Management Promotion Template

Employee Name:	[redacted]	**Manager:**	[redacted]
Current Career Level and Job Code:	17140.Product Manager/Strategy 4-ProdDev	**Proposed Position and Job Code:**	17220, Manager
Total Time in Current Position:	**1 year**		
Current Salary:	[redacted]	**Min Salary for New Position:**	[redacted]
Performance Rating:	**5**	**VP**	**Katrine Haugerud**

Please address the following factors, including examples when recommending promotions to Management positions

BUSINESS NEED

[redacted] experience and expertise bring the right level of attention and strategic focus to Oracle's development driven [redacted] programs. This level of attention is *essential* to Oracle's continued growth and leadership in this space, and to further improve the overall Lines of Business, Partner and Customer engagement.

SUMMARY OF EXPERIENCE

[redacted] – [redacted] is actively managing the new communication and training program for customers, partners, and field. This program is currently conducting 15+ live briefings monthly. The number of live attendees is easily 500+ per event. Communication is done in concert with senior managers including EVPs, leading evangelists, and influencers across the organization.

Specifically, these programs focus on providing strategic direction and updates focused on Oracle Cloud's breadth, depth and width. These briefings are targeted at specific audiences including customers, partners and field.

[redacted] – With Oracle's continuous development cycle, which means rapid delivery of innovation, we have to inform and educate customers, partners, and field to let them know what's new and upcoming next month. A big part of this program is the Spotlight videos. This deliverable is cutting edge and a delivers timely and ready to consume training videos to all audiences: Prospects, Customers, Partners and Oracle Employees.

[redacted] has a high attention to details resulting in quality deliverables. Projects, small or big, are always reaching deadlines or goals due to great follow-through skills and 'can do' attitude. This sets a great tone for the rest of my team (direct or virtual). She takes on new tasks with a positive attitude. She is professional and works efficiently with her own team as well as superiors, colleagues, partners, and customers.

EXHIBIT 104
Deponent Baxter
Date 7-3-19
Gina Carbone, CSR

Exhibit P-117

SCOPE OF POSITION

This job has a big focus on training of all audience and draws upon her industry expertise and business background. The job requires excellent interpersonal and communications skills as it is dependent upon creating great relationships with Development, Strategy, Customer success teams, Sales teams, Partners, Customers, and Executives.

The job goes far beyond an organizational chart; it requires management of virtual teams of collaborators including strategists, developers, sales, support engineers, upper management including EVP, etc. A matrix management understanding and skill-set is critical in order to successfully manage these strategic, division wide programs: [redacted]. [redacted] is extremely capable and successful in managing virtual teams at Oracle.

The job requires excellent interpersonal and communications skills as it is dependent upon creating great relationships with Development, Strategy, Customer success teams, Sales teams, Support, Consulting, Sales, Partners, Customers, and Executives. Without the interaction from these teams, we would not be able to harvest the content needed for these programs and deliver outstanding deliverables for [redacted]. Content includes strategic live presentations to customers, partners and internal Oracle LoBs. It includes the preparations with presenters and publishing team on beforehand, working with design teams on the actual product, and publishing work directly with the OU studio team and video producers for customers, partners and Oracle employees to consume. The result of this work gets published monthly to executives via monthly statistics packages.

Furthermore, this program in particular requires a great deal of strategic buy in and influence as the programs' success is heavily dependent upon active participation from the Cloud organizations (virtual teams). [redacted] is one of very few that is already very capable and successful in managing virtual teams at Oracle. This is a critical skill for this role and in my team as we rely so much on other teams to respond to us and follow our direction for the community. Through her extensive network within Oracle that she has developed through this and prior programs, she now interacts with all LoB at Oracle, as well as external groups including partners and customers. Therefore, this position is critical as its objective is to bring together 100s of individuals across many groups to act and present themselves to our partners and customers as one team.

[redacted] has been supervising two employees for the past 6 months. I have regularly followed up on this and have all positive feedback on her style and effectiveness with these folks. She exudes great leadership and initiative both as a matrix/virtual team leader and a direct manager.

Metrics: Headcount and Span of Control

Current Position HC:	Principal Product Manager	0 # Employees under this position:		0 # Direct Reports:		1 # Mgmt Level of reports:	
Proposed Position HC:	Manager, Product Management	2# Employees under this position:		2 # Direct Reports:		2 # Mgmt Level of reports:	

SIGNIFICANCE OF POSITION AND IMPACT ON THE COMPANY

[redacted] - The [redacted] program is crucial in getting the message out from development to the field about the product offerings. Specifically the [redacted] program provides training and information to the audience so that they become excited and understands the value of the product offerings. This knowledge will in turn empower the audience to sell and position Oracle's Cloud offering more precisely.

[redacted] – [redacted] is all about enabling the field and partners to sell, implement and support. Furthermore, it empowers customers to access readily available material such as videos and pdf for a quick update on the product offerings. This alleviates the need for support calls and enables a quicker turnaround time for knowledge and fact findings.
Both of these programs have grown tremendously over the past year. In fact we hosted more than 150 live events in 2016. [redacted] was instrumental in standardizing the look and feel of the sessions and the accompanying announcements externally. This helps with how Oracle is perceived in the market place with competitors, customers, partners, and analysts.

This lead position is influential in aligning the communication strategy within Oracle t customers and partners.

EXTERNAL VISIBILITY

[redacted] has established herself as the [redacted] go-to-person within [redacted] Her role as the driver of these programs means that she is constantly reaching out to Executives, Manager and the Field for their input and contributions to the success of these programs by being presenters.

As part of the job, she coordinates requirements, design, and program deliverables on behalf of the virtual teams and stakeholders. She actively drives planning and design meetings, and works with a variety of audiences.

These events hosted on the community, is an integral part of Oracle's Cloud strategy to improve the Total Customer Experience for Cloud Customers of Oracle. The events already play a key role in a new initiative headed by [redacted] and team called [redacted] as well as bringing User Groups into the fold at Oracle by partnering with them on events for Customers and Partners.

As part of the job, she coordinates requirements, design, and program deliverables on behalf of the virtual teams and stakeholders. She actively participates in customer, user groups, and partner meetings to inform the audience and/or to receive direct feedback and input.

TEAMWORK AND INFLUENCE WITHIN ORACLE

[redacted] manages and influences people in these groups to participate and create deliverables. She is very accomplished in influencing and driving others to deliver and execute according to plan. She would not be able to be successful in this role could she not influence effectively.

The scope of this job goes far beyond an organizational chart; it requires management of virtual teams of collaborators including executives, managers, strategists, developers, sales, support engineers, partners and more. The number of people that she interact with to make these programs successful, spans several hundred people.

The job requires excellent interpersonal and communications skills as it is dependent upon creating great relationships with Development, Strategy, Customer success teams, Sales teams, Partners, Customers, and Executives. Both programs require a great deal of strategic buy in and influence as the programs' success is heavily dependent upon participation from the Cloud organizations (virtual teams).

ACHIEVEMENT

[redacted] – [redacted] is managing all aspects of this program today. From interacting and pursuing content and getting presenters to sign up to present and speak, to design invites, reminder announcements and more. Create Statistics packages shared with senior management.

There is a big focus on presenting the topics in interesting formats – thus keeping the interest level high in the field when Development presents topics. Statistics are analyzed and total consumption data is presented on a monthly basis across all types of events. Year to date, consumption is over 100,000 (replays and live attendance).

[redacted] – Since the start of Fusion, she has been instrumental in modernizing the [redacted] program to where it is today with a set of assets available on the cloud portal to everyone. The newest asset added to this set is the [redacted] introduced in 2014.

JUSTIFICATION FOR NON-FOCAL PROMOTION

(Explain why it is critical to consider this promotion now.)

RECOMMENDATIONS

(Comments from other senior management staff, both within and outside of group - minimum of three)

[redacted] **Director** [redacted]

I would strongly endorse [redacted] to be a Manager. I believe she is already working at this level. [redacted] is super organized; she manages many 'balls in the air' without dropping any, and always responds and completes tasks with great efficiency. This includes managing the many simultaneous [redacted] in various stages of pre-planning, materials creation, live delivery, and after-action analysis. Although she is doing this for all App pillars, from my vantage point in HCM it feels like I have a dedicated resource to work with.

[redacted] brings strategic thinking and creativity to her work – she adds value with recommendations, analysis, brainstorming and help in prioritizing key topics and ways to reach all of our target audience. She is a quick study who has gained a good understanding of our business and its drivers.

I will also note that [redacted] is very friendly and great to work with. Her communication skills, written and oral, are excellent. She is concise and clear. And my colleagues and I genuinely enjoy working with her. We appreciate the great internal 'customer service' that [redacted] provides. She is a true asset to Oracle.

[redacted] Director [redacted]

I've been working with [redacted] on many aspects of the [redacted] run by [redacted] organization. She has grown from managing the [redacted] to overseeing the operations for all of the programs. She has taken the lead on working with [redacted] on determining what is the best way to use the tools and deliver the presentations successfully, and smoothly in a virtual environment. She has been instrumental in helping us fine tune the process documentation for all of the people involved in running and participating in these live events - Presenters, Studio PMs, and Publishing.

Over the course of seeing the above mentioned live event series grow, [redacted] has shown she is ready to take her leadership skills to the next level. She is quick on identifying issues and gaps and coming up with solutions to solve them. Her attention to details is what has helped make this a successful program. In my opinion, [redacted] has shown the talent necessary in order to take on a management role.

[redacted] Principal Product Manager

I've worked with [redacted] regularly over the past two years on two key programs – the [redacted]. Her communication is always timely, accurate, and concise. Her planning and foresight has made my work easier when it comes to producing video content and I know is appreciated by everyone involved.

Her communication with the product management and product strategy teams streamlines the entire video production process for me. Without her coordination and planning, producing the [redacted] videos would be a more than arduous task.

I wouldn't hesitate for a minute to recommend [redacted] for a promotion. I consider her a key asset to any team she works with. Plus she's a pleasure to work with!

Position Criteria

(Senior management positions may include unique requirements, therefore template metrics are general guidelines, not hard rules.)

FACTOR	DIRECTOR	SR. DIRECTOR	VICE PRESIDENT
Summary Of Experience	Requires 8+ years of related managerial/technical experience, including at least 2+ years as Sr. Manager.Works on projects of high conceptual complexity. Provide tenure in current position and overview of prior jobs held.	Requires 10+ years of related managerial/technical experience.Should have broad functional experience, enabling management of product mgt., QA, tools, Doc, etc. Directs and controls activities through managers.Works on projects of high conceptual complexity. Provide tenure in current position and overview of prior jobs held.	Requires 12+ years of related experience.Directs and controls activities through directors.High conceptual complexity, with significant intangible or external factors, performing significant management or leadership roles. Provide tenure in current position and overview of prior jobs held.
Management Skills	Mgt. skills more task focused within their group.Demonstrated history of attracting and retaining high caliber employees and facilitating positive morale.Group managed has low turnover rate, meets/beats project due date and shows teamwork. Has respect of peers for management skills and getting tasks accomplished.Excels in current position.	Mgt. skills divided between group task focus and problem solving between groups in division.Demonstrated history of attracting and retaining high caliber employees and facilitating positive morale.Group managed has low turnover rate, meets/beats project due date and shows teamwork.Has respect of peers for management skills and getting tasks accomplished.Excels in current position.	Executive level mgt. skills as shown in communication, leadership or strategic initiatives.Leads problem resolution and agenda setting within and between divisions.Demonstrated history of attracting and retaining high caliber employees and facilitating positive morale.Group managed has low turnover rate, meets/beats project due date and shows teamwork.Has respect of peers for management skills and getting tasks accomplished.Excels in current position.
Scope Of Position	Manages teams or virtual teams of 15-30 developers.Responsible for a project or software area.Full responsibility for architecture of 1 or more layer or subsystem within a product or medium sized product.	Manages teams or virtual teams of 20-40 developers with responsibility for a product or product set, or a substantial portion of a very large product.Full responsibility for architecture of 1 or more layer or subsystem within a product or medium sized product.	Manages large staff of 30+ structured into teams or sections. Full responsibility for a product group, large product or function.Completes projects that span product or organizational boundaries.
Significance of Position and Impact On Oracle	Technology or product area is critical to the success of Oracle's strategic goals.Decisions impact schedule and group operations of	Technology or product area is critical to the success of Oracle's strategic goals.Decisions impact schedule and group operations of Development and	Decisions have serious impact on success of division and company operations.Plays major role in developing corporate and/or division

	Development and may impact revenue.Decisions may be visible to Development SVP and senior management.Actively defines product goals/directions within their area and indirectly with multiple other areas.	possibly other divisions.Decisions are visible to Development SVP and generally other senior management.Actively defines product goals/directions and is fully responsible for their establishment within their area and indirectly impacts multiple other areas. Suggests and justifies product direction with VP/SVP approval	strategies and policies.Sets standards and procedures in a significant product area or product family.Suggests and justifies product direction with SVP/EVP approval.
External Visibility	Visible	Highly visible	Highly visible, may meet with or represent Oracle with external contacts such as industry forums, key customers, partners, press or analysts.
Teamwork and Internal Influence	Some interaction with other groups, influences decisions.Should exhibit effective teamwork with directors and above within Development and across Oracle.	Interacts with other groups, driving action plans and decisions.Broad influence with: senior management. Should exhibit effective teamwork with directors and above within Development and across Oracle on critical matters.	Significant interaction within and across divisions and highly successful in driving strategic level decisions and action plans with these groups.Regularly interacts with Oracle senior management and major customers on critical matters
Achievements	Technical or managerial stature recognized within group and/or Oracle.Represents group within Oracle.Under broad direction, defines requirements for new projects and specifies, designs and develops software to those requirements.	Technical or managerial stature recognized within group, widely within and outside Oracle.Defines requirements for new projects and specifies, designs and develops software to those requirements. Represents group within Oracle	Technical or managerial stature recognized within group, widely across and outside Oracle.Defines requirements for new projects and specifies, designs and develops product components accordingly.Represents group and Oracle both within and outside the company.
Recommendations	From Development senior management outside of VP's group	From senior managers, both within and outside Development.	From senior managers, both within and outside Development.