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The text 'Premier Sponsor' is in white, and the AARP logo is in red. The AARP logo consists of the letters 'AARP' in a bold, sans-serif font with a registered trademark symbol, and a red swoosh underline under the 'A'.

Delivering Data as a Service

FPAC™

CERTIFIED CORPORATE
**FINANCIAL PLANNING &
ANALYSIS** PROFESSIONAL

STAND OUT FROM THE CROWD

with the Certified Corporate Financial
Planning and Analysis Professional Credential

“ Earning my **FPAC** played a
critical role in this promotion. ”

Natalie Morrison, CTP, FPAC

Manager of Financial Planning &
Analysis, *WaterOne*



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Delivering Data as a Service

Jesse Todd



FP&A Transformation Lead
Microsoft
Seattle

AFP 2022
OCTOBER 23-26 | PHILADELPHIA

There's a space for you at AFP 2022:

FP&A HUB

FEATURING:

- FP&A Track of Educational Sessions
- FP&A Keynote
- Networking Events like Roundtables, Meet-ups, and Receptions



JOIN US IN PHILADELPHIA.
AFP2022.ORG

Geetanjali Tandon



SVP of Financial Planning & Analysis
Ceridian
Orlando



A Virtual Event for Finance Professionals

Delivering Data as a Service

Jesse Todd

Microsoft Finance

FP&A Digital Transformation Lead

Premier Sponsor 

Our Finance challenges – look familiar?



Surging data +
legacy systems +
static reporting



Inadequate tools to
anticipate growing
business complexity



Manual, inefficient and
error-prone processes



Increasing regulations,
risks, and threats



Remote workforce
juggling “new normal”



Our journey to Data as a Service

Business Case for Change

The State of the Business

Changing Customers, products, market opportunity

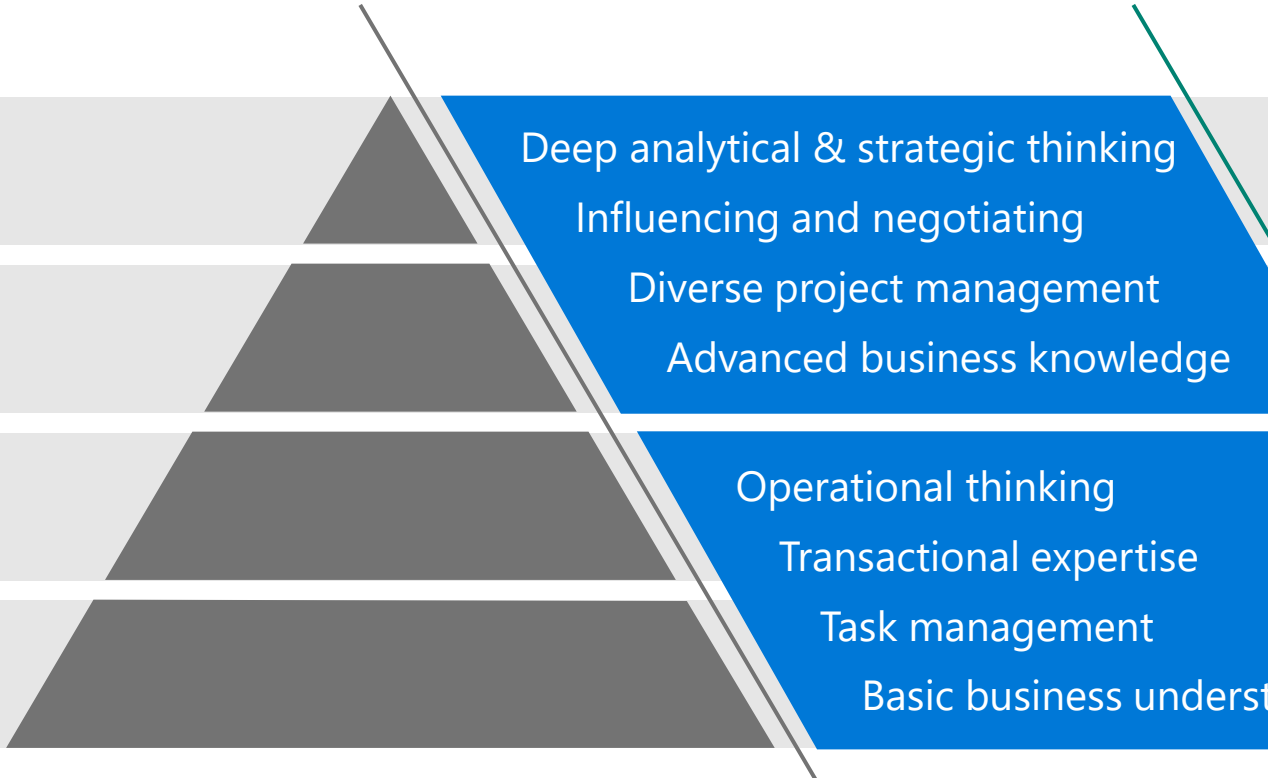
Increasing Competitive pressures

Siloed Each function “owned” their data and analytics

Slow Decision making hampered

Inefficient Duplicative work and data investments

Where we started



Deep analytical & strategic thinking
Influencing and negotiating
Diverse project management
Advanced business knowledge

Operational thinking
Transactional expertise
Task management
Basic business understanding

Why we were “stuck”

Inconsistent definitions, hierarchies, metrics & KPI’s

75% analyst time spent collecting and compiling data

78% reports created in “offline environments”

350+ decentralized Finance Tools and Systems

~\$30M annual spend on “shadow applications”

A page from our past: Executive Reviews

Manual, labor-intensive process with numbers prone to "individual interpretation"

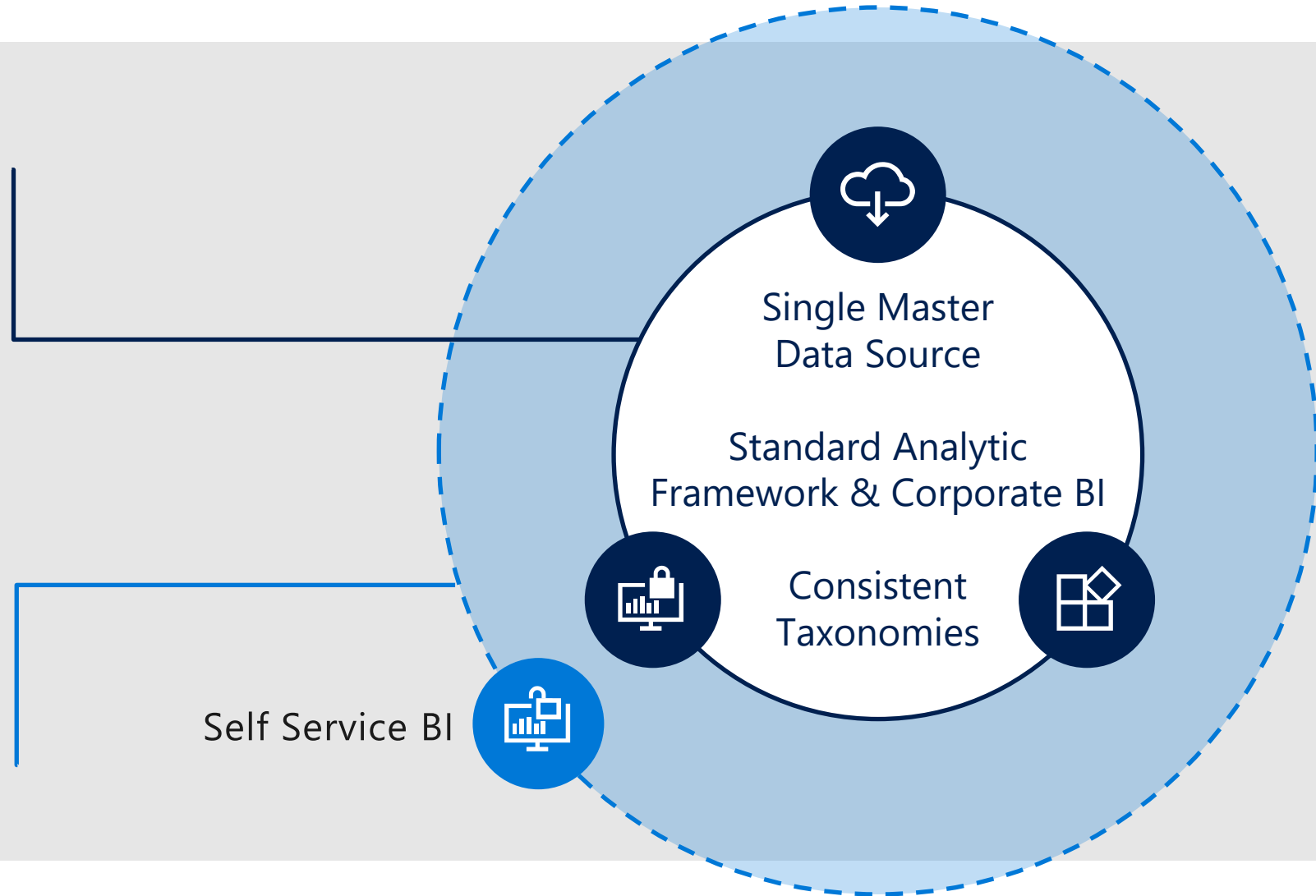
Segment (ST)	YoY%		FY15 - H1 Actual			FY15 - H2 Forecast			FY15 Full Year Forecast			Fct Seasonality (Change YoY)			Insights/ Actions/Help Needed and Feedback
	FY15	FY14	Actual	SVTB	YoY%	Forecast	SVTB	YoY%	Forecast	SVTB	YoY%	H1	Q3	Q4	
EPG Commercial	3.7%	10.6%	98,666	(2,026)	(18.5%)	226,875	(17,620)	(3.9%)	325,434	(9,963)	(6.0%)	-1.6 pts	-1.2 pts	2.8 pts	
EPG Government	(0.2%)	3.8%	51,817	4,450	24.5%	65,480	2,713	(5.1%)	117,297	7,363	6.1%	6.5 pts	-1.0 pts	-5.6 pts	
EPG Education	(2.9%)	0.6%	6,262	5,542	356.3%	32,949	(7,328)	(10.6%)	39,211	(1,786)	4.6%	14.4 pts	-14.8 pts	0.5 pts	
EPG Public Sector	(0.9%)	2.9%	58,079	11,192	37.5%	98,429	(4,615)	(7.0%)	156,338	5,577	5.7%	8.6 pts	-4.7 pts	-3.9 pts	
EPG	2.2%	8.2%	156,745	8,164	2.8%	325,305	(22,415)	(4.8%)	481,912	(14,400)	(2.9%)	1.6 pts	-2.1 pts	0.5 pts	
Corp AM SMSBP	9.6%	11.5%	88,911	(9,878)	2.4%	125,267	7,640	5.9%	213,089	(2,425)	4.3%	-0.9 pts	2.1 pts	-1.3 pts	
Corp TM SMSBP	14.8%	12.4%	90,156	300	14.5%	111,527	(2,125)	21.8%	201,657	(2,051)	18.3%	-1.6 pts	1.3 pts	0.3 pts	
Corporate Accounts (AM + TM)	11.9%	11.9%	178,367	(9,578)	8.2%	236,795	5,514	12.8%	414,746	(4,480)	10.7%	-1.1 pts	1.8 pts	-0.7 pts	
Breadth SMB	6.1%	14.8%	91,946	(4,824)	14.0%	120,388	5,370	24.9%	212,173	473	19.9%	-2.3 pts	0.0 pts	2.3 pts	
SMSBP Other	(3.7%)	(12.6%)	28,816	(4,653)	(8.6%)	38,215	438	0.9%	67,532	(3,715)	(2.7%)	-2.0 pts	0.1 pts	1.9 pts	
SMSBP	7.9%	9.3%	299,128	(18,055)	8.0%	395,318	11,330	14.9%	694,450	(7,721)	11.8%	-1.5 pts	1.1 pts	0.4 pts	
EPG Commercial Surface			291		864.2%										
SMSBP Commercial Surface			6,316		1505.8%										
Commercial Surface			6,607	(187)	1460.1%	9,583	-	200.2%	15,934	(447)	140.1%	20.1 pts	10.1 pts	-31.2 pts	
Managed Retail incl. Surface	(14.5%)	9.5%	49,025	(2,053)	9.3%	30,072	1,022	(7.5%)	78,438	(1,889)	1.4%	3.7 pts	-3.3 pts	-0.4 pts	
Online Stores incl. Surface	85.4%	(0.8%)	8,062	1,807	86.8%	9,053	2	57.6%	17,195	1,608	70.1%	4.2 pts	-7.4 pts	3.2 pts	
Retail	(8.3%)	8.2%	57,087	(440)	16.1%	39,125	1,024	2.3%	95,633	180	9.3%	2.8 pts	-3.7 pts	0.9 pts	
Other Distribution	(19.4%)	11.2%	10,915	(1,901)	3.6%	11,370	(1,248)	(41.5%)	22,237	(3,197)	(25.0%)	13.3 pts	-4.8 pts	-6.5 pts	
OEM Field	(11.5%)	31.0%	14,167	(210)	(26.9%)	15,358	0	(38.4%)	28,993	258	(32.3%)	5.1 pts	-3.6 pts	-1.4 pts	
OEM Field + Other Distribution	(15.2%)	22.3%	25,082	(2,112)	(16.1%)	26,728	(1,248)	(39.3%)	52,231	(2,940)	(29.4%)	8.4 pts	-4.1 pts	-4.3 pts	
CCG	(11.4%)	14.2%	82,169	(2,538)	3.9%	65,853	(224)	(20.0%)	147,794	(3,820)	(8.4%)	6.4 pts	-4.5 pts	-5.9 pts	
Total Field Bill	2.9%	9.8%	544,650	(13,427)	7.0%	794,068	(11,320)	3.2%	1,340,081	(25,594)	4.7%	0.0 pts	-0.8 pts	-0.1 pts	
Memo: Total Public Sector	4.8%	8.5%	143,615	(2,567)	18.3%	212,002	2,882	2.6%	355,617	316	5.5%	1.7 pts	0.0 pts	-1.7 pts	
Memo: Consumer OEM MNA Revenue Proxy			14,316		15.0%						(100.0%)				
Memo: Commercial OEM MNA Revenue Proxy		19.3%	34,828		(3.0%)						(100.0%)				
Memo: MCS - External Net Revenue			23,817	(1,588)	(8.2%)	25,832	(6,051)	(11.3%)	49,649	(7,691)	(11.0%)	1.5 pts	-2.4 pts	0.9 pts	
Memo: Premier - Support Net Revenue			40,181	418	38.0%	41,887	(2,371)	8.7%	82,068	(1,952)	18.2%	4.5 pts	-0.3 pts	-4.2 pts	
Memo: Total ES Net Revenue			66,451	(1,045)	11.8%	71,086	(8,888)	(1.2%)	137,537	(9,954)	4.7%	3.1 pts	-1.1 pts	-2.0 pts	
Memo: Consulting New Work Sold		17.7%	17,344	(9,661)	(33.9%)	45,473	9,665	37.8%	62,817	0	6.0%	-16.7 pts	1.9 pts	14.8 pts	
Memo: Premier Core Billed Revenue		13.2%	19,942	877	13.4%	30,778	6	12.4%	50,720	883	12.9%	0.2 pts	-0.3 pts	0.1 pts	
Memo: MCS Utilization Rate			0.0 pts			48.3%	-6.5 pts	-7.3 pts	57.2%	-1.6 pts	-3.0 pts	-5.0 pts			
Memo: BGS Total w/o Surface	5.3%	8.8%	485,873	(10,888)	6.1%	720,622	(11,109)	5.1%	1,176,363	(22,127)	5.9%	0.2 pts	-0.1 pts	0.1 pts	
Memo: Azure SE	159.3%	222.2%	8,876	(954)	129.2%	19,323	1,529	111.1%	27,999	575	116.4%	1.7 pts	4.8 pts	-6.5 pts	
Memo: Office 365 SE	121.8%	133.9%	52,960	9,339	85.2%	92,534	4,992	51.3%	145,511	14,547	62.3%	4.5 pts	3.8 pts	-8.1 pts	
Memo: Dynamics CRM Online SE	188.0%	58.6%	2,993	763	187.3%	6,172	1,085	156.6%	8,765	1,828	165.0%	2.3 pts	2.7 pts	-5.0 pts	
Memo: CCG Surface		219.2%	13,500	(2,185)	(38.8%)	9,714	132	3.5%	23,083	(2,184)	(20.1%)	-9.6 pts	-0.6 pts	10.2 pts	
Memo: Total Surface (ST)		219.2%	20,107	(2,360)	(8.9%)	19,307	132	53.4%	38,017	(2,631)	30.0%	-10.0 pts	3.3 pts	7.5 pts	
Memo: Total Surface (SE)		240.2%	19,876	(4,895)	2.2%	20,808	638	56.7%	40,655	(4,286)	24.2%	-10.6 pts	4.7 pts	6.0 pts	
Memo: Xbox Consoles (ST)	(44.9%)	(27.4%)	17,802	1,211	140.7%	7,907	809	69.2%	25,402	1,833	132.6%	8.0 pts	-8.1 pts	0.1 pts	
Memo: Xbox Consoles (SE)	(48.8%)	(43.3%)	20,163	2,095	227.2%	7,417	(581)	231.2%	27,580	1,514	228.2%	-0.2 pts	-8.9 pts	9.2 pts	
Memo: MINDS Net Sales Invoiced*			38,445		48.7%	17,957		(38.5%)	56,402		1.9%	21.8 pts	-6.9 pts	-12.9 pts	
Memo: MINDS 1st Party Lumia Phone (SE) Units (K)*			192		151.2%	128		6.0%	320		62.3%	21.2 pts	-10.8 pts	-10.4 pts	
Memo: MINDS 1st Party Non-Lumia Phone (SE) Units (K)*			163		(38.6%)	151		(18.9%)	314		(31.2%)	-7.3 pts	10.0 pts	-2.8 pts	

* MINDS Memo Lines are directly from MINDS Systems and do not contain the adjustments necessary to tie to Mercury. Budget dots is available only for Area level.

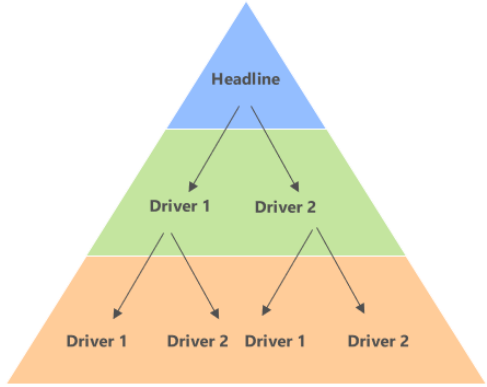
Microsoft Finance Data Strategy

Discipline at
the Core
IT Retains Control

Flexibility at
the Edge
Finance has agility



The Foundation: Building a Shared Analytical Framework

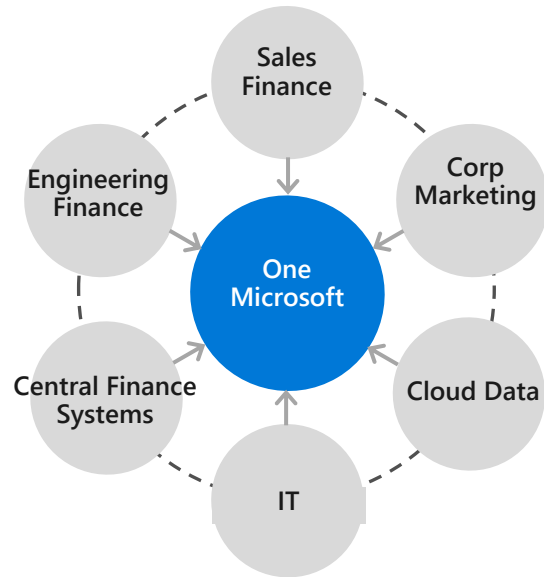


	Tier 1	Tier 2	Tier 3
	Primary Metrics (3-5)	Secondary Metrics (15-30)	Remaining Metrics
Short Term Performance	Revenue	Price: ARPU, Mix Quantity: Units, Users	Churn
Long Term Performance	Penetration Monetization Usage		
Strategic Indicators	New Product Deployment		

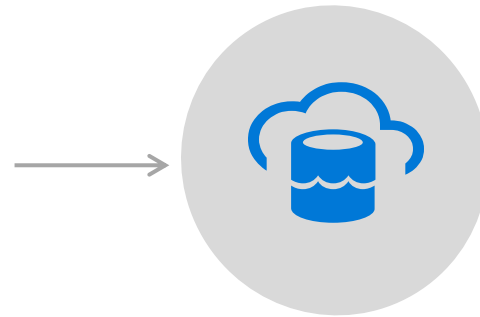
1. Finance build first iteration, including both financial and non-financial data
2. Align with other functional business partners (global product management, engineering, sales & marketing)
3. Codify core set of KPIs used to determine performance and specific definitions used to calculate measures

Delivering “Data as a Service”

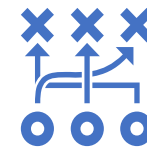
From manual, static, inconsistent to automated, dynamic, and centralized



100+ Data Sources



Finance Data Warehouse



Custom Mapping



Analytics & Reports

Delivering “Certified” BI

Executive business reviews standardized and automated – from 2 months prep to 2 days



One Platform, One Model, One Portal

The screenshot shows the MSX Insights dashboard for a user named Donald. The dashboard is organized into several sections:

- Navigation:** A left sidebar with options like Home, Reports, BAM Controller, Consumption - US, Control & Compliance, Customer Solution Area, All, Modern Workplace, MWBA Toolkit, Modern Workplace, Surface EG Reports, O365 Customer Acq..., O365 Usage Queries, MW GTM Planning T..., and Account Map.
- Top Bar:** Includes 'MSX Insights', 'BAM Controller', and user profile information.
- Welcome Section:** A 'Welcome to MSX Insights, Donald ...' message with a 'Getting Started' button. Below it, a 'Welcome' card with a video player and a 'Share your feedback!' link.
- Summary Cards:**
 - Revenue Summary:** 2709 Accounts with revenue, \$619M of FRA.
 - Billed Pipeline Summary:** 588 Opportunities Created, \$276M Pipeline \$ Created.
 - ACR Pipeline Summary:** 425 Number of Engagements Created, \$28,431,579 Azure Engagement Pipeline.
- Revenue Landed Chart:** A bar chart showing revenue landed from 11/30/2019 to 12/4/2019. The highest bar is on 12/1/2019 at \$0.54bn.
- Table:** A table titled 'Revenue Landed - Click on a day to see the details' with columns for Cust View, Account, Date, and FRA. It lists several accounts and their corresponding FRA values.



Delivering Data as a Service

Our Shared Data Platform



Sales
Marketing
Finance



Reporting

Platform



Enabling Business Performance Management



Agile & Responsive



30k+
active monthly
users



1500+
connected
reports



Cross-business
Insights



>120
conformed data
sources



>3000
high-fidelity KPIs

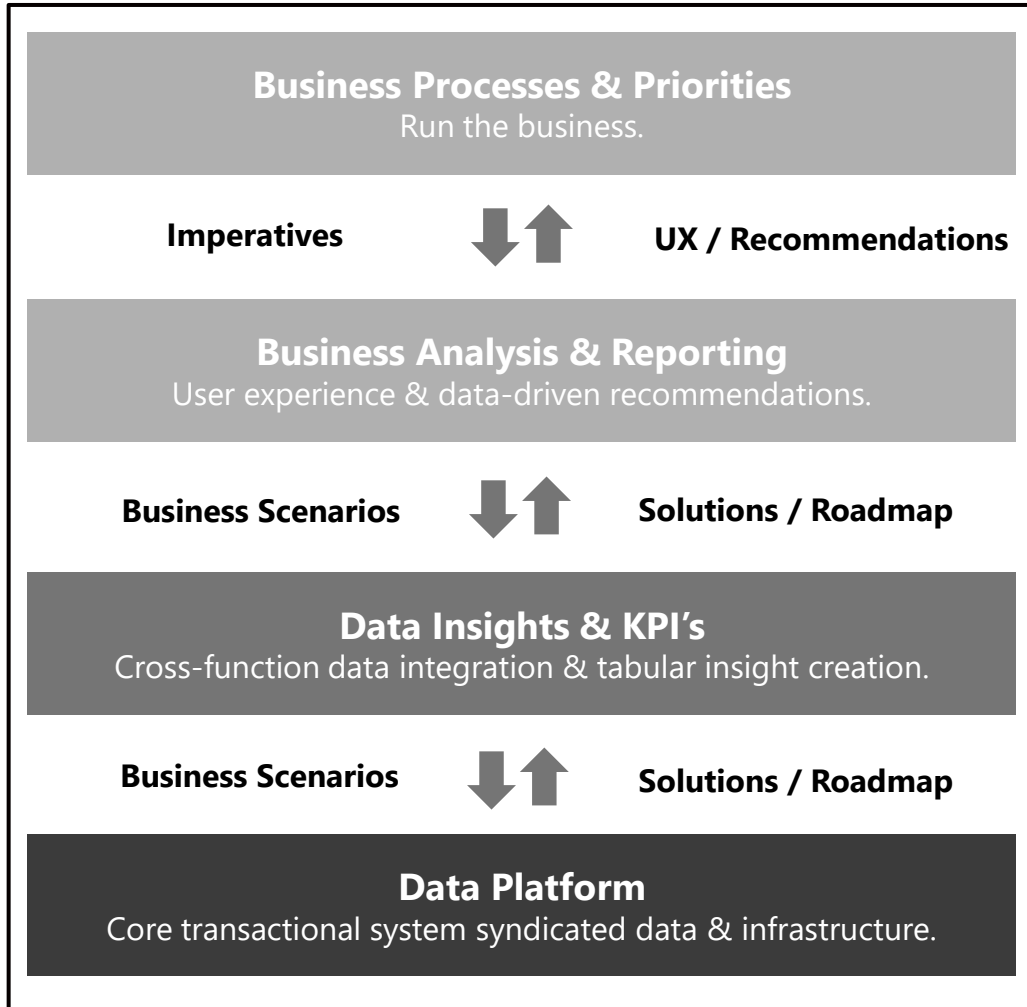


Modern
Technology

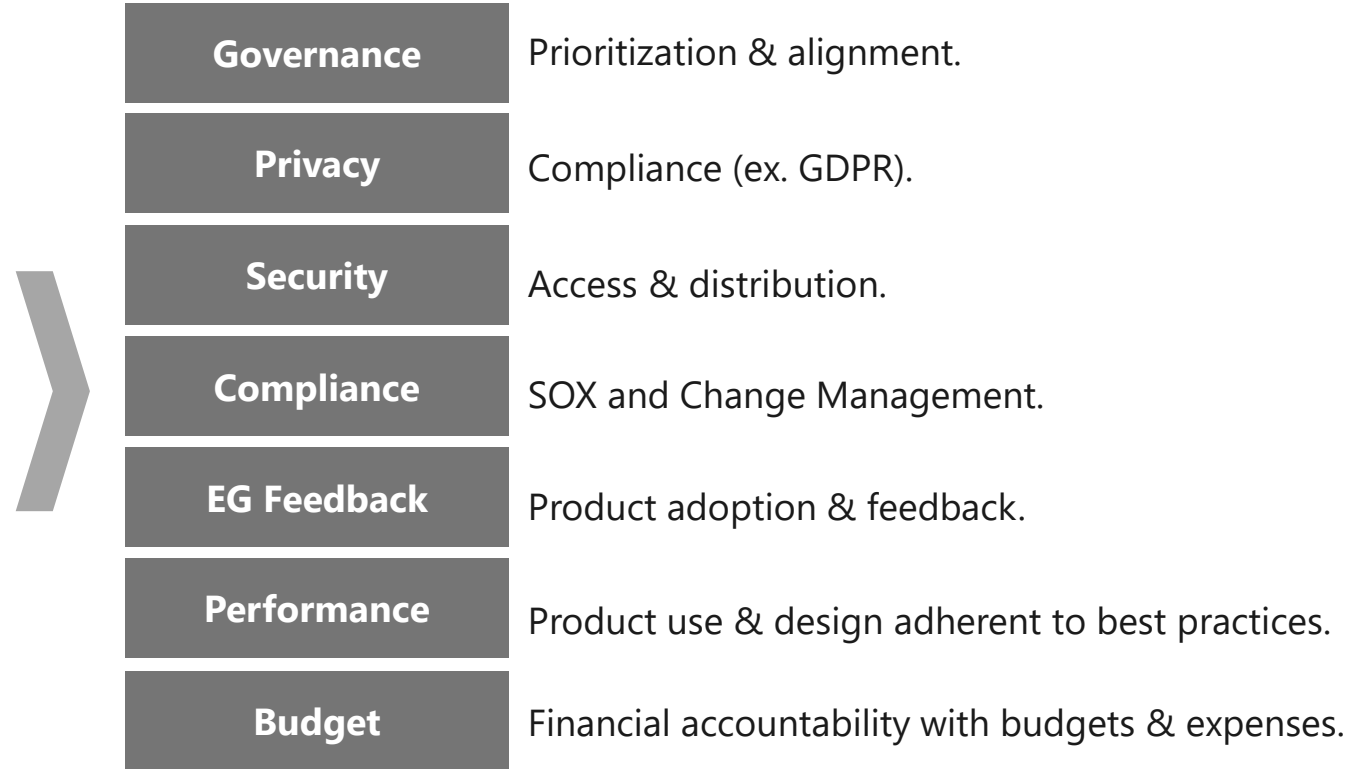


The Delivery Funnel

Delivery Funnel



Shared Areas of Accountability



Where we are headed

Shift in how FP&A teams spend their time

Deep analytical & strategic thinking
Influencing and negotiating

Diverse project management
Advanced business knowledge

Operational thinking
Transactional expertise
Task management
Basic business understanding

Certified definitions, hierarchies, metrics & KPI's

75% analyst time spent analyzing data, supporting decisions

85% reports centrally curated and automatically delivered

~30 certified Finance Tools and Systems

~\$30M IT resources centrally managed/highly leveraged

Microsoft Modern Finance journey

Finance Learning Paths – “Accelerate tech intensity”

- Technical Foundations
- Data Analytics
- Data Science
- Personal Development
- Presentations & Storytelling
- Core Tools

Citizen Developers – “Low-code/no-code solutions”

- Power Apps
- Power Automate
- Power Virtual Agents

Artificial Intelligence – “Augmenting human creativity with intelligent technology”

- Virtual agents/bots
- Smart automation
- Intelligent recommendation

Machine Learning – “Training algorithms to learn patterns from enormous amounts of data”

- Revenue forecasting
- AR Planning
- Proactive compliance
- Intelligent Collections
- Deep learning to spot invoice errors

Unified Data & Reporting Platform – “One source of truth for financial and non-financial metrics driving curated reporting”

- Rapid adoption of Power BI to build data models and dashboards
- Data Lake for 150+ sources and 3000 KPIs
- 1500+ Standard reports in PBI
- “Storefront” for curated, role-based reports for 30K monthly active users
- Blockchain use in Treasury and Operations

2015

2016

2017

2018

2019

Today

Lessons Learned



No data shortcuts



Partnering with CIO is essential



Early wins matter



Leadership must prioritize



Celebrate the risk takers



Compliance & Security focus