSE Business Intelligence (18%), Big Data (14%)</td>
</tr>
<tr>
<td>Identity Solution Engineer</td>
<td>IT Administrator (54%), Support Engineer (40%), Network Engineer (33%), Developer (15%)</td>
<td>Problem Solving (65%), Integrity (35%), Highly Organized (33%)</td>
<td>Certified Identity Management Professional (CIMP), Certified Identity Security Technologist (CIST)</td>
</tr>
<tr>
<td>Security Analyst</td>
<td>IT Administrator (66%), Solution Architect (37%), Developer (19%)</td>
<td>Problem Solving (69%), Integrity (49%), Verbal Communication Skills (34%), Highly Organized (34%)</td>
<td>Certified Cloud Security Professional (CCSP) (22%), Certified Ethical Hacker (CEH) (19%), Cisco Certified Network Professional (CCNP) (17%), Certified Information Systems Security Professional (CISSP) (17%)</td>
</tr>
<tr>
<td>Role</td>
<td>Duties</td>
<td>Certifications &amp; Skills</td>
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</tr>
<tr>
<td><strong>Security Architect</strong></td>
<td>IT Administrator (57%), Security Analyst (45%), Developer (11%)</td>
<td>Problem Solving (70%), Integrity (43%), Confidence (32%)  Certified Information Systems Security Professional (CISSP) (32%), Certified Information Security Manager (CISM) (28%), Certified Cloud Security Professional (CCSP) (19%)</td>
<td></td>
</tr>
<tr>
<td><strong>Service Delivery Manager</strong></td>
<td>Technical Account Manager (42%), Solution Architect (26%), Sales Manager (14%)</td>
<td>Problem Solving (55%), Highly Organized (44%), Verbal Communication (39%)  IT Service Management (ITSM) (36%), Professional Cloud Service Manager (PCSM) (24%)</td>
<td></td>
</tr>
<tr>
<td><strong>Software Developer</strong></td>
<td>Support Engineer (7%), Network Engineer (5%), No previous role (88%)</td>
<td>Problem Solving (88%), Attitude (41%), Creativity (39%)  MCSE Cloud Platform and Infrastructure (9%), MCSA Linux on Azure Solutions Associate (7%), MCSA Cloud Platform Solutions Associate (7%)</td>
<td></td>
</tr>
<tr>
<td><strong>Solution Architect</strong></td>
<td>Developer (42%), Support Engineer (25%), Network Engineer (22%), No previous role (22%)</td>
<td>Problem Solving (41%), Creativity (21%), Attitude (20%)  MCSA Cloud Platform Solutions Associate (24%), MCSE Cloud Platform and Infrastructure (21%), MCSA Linux on Azure Solutions Associate (8%)</td>
<td></td>
</tr>
<tr>
<td><strong>Technical Program Manager</strong></td>
<td>Developer (32%), Other (23%)</td>
<td>Problem Solving (59%), Highly Organized (36%), Integrity (32%)  Project Management Professional (PMP) (20%), Certified Scrum Master (14%), Program Management Professional (PgMP) (11%)</td>
<td></td>
</tr>
</tbody>
</table>

* Multiple Choice question, sum will be over 100%

** 53% of partners surveyed did not feel that job titles were very important (Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018)
Job Descriptions

The following job descriptions can be leveraged for technical roles you may need to hire to support starting or accelerating your practice development.

**Automation Engineer**

An Automation Engineer is responsible for the automation of your development and deployment activities. They must be familiar with DevOps tools such as Jenkins, Puppet, Ansible, Redgate, Azure ARM Templates, Azure DevOps and many more. They should have the skills to implement and support your development activities via Continuous Integration (CI), Continuous Deployment and Delivery (CD) methods. They are very skilled at setting up rigorous testing mechanisms to ensure high quality automated releases are delivered to your customers.

- **Top Qualities:** Problem Solving (78%), Highly Organized (46%), Creativity (35%)
- **Previous Roles:** Developer (56%), IT Administrator (52%), Support Engineer (33%), Network Engineer (30%)
- **Certifications:** ISA Certified Automation Professional (CAP) (13%), Six Sigma (11%), ISTQB Advanced Level Test Automation Engine (9%)  

**Technical Skills**

- Solid understanding of modern DevOps and deployment automation practices.
- Deep understanding of automation, continuous delivery, continuous deployment, and continuous integration methodologies.
- Deep technical experience in scripting and software development.
- Understanding of common database technologies, such as SQL Database/Server, Oracle, MySQL, PostgreSQL, MongoDB.
- Working knowledge with AGILE development, SCRUM and Application Lifecycle Management (ALM) with one or more of the following programming languages: PowerShell, Bash, .NET, C#, Java, JSON, PHP, Perl, Python, Ruby on Rails, HTML, CSS, JavaScript, Responsive Web Design.
- Understanding of software testing and optimization methodologies, including executing performance and regression testing and building test plans and cases.

**Non-Technical Skills**

- Proven track record for continuously deploying software following Agile development practices.
- Process oriented, with a proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through.
- Proven track record for driving decisions collaboratively, resolving conflicts and ensuring follow through.
- Problem solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

**Technologies**

Ansible, Apache Maven, ASP .NET, AWS, Azure DevOps, Chef, Confluence, Consul.io, Docker, GitHub, Jenkins, Jira, Kafka, MongoDB, MySQL, Node.js, Oracle, PostgreSQL, Microsoft Project, Puppet, Visual Studio

**Programming/Scripting Languages:** C, C#, C++, Java, JavaScript, Perl, PHP, PowerShell, Python, Ruby, SQL, VBScript; **Platforms:** Linux, Windows

**Certifications**

Microsoft Certified Azure Administrator Associate, Microsoft Certified Azure Developer Associate, MCSE Cloud Platform and Infrastructure, or other relevant certifications in Quality Management or Quality Assurance and DevOps, such as AWS Certified DevOps Administrator.

Exam priorities: [Implementing Infrastructure Solutions 70-533](https://aka.ms/practiceplaybooks) (retired), [Microsoft Certified Azure Administrator Associate AZ-103](https://aka.ms/practiceplaybooks), or [AZ-102](https://aka.ms/practiceplaybooks) (retired), or [AZ-100](https://aka.ms/practiceplaybooks) (retired) and [AZ-101](https://aka.ms/practiceplaybooks) (retired); [Developing Azure Solutions 70-532](https://aka.ms/practiceplaybooks) (retired), [Microsoft Certified Azure Developer Associate AZ-203](https://aka.ms/practiceplaybooks).

**Project Experience Types/Qualities**

- 3+ years of implementing large automation projects, documenting workflow and processes, reliable monitoring implementations, optimizing script performance, and delivering high quality, consistent results.
- 5+ years performing testing, test automation, bug tracking and quality management.
- 5+ years of successful usage of open source testing tools, large test data sets, agile and sprint-based projects, with an emphasis on quality.
Cloud Administrator

A Cloud Administrator manages cloud tenants. They should be the interface with the support engineers and the cloud provider support. They deploy cloud applications based on deployment templates and DevOps processes and have deeper technical knowledge of the various cloud technologies (Networking, IaaS, PaaS, Security) than a support engineer. Cloud Administrators also manage the license assignments for cloud users across your various SaaS applications.

- **Top Qualities**: Problem Solving (69%), Highly Organized (41%), Integrity (28%)
- **Previous Roles**: IT Administrator (67%), Network Engineer (45%)
- **Certifications**: MCSA, MCSE (38%), MCITP (14%), Cisco Certified Network Associate (CCNA) (10%), Cisco Certified Network Professional (CCNP) (9%)

**Technical Skills**

- Deep understanding of cloud computing technologies, business drivers, and emerging computing trends.
- Strong foundation in system administration, including performing backups, upgrading and patching, performance tuning, monitoring, alerting, deployments, and disaster recovery.
- Understanding of infrastructure design, including public and private cloud, networking, virtualization, identity, security and storage.
- Experience deploying and managing the infrastructure for databases, such as SQL Server, Oracle, Maria, and Cassandra.

**Non-Technical Skills**

- Proven track record of building deep technical relationships with business leaders, creating rich technical documentation, and following industry standards.
- Background in software license management.
- Analytical and process oriented, with a proven track record of driving decisions collaboratively, resolving conflicts and ensuring follow through.
- Problem solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

**Technologies**

Active Directory, Ansible, AWS, Azure, CentOS, Chef, Citrix, Confluence, Docker, Excel, firewalls, Jira, Microsoft Project, MySQL, Node.js, Office 365, PostgreSQL, Puppet, ServiceNow, SharePoint, SQL Server, Visio, VMware

**Programming/Scripting Languages**: C#, Java, JavaScript, Perl, PowerShell, Python, Ruby, SQL

**Platforms**: Linux, Windows

**Certifications**

Microsoft Certified Azure Administrator Associate, MCSA Cloud Platform, MCSE Cloud Platform and Infrastructure, CompTIA Security+, AWS Certified DevOps Administrator, Google Cloud Certified Professional Cloud Architect

Exam priority: Implementing Infrastructure Solutions 70-533 (retired), Microsoft Certified Azure Administrator Associate AZ-103, or AZ-102 (retired), or AZ-100 (retired) and AZ-101 (retired).

**Project Experience Types/Qualities**

- 3+ years of implementing and maintaining cloud monitoring systems and monitoring cloud services for errors and issues.
- 5+ years of setting up and deploying large software packages to cloud systems.
- 3+ years migrating on-premises environments to cloud, virtual network deployments, and cloud security implementations using best practices.
- 3+ years of setting up and maintaining hybrid backup and restore systems.
- 5+ years of experience with scripting and DevOps for cloud.
Cloud Support Engineer

A Cloud Support Engineer assists both your internal and external customers who are having technical issues with your product, or who need help realizing the full benefit of your solution to help them deliver their cloud-based workloads. They can help customers navigate the operational challenges of cloud computing, so thoroughly training them on both your product and the infrastructure on which it is built is paramount to their success, and ultimately, your customers’ satisfaction. Qualifications include technical support experience and great communication and interpersonal skills (soft skills). Experience with numerous cloud technologies is a major plus.

- **Top Qualities:** Problem Solving (67%), Highly Organized (36%), Attitude (31%)
- **Previous Roles:** Support Engineer (57%), Escalation Engineer (9%), no previous role (24%)
- **Certifications:** MCSE Cloud Platform and Infrastructure (28%), MCSA Cloud Platform Solutions Associate (17%), MCSE Enterprise Devices and Apps (3%)

### Technical Skills
- Deep understanding of cloud computing technologies, business drivers, and emerging computing trends.
- Experience with Windows, Linux, and OSS technologies.
- Experience with configuration management and automation technologies such as PowerShell DSC, Chef, ARM Templates, and Puppet.
- Deep understanding of access management, administration, and application support.
- Solid understanding of modern authentication protocols and cyber security principals.

### Non-Technical Skills
- Building customer/partner relationships.
- Proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

### Technologies

**Programming/Scripting Languages:** C#, Java, JavaScript, Perl, PHP, PowerShell, Python, Ruby, SQL

**Platforms:** Windows, Linux

### Certifications
- Microsoft Certified Azure Administrator Associate, MCSA Cloud Platform, MCSE Cloud Platform and Infrastructure, CompTIA Security+, AWS Certified DevOps Administrator, Google Cloud Certified Professional Cloud Architect
- Exam priority: Implementing Infrastructure Solutions 70-533 (retired), Microsoft Certified Azure Administrator AZ-103, or AZ-102 (retired), or AZ-100 (retired) and AZ-101 (retired).

### Project Experience Types/Qualities
- 3+ years of experience with release and change management and cloud DevOps, including continuous integration and deployment and large multi resource deployments.
- 5-7+ years of production application support, migration support, and incident response experience.
- 5+ years of experience deploying cloud monitoring solutions.

aka.ms/practiceplaybooks
Compliance Officer (Data Protection Officer)

Compliance Officers, or Data Protection Officers, are responsible for ensuring that data is kept safe and secured throughout your various technology solutions. They work with internal and external data processors to ensure that legal regulations are followed. These individuals are to work with legal bodies and the internal and external legal teams when litigations via lawsuits are involved. They work hand in hand with your Security Architects and Analysts to discover, remediate and resolve compliance issues and unauthorized data breaches.

- **Top Qualities**: Highly Organized (48%), Integrity (45%), Written communication (36%)
- **Previous Roles**: Security Architect (31%), Technical Program Manager (26%), Solution Architect (24%)
- **Certifications**: Certified Information Systems Security Professional (CISSP) (16%), Certified Information Systems Auditor (CISA) (12%), Certified Information Security Manager (CISM) (10%)

<table>
<thead>
<tr>
<th>Technical Skills</th>
<th>Solid understanding of modern cyber security methodologies and protocols.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Experience with tools for conducting port scans, network scans, fingerprinting and vulnerability scans.</td>
</tr>
<tr>
<td></td>
<td>Experience with tools for conducting enumeration of target environment and configuration.</td>
</tr>
<tr>
<td></td>
<td>Strong understanding of cloud computing technologies.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-Technical Skills</th>
<th>Proven track record of maintaining regulatory compliance and a high degree of understanding around regulatory requirements, such as GDPR, HIPPA, and PCI.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Proven track record of successfully working with auditors, both internal and external.</td>
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<tr>
<td></td>
<td>Proven track record of driving decisions collaboratively, resolving conflicts &amp; ensuring follow through.</td>
</tr>
<tr>
<td></td>
<td>Presentation skills with a high degree of comfort with both large and small audiences.</td>
</tr>
<tr>
<td></td>
<td>Problem solving mentality leveraging internal and/or external resources.</td>
</tr>
<tr>
<td></td>
<td>Awareness of current laws and governing agencies that may affect regulatory compliance.</td>
</tr>
<tr>
<td></td>
<td>Exceptional verbal and written communication.</td>
</tr>
</tbody>
</table>

**Technologies**

Access, Excel, SharePoint, Word

**Programming/Scripting Languages**: None

**Platforms**: Westlaw

**Certifications**

- Certified Information Systems Security Officer (CISSO)
- Certified Cloud Security Officer (CCSO)
- Certified Chief Information Security Officer (CISO)
- Certified Security Leadership Officer (CSLO)

**Project Experience Types/Qualities**

- 5+ years of experience with understanding regulations and laws governing compliance and maintaining an up-to-date awareness of security issues.
- 5-10 years of experience working with local, state and federal investigations and auditors.
- 7+ years of implementing policies, standards and guidelines around security, risk management, and providing security recommendations.
- Experience with the prosecution of bad actors a plus.
Data Analyst

The Data Analyst is responsible for querying your data sources using tools like Excel (PowerPivot, Power Query, Power Map), PowerBI and other reporting tools such as Tableau, SAS and Teradata. They should be familiar with data catalogs and how to build and validate data metrics from their queries. They should be familiar with caching strategies and analytic data streaming technologies. Data Analysts are in charge of getting the decision support reports and data to the executives for their periodic review.

- **Top Qualities:** Problem Solving (76%), Creativity (36%), Attitude (32%)
- **Previous Roles:** Business Analyst (58%), Developer (52%), No previous role (28%)
- **Certifications:** MCSE Data Management and Analytics (24%), MCSE Business Intelligence (18%), Big Data (14%)

<table>
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<tr>
<th>Technical Skills</th>
<th>Non-Technical Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Deep understanding of manipulating and analyzing complex, high volume, high-dimensionality data from varying sources using a variety of tools and data analysis techniques.</td>
<td>- Problem-solving mentality leveraging internal and/or external resources.</td>
</tr>
<tr>
<td>- Strong ability to define, track, and report key metrics to assess overall business health, delivering in depth analysis on business performance (trends, funnels, etc.) and drivers, as well as forecasts and targets.</td>
<td>- Ability to collaborate with other team members to provide data analytics support for their initiatives.</td>
</tr>
<tr>
<td>- Deep understanding of how to build and design dashboards to enable ongoing monitoring of business health, as well as operationalizing dashboards and ingesting new data sources.</td>
<td>- Proven track record of driving decisions collaboratively, resolving conflicts &amp; ensuring follow through.</td>
</tr>
<tr>
<td>- Able to provide actionable insights on how to improve business services.</td>
<td>- Presentation skills with a high degree of comfort with both large and small audiences.</td>
</tr>
<tr>
<td>- Strong understanding of scripting languages, including R, Python, Scala, and SQL.</td>
<td>- Exceptional verbal and written communication.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Technologies</th>
<th>Programming/Scripting Languages</th>
<th>Platforms</th>
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<thead>
<tr>
<th>Certifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>MCSE Data Management and Analytics, MCSE Building Intelligence, MCSA Data Engineering in Azure, MapR Certified Data Analyst (MCDA), Cloudera Certified Associate – Data Analyst (CCA), Certified Business Intelligence Professional (CBIP)</td>
</tr>
</tbody>
</table>

Exam priorities: [Designing and Implementing Cloud Data Platform Solutions 70-473](https://aka.ms/practiceplaybooks) (retired); [Azure Data Engineer Associate DP-200](https://aka.ms/practiceplaybooks) and [DP-201](https://aka.ms/practiceplaybooks).

<table>
<thead>
<tr>
<th>Project Experience Types/Qualities</th>
</tr>
</thead>
<tbody>
<tr>
<td>- 5+ years of experience in data analytics and data mining with proven quantitative orientation.</td>
</tr>
<tr>
<td>- 3+ years of working on complex reporting requirements, large, complex data sets, and various reporting tools, such as Power BI.</td>
</tr>
<tr>
<td>- 3+ years of demonstrated ability to deliver high-quality reporting metrics to customers and executives.</td>
</tr>
<tr>
<td>- 5+ years of proven ability to judge data results as valid and accurate.</td>
</tr>
</tbody>
</table>
Data Architect

A Data Architect (DA) drives customer initiatives leveraging Azure data and analytics services (e.g., ranging from SQL Server to SQL Database and SQL Data Warehouse to Cortana Intelligence Suite) to solve the biggest and most complex data challenges faced by enterprise customers. The DA is a technical, customer facing role, accountable for the end-to-end customer deployment and usage experience for Azure data services. DAs own the Azure technical customer engagement including: architectural design sessions, implementation projects and/or proofs of concept and pilots. The Data Architect is proficient in distributed computing principles and familiar with key architectures including Lambda and Kappa architectures, and has a broad experience designing solutions using a broad set of data stores (e.g., HDFS, Azure Data Lake Store, Azure Blob Storage, Azure SQL Data Warehouse, Apache HBase, Azure Cosmos DB), messaging systems (e.g., Apache Kafka, Azure Event Hubs, Azure IoT Hub) and data processing engines (e.g., Apache Hadoop, Apache Spark, Azure Data Lake Analytics, Apache Storm, Azure HDInsight). The ideal candidate has experience in customer facing roles and success leading deep technical architecture and design discussions with senior executives. Five plus years of experience with deep understanding of databases and analytics, including relational databases, data warehousing, big data, business intelligence and analytics. Five plus years of success in consultative/complex technical sales and deployment projects. Technical BS degree in Computer Science or Math background desirable.

- **Top Qualities:** Problem Solving (72%), Creativity (34%), Highly Organized (33%)
- **Previous Roles:** Database engineer (43%), Database administrator (43%), no previous role (28%)
- **Certifications:** MCSE Data Management and Analytics (34%), MCSE Cloud Platform and Infrastructure (21%), MCSA Cloud Platform Solutions Associate (19%)

**Technical Skills**

- Deep understanding of using data and analytics services to solve enterprise data challenges.
- Extensive architecture and design experience with complex applications across various data sources and platforms.
- Highly proficient in distributed computing principals and familiar with key architectures, including Lambda and Kappa architectures, and has extensive experience designing solutions leverage a diverse assortment of data sources.
- Deep understanding of common database technologies, such as SQL Database/Server, SQL Data Warehouse, Oracle, MySQL, and other data sources, such as Azure Data Lake Storage and Azure Blob Storage.
- Solid understanding of data governance and creating data dictionaries.
- Understanding of how to accelerate a customer’s digital transformation using advanced analytics, artificial intelligence (AI), and Big Data.
- Strong understanding of scripting languages, including R, Python, Scala, and SQL.
### Non-Technical Skills
- Proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Prior work experience in a consulting/architecture position within a software & services company.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

### Technologies


**Platforms:** Linux (Red Hat, Ubuntu, Debian, etc.), Windows.

### Certifications
MCSE Business Intelligence, MCSE Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, MCSE Cloud Platform and Infrastructure, MCSE Data Management and Analytics, AWS Certified Solution Architect, AWS Certified Developer, AWS Certified Developer, Big Data, Certified Analytics Professional, Certificate in Engineering Excellence Big Data Analytics and Optimization (CPEE), Cloudera Certified Developer, Cloudera Certified Specialist, Data Warehousing, IBM Certified Data Architect/Engineer, Mining Massive Datasets, Graduate Certificate (Stanford), Oracle, Salesforce.com, SAP, SAS Certified Big Data Professional

Exam priorities: [Designing and Implementing Big Data Analytics Solutions 70-475](https://aka.ms/practiceplaybooks) (retired); [Azure Data Engineer Associate DP-200](https://aka.ms/practiceplaybooks) and [DP-201](https://aka.ms/practiceplaybooks); [Designing Business Intelligence Solutions with Microsoft SQL Server 70-467](https://aka.ms/practiceplaybooks).

### Project Experience Types/Qualities
- 5+ years of experience building advanced analytics (including machine learning) solutions.
- 5+ years of experience with one or more scripting languages, such as R, Python, Scala, or SQL.
- 5-8 years of experience building data pipelines to operationalize end-to-end solutions.
- 5+ years of experience in data analytics and data mining with proven quantitative orientation.
- 5+ years of working on complex reporting requirements, large, complex data sets, and various reporting tools, such as Power BI.
- 8+ years of demonstrated ability to deliver high-quality reporting metrics to customers and executives.
- 8+ years of proven ability to judge data results as valid and accurate.
- 5+ years of experience delivering proven database modernization solutions.
- 5+ years of experience in ingesting and performing advance analytics on data from multiple sources, including batch analytics, interactive analytics, real-time/streaming analytics.
Data Developer

A Data Developer is responsible for helping to select and implement the tools and processes required of a data processing pipeline in support of the customer requirements. The Data Developer may be a customer facing role, but the primary responsibilities include implementing ETL (extract, transform and load) pipelines, monitoring/maintaining data pipeline performance and implementing big data or advanced analytics solutions. The Data Developer is proficient in distributed computing principles and familiar with key architectures including Lambda and Kappa architectures, and has a broad experience across a set of data stores (e.g., HDFS, Azure Data Lake Store, Azure Blob Storage, Azure SQL Data Warehouse, Apache HBase, Azure Cosmos DB), messaging systems (e.g., Apache Kafka, Azure Event Hubs, Azure IoT Hub) and data processing engines (e.g., Apache Hadoop, Apache Spark, Azure Data Lake Analytics, Apache Storm, Azure HDInsight). The ideal candidate experience working on solutions that collect, process, store and analyze huge volume of data, fast moving data or data that has significant schema variability.

- **Top Qualities:** Problem Solving (70%), Creativity (48%), Highly Organized (34%)
- **Previous Roles:** Developer (55%), Statistician/Mathematician (20%), no previous role (36%)
- **Certifications:** MCSE Data Management and Analytics (29%), MCSE Business Intelligence (20%)

### Technical Skills

- Deep understanding of application development practices and design patterns, application lifecycle management, and common software architectures.
- Solid understanding of modern DevOps practices, including automation, continuous delivery, continuous deployment, and continuous integration methodologies.
- Deep understanding of using data and analytics services to solve enterprise data challenges.
- Extensive architecture and design experience with complex applications across various data sources and platforms.
- Highly proficient in distributed computing principals and familiar with key architectures, including Lambda and Kappa architectures, and has extensive experience designing solutions leverage a diverse assortment of data sources.
- Deep understanding of common database technologies, such as SQL Database/Server, SQL Data Warehouse, Oracle, MySQL, and other data sources, such as Azure Data Lake Storage and Azure Blob Storage.
- Strong understanding of scripting languages, including R, Python, Scala, and SQL.

### Non-Technical Skills

- Proven ability to develop software using Agile methodologies.
- Proven track record of driving decisions collaboratively, resolving conflicts and ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Prior work experience in a consulting/architecture position within a software & services company.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

### Technologies


### Programming/Scripting Languages:

C#, DMX, DAX, MDX, SQL, T-SQL, Java, Scala, Python, PowerShell, R, Ruby.

### Platforms:

Linux (Red Hat, Ubuntu, Debian, etc.), Windows.
### Certifications

MCSE Data Management and Analytics, MCSE Cloud Platform and Infrastructure, and other Big Data related certifications, such as SAS Certified Big Data Professional, MapR Hadoop Developer (MCHD), Certified Business Intelligence Professional (CBIP).

Exam priorities: [Designing and Implementing Big Data Analytics Solutions 70-475](https://aka.ms/practiceplaybooks) (retired); [Azure Data Engineer Associate DP-200](https://aka.ms/practiceplaybooks) and [DP-201](https://aka.ms/practiceplaybooks).

### Project Experience Types/Qualities

- 5+ years of experience building advanced analytics (including machine learning) solutions.
- 5+ years of experience with one or more scripting languages, such as R, Python, Scala, or SQL.
- 5-7 years of experience building data pipelines to operationalize end-to-end solutions.
- 5+ years of experience in data analytics and data mining with proven quantitative orientation.
- 5+ years of working on complex reporting requirements, large, complex data sets, and various reporting tools, such as Power BI.
- 5+ years of demonstrated ability to deliver high-quality reporting metrics to customers and executives.
- 5+ years of proven ability to judge data results as valid and accurate.
- 5+ years of experience in ingesting and performing advance analytics on data from multiple sources, including batch analytics, interactive analytics, real-time/streaming analytics.
Data Engineer

A Big Data Engineer is responsible for helping to select and implement the tools and processes required of a data processing pipeline in support of the customer requirements. The Big Data Engineer may be a customer facing role, but the primary responsibilities include implementing ETL (extract, transform and load) pipelines, monitoring/maintaining data pipeline performance. The Big Data Engineer is proficient in distributed computing principles and familiar with key architectures including Lambda and Kappa architectures, and has a broad experience across a set of data stores (e.g., HDFS, Azure Data Lake Store, Azure Blob Storage, Azure SQL Data Warehouse, Apache HBase, Azure Cosmos DB), messaging systems (e.g., Apache Kafka, Azure Event Hubs, Azure IoT Hub) and data processing engines (e.g., Apache Hadoop, Apache Spark, Azure Data Lake Analytics, Apache Storm, Azure HDInsight). The ideal candidate has three or more years’ experience working on solutions that collect, process, store and analyze huge volume of data, fast moving data or data that has significant schema variability.

- **Top Qualities:** Problem Solving (79%), Highly Organized (44%), Creativity (31%)
- **Previous Roles:** Database administrator (54%), IT Administrator (29%), Network Engineer (21%)
- **Certifications:** MCSE Data Management and Analytics (33%), MCSE Business Intelligence (21%), MCSE Cloud Platform and Infrastructure (21%)

**Technical Skills**

- Deep understanding of using data and analytics services to solve enterprise data challenges.
- Extensive architecture and design experience with complex applications across various data sources and platforms.
- Highly proficient in distributed computing principals and familiar with key architectures, including Lambda and Kappa architectures, and has extensive experience designing solutions leverage a diverse assortment of data sources.
- Deep understanding of common database technologies, such as SQL Database/Server, SQL Data Warehouse, Oracle, MySQL, and other data sources, such as Azure Data Lake Storage and Azure Blob Storage.
- Solid understanding of data governance and creating data dictionaries.
- Understanding of how to accelerate a customer’s digital transformation using advanced analytics, artificial intelligence (AI), and Big Data.
- Strong understanding of scripting languages, including R, Python, Scala, and SQL.

**Non-Technical Skills**

- Proven ability to develop work in environments following Agile methodologies.
- Proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Prior work experience in a consulting/architecture position within a software & services company.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

**Technologies**


**Programming/Scripting Languages:** C#, DAX, DAX, MDX, SQL, T-SQL, Java, Scala, Python, PowerShell, R, Ruby. **Platforms:** Linux (Red Hat, Ubuntu, Debian, etc.), Windows.
## Certifications
MCSE Data Management and Analytics, MCSE Cloud Platform and Infrastructure, and other Big Data related certifications, such as SAS Certified Big Data Professional, MapR Hadoop Developer (MCHD), Certified Business Intelligence Professional (CBIP).

Exam priorities: [Designing and Implementing Big Data Analytics Solutions 70-475](#) (retired); [Azure Data Engineer Associate DP-200](#) and [DP-201](#).

## Project Experience Types/Qualities
- 5+ years of experience building advanced analytics (including machine learning) solutions.
- 5+ years of experience with one or more scripting languages, such as R, Python, Scala, or SQL.
- 5-10 years of experience building data pipelines to operationalize end-to-end solutions.
- 5+ years of experience building advanced analytics (including machine learning) solutions.
- 5+ years of experience in data analytics and data mining with proven quantitative orientation.
- 5+ years of working on complex reporting requirements, large, complex data sets, and various reporting tools, such as Power BI.
- 8+ years of demonstrated ability to deliver high-quality reporting metrics to customers and executives.
- 8+ years of proven ability to judge data results as valid and accurate.
- 5+ years of experience delivering proven database modernization solutions.
- 5+ years of experience in ingesting and performing advanced analytics on data from multiple sources, including batch analytics, interactive analytics, real-time/streaming analytics.
**Data Scientist**

A Data Scientist is responsible for identifying the insight opportunities present in the customer’s data and helping shape the data pipeline that deliver the insights by applying advanced analytics (e.g., machine learning) in collaboration with the customer. The Data Scientist is a technical, customer facing role, who along with the Big Data Engineer is accountable for the end-to-end data pipeline envisioning and development that starts with addressing issues of data acquisition and data sampling, data exploration and data quality assessment, data wrangling to massage the data so it is better suited to applying advanced analytics, and visualizing or reporting on such data to make the insights available to the customer’s business. The ideal candidate has experience in customer facing roles and has a cross-disciplinary background consisting of statistics and software development. A technical BS degree in Computer Science or Math background is highly desirable. Three or more years of customer facing experience desired.

- **Top Qualities:** Problem Solving (78%), Creativity (39%), Attitude (33%)

- **Previous Roles:** Developer (55%), Statistician/Mathematician (37%), No previous role (37%)

- **Certifications:** MCSA In Machine Learning (24%), MCSE Data Management and Analytics (24%)

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**Technical Skills**

- Deep understanding of how to identify data sources, integrate multiple sources or types of data, and apply expertise within a data source to develop methods to compensate for limitations and extend the applicability of the data.
- Strong ability to apply (and develop if necessary) tools and pipelines to efficiently collect, clean, and prepare massive volumes of data for analysis.
- Able to transform formulated problems into implementation plans for experiments by applying (and creating when necessary) the appropriate data science methods, algorithms, and tools, and then statistically validating the results against biases and errors.
- Deep understanding of how to interpret results and develop insights into formulated problems within the business/customer context, while providing guidance on risks and limitations.
- Acquires and uses broad knowledge of innovative methods, algorithms, and tools from within the larger scientific community, and applies his or her own analysis of scalability and applicability to the formulated problem.
- Understanding of how to validate, monitor, and drive continuous improvement to methods, and propose enhancements to data sources that improve usability and results.
- Deep understanding of big data systems, including Spark, Hadoop, Azure Data Lake, Azure SQL, etc.
- Strong understanding of scripting languages, including R, Python, Scala, and SQL.

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**Non-Technical Skills**

- Work with management and stakeholders, identify opportunities for data science to make an impact, and formulate these opportunities to data science projects.
- Consultative requirements gathering with stakeholders at all levels of the business.
- Proven track record of driving decisions collaboratively, resolving conflicts, and ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

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**Technologies**


**Programming/Scripting Languages:** R, Scala, Python, DMX, DAX, MDX, SQL, T-SQL, Java

**Platforms:** Linux (Red Hat, Ubuntu, Debian, etc.), Windows.

aka.ms/practiceplaybooks
Certifications

MCSA in Machine Learning, other certifications include: Master or PhD in Data Science, Statistics or Probability from accredited universities, Certified Analytics Professional (CAP), Certification of Professional Achievement in Data Sciences, Cloudera Certified Professional: Data Scientist (CCP:DS), edX Verified Certificate in Data Science Curriculum, EMC Data Science Associate, edX Verified Certificate in Data Science Curriculum, EMC Data Science Associate, MCSE Business Intelligence, MCSE Data Management and Analytics, Revolution R Enterprise Professional, SAS Certified Data Scientist.

Exam priorities: Analyzing Big Data with Microsoft R 70-773 (retired); Perform Cloud Data Science with Azure Machine Learning 70-774 (retired); Azure Data Scientist Associate DP-100.

Project Experience Types/Qualities

- 5-8+ years of experience developing and working with machine learning algorithms, including classification, regression, clustering, time series forecasting, recommendation systems, and text analytics, and a good understanding of deep learning.
- 5 years of working experience in applying machine learning to solve complex business problems.
- 5+ years of experience with one or more scripting languages, such as R, Python, Scala, or SQL.
- 5+ years of experience working with machine learning platforms, such as R, Python, and Azure ML.
- 5-8 years of experience building data pipelines to operationalize end-to-end solutions.
- 3+ years applying statistical modeling and machine learning algorithms to real-world problems.
## Identity Solution Engineer

Identity Solution Engineers (ISE) are responsible for securing your organizational identities. This includes the integration with internal and external applications. They should be familiar with identity management platforms such as Active Directory, Active Directory Federated Services (ADFS), and Azure Active Directory. They are responsible for configuring trusts and federation and understanding the various standard authentication protocols like OpenID and OAuth. They are also responsible with what and how profile information is exposed to applications.

- **Top Qualities:** Problem Solving (65%), Integrity (35%), Highly Organized (33%)
- **Previous Roles:** IT Administrator (54%), Support Engineer (40%), Network Engineer (33%), Developer (15%)
- **Certifications:** Certified Identity Management Professional (CIMP), Certified Identity Security Technologist (CIST)

### Technical Skills

- Solid understanding of modern authentication protocols and a background in cyber security.
- Deep understanding of cloud computing technologies, business drivers, and emerging computing trends.
- Experience with Windows Server Active Directory and other LDAP-based directory services.
- Experience with Azure AD and Azure Infrastructure as a Service (Virtual Machines, Virtual Networks).
- Integration and migration experience with Skype for Business, Exchange, SharePoint, and Office 365.
- Experience with Windows, Linux, iOS, Android, Blackberry.
- Experienced troubleshooter, analyzing log files, network traffic, permissions issues, identifying problems with performance and scale.
- Developer experience with .NET, Java, HTML, CSS, JavaScript.

### Non-Technical Skills

- Proven track record of driving decisions collaboratively, resolving conflicts, and ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.
- Basic understanding and knowledge of PCI and SOX regulatory standards.

### Technologies

Access, Active Directory, ADFS, Auth0, AWS, Azure, Citrix, Excel, firewalls, MySQL, Node.js, Office 365, Okta, Oracle, Oracle Identity Management, Ping Identity, PostgreSQL, Power BI, Radius, SharePoint, Skype, SQL Server, SSAS, SSIS, SSRS, Apache Tomcat, VMware

**Programming/Scripting Languages:** C#, C++, Java, JavaScript, Perl, PHP, PowerShell, Python, Ruby, SQL

**Platforms:** Linux, Windows

### Certifications

Microsoft Certified Azure Administrator Associate, MCSE Cloud Platform and Infrastructure, MCSA Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, CompTIA Security+, CISSP, AWS Certified Solution Architect.

Exam priorities: [Identity with Window Server 2016](#), [Implementing Infrastructure Solutions 70-533](#) (retired), [Microsoft Certified Azure Administrator Associate AZ-103](#), or [AZ-102](#) (retired), or [AZ-100](#) (retired) and [AZ-101](#) (retired); [Planning for and Measuring Devices in the Enterprise 70-398](#) (retired).

### Project Experience Types/Qualities

- 3–5+ years senior (tier 3) level support with identity management as part of responsibilities.
- 5–8 years of experience with identity architecture and management.
- 3–5 years deploying, migrating, or managing an Office 365 environment.
Security Analyst

An Information Security Analyst assesses and provides security advice on your cloud infrastructure, including network, service, and application components. This role conducts risk assessments, architectural reviews, provides cyber security subject matter expertise, and assists in the building and design of secure solutions. Additional duties may include network and application penetration testing, and support for cyber security investigations as well as on-call response for cyber security incidents. A computer science or related engineering degree is required, or the equivalent combination of education, professional training, or work experience.

- **Top Qualities:** Problem Solving (69%), Integrity (49%), Verbal Communication Skills (34%), Highly Organized (34%)
- **Previous Roles:** IT Administrator (66%), Solution Architect (37%), Developer (19%)
- **Certifications:** Certified Cloud Security Professional (CCSP) (22%), Certified Ethical Hacker (CEH) (19%), Cisco Certified Network Professional (CCNP) (17%). Certified Information Systems Security Professional (CISSP) (17%)

### Technical Skills

- Solid understanding of modern authentication protocols and a background in cyber security.
- Deep understanding of cloud computing technologies.
- Experience with Windows, Linux, iOS, Android.
- Experience in network security: TCP/IP, DNS, proxies, firewall configuration, intrusion detection and prevention systems, IPSec and TLS/SSL.
- Experience with cryptography: symmetric and asymmetric cryptography, hashing.
- Experience with tools for conducting port scans, network scans, fingerprinting and vulnerability scans.
- Experience with tools for conducting enumeration of target environment and configuration.
- Experience with tools used for system hacking (e.g., password cracking), malware creation/deployment, network traffic sniffers, session hijacking, denial of service and SQL injection.

### Non-Technical Skills

- Proven track record of conducting vulnerability assessments and delivering clear, actionable reports.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional written communication and strong verbal communication skills.
- Awareness of current laws that may affect penetration testing and analysis, and in conducting test that stay within the law.
- Experience with non-technical attacks and social engineering.

### Technologies

Access, Active Directory, ASP.NET, AWS, Azure, Burp Suite, Chef, Excel, firewalls, HP Fortify, Db2, Jira, Metasploit, Microsoft IIS, MySQL, Nessus, Nmap, Node.js, Oracle, PaaS, Microsoft Project, Puppet, Radius, ServiceNow, SharePoint, sniffers, Oracle Solaris, SQL Server, Sybase, Visio, VMware, WSDL

**Programming/Scripting Languages:** C#, C++, Java, JavaScript, Perl, PowerShell, Python, Ruby

**Platforms:** Linux, Windows

### Certifications

Relevant security certifications, such as CISSP, Certified Ethical Hacker, AWS Certified Security, Certified Penetration Testing Consultant (CPTC), GIAC Exploit Researcher and Advanced Penetration Tester (GXPN), Certified Penetration Testing Engineer (CPTE), Licensed Penetration Tester (LPT), GIAC Penetration Tester (GPEN), GIAC Web Application Penetration Tester (GWAPT), Cisco CyberSecurity Specialist, Offensive Security Certified Expert (OSCE).

### Project Experience Types/Qualities

- 5+ years of experience implementing and validating security postures, performing vulnerability assessments and remediations, implementing intrusion detection and prevention system, and performing cloud-based security audits.
- 5-10 years of working with security testing frameworks such as OWASP.
- 8-10 years of experience with identity audit log review strategies, and SIEM tool implementation and configuration.
- 3+ years of experience in legal investigations working with state and federal authorities.
- 5+ years of successful prevention of phishing and social engineering campaigns.
## Security Architect

A Security Architect is the first line of defense in the prevention of hackers, malware, viruses and other malicious activities. They are responsible for setting up policies, procedures and guidelines for system access and ensuring that your SIEM systems are monitoring all business-critical applications. Security Architects must be familiar with all levels of the application and network communications. It is their job to implement encryption at rest, encryption in transit and ensure proper access and data loss prevention controls are in place. They interact with your Compliance Officer and Legal team to provide technical guidance on security incidents.

- **Top Qualities:** Problem Solving (70%), Integrity (43%), Confidence (32%)
- **Previous Roles:** IT Administrator (57%), Security Analyst (45%), Developer (11%)
- **Certifications:** Certified Information Systems Security Professional (CISSP) (32%), Certified Information Security Manager (CISM) (28%), Certified Cloud Security Professional (CCSP) (19%)

<table>
<thead>
<tr>
<th>Hard Skills: Technical</th>
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<tbody>
<tr>
<td>• Solid understanding of modern authentication protocols and a background in cyber security.</td>
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<tr>
<td>• Deep understanding of cloud computing technologies and network architectures.</td>
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<tr>
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</tr>
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<td>• Strong experience with tools for conducting port scans, network scans, fingerprinting and vulnerability scans.</td>
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<td>• Deep experience with tools used for system hacking (e.g., password cracking), malware creation/deployment, network traffic sniffers, session hijacking, denial of service and SQL injection.</td>
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<thead>
<tr>
<th>Hard Skills: Non-Technical</th>
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<tbody>
<tr>
<td>• Proven track record of conducting vulnerability assessments and delivering clear, actionable reports.</td>
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<tr>
<td>• Problem-solving mentality leveraging internal and/or external resources.</td>
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<thead>
<tr>
<th>Technologies</th>
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</thead>
<tbody>
<tr>
<td>Active Directory, Azure, Chef, Excel, firewalls, Jira, Metasploit, Nessus, Oracle, Oracle Solaris, VMware</td>
<td></td>
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</tbody>
</table>

| Programming/Scripting Languages: | C, C#, C++, Java, JavaScript, Perl, PHP, PowerShell, Python, Ruby |
| Platforms: | Linux, Windows |

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<td>Relevant security certifications, such as CISSP, Certified Ethical Hacker, AWS Certified Security, Certified Penetration Testing Consultant (CPTC), GIAC Exploit Researcher and Advanced Penetration Tester (GXPN), Certified Penetration Testing Engineer (CPTE), Licensed Penetration Tester (LPT), GIAC Penetration Tester (GPEN), GIAC Web Application Penetration Tester (GWAPT), Cisco CyberSecurity Specialist, Offensive Security Certified Expert (OSCE).</td>
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<tr>
<td>• 7+ years of experience implementing and validating security postures, performing vulnerability assessments and remediations, implementing intrusion detection and prevention system, and performing cloud-based security audits.</td>
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<td>• 8-10 years of experience with identity audit log review strategies, and SIEM tool implementation and configuration.</td>
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<td>• 5+ years of experience in legal investigations working with state and federal authorities.</td>
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<td>• 7+ years of successful prevention of phishing and social engineering campaigns.</td>
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</tr>
<tr>
<td>• 7+ years of knowledge about network and application vulnerabilities.</td>
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## Service Delivery Manager

The Service Delivery Manager (SDM) oversees delivering your practice(s). You may have an SDM that is focused on one vendor segment or they could be focused on the entire set of products from a single vendor. They should have both a sales and customer service mindset. They are at the front line dealing with your customer and in charge of keeping the customer satisfaction pulse of your projects.

- **Top Qualities:** Problem Solving (55%), Highly Organized (44%), Verbal Communication (39%)
- **Previous Roles:** Technical Account Manager (42%), Solution Architect (26%), Sales Manager (14%)
- **Certifications:** IT Service Management (ITSM) (36%), Professional Cloud Service Manager (PCSM)(24%)

### Technical Skills

- Deep understanding of the products and services offered by your practice(s).
- Solid understanding of software delivery methodologies, including continuous delivery, continuous deployment, and continuous improvement.
- Understanding of enterprise identity and access control and security solutions.
- Understanding of cloud governance technologies for cost management and control.

### Non-Technical Skills

- Building customer/partner relationships.
- Proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.

### Technologies

- Excel, Microsoft Project, ServiceNow, UserVoice

### Certifications

- Information Technology Infrastructure Library (ITIL V3)
- Project+
- Information Technology Infrastructure Library (ITIL)
- Project Management Professional (PMP)

### Project Experience Types/Qualities

- 6+ years of experience successfully delivering client solutions.
- 8+ years of consistently receiving high customer service reviews and exhibiting a pattern of resolving issues quickly.
- 5+ years of experience demonstrating the ability to define and deliver high quality services to customers.
- 5+ year history of profitable service portfolios.
Software Developer (Senior, Junior, Mobile, Full-Stack, etc.)

A Software Developer enjoys the challenge of designing and building applications that solve today's business needs. This person must be willing to keep up to date with the fast-moving cloud services landscape including IaaS, SaaS, and PaaS designs to remain an effective member of the development team. A software developer should work equally well on a team or independently, given a set of project requirements or tasks. This requires the developer to possess Excellent communication and collaboration skills. The developer should understand the aspects of the software development cycle, from architecture to testing. This person designs, builds, and maintains efficient, reusable, and reliable code. This person should have experience with participating in projects using agile methodologies, such as the Scrum approach to agile software development. They should also be able to effectively gather customer requirements and ask clarifying questions when needed and translate these requirements to actionable tasks they perform, or delegate to members of the team. Five plus years of experience with deep understanding of web technologies, API consumption/development, full lifecycle application development, database development (relational and/or NoSQL), and enterprise/cloud architecture. Technical BS degree in Computer Science desirable.

- **Top Qualities:** Problem Solving (88%), Attitude (41%), Creativity (39%)
- **Previous Roles:** Support Engineer (7%), Network Engineer (5%), No previous role (88%)
- **Certifications:** MCSE Cloud Platform and Infrastructure (9%), MCSA Linux on Azure Solutions Associate (7%), MCSA Cloud Platform Solutions Associate (7%)

### Technical Skills

- Deep understanding of application development practices and design patterns, application lifecycle management, and common software architectures.
- Solid understanding of modern DevOps practices, including automation, continuous delivery, continuous deployment, and continuous integration methodologies.
- Solid understanding of common database technologies, such as SQL Database/Server, Oracle, MySQL, PostgreSQL, MongoDB.
- Strong understanding of Agile development best practices.
- Understanding of software testing and optimization methodologies, including writing unit tests and executing performance and regression testing.

### Non-Technical Skills

- Proven ability to develop software using Agile methodologies.
- Proven track record of creating rich documentation for software solutions.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Proven track record of driving decisions collaboratively, resolving conflicts and ensuring follow through.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Programming/Scripting Languages</td>
<td>C, C#, C++, F#, Go, Java, JavaScript, Objective C, Perl, PHP, PowerShell, Python, Ruby, Ruby on Rails, Scala, SQL, T-SQL</td>
</tr>
<tr>
<td>Platforms</td>
<td>Linux (Red Hat, Ubuntu, Debian, etc.), Windows, iOS</td>
</tr>
<tr>
<td>Certifications</td>
<td>Microsoft Certified Azure Developer Associate, MCSD App Builder, MCSE Enterprise Devices and Apps, MCSE Business Intelligence, MCSA Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, MCSE Cloud Platform and Infrastructure, AWS Certified Solution Architect, AWS Certified Developer</td>
</tr>
<tr>
<td>Exam priorities</td>
<td>Developing Azure Solutions 70-532 (retired), Microsoft Certified Azure Developer Associate AZ-203</td>
</tr>
</tbody>
</table>
| Project Experience | • 3-10+ years of experience developing applications, consuming and developing APIs, and following technical best practices and design patterns.  
• 3-5 years of experience with creating pilots, prototypes, and proof-of-concepts to provide validation of specific scenarios.  
• 4-6 years of experience developing hybrid solutions on-premises or in the cloud.  
• 3+ years of experience working in an Agile environment practicing CI/CD.  
• 3+ years of experience working with source code repository management systems, such as TFS, GitHub, and Azure DevOps. |
Solution Architect

A Solution Architect (CA) drives Azure-based customer initiatives in collaboration with customers and participates in both pre and post-sales (e.g., deployment) efforts. The CA is a technical, customer facing role that is accountable for the end-to-end customer cloud deployment experience. CAs own the Azure technical customer engagement including architectural design sessions, specific implementation projects and/or proofs of concept, and deployment. The ideal candidate has experience in customer facing roles and success leading deep technical architecture and application design discussions with senior customer executives to drive cloud deployment. Five or more years of architecture, design implementation and/or support of distributed applications designed to run in the cloud or across hybrid cloud and on-premises environments. Experience in consultative sales, design and deployment of projects strongly preferred. A computer science or related engineering degree is required.

- **Top Qualities**: Problem Solving (41%), Creativity (21%), Attitude (20%)
- **Previous Roles**: Developer (42%), Support Engineer (25%), Network Engineer (22%), No previous role (22%)
- **Certifications**: MCSA Cloud Platform Solutions Associate (24%), MCSE Cloud Platform and Infrastructure (21%), MCSA Linux on Azure Solutions Associate (8%)

### Technical Skills

- Deep understanding of cloud computing technologies, business drivers, and emerging computing trends.
- Solid understanding of cloud virtualization, storage and networking.
- Understanding of cloud governance technologies for cost management and control.
- Understanding of common database technologies such as SQL Database/Server, Oracle, MySQL.
- Deep technical experience in enterprise mobile, identity and access control, & security solutions.
- Working knowledge with AGILE development, SCRUN and Application Lifecycle Management (ALM) with one or more of the following programming languages: PowerShell, Bash, .NET, C++, Java, JSON, PHP, Perl, Python, Ruby on Rails, HTML, CSS, JavaScript, Responsive Web Design.
- Solid understanding of modern DevOps practices, including automation, continuous delivery, continuous deployment, and continuous integration methodologies.
- Deep understanding of cloud-based Business Continuity and Disaster Recovery practices.

### Non-Technical Skills

- Building customer/partner relationships.
- Proven track record of building deep technical relationships with senior executives and growing cloud consumption share in large or highly strategic accounts.
- Proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through.
- Presentation skills with a high degree of comfort with both large and small audiences.
- Prior work experience in a consulting/architecture position within a software & services company.
- Problem-solving mentality leveraging internal and/or external resources.
- Exceptional verbal and written communication.
### Technologies


**Programming/Scripting Languages:** C#, C++, Apache Hive, Perl, PHP, Pig, PowerShell, Ruby, Ruby on Rails, Scala, SQL, T-SQL

### Certifications

- Microsoft Certified Azure Administrator Associate, Microsoft Certified Azure Solutions Architect Expert, MCSE Cloud Platform and Infrastructure, MCSE Data Management and Analytics, MCSA Cloud Platform, MCSA Linux on Azure, AWS Certified Solutions Architect – Associate and/or Professional, AWS Certified Developer – Professional.

Exam priorities: [Implementing Infrastructure Solutions 70-533](https://aka.ms/infrastructure70-533) (retired), Microsoft Certified Azure Administrator Associate **AZ-103**, or **AZ-102** (retired), or **AZ-100** (retired) and **AZ-101** (retired); [Architecting Azure Solutions 70-535](https://aka.ms/solutions70-535) (retired), Microsoft Certified Azure Solutions Architect Expert **AZ-300** and **AZ-301**, or **AZ-302**.

### Project Experience

- 5-8 years of experience designing and delivering cloud solutions on an enterprise scale.
- 5+ years of experience with creating pilots, prototypes, and proof-of-concepts to provide validation of specific scenarios.
- 4-6 years of experience providing cloud solutions, including hybrid solutions on-premises or in the cloud, lift-and-shift initiatives, migrations and upgrades.
**Technical Program Manager**

The Technical Program Manager or Program Management team "owns" the specification for an application's features and functionality and coordinates the day-to-day communication required to develop and deliver the application effectively and consistently within organizational standards.

Program Management has a key communication and coordination role. With input from other team leads, Program Management assists Product Management in articulating the vision for the project. Using this vision, Program Management drafts the initial version of the functional specification and is considered the keeper of the functional specification. Program Management is responsible for all activities associated with analysis, specification, and architecture. Program Management is also responsible for defining how the project interoperates with external standards, maintaining external technical coordination and communication, and managing the master schedule.

- **Top Qualities:** Problem Solving (59%), Highly Organized (36%), Integrity (32%)
- **Previous Roles:** Developer (32%), Other (23%)
- **Certifications:** Project Management Professional (PMP) (20%), Certified Scrum Master (14%), Program Management Professional (PgMP) (11%)

### Technical Skills
- Solid technical background in IT infrastructure and administration and application architecture.
- Solid understanding of DevOps methodologies, including continuous integration and continuous delivery and deployment.
- Strong understanding of continuous improvement and Agile methodologies
- Proven track record of identifying risks through testing and customer feedback.

### Non-Technical Skills
- Strong project management skills including experience of a variety of project management methodologies such as Agile, SCRUM, waterfall methodologies, etc.
- Demonstrated success in driving complex projects with multiple stakeholders and dependencies.
- Proven track record of building deep technical relationships with senior executives and growing cloud consumption share in large or highly strategic accounts.
- Proven track record of driving decisions collaboratively, resolving conflicts & ensuring follow through.
- Strong written and spoken presentation skills with a high degree of comfort with senior audiences. Able to represent the project to the customer.

### Technologies
- Excel, GitHub, Azure DevOps Boards, Jira, Microsoft Project, ServiceNow, SharePoint, UserVoice, Visio

### Certifications
- A relevant Project Management qualification, such as PMP, Certified ScrumMaster, or PRINCE 2.
- Microsoft Certified Azure Administrator Associate, Microsoft Certified Azure Solutions Architect Expert, MCSA Cloud Platform Solutions Associate, MCSA Linux on Azure Solutions Associate, AWS Certified Solution Architect.
- Exam priorities: Implementing Infrastructure Solutions 70-533 (retired), Microsoft Certified Azure Administrator Associate AZ-103, or AZ-102 (retired), or AZ-100 (retired) and AZ-101 (retired); Architecting Azure Solutions 70-535 (retired), Microsoft Certified Azure Solutions Architect Expert (AZ-300 and AZ-301, or AZ-302).

### Project Experience Types/Qualities
- 5+ years of successfully building and shipping products, cross-functional team relationship building, and consistently meeting targets.
- 5-7 years of experience delivering high-quality customer service and feedback, and on-time product delivery.
- 5+ years of demonstrating the ability to write functional specifications from business requirements.
Aligning Resources

As you are building out your hiring plan, consider these resource mappings for the Microsoft cloud practices and the number of individuals based on roles that you need on your team.

- In the following tables, we provide some guidelines on how many technical employees you should consider based on the practice sizes defined below: Small – The minimal set of resources that you would need to say that you have that respective practice
- Medium – the number of resources you should have to support 2-3 small to medium projects concurrently
- Large – the number of resources you should have to support 3-5 medium to large projects concurrently

Resourcing Considerations

<table>
<thead>
<tr>
<th>CLOUD APPLICATION DEVELOPMENT</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solution Architect</td>
<td>1</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Software Developer</td>
<td>2</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Automation Engineer</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Cloud Administrator</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Security Architect</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Identity Solution Engineer</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Security Analyst</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Compliance Officer</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Data Scientist</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Data Architect</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Data Analyst</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Data Developer</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Service Delivery Manager</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Technical Program Manager</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Cloud Support Engineer</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DATA PLATFORM</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solution Architect</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Software Developer</td>
<td>1</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Automation Engineer</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Cloud Administrator</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Security Architect</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Identity Solution Engineer</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Security Analyst</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Compliance Officer</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Data Scientist</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Data Architect</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Data Analyst</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
To augment these technical resources, you’ll also need to fill customer-facing sales, delivery, and support roles.
IDENTIFY ENGAGEMENT RESOURCES

The technical team for any cloud-based practice typically consists of the following members.

- Technical Sellers: Technical individuals with strong communication skills and competency in the technology being presented to the prospective customer.
- Customer Success Managers: Individuals present throughout the sales process and act as a primary point of contact for the customer.
- Solution Delivery: The resources that help implement the solution for the customer.
- Support: The resources that assist the customer outside of solution delivery.

IDENTIFY AND FILL THE GAPS

Now that you understand what is required by the technical team to deliver your solution, examine your current team and identify the skills that are missing. With this list in hand, consider which positions to hire and which to train. Some of these capabilities would represent incremental learning for an existing team member or they could be quickly acquired. For these, you should consider training the existing team. Some skills may be completely foreign to your team and may require significant training prior to engaging with customers. For these, you should consider hiring either additional full-time staff or contractors to fill the gap.
Geographic Expansion

Moving into new markets and building a local staff will require you to understand and work within the regulations of those markets. You’ll be faced with several options for hiring an onboarding staff, from hiring in-country talent, to partnering with local firms, outsourcing and relocating employees from other regions.

This can present unique challenges for building teams that align with your company culture and mission. Your ability to scale expertise to new regions will directly impact your profitability and growth. It may be more cost-effective to use remote talent for a period of time until you can onboard and train new teams.
Partnership Opportunities

Customers aren’t the only ones outsourcing their managed services. Partners are also in a bind for finding qualified and skilled talent for many cloud technologies. If you are finding it impossible to find affordable, skilled talent to hire and it’s too timely and costly to train individuals to meet your requirements, your next possible option is to outsource. Technology outsourcing has been around for over 20 years and companies that have figured out how to make it successful have also had organizational success.

There are many ways to approach outsourcing, the acquisition of talent outside the company payroll. Some partners have had great success partnering with other trusted Microsoft Partners, or consulting companies that are outside the partner network. Based on the cost of sourcing local talent, other partners find it more cost-effective to “offshore” or “nearshore” particular roles.

Partner to Partner

Working with other partners can provide you with skills and domain knowledge to complete or expand your solution, expand your customer base or geographic reach, leverage joint marketing, or provide ongoing customer support more efficiently. In most scenarios, working with other partners allows you to focus on your own core strengths. Partnerships, when done well, help to reduce the cost of going to market, and build your market reputation and market share.

Outsourcing

WHAT SHOULD YOU OUTSOURCE?

The following chart shows main technical job roles discussed in this playbook and their outsourced percentages based on the Microsoft Hiring and Onboarding Playbook Study. The reasons for outsourcing vary but a few examples for doing so could be due to a scarcity of talent in the market, a new regulatory requirement such as the General Data Protection Regulation (GDPR), or a specialization or skill in a specific geography.

<table>
<thead>
<tr>
<th>ROLE</th>
<th>% Outsourced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Developer</td>
<td>29%</td>
</tr>
<tr>
<td>Data Scientist</td>
<td>27%</td>
</tr>
<tr>
<td>Software Developer</td>
<td>25%</td>
</tr>
<tr>
<td>Security Analyst</td>
<td>24%</td>
</tr>
<tr>
<td>Data Analyst</td>
<td>20%</td>
</tr>
<tr>
<td>Security Architect</td>
<td>19%</td>
</tr>
<tr>
<td>Identity Solution Engineer</td>
<td>19%</td>
</tr>
<tr>
<td>Data Architect</td>
<td>19%</td>
</tr>
<tr>
<td>Solution Architect</td>
<td>18%</td>
</tr>
<tr>
<td>Data Engineer</td>
<td>17%</td>
</tr>
<tr>
<td>Technical Program Manager</td>
<td>14%</td>
</tr>
<tr>
<td>Compliance Officer</td>
<td>12%</td>
</tr>
<tr>
<td>Cloud Support Engineer</td>
<td>12%</td>
</tr>
<tr>
<td>Automation Engineer</td>
<td>11%</td>
</tr>
<tr>
<td>Service Delivery Manager</td>
<td>6%</td>
</tr>
<tr>
<td>Cloud Administrator</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Several partners we interviewed also reported outsourcing more than technical roles, including other functions like marketing and operations to gain quantities of scale advantages.

**KEYS TO OUTSOURCING SUCCESS**

When done properly, outsourcing allows you to take advantage of gained efficiencies with differing time zones, and potentially unlock cost savings and profit increases. The following are suggestions that can increase your success when outsourcing:

- Inquire if your outsourcing partner is ISO certified, this can indicate their commitment to quality
- Ensure that you include specifically defined, measurable milestones and deliverables in your statements of work
- Educate your team on the process of engaging with the outsourcing partner, including cultural awareness, working hours to collaborate, etc.
- Implement SCRUM and Agile sprints to keep status and progress of your outsourced teams on track
- Enable a team environment of trust and transparency

**OFFSHORING**

In many markets, you can expect to pay a premium for candidates with in-demand cloud skills. If salaries are too high for these individuals, you may need to look to other sources such as outsourcing and offshoring to meet your needs. Based on a 2018 CareerBuilder survey, 23% of employers plan to hire workers from other countries.

If you are new to outsourcing and offshoring, it is worth talking to other partners and getting a perspective on how they have successfully implemented their relationships. Here are some of the common challenges you may find with offshoring:

- Currency exchange
- Language barriers
- Local regulatory requirements
- Security and technology access
- Unclear statements of work
- Communication and workstyle differences
- Attrition and turnover
- Time zone gap issues making meeting hard to coordinate
- Customers not allowing non-employee resources on a project

**WHERE SHOULD YOU OFFSHORE**

In the past 20 years, many pools of talent have emerged for outsourced technology talent in countries like India, China, and Russia. Over time the cost of those resources has increased allowing other talent resource pools to emerge in places like Malaysia, Thailand, Brazil, and Indonesia.

Although these countries have been popular for outsourcing talent over the past few years, several others are emerging in countries such as Argentina, Bulgaria, Egypt, Philippines, Mexico, and Colombia, as the costs of the offshoring to other countries continue to increase.
Aligning Talent to Competencies

To ensure your technical staff has the expertise needed for various roles, use the skill levels aligned with Microsoft Partner Network’s required competencies.

<table>
<thead>
<tr>
<th>SOLUTION AREA</th>
<th>APPLICABLE COMPETENCIES</th>
</tr>
</thead>
</table>
| Cloud Application Development | • Application Development  
                                   • Application Integration  
                                   • DevOps  
                                   • ISV                              |
| Cloud Infrastructure        | • Datacenter  
                                   • Cloud Platform                     |
| Data Platform & Analytics   | • Data Analytics  
                                   • Data Platform                          |
| Business Applications       | • Cloud Business Applications  
                                   • Cloud Customer Relationship Management  
                                   • Enterprise Resource Planning           |
| Mobility                    | • Enterprise Mobility Management  
                                   • Windows and Devices                  |
| Productivity                | • Cloud Productivity  
                                   • Small and Midmarket Cloud Solutions  
                                   • Collaboration and Content  
                                   • Communications  
                                   • Messaging  
                                   • Project and Portfolio Management      |
| ISV                         | • Application Development  
                                   • Application Integration  
                                   • DevOps  
                                   • ISV                                  |
Hiring Industry Expertise

In addition to technical skills, domain knowledge and expertise become increasingly valuable as you differentiate your services around industry or functional processes.

EXAMPLES OF THESE TYPES OF SPECIALIZATION

- Vertical specialization: manufacturing, banking, retail
- Functional process specialization: accounting, human resources, marketing campaign management
- Technology specialization: systems management, analytics, enterprise resource planning

Think about it this way; if there is lack of differentiation in the market owing to approaches like verticalization, then price becomes the primary differentiator between you and your competition. This can erode your margins and trap you in a business they can’t afford to invest in as prices race to the bottom to win customers.

Establish your company as an expert in your selected areas. You can also focus on a specific technology or become known as an early adopter and technology leader. But the real value comes from IP or expertise in an industry, vertical, or business process. The combination of adding IP to a vertical or business process expertise makes that advantage even more powerful.

Our research with partners suggests mastering one specialization before adding additional ones. We understand that it is easy to be distracted, by saying “yes” to every request, and by diversifying into too many offerings. But in the long run, it is better to say “no” to those projects that are outside of your focus. Partners have shown benefit from having a strict focus on one key solution and growing by expanding one vertical at a time. Less is more – it is better to be develop an expertise with marque customers in one vertical than being average in several.
Hire

Recruit, Hire, Onboard, and Retain Talent

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Executive Summary

In this section, we will share partner best practices for hiring and onboarding new employees, including the steps of interviewing, assessing, and making the offer to your selected candidates.

As part of the hiring processes, we’ll touch on why it is important to consider alternatives such as outsourcing and offshoring due to the ever-growing global economy.

It is also important to have a structured hiring process to drive efficiencies and create a good impression for the candidate. This includes many aspects of the interview process including applications, interview questions, candidate evaluation.

As part of a structured hiring process, it helps to have applicant tracking systems in place to manage the steps and compare inputs. The candidate evaluation process can be long and complex so eliminating redundancies will speed your time to hire and show candidates that you are professional and prepared.

See how successful partners set up interview teams and the key factors they evaluate in the interview process. You’ll get a feel for the types of questions put to candidates and how partners assess the technical and soft skills needed to perform effectively in their organizations.

And when it comes time to extend an offer, you’ll see the common considerations and necessary information that you’ll need to collect to make a mutually agreeable proposal, including compensation strategy and benefits.

Top 5 things to do

Turn your hiring and interviewing into a super efficient process that delivers high quality candidates that stay with you for many years to come.

- Develop a structured hiring process
- Create a candidate evaluation process
- Leverage tracking systems
- Understand key technical and soft skills
- Define your compensation strategy
Hiring

Potential employees experience your company for the first time as they journey through the hiring process. To ensure you make it a positive experience for new hires, it is important that you build an organized hiring process. By carefully following a repeatable hiring process that tests for the competencies and hard/soft skills required to deliver in a cloud-based practice, your organization will achieve the following:

- **Minimize expensive hiring mistakes** -- Beyond base salary compensation and external training costs, new hires require a significant amount of management and subject matter experts’ time.
- **Attract higher caliber candidates** -- Benchmarking competencies, behavioral traits, communication skills and other proven hiring criteria leads to more accurate job descriptions and a more consistent and efficient interview process.
- **Accelerate new hire effectiveness** -- Leaders will have the information they need to optimize and adjust the onboarding process, as well as focus their coaching efforts on specific competencies and skills.
- **Build a long-term candidate funnel** -- Leveraging social media tools and industry channels to attract top talent on a continuous basis provides a steady flow of promising new applicants.

### HIRING PROCESS COMPONENTS

Once you’ve identified the business need and secured budget support, it’s time to begin the hiring process. For efficiency, consistency, and fairness, we recommend that you put some structure to this process. At a minimum, a typical structured hiring process include the following activities:

- **Define the role**
  - Develop a job description with key objectives of a successful first year
  - Define skills, traits and qualifications for the ideal candidate
- **Source candidates**
  - Determine recruiting resources
  - Share job internally
  - Post job externally
- **Filter applicants**
  - Establish filter criteria
  - How various skills, traits and qualifications are weighted in determining who to interview
- **Interview process**
  - What is your candidate profile?
  - When/How should we evaluate the candidate?
    - Facilitate internal stakeholder/senior management participation
  - Interview guide (questions you can/cannot ask)
  - Predefined set of interview questions for interviewers
  - Tool for interviewer feedback
  - Interview method (phone, in-person)
- **Offer**
  - Extend the offer
  - Negotiate salary and benefits
- **Hire**
  - Formally accept the signed offer letter
  - Start the onboarding process

![New Hire Onboarding Process](image)

Over half have a flexible onboarding process that includes some guidelines (55%); a fifth (20%) have no structured process.

---

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

aka.ms/practiceplaybooks
HIRING METRICS

The hiring process is an investment of time and resources and to ensure your structured hiring process is meeting goals, you’ll need a way to measure successes and identify gaps or areas that need refinement. We recommend monitoring the following metrics as part of your interview process:

- **Time to fill** – The time between identification of a candidate and the acceptance of an offer is typically 3-6 weeks and can vary greatly depending on your hiring process and the type of position that you are hiring for.
- **Time in an interview step** – The time a candidate takes in each step of the interview process, which includes items like phone screens, submission to manager, interviews, etc.
- **Quality of hire** – those that do not exist within a set period, such as 6 months
- **Business acceptance percentage** – how satisfied the hiring manager is with submitted candidates
- **Offer acceptance** – if you are getting quality candidates, yet they are not accepting your offers, this can be a huge warning sign
- **Application drop off rate** – those that do not complete the application process
- **Candidate Net Promoter Score** – Measures the willingness to recommend your company for other job roles. Conversely, you can use sentiment analysis tools to discover any negative feedback trends in social media.
- **Cost to acquire** – as it implies, the cost to acquire new hires. Most partners surveyed spend under $2,000 USD per hire.

<table>
<thead>
<tr>
<th>Median number of candidates applying to open positions at organization</th>
<th>Median number of candidates interviewed prior to hiring for a position</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>5</td>
</tr>
</tbody>
</table>

Most (63%) spend under $2,000 USD (per hire) in the hiring process

APPLICATION/TALENT TRACKING SYSTEMS

If you do not have a structured hiring process and the thought of managing all the steps above seems a bit daunting, you are not alone. Several partners we interviewed utilize application tracking systems that manage every step of the hiring and interviewing process.

One such system that you can utilize as a Microsoft Partner is [Microsoft Dynamics 365 for Talent](https://aka.ms/practiceplaybooks). This module of Dynamics 365 allows you to manage your talent pipeline and keep employees engaged. Features of this cloud-based talent management application include:

- Talent acquisition experience
- Onboarding guides and workflows
- Continuous learning
- Talent insights via business intelligence and predictive analytics
- Integration with LinkedIn Talent Solutions
Candidate Evaluation Process

Once you have identified your potential set of candidates, determining the one you want to extend an offer can be a lengthy process. Having realistic expectations for how long it takes to find the right candidate should be factored into your practice strategy. A structured approach with standardized assessments and interview questions can ensure a compliant and comprehensive evaluation approach that eliminates redundancy and enables the hiring manager to cross-compare interview results.

The evaluation process is commonly made up of several well-defined stages:

1. **Application Sent**
2. **Applications Received**
3. **Applicants to Interviews**
4. **Interviews to Offers**
5. **Offers to Hires**

**CANDIDATE APPLICATION**

The application process for candidates should be as painless as possible. If you use a job or career site, they typically fill out the application based on a user’s profile. Based on a CareerBuilder report, candidates won’t spend more than 20 minutes completing an application. 76% also want to be informed how long the application process is expected to take. 66% say they wait up to two weeks for a callback before they move on to another opportunity. These statistics point to the need for your interview process to be fast, efficient and easy for applicants, otherwise you can lose out on viable candidates.

The time between identification of a candidate and the acceptance of an offer can vary greatly depending on how rigorous your hiring process is and the type of position that you are hiring for. On average, you can expect the typical interview to job offer cycle to take 3-6 weeks.

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
BEHAVIORAL INTERVIEW QUESTIONS

The majority (78%) of Microsoft partners interviewed report incorporating behavioral questions during interviews. These questions are designed to measure attributes such as teamwork and relationship building, communication and influence, creative and analytical thinking, and integrity and ethics. They can also screen for leadership capabilities, planning and organization skills, and risk taking and decision making. Examples of these interview questions include:

- Describe a stressful situation at work and how you handled it.  
- How do you handle mistakes?  
- Tell me about how you worked effectively under pressure.  
- What do you do when you work on multiple projects or do you prioritize?  
- How do you handle a challenge?  
- Give an example of a goal you set and tell me how you achieved it.

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

Be sure that you understand your local regulations governing which questions you can and cannot ask during an interview.

Not only should the candidate be asked questions, the candidate should ask questions about the role. It provides insight into the thought process, passion and other behavioral characteristics.

INTERVIEW TEAM

As you have already learned, determining if a person is a good culture fit is one of the most important aspects of the interview process. To evaluate a broader range of capabilities and behaviors, have the team members that the candidate would work with also interview the candidate. The perspectives of existing team members will each provide varying assessments of technical capabilities, intelligence, and behavioral and cultural fit. Everyone participating in the interview and selection process should record his/her impressions on a candidate evaluation form. Instruct each person to rate the relevant candidate competencies on a scale of 1 to 5 (poor to excellent) for each hiring activity, in addition to documenting subjective observations.

The number of members on the interview team and their responsibilities vary from company to company, but the roles are typically the same. Consider making the following individuals a part of your interview team:

- Hiring manager
- Hiring manager peers
- Internal and external customers
- Future team members
- Stakeholders outside the team

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
An interview is as much a sales activity as it is them selling us. One of our biggest value propositions is our culture, and if that doesn’t come across in the interview we may leave people wondering why they want to work here.

PEDRO ALFONZO
VP Service Delivery
ProServeIT
Candidate Evaluation

Astute partners understand the needs of agile teams who have a range of skill sets that can be rapidly assembled to address a customer’s ever-changing needs. With highly ambiguous customer requirements, your team needs to be comfortable in addressing these situations. Finding people who can thrive in this environment requires appropriate screening processes across skills, cultural fit, and operational acumen. Even the ability of a potential hire to handle new and unarticulated issues has become an important attribute in hiring decisions.

To accurately evaluate candidates, you must observe them demonstrating the skills and capabilities they will need to succeed in their new role. Structuring an evaluation process around interview activities that mirror the respective workload or engagement process very quickly sheds light on leading candidates, while providing valuable input for the onboarding and coaching phases.

In the Microsoft Cloud Practice Development Study, Azure partners reported the following factors as top candidate evaluation criteria, with the three most important factors being work history, cultural fit and years of experience.

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<th>Factor</th>
<th>Total (n=1136)</th>
<th>SMB (n=886)</th>
<th>Enterprise (n=250)</th>
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<tr>
<td>Work history</td>
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<td>68%</td>
<td>74%</td>
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<tr>
<td>Cultural fit</td>
<td>43%</td>
<td>40%</td>
<td>53%</td>
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<td>Years of experience</td>
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<td>Professional certifications</td>
<td>32%</td>
<td>34%</td>
<td>22%</td>
</tr>
<tr>
<td>Referrals</td>
<td>28%</td>
<td>29%</td>
<td>26%</td>
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<tr>
<td>Professional training received</td>
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<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Reputation through community</td>
<td>16%</td>
<td>15%</td>
<td>19%</td>
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<tr>
<td>Formal education</td>
<td>13%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Contract to hire or other means to test skills “hands-on”</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Publications</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Awards received</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Attitude</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: Microsoft Cloud Practice Development Study, MDC Research, November 2016
Evaluation Process

A popular approach for evaluating and finding the most qualified candidates is the Topgrading methodology. It is comprised of 12 steps that start from the interview through to the offer. The goal of the methodology is to reduce the "mis-hire" rate. It assumes that a standard interview process is likely to evoke dishonesty from candidates that may make them seem like a fit for a role. The 12 steps of the Topgrading include:

1. Measure and improve the current hiring process
2. Create a job scoreboard
3. Recruit candidates
4. Screen candidates with work history forms
5. Conduct telephone interviews
6. Do competency interviews
7. Conduct a topgrading interview
8. Provide feedback and coaching to interviewers
9. Write a summary
10. Have the candidate arrange reference calls
11. Coach the new hire
12. Measure hiring success annually

The more important aspect of the process is the job scorecard. This starts with understanding what are the skills and criteria necessary for the role and comparing all candidates against those 15-20 specific points. For cloud-based roles, this playbook defined 16 cloud-based roles in the previous section with the top skills required from the industry today. You can use those as a starting point for building your job scorecards.

SOCIAL MEDIA PRESENCE

Based on the 2017 MRINetwork Hiring Sentiment study, over 80% of employers and 90% of recruiters review social media profiles for insight on candidates with 85% stating that the content within a profile is extremely important. Most candidates realize that their social media presence is reviewed as part of the interview process, but there are a few (22%) that don’t feel an online presence is important. According to CareerBuilder, 41% of employers say they might not interview a candidate if they can’t find them online. Candidates should have a compelling online profile and ideally some published or curated content. Potential candidates can be pre-evaluated online for professionalism, writing style and industry/focus contacts. They can also be vetted for ‘job hopping’. Before reaching out to a potential candidate, review their online profiles to evaluate their online “brand”, which is exactly what your prospects will do with your company profile.

An employee is a direct representation of your company and its brand, you should be conscious of individuals with social profiles that may offend others and periodically review and evaluate the social profiles of those that currently work for you.

BACKGROUND, DRUG TESTS AND CREDIT CHECKS

Employers can take preemptive steps to evaluate a candidate’s history. Background/credit/reference checks and drug testing (as allowed under local laws) are common methods to help validate the character of the candidates you may potentially hire and help reduce business risk.

REFERENCE CHECKS

It is quite common that resumes may have a few “extra” things on them that may not necessarily be true. The most common source of candidates is referrals which provides the highest rate of viable candidates and hires. However, it also can lead to misleading or over-selling of an individual’s abilities. No matter the source, you should always ask for and verify a candidate’s references.

Some partners take references very seriously and use the Thread of Reference Checking (TORC) as part of the methodology. TORC asks each candidate to arrange the calls with their references.
Assessments

There are several ways to verify the technical and aptitude levels of candidates.

TECHNICAL ASSESSMENTS

Using standardized tests for new or less experienced hires allows you to place them in the right role and set them up for success. If new hires are ready and willing to learn, the rest can come with experience, and ongoing learning. Technical assessments offer a great way to evaluate whether a candidate’s capabilities align to the role for which you are hiring.

Keep in mind that many of these cloud-based services are new and evolving and you should not expect candidates to know or be an expert in everything a job role may require. You should expect some on the job and supplemental training for both new and existing staff.

APTITUDE EXAMS (APTITUDE)

General aptitude tests determine core skills like math and comprehension. They don’t test any technical skills such as programming C# or cloud architecture design but look at skills in general. These give you a sense of the common knowledge level of the candidate. Some examples of items in a basic aptitude test include:

- Logic – problem solving and reasoning
- Management – planning, use of time and resources
- People – ability to train and counsel, mentor, interaction
- Mechanical – working with tools and equipment
- Communication – working with others, listening, speaking
- Judgement – making clear and decisive decisions
- Attention – focusing on problems at hand
- Thinking – working with new ideas, creative thinking

In the Microsoft Hiring and Onboarding Playbook Study, partners reported basic in-person questionnaires and on-site exam or exercises as the most common tools.

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Extending an Offer

After finding a qualified candidate, and conducting the necessary background checks, an offer is extended. At this juncture in the process, it will be important to gather the necessary information before presenting the offer.

Items you should be aware of before extending a job offer:

- Candidate’s desired compensation
- Candidate’s desired start date
- Candidate’s relocation requirements
- Expected hours per week
- Expected job title
- Long term career goals
- Expected company cultural requirements
- Citizenship requirements
- Potential non-compete agreements
- A sense for what the candidate views as the most important aspect of their future potential company and career

Many of these data points can be collected during the interview process, but if you find you are missing any of this information, ensure that you gather it as early as possible to prevent any misunderstandings at this stage. Having this information early in the process can help prevent investing time and money into a candidate that may never accept your best offer.

DELIVERING THE OFFER

Even though you are offering a job to a candidate, this does not mean that they are going to accept it. Based on our 2018 Microsoft Partner MDC survey, over 51% of candidates have more than one job offer. To prevent this from occurring, invest the time upfront to evaluate the candidate’s interest and commitment level prior to delivering the offer.

![Frequency of Candidates Having Multiple Job Offers](chart)

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
COMPENSATION STRATEGIES

Compensation plans are a critical lever in driving strategy a company puts forward and can facilitate the transformation required in order to drive long-term success. Many successful partners that have transformed their business models from traditional on-premises to recurring revenue model aligned their employee compensation plans to reward a cloud-based approach.

- When building a structured compensation strategy, make sure your strategy is fair, consistent, and defendable. Consider the following: **Budget allocation** – Percentage allocated to salary and benefits
- **Fixed versus variable pay** – Percentage of pay should be variable verse a fixed amount
- **Salary ranges** – Define job roles, compare to other organizations, set ranges using salary.com or payscale.com
- **Salary audits** – Ensure that current employees are at same level as new employees
- **Benefit packages** – Health, retirement, tuition reimbursement, etc.
- **Legal compliance** - Federal and state legal requirements, minimum wage, overtime

In the race to attract the top talent, it is a common mistake to over spend by targeting the top percentile of the going market rates. It will be important to determine if your company can afford to pay higher base salaries or to incorporate a variable pay structure based on individual and company performance. One approach is to align on fixed based pay with a higher potential on a variable bonus amount.

In the Microsoft Hiring and Onboarding Playbook Study, partners surveyed indicate the following considerations for salary and compensation:

- Location
- Certifications
- Type of industry
- Government security clearance
- Work experience and education
- Metrics such as low, average and top line salaries for specific position

<table>
<thead>
<tr>
<th>Top Resources Used to Determine Competitive Job Offers and Market Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational compensation data</td>
</tr>
<tr>
<td>Online compensation data</td>
</tr>
<tr>
<td>Internal compensation specialists</td>
</tr>
<tr>
<td>(n=275)</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

It may be important to point out to a candidate that their salary offer may be higher for a job in a different location, but their cost of living will also be higher. This also may be true when you offer benefits that they would have to pay for at another company.

COMPANY EQUITY

For publicly traded companies, providing company equity is a common and widely accepted practice. The benefits of offering stock and ownership in your company include:

- **Stock vs. cash** – Building a practice can be cash intensive. By giving out unvested stock options, you can keep your cash ready to reinvest.
- **Attract talent** – By offering stock that vests over 5 years, you can attract employees by providing stock allocations tied to performance.
- **Retain talent** – When employees feel they have a personal and vested interest in the success of the business, they have increased performance, drive profitability, and stay longer.
Granting ownership can be a complicated process. The specifics and terms permutations of stock and ownership contracts can be infinite. Things to consider when issuing stock options:

- Stock distribution plan
- Shareholder approval
- Right to terminate employment
- Right of first refusal
- Vesting
- Exercise pricing and timing
- Transferability
- Tax implications

**BENEFIT NEGOTIATIONS**

In the past, it was common in a benefit package to simply receive health insurance, a retirement plan, and some paid vacation. In today’s world, technology companies and startups have driven a trend to provide an even more impressive set of benefits. These can include things such as:

- On-site cafeteria
- Flexible work locations
- Child care
- Paid maternity leave
- Gyms and concierge services
- Insurance other than health
- Student loan reimbursement
- Wellness programs
- Profit sharing
- Reimbursement to attend professional conferences
- Tuition reimbursement
- Employee assistance programs
- Subsidized transportation programs

Given all the possible options an employer could provide to an employee, it is important to understand what is most important to your employees. This can be difficult to determine as geographic and other demographic features of your various work locations can affect what is desired. Having a generic company benefit option when you have a global footprint may not serve you well in terms of retention and turnover. Conversely, smaller companies may not be able to provide options such as 401K with employer match programs.

Based on the 2017 MRI Network Hiring Study, recruiters emphasize advancement opportunities and the compensation package as the most important factors when a candidate accepts an offer, with compensation being the most important. In most cases, a job offer is not acceptable because of the compensation package. This points to the importance of ensuring that you are familiar with the latest compensation trends and baselines to ensure that you aren’t missing out on qualified candidates due to a non-competitive benefits package.

Based on the 2017 Accenture GenZ study, 45% of graduates graduate with student loan debt with only 13% reporting that their employer provided student loan debt assistance. This metric points to a higher probability that you can attract new graduates by offering student loan assistance programs. Consider the following for attracting more candidates:

- Offer full-time flexible working locations
- Offer profit sharing
- Offer student loan assistance programs
- Offer the most competitive compensation package
CANDIDATE ACCEPTANCE (OR NOT)

Always require a candidate to sign an offer letter and have it returned by a specific date. It is important not to make any assumptions that a candidate has received the offer or has committed to the role after a verbal acceptance.

![Frequency of Candidates Accepting a Role at Another Company](chart)

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

NOTIFYING OTHER CANDIDATES

Once you have selected a potential candidate, it is important to withhold from informing other candidates until you have received a formal offer acceptance from the selected candidate.

Additionally, it is important to follow up with each candidate you interviewed to provide them with status of their application and gather feedback on your interview process. Ensure that you are respectful and authentic in your communications for future opportunities or referrals.
Onboard and Develop

Recruit, Hire, Onboard, and Retain Talent

aka.ms/practiceplaybooks
Executive Summary

Your potential team member has accepted the offer, how you onboard them can impact how fast they become a productive member of the team and help you achieve your growth goals. For that reason, we recommend a comprehensive and structured onboarding process which includes all processes, policies, tools, training and career development for new hires to acclimate and begin contributing to your success.

Utilizing an onboarding checklist for Human Resources, hiring managers and team members can reduce that time to productivity. That checklist should reiterate the company mission and its culture as an important first step in their journey. Additionally, reinforcement of the practice objectives, should also be included.

The pace of change for cloud practices requires you to develop a culture of learning where employees are motivated to acquire new skills and certifications. Learning and development programs are essential to compete in the landscape of digital transformation, retain talent and expand your services.

And don’t forget to help new hires develop the soft skills needed to thrive in your organization in addition to technical skills require to perform their duties.

Top 4 things to do

- Understand benefits of structured onboarding
- Define organizational objectives
- Develop onboarding checklists
- Prioritize learning and development opportunities

Having a structured onboarding process which is integrated with your corporate community can generate substantial advantages.
Structured Onboarding

Most large organizations have a very structured onboarding process in place to help new hires find the people, resources, and training they need to become productive in their roles. Structured onboarding is designed to help new hires generate corporate value in less time.

Once hired, employees with highly sought skills expect to quickly make a difference. Your ability to successfully onboard, motivate, and recognize your new talent is key, as is creating aspirational career paths that focus their training and development.

Without a culture of learning, your best people will look elsewhere to further their careers. So, providing access to the training, assessment, and validation of new skills becomes strategic for digitally enabled partners. Your career development initiatives can quickly become a competitive differentiator and further attract the right applicants as your needs expand.

And learned skills are only part of the equation. To be competitive, your employees will need to thrive in an agile environment, respond quickly to ambiguous problems, and fail and iterate as part of an accepted process. Hiring strategies of digitally transformed partners emphasize cultural fit when evaluating prospective employees.

Onboarding Process

They are motivated to be successful, open to learning new strategies, and eager to engage with your prospects. Numerous studies show that having a well-structured onboarding process improves the overall satisfaction of your new hires and lowers the chance they may depart your organization prematurely. The greatest risks to successfully onboarding cloud professionals occurs within the first two weeks of employment.

Ultimately, a new hire’s success is directly tied to how comprehensive they found their initial orientation and socialization onboarding experience. Based on the 2018 Stack Overflow Developer Survey, 30% of developers expect co-workers to be productive in less than a month, but an overwhelming majority (44.7%) expect them to take 1-3 months.

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Onboarding programs can increase retention and improve employee performance. By implementing a structured onboarding process, your new employees are likely to feel included and be productive sooner, which is positive and beneficial to both the employee and company.

To prepare new hires, be ready with:

- the tools, access, and resources to enable productivity
- a comprehensive onboarding roadmap that clearly outlines their one-, seven-, thirty- and ninety-day action plans and expectations
- regular checkpoints during the onboarding cycle

### Top Facets of the New Hire Process

<table>
<thead>
<tr>
<th>Facet</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informal introduction to team</td>
<td>59%</td>
</tr>
<tr>
<td>Informal mentorship program</td>
<td>44%</td>
</tr>
<tr>
<td>Formal introductory process to welcome them to the team</td>
<td>41%</td>
</tr>
<tr>
<td>Onboarding checklists</td>
<td>38%</td>
</tr>
<tr>
<td>Formal process to introduce them to their role</td>
<td>36%</td>
</tr>
<tr>
<td>Formal mentorship program</td>
<td>18%</td>
</tr>
</tbody>
</table>

(n=275)

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
ONBOARDING CHECKLISTS

Onboarding checklists help streamline the process and support the structured onboarding objective. A good checklist should identify what activities occur and when, and who is responsible for them. This makes the process easier to visualize and decreases the likelihood that something is overlooked. A standard checklist should span the onboarding timeframe.

Typically, you should have two checklists, one for the hiring manager and one for the new hire. At a high level, the onboarding checklist should focus on the following categories of tasks:

- Human resource requirements, i.e. payroll and benefits enrollment
- Job schedule, duties and expectations
- Technology access
- Socialization
- Training and development

A typical set of tasks for a hiring manager (administrative):

- Confirm start date, time, location
- Identity computer needs
- Identity system access
- Add regularly schedule meetings to manager and employee calendar
- Assign a mentor
- Prepare first two full weeks
  - First day
  - Introduction to tools
  - Orientation of the office
  - Meet the team
- Plan the first assignment

A typical set of tasks for new employee:

- Tour of the office (common areas, cafeteria)
- Complete HR paperwork (benefit, direct deposit forms, etc.)
- Acquire computer and credentials
- Meet peers and office mates
- Explore company internal resources (intranet sites, etc.)
- Attend orientation training
- Receive first project
- Review expectations for week, month and next three months
- Complete required training
- Meet customers (as applicable to role)
- 30-day assessment
- 60-day assessment

At the end of the formal onboarding process, both the new hire and manager should evaluate the onboarding process. This feedback can be used to inform improvements the onboarding process.
ONBOARDING GUIDES

Having a comprehensive guide that outlines your new hire’s tasks and anticipates needs and questions shows your strong commitment to their success. The onboarding kit should include the following items:

- Link to Human Resources portal with benefits, career, and compensation information and tools
- Dedicated in person onboarding event with diversity and role-specific training
- Online training for your product and service offerings
- Technology setup resources and support contacts
- Company organization chart
- Mentorship program details
- First week schedule
- Employee handbook

EMPLOYEE HANDBOOK

An employee handbook establishes policies and procedures to ensure that issues are dealt with in a fair and consistent manner. Employee handbooks contain information such as, company mission, vision and values, policies and procedures, code of conduct, benefits, and perks. A code of conduct is an explicit set of principles, values, standards and rules that forms the core of the company’s culture and helps employees make decisions when faced with moral or ethical considerations.

New regulations like the General Data Protection Regulation (GDPR) are becoming more commonplace and cause many companies to modify their employee handbooks to cover privacy and compliance aspects of employee information. Be sure that you review any necessary changes you may need to support your local regulations.
Training & Readiness

Fostering a culture of learning within your organization results in a workforce that is motivated to acquire new skills and the latest, in-demand certifications, which furthers careers and improves staff retention. Programs that help retain and retrain quality people can have a significant impact on your business by increasing retention rates and helping maintain a consistent focus on company goals.

Learning and Development Programs

Our survey of partners indicates that most (77%) lack a formal training department, and more than allocate less than 10% of employee time to ongoing learning and development. It comes as no surprise then that assessing, and motivating are top challenges in the onboarding and training process. This is especially problematic when the same survey shows that a lack of continuous training yields retention of less than 3 years and a lack of participation in professional development opportunities yields retention of less than 2 years.

Learning and Development (L&D) programs are the core to driving your corporate learning culture and providing the training necessary to build your cloud practice(s). L&D programs typically have dedicated managers who are the coaches and the mentors of the organization. They help create an environment for continuous learning and guide employees to learning resources to develop their careers and close skill gaps.

Most partners lack a formal training dept. (77% have no internal training dept.)

Over half (58%) allocate less than 10% of employee time to ongoing learning/prof. dev.

Majority (85%) have a strategy to train and maintain technical staff on cloud technologies

Self study (72%) is the top learning process partners use to train employees

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

By developing a strategic view of training, you create a learning culture marked by well-structured and proactive training and enablement plans. Career development paths should be well-articulated, as should the skills and attributes your employees need to pursue those paths. Self-service options for continuous learning and ongoing certifications should be readily available and aligned to your organization’s overall business and growth strategy.

Continuous learning programs across emerging digital technologies and other disciplines can ensure that your staff is kept up to date on new capabilities and use cases, and how these apply to their specific roles. These programs can guide both HR and individual employees in defining career development paths, with the relevant training needed to meet your company’s strategic and growth objectives.

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MEASURING L&D SUCCESS

Leadership and HR must have data and analytics to continuously assess employee strengths and identify skills gaps to develop the relevant recruiting and training. Data and analytics can also be leveraged to establish policies that attract and keep the best employees, learning opportunities that impact attrition rates, and compensation and employee recognition programs that build loyalty.

Executives say that the success of the L&D program is best demonstrated by its impact on retention and performance metrics, such as:

- Talent retention
- Increase in performance metrics
- Qualitative feedback on employee behavior changes
- Employee completion of learning program

For evaluating employee performance, 43% of partners surveyed indicated that tracking performance over time was the best, and 31% said identifying performance measures by role/department was a best practice.

In addition, having a skills assessment platform can help you to match your resources with your projects. A fifth of partners in our survey had not yet built a skills assessment platform, and of those that had, the biggest barrier to success was dealing with ambiguous evaluation criteria. Most partners stressed that finding an inexpensive platform that can adapt is the main reason for not having such as system in place. If that’s the case, we recommend leveraging third party or training partner resources for managing and assessing your skills development program.

Adaptation to partner organizations (11%) and cost (8%) are seen as the largest potential issues of using a vendor-provided skills assessment system.

(n=212)

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Training Best Practices

Sustaining and growing a cloud practice requires investment in skill development. Our survey shows that partners with formal learning and development programs use a combination of instructor-led and on-demand training methods.

Have structure and invest in skill development to keep experienced employees trained on the latest technologies. In addition to ensuring everyone is properly trained in the day-to-day work, you also need to keep their technical and delivery skills sharp. It is hard to carve out time for ongoing learning, but if you make it part of the daily, weekly or monthly work rhythm, it can become a valued part of your employees’ benefits and integral to their career advancement. The key is to make the learning extremely relevant.

Based on the 2018 LinkedIn Workplace Learning Report, the following can lead to employees spending more time learning new workplace skills:

- Manager directed
- Required learning for promotion
- Peer recommended
- Participation tied to promotion
- Incentives
- Executives have reports on learning progress
- Time spent learning is visible

Additionally, the LinkedIn report found that managers account for 70% of the employee engagement score. Therefore, creating programs that get managers engaged with learning and development is critical to the success of the talent development team. Respondents listed the following reasons for why a manager would recommend an L&D program to their direct reports:

- Help career growth
- Improve skills for role
- Expressed interest in new skill
- Immediate problem to solve
- Gave employees a path to promotion
- System recommended learning opportunities
- Improved employee job performance
- Online learning for learn at your own pace learning
- Company structured learning opportunities
- Senior Management Requested

When it came to guiding managers to encourage employees to train, their motivation to do so is due to the following:
IMPLEMENT SKILLS PROFILES

Providing staff with online portals to manage digital profiles lets employees feel engaged. Once their profile has been established, you can use their digital profiles to find employees with the requisite skills to assign to new projects. The skill profile system must be easy to use and allow for simple and easy adoption. As part of the new hire process, you can make it a required step to fill out their digital profile. This enables the manager to better understand their new employees’ abilities. You can also apply these skill profiles to determine skill gaps and target training at those that need it the most. DiscoverMe is an example of a skills-based employee application that runs on Microsoft SharePoint.

If you can more accurately plan for talent requirements – with technology, location, or vertical industry – you can more efficiently build strength in one area and reduce it in another. This has the added benefit of not overburdening current staff, which can lead to attrition.

CROSS TRAINING

With today’s focus on cloud-based solution development, projects tend to be shorter-lived, and as new customers enter your market, your technical staff needs to be more versatile and agile. Avoid being overly reliant on single staffers with key knowledge by developing a structure that fosters cross-training.

FOCUS ON BUILDING SOFT SKILLS

The 2018 LinkedIn Workplace Learning Report emphasized the importance of soft skills development, with leadership, communication and collaboration as the top soft skills employees need to learn. Based on the report, 92% of executives say that soft skills are equally important or more important than technical skills.

BALANCE TODAY’S CHALLENGES WITH TOMORROW’S OPPORTUNITIES

The 2018 LinkedIn report also shed light on the misalignment between what executives consider important and what internal talent developers are emphasizing. Executives are worried talent developers are focusing on today’s skill demands, at the expense of preventing tomorrow’s skills gaps.

Additionally, executives are also focused on:

- How to train for soft skills
- Identifying trends to prevent future skill gaps
- Understanding the impact of technology
- Consistent global training
- Deliver insights on internal skill gaps
- How to track skill development
- How to access skill competencies

More results from the LinkedIn report to consider:

- 68% of employees prefer to learn at work
- 58% of employees prefer to learn at their own pace
- 49% of employees prefer to learn at the point of need
- 53% of managers would invest more time in encouraging learning for direct reports if it is a path to promotion for employees
- 52% of managers would encourage more learning if they had a system that helped them recommend courses based on specific criteria

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Preparing and Training IT Staff for the Cloud

For IT staff to function as change agents supporting current and emerging cloud technologies, their buy-in for the use and integration of these technologies is needed. For this, staff need three things:

- An understanding of their roles and of any changes to their current position
- Time and resources to explore the technologies
- An understanding of the business case for the technologies

The certification process is a great way to train for and verify a host of high-value skills. Certifications yield both on the job performance benefits and salary improvements for the individual.

| 70% Improvement in on the job effectiveness | Worldwide, certified IT staff see a 9% salary increase over non-certified staff |
| 40% Perform their job faster | In Asia, certified IT staff see a 45% salary increase over non-certified staff |
| 30% Implemented system efficiencies | In the U.S., certified IT staff see a 22% salary increase over non-certified staff |
| 38% Expertise more sought after in organization | Globally, 89% of IT employees possess at least one valid certification |

Source: 2018 Global Knowledge IT Skills and Salary Report

USE THE FOLLOWING RESOURCES AS PART OF YOUR AZURE ONBOARDING FOR NEW AND EXISTING STAFF

- **Azure Training and Certification** provides free online training options including online courses, learning paths, hands-on labs as well as resources to help you find learning partners who can help you achieve your skills development goals using Microsoft Azure services.
- **Microsoft Azure Hands-on Labs** provides free, self-paced labs to help you stay current with Azure. The live environments are fully self-contained. You do not need your own Azure subscription to complete the labs, just log in with a remote desktop (RDP) client and get started.
- **Microsoft Virtual Academy** offers training from the people who helped to build Microsoft Azure. From the basic overview to deep technical training, IT staff will learn how to leverage Microsoft Azure for their business.
- **Microsoft IT Pro Cloud Essentials** is a free annual subscription that includes cloud services, education, and support benefits. IT Pro Cloud Essentials provides IT implementers with hands-on experience, targeted educational opportunities, and access to experts in areas that matter most to increase knowledge and create a path to career advancement.
- **The Microsoft IT Pro Career Center** is a free online resource to help map your cloud career path. Learn what industry experts suggest for your cloud role and the skills to get you there.
- **Microsoft Learning** offers a wide variety of official curriculum on-demand, as well as edX courses that are taught by Microsoft experts, and help you learn through hands-on experiences with a broad reach of Azure technologies.
- **The Microsoft Partner Network (MPN) Learning Portal** provides a centralized interface with training opportunities and certification options organized by products, competencies, certifications, and job role.

Follow a learning curriculum at your own pace to build the skills you need most to stay relevant. Suggested resources to help onboard your team for training success are available in this section.
Sales and Technical Training

Fill a skills gap or improve your team’s skill surface area with sales and technical training.

In our research, we found conferences and paid online training are the most common learning mechanisms.

<table>
<thead>
<tr>
<th>Top Learning Processes Uses with Employees</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Self study</td>
<td>72%</td>
</tr>
<tr>
<td>Certification programs</td>
<td>58%</td>
</tr>
<tr>
<td>Webcasts</td>
<td>53%</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

CLOUD AND ENTERPRISE PARTNER RESOURCES

The Cloud and Enterprise Partner Resources portal provides a source of sales and technical training for partner practices and key areas of specialization. Resources include customer success stories, sales and technical training, tools, engines, and resources available to help build your skills around selling, deploying, and architecting cloud infrastructure and management, cloud application development, data platform and analytics, and security and Compliance solutions.

CLOUD + ENTERPRISE UNIVERSITY ONLINE

Train at your own pace by leveraging the Cloud + Enterprise University Online to build knowledge, stay sharp, and prove your expertise on selling and supporting Microsoft cloud solutions through our live and on-demand webcasts and virtual, instructor-led courses.

MICROSOFT CONFERENCE RECORDINGS

Even if you missed the annual live events, the Microsoft Inspire Conference and Microsoft Ignite conferences provide many of its sessions as on-demand recordings — no conference pass required.

MPN PARTNER TRAINING CENTER

The MPN Partner Training Center provides a simplified experience that offers new role-based learning paths with curated training recommendations based on technical role, skill level, and solutions being developed.

PARTNER COMMUNITY EVENTS, CALLS & WEBINARS

The Microsoft Partner Enablement Blog maintains a schedule of trainings available to partners. Visit often and plan your training calendar.

SMART PARTNER MARKETING

Leverage the Microsoft Smart Partner Marketing site as your starting point for training marketing resources.

LEARNING PARTNERS

Microsoft Learning Partners are available worldwide to help enable your team via live instructor-led technical training. This can be scheduled as a dedicated delivery at your location or virtually using remote learning technologies. Many courses are scheduled as open-enrollment courses, which doesn’t require you to schedule a dedicated class.
Evaluate, Coach & Mentor

Recruit, Hire, Onboard, and Retain Talent

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Executive Summary

Employees look to their managers to provide guidance towards their career goals. Regularly providing them with suggestions and feedback – and soliciting their feedback – helps employees achieve their objectives and provides insights into what drives them to perform.

Mentorships are common coaching method to help the employee and company achieve its common goals. Aligning mentors with an employee’s career goals increases retention.

As you formalize your coaching and mentoring programs, be sure to set program goals and objectives and agree on their success metrics, which can be tracked over time.

Scheduled performance reviews and more frequent check-ins are an opportunity to gauge how employees are contributing to organizational and team goals, while assessing not only what they’ve achieved, but also how they’ve their objectives in keeping with company culture and ethical standards.

Top 4 things to do

Guide managers on how to evaluate coach and mentor employees. Create training programs for managers to utilize a coaching framework that supports measurable, goal oriented, techniques.

- Establish guidelines for evaluation
- Utilize a coaching framework
- Create a mentoring program
- Share wins and case studies
Coaching

Coaching is best done in a helpful, supportive manner, knowing that happy, productive employees contribute more to the overall team and organization. It’s an activity that helps keep the communication open and builds trust, purpose and mutual accountability.

Coaching occurs on two fronts: To help employees put structure around their career goals to grow within the organization; and to help them build confidence and perform best on individual and team projects by understanding their options and expectations for collaboration and communication.

Part of coaching is motivating your team members and showing your own passion for what they can achieve. Motivation helps fuel more learning and exploration and helps them continue their growth on their own.

With the fast pace of creating, growing and managing a practice, finding time to devote to coaching activities can be difficult, and this is where coaching frameworks can be helpful. There are a handful of well-established models that you can follow but they essentially put structure and trackability around achieving goals, making sure the objectives are achievable and measurable, and setting milestones and timeframes.

**COACHING BEST PRACTICES**

- Weekly individual one-on-one check-ins that reinforce company culture and employee commitments
- Use a simple template for one-on-one meetings designed to capture the status of key initiatives and address obstacles
- Encourage “hallway conversations” with other team members for informally bouncing ideas and building collaboration and trust
- Regular team meetings that bring together remote and geographically dispersed team members
- Use tools such as video conferencing, collaboration systems, and mobile productivity applications
- Hold team offsite events to build camaraderie
- Advocate for your employees with your management
- Recognize achievement and encourage team members to do the same
- Use digital channels to keep employees up to date on new team members, team activities, and company news.

Many methods are employed in successful coaching. Microsoft partners indicated the following activities:

<table>
<thead>
<tr>
<th>Coaching Methods</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pair with mentor</td>
<td>77%</td>
</tr>
<tr>
<td>Team meetings</td>
<td>63%</td>
</tr>
<tr>
<td>Online training courses</td>
<td>51%</td>
</tr>
<tr>
<td>Weekly one-on-ones</td>
<td>36%</td>
</tr>
<tr>
<td>Online webinars</td>
<td>33%</td>
</tr>
<tr>
<td>Rotational coaching</td>
<td>26%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Mentoring

When done properly, mentoring programs can increase retention, promotion rates and employee satisfaction. They are broadly applicable across roles, experience levels, and objectives, and can help both the employee and the company achieve their goals.

According to the 2017 MRI Network Millennial Hiring Trends Study, mentorships and opportunities for advancement are tied for 2nd as the most important things Millennials are looking for when joining a company. When asked what coaching methods partners use, pairing employees with a mentor was the number one method.

Mentoring programs should have clear objectives, executive leadership support, and be driven by an assigned Mentoring Program Manager who can match mentors with an employee’s career path and development activities. For instance, if an employee has a desire to become a director or vice president, consider matching them with an executive-level mentor.

For new hires and interns, consider peer mentors. These are typically employees who have been hired in the last couple years and have recent and relevant experience working successfully through the onboarding process.

Consider formalizing a mentoring process via a tool that captures key components of the interaction and the results.

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Evaluations

Evaluations are an important tool for ensuring that your employees are working effectively toward their commitments and their career paths. Evaluations are an opportunity to praise and recognize, as well as provide feedback on needed improvement.

It is important to evaluate a new hire within their first 30, 60 and 90 days to ensure they are adapting well and help remove barriers.

Examples of evaluation questions that help gauge alignment with your company goals, mission and vision include:

- Do you feel that we are accomplishing the overall company goals and aligning with its vision and strategy? Why or why not?
- Do you understand your role in achieving those goals?
- What are your personal and professional goals? Are you working toward them in your role?
- What is one thing you like most and one think you like least about your job?
- Do you have any talents that we may not be taking advantage of?
- Are there any processes or practices that you feel are prohibiting our success?
- Do you have the tools and resources you need to achieve your goals and do your job effectively?

MANAGER EVALUATIONS

In addition to employee evaluations, managers should always be looking to gather feedback on their style and how it resonates with their team. Formal manager evaluations can be a part of the employee evaluation process or done separately by your human resources team via surveys. But managers should also ask questions directly, which can include:

- What is a strength I should leverage more in my role?
- What is one thing you like and one that you feel could be improved upon?
- What can I do better to support you in your role?
- How can we make our meetings more effective and efficient for you?

Question categories in your manager surveys could include:

- Performance
- Promotes diversity and a positive, respectful work environment
- Alignment with company culture and mission
- Communication
- Planning and organization
- Supervisor skills and leadership style
- Things you would like them to do, or not do
PEER EVALUATION

In addition to manager evaluations, peers can provide a valuable contribution to employee evaluations. Expanding the evaluation sphere can add time to the process with more input to gather and review, but the advantage is that you have a more complete view of the interactions between your employee and peers and stakeholders.

Evaluations are traditionally conducted on an annual basis and typically all during roughly the same period. In the past few years, this evaluation frequency has fallen out of favor as many feel it is a backward-looking view that has since become irrelevant to the fast-changing metrics of today’s technology focused businesses.

Today’s technology companies have opted for a more frequent evaluation period such as quarterly reviews. This allows a manager and employee to be better in line with the continually changing requirements of the business. Although this trend has been displayed in the overall industry, 44% of Microsoft partners still perform evaluations on an annual basis.

SETTING COMMITMENTS

As part of the review process, you’ll first need to agree upon and set employee commitments in order to measure and document performance in an unbiased way. Help your employees set commitments that align with organizational objectives. This provides guidance to management and employees on their short-term and medium-term tasks and responsibilities. Since objectives typically drive current policies and allocation of company resources, they tend to be tightly coupled with employee review and bonuses, which helps ensure that employees are driving toward company goals.

EVALUATION MANAGEMENT SYSTEM

Having a system that allows online evaluation and records the input from in-person reviews is key to preventing lost paperwork and skewed metrics. Additionally, a system that allows you to measure your results and do standards-based reporting when deciding promotions, raises, and terminations. In the Microsoft Hiring and Onboarding Playbook Study, partners reported the following objectives for their evaluation systems:

Evaluation System Objectives

- Track performance over time: 42%
- Identify performance measures: 31%
- Develop feedback guidelines: 30%
- Centralize evaluation data: 24%
- Maintain evaluation schedule: 20%
- Standardize disciplinary/termination process: 16%

**Frequency of Employee Reviews**

20% Monthly 27% Quarterly 26% Semi-annually 44% Annually

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018
Measuring Success

Just like performance metrics, it’s helpful to have metrics to measure your success in meeting the organization’s employment and retention goals. Set targets and objectives for the coming year and include the scoring as part of managers reviews.

Some of the most important HR metrics that managers play a role in achieving are:

- Voluntary turnover rate
- Retention rate
- Training hours and training costs per employee
- Diversity
- Cost per hire
- Interview to offer ratio
- Length of time in role before promotion
- Satisfaction (via company-wide surveys)
Recognize & Retain

Recruit, Hire, Onboard, and Retain Talent

aka.ms/practiceplaybooks
Executive Summary

Keeping the talent you have worked hard to find calls for you to empower, recognize and motivate employees through methods that resonate. It means creating environment of learning and exploration and providing the modern tools that foster communication and collaboration.

It also means formalizing processes to recognize and appreciate all the great work your employees produce to build morale and decrease turnover. Turnover is an inevitable when running a business, and understanding how it can cost your company time, money and productivity is an important focus of this section. Understand the types of recognition and awards that will resonate with your employees and other tactics you might employ to increase satisfaction and retention.

<table>
<thead>
<tr>
<th>Top 5 things to do</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have worked hard to attract the resources you have, keeping them will be just as difficult. Ensure you are doing what you can to keep them motivated and engaged.</td>
</tr>
<tr>
<td>✅ Support employee empowerment</td>
</tr>
<tr>
<td>✅ Establish recognition methods</td>
</tr>
<tr>
<td>✅ Define award criteria</td>
</tr>
<tr>
<td>✅ Measure turnover and attrition rates</td>
</tr>
<tr>
<td>✅ Understand employee motivation</td>
</tr>
</tbody>
</table>
Employee Empowerment

Successfully empowering your employees is a cornerstone of your digital transformation.

It is ultimately what ignites the engine of your profitable business and related practices. Digital transformation requires a reconsideration of how your business engages with its employees. While you can’t hire an entirely new staff to fit this model, you can be creative in using attributes such as training and flexible work hours, as well as equipping employees with the right tools, to build an engaging work environment.

Cloud technologies and applications play a significant part in enabling employee engagement. With the right technologies, employees can work anywhere, at any time, and collaborate with colleagues and connect with customers – all in ways that are secure, flexible and accommodate innovation.

In the digital economy, collaboration and communication take on heightened importance, and employee use of mobile technology and social apps to reach out to each other, to prospects, and to customers is crucial.

With transformation, you and your peers are focused more on increasing employee training than any other area of employee engagement, as well as simplifying the way your company is managed to meet the agile demands of a digital business.

Other employee engagement priorities include establishing programs to build a collaborative environment and increasing the decision-making powers of front-line employees. Partners identified as being more digitally mature than others were more likely to have made these changes to their employee engagement capabilities.

Top Employee-Related Digital Transformation Initiatives

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased employee training activities</td>
<td>44%</td>
</tr>
<tr>
<td>Simplified the way the company is managed</td>
<td>39%</td>
</tr>
<tr>
<td>Established programs to build collaboration culture</td>
<td>32%</td>
</tr>
<tr>
<td>Increased decision-making powers of front-line employees</td>
<td>29%</td>
</tr>
<tr>
<td>Made major changes to core organizational structures</td>
<td>29%</td>
</tr>
<tr>
<td>Changed recruiting criteria to digital sales and technology skills</td>
<td>24%</td>
</tr>
<tr>
<td>Changed retention criteria and plans to encourage employees to stay</td>
<td>20%</td>
</tr>
</tbody>
</table>


Automating some HR processes is key to streamlining employee engagement. In fact, many transforming partners are planning major changes to their employee management systems providing self-service tools that automate routine processes for their human resources function. Digital enablement also makes use of collected employee data to help address trends, increase job satisfaction and retention, and identify training needs.
Communication

Everyone yearns to belong, have an impact, and feel valued. That sense of connection helps everyone align around your company’s mission and vision.

There are several methods to foster employee interaction and promote the feeling of purpose and community that comes with an environment of shared goals. That sense of belonging is fed by effective communication and collaboration. Today’s partner practices, which require agility and distributed teams, use several tools to foster engagement, and part of the onboarding process should cover the expected use of these assets. Examples include:

- **Internal newsletters and blogs** to keep teams across the company updated on major initiatives
- **Internal team portals** to share project-specific information
- **Peer collaboration tools** such as MS Teams for bringing together teams and communicating with customers
- **In-person events** from smaller team morale events to company-wide meetings
- **Executive touch points** to reinforce company mission and vision, and recognize accomplishments

**MILLENNIALS**

Millennials are expected to comprise 75% of the workforce by 2025, according to the Brookings Institution. It’s critical to embrace this new wave of talent as Millennials shape the future and further define the digital workplace. It’s important to establish an environment that meets the needs of Millennials.

**WORKING OUTSIDE THE OFFICE**

In addition to the typical in-office tools that foster collaboration, some partners encourage outside the office community by allowing team members to see who works in their area. Data suggests that having the ability to connect with fellow employees even if they were not on the same team or project helps to build community and connections that may not have existed before.
Recognize

Companies that recognize and celebrate their employee’s achievements enjoy stronger engagement, increased employee morale, better customer service and lower turnover.

Employee Recognition

Don’t wait to show your employees the appreciation and recognition they deserve. Include why you think it is great. By doing this, not only does the employee feel appreciated, but others can be motivated by the same type of recognition.

Wins are typically shared with employees as they occur (40%)

Formal recognition processes are uncommon used by only 28% of partners

Public recognition in meetings are the most common informal recognition metrics (51%)

Case studies/best practices are also shared most often as they occur (29%)

Cash bonuses are the top financial incentive used to reward employees (57%)

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

COMMON RECOGNITION METHODS

The following examples are common recognition methods that you should consider implementing if you don’t already utilize them. In the Microsoft Hiring and Onboarding Playbook Study, partners reported informal public recognition in meetings as the most common method of recognition. When formal recognition is utilized, personal evaluation is the top method typically led at a department level.

<table>
<thead>
<tr>
<th>Top Methods of Formal Recognition Used</th>
<th>Top 5 Leaders of Formal Recognition Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Evaluation</td>
<td>Led at Department Level</td>
</tr>
<tr>
<td>Public Recognition in Meetings</td>
<td>Led by Human Resources Department</td>
</tr>
<tr>
<td>Public Recognition (e.g., Newsletter/E-mail Announcement)</td>
<td>Managed by Human Resources System</td>
</tr>
<tr>
<td>Awards (e.g., President’s Club)</td>
<td>Employee Led Program</td>
</tr>
<tr>
<td>Human Resources System</td>
<td>Led by Employees</td>
</tr>
<tr>
<td>Shout Outs</td>
<td></td>
</tr>
</tbody>
</table>

(n=60)

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

aka.ms/practiceplaybooks
TEAM MEETING RECOGNITION

Most teams have a standing weekly or other frequent meeting. You can take 2-3 minutes out of each of these meetings to allow team members to continually recognize other team members for their accomplishments or something they are grateful for.

In smaller rapidly growing practices daily recognition is important for showing and keeping the momentum going. People that are working above and beyond to build your practice can suffer from decreasing morale and burn out much more quickly than those in a well-established practice. Be sure that you celebrate and recognize their hard work.

COMPANY-WIDE COMMUNICATION

Many companies have internal news portals or newsletters that contain sections for recognizing employees’ individual contributions as well as team achievements.

AWARDS

Awards come in all forms depending level of accomplishment and value to the company. Your options might include:

- Cash bonus
- Stock options
- Paid time off
- Gift cards
- Vacation getaways
- Individual or team lunch
- Employee of the month
- Recognition boards
- Signs and banners

According to the Microsoft partners surveyed, cash rewards were the top financial incentive used to reward employees with 45% of average cash rewards falling between $500-$1999 and 15% of $2000 or more.

SOCIAL MEDIA

Posting about your amazing employee and project achievement via your social media accounts (Twitter, Facebook, LinkedIn, etc.) is a great way to publicly show your appreciation. Be sensitive of you employees’ privacy.

Sharing Wins

In our partner interviews, every partner agreed that it is important to showcase company and employee success stories and innovative architectures and designs they’ve developed as references to keep high employee engagement. By doing so, it shows employees that there are opportunities for recognition and upward mobility within companies.

Partners used the following methods to share wins:

- During team meetings
- Specific role to gather learnings and embed in future guidelines and standards
- Bi-weekly sprints where results are recognized
- Bi-weekly team calls by executives to share wins
- During semi-annual, out-of-office events
- Informal monthly team catchups
- Utilize collaboration platforms to share learnings with manager-encouraged participation
- Quarterly awards
- Group chat channel

Not only should you demonstrate and learn from your internal wins, but you should also learn from the wins of other partners and Microsoft. Microsoft provides a collection of case studies highlighting how partners make their customers successful, including PDFs and PowerPoint slides summarizing the key learnings and videos. The Partner Stories website also provides a curated collection of case studies.

PEER TO PEER

Management-to-employee recognition is a great first step, adding the ability for peer-to-peer recognition is even better. Having a system that allows people to publicly or privately recognize individuals can go a long way to driving employee morale and reducing your turnover.
Retain

Turnover is a natural part of managing a business. On average, you can expect most employees to stay for at least 3 years, with some notable variations in specific job roles.

Measuring your “voluntary” turnover helps gauge your employee satisfaction. If you notice that your turnover ratio has drastically increased over the past year, this could hint at possible issues in your organization that need to be identified and addressed.

Calculating turnover is an easily calculation. If you have 100 employees and 12 are fired or quit, your turnover rate is 12%. You can however get more specific and do it monthly and average it out your monthly turnover rate. You can also break it down further between involuntary and voluntary turnover rates.

According to the 2017 Human Capital Benchmark Report, the average overall turnover rate is 18%. According to an ERE study, the real cost of employee turnover for an entry level employee can be between 30-40% of their annual salary, a mid-level employee upwards of 150% and for a high-level employee, up to 400%.

Additionally, we previously explored the costs to acquire and hire candidates. Knowing your turnover rate can help you with budgeting for future hiring. High turnover rates cost businesses significant amount of money, time and productivity. Keeping turnover as low as possible should be one of your primary goals. This can be done through recognition and motivation strategies.

The following are some top motivations to consider when managing your technical staff:

- Compensation
- Working with exciting technologies
- Opportunities for professional development
- Company culture
- Opportunity to work from home
- Conference or education budget

Understanding your employee’s motivation for working can help you tailor your recognition and rewards, and increase retention.

RETENTION TACTICS

Take time to understand what motivates your employees and constantly assess your offering, which might include:

- Flexible work hours
- Opportunity to use cool technologies
- Benefits like free snacks and meals, gym memberships, daycare, transportation reimbursement, etc.
- Growth and development opportunities
- Facility perks (pool, sports fields, movies)
- Training and skills development
- International travel
- Opportunity to attend key conferences and connect with peers
- Opportunities to mentor other employees
- Opportunity to drive impact
They love our growth story – we’ve doubled in size in each of the last 3 years. They see opportunity to grow and develop with the company. We provide plenty of facilities (pool, air hockey, sound system, etc.) and provide fruit, coffee, snacks and other benefits to keep the team happy and engaged.

MIKE WARDELL
CEO
Giacom World Networks Ltd.
Attrition

Why Employees Leave

Employees leave for various and numerous reasons. Some are completely outside your control, others are tied directly to your corporate culture, morale and their treatment.

Other reasons include:
- Accepted a job at a new company
- Relocating outside of business area
- Not getting along with co-workers or management
- Significant change in company mission or vision
- Dealing with personal matters
- Lack of trust
- Can’t meet expectations and objectives
- Unrealistic expectations
- Unsafe or unhealthy working environment
- Lack of respect
- No open communication with management
- Lack of recognition
- No corporate investment in enhancing their skills or knowledge
- Getting passed over for promotion or raises
- Job stagnation
- Stress or other physical or physiologic factors
- No clear career path
- Ethics or corporate policy violation

Top 3 Most Important Factors in Retaining Talent

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive corporate culture</td>
<td>63%</td>
</tr>
<tr>
<td>Flexible scheduling</td>
<td>45%</td>
</tr>
<tr>
<td>Compensation</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: Microsoft Hiring and Onboarding Playbook Study, MDC Research, June 2018

Succession Planning

Succession planning is focuses on identifying the knowledge, skills and abilities needed to prepare one or more individuals to potentially perform the duties of departing employees. Having a succession plan to ensure you have an experienced and capable person to take over the previous employee’s roles ensures that yours and your customer’s success is maintained. Additionally, succession and replacement planning fits into your retention strategy with regard to training, development, career planning and career management. Other benefits include:
- Adapting to talent scarcity
- Analyzing demographic changes
- Identifying skill gaps
- Retaining institutional knowledge
- Increasing morale and retention through employee investments
- Maintaining highly specialized competencies

In the Microsoft Hiring and Onboarding Playbook Study, partners indicated that most employees stay with their companies 3-5 years.
Onboarding Playbook - Summary

Thank you for taking the time to review this playbook. We hope you have gained new insight on how to improve your hiring, onboarding and retention, as well as keeping your Microsoft practice successful and healthy.

Our goal, when creating this playbook, is to provide a partner focused look at the Onboarding, Hiring and Retention process. We organized various helpful industry and partner resources and insights in such a way that you can quickly use them to accelerate or optimize your cloud practice(s). To this end, we laid out the main steps in the onboarding process which you can review in order, or individually at any time in the future.

In the first section, Attract and Recruit, we helped you define the strategy to build your brand and attract the right people with the right motivations; the techniques that are most successful in finding the right candidates; a set of descriptive cloud job descriptions, outsourcing statistics, and cost strategies.

In the second section, Hiring & Interviewing, we focused on the importance of hiring the right team; enforcing your mission and vision combined with your corporate culture; structured hiring processes; interview techniques with methodologies; understanding generational gaps; extending offers, and the state of the job market.

In the third section, Onboarding and Development, we suggested ways to make your new hires productive from the start; the importance of internships; and the value of internal and external employee community and collaboration tools.

The fourth section, Evaluate, Coach and Mentor, we explore the various ways to evaluate new hires, regular employees and managers; describe coaching frameworks; and the importance of having a mentor program.

The final section, Recognize and Retain, stressed the importance of employee recognition through various methods; retention through employee motivation and engagement; and the vital process of continuous training and readiness for practice growth.

FEEDBACK

Share feedback on how we can improve this and other playbooks by emailing playbookfeedback@microsoft.com

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