

# Exchange 2007 Upgrade Sample Telesales Script

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## Purpose of This Document

This document was created to help prepare an outbound telesales professional for a Microsoft Exchange Server 2007 upgrade sales call. This script is meant to be used with customers who are already using Exchange Server 2000 or Exchange Server 2003. It is expected that the telesales professional will use their experience and judgment to adjust the script as needed.

Before phoning the customer, the telesales professional should already know the business name, their industry, the contact name and e-mail address, information on what version of Exchange Server they are running, and information on any support or licensing agreements they have with Microsoft that have lapsed or will soon lapse.

## Calls to Action

The purpose for the outbound call to the Exchange Server 2000 or Exchange Server 2003 customer is to generate a qualified sales lead for a Microsoft technology partner or Microsoft sales representative. A successful call will result in:

- **Confirmation of client contact information**, including contact name, e-mail address, phone number, and mailing address.
- **Specific information for the recipient of the sales lead** on the client's use of Exchange today and their plans (if any) to upgrade to Exchange Server 2007 or to Hosted Exchange.
- **Agreement to allow a Microsoft technology partner or Microsoft sales representative to schedule time** to come in and discuss their needs and demonstrate Exchange Server 2007 and show them the great new features in it.

## The Script

Part I: Engage the prospect.	
Objective	Establish who you are and why you are calling, and gain permission to ask questions of them.
Introduction	<p><b>"Hello, &lt;contact name&gt;, this is &lt;your name&gt; from Microsoft."</b></p> <p><b>"If I could take just a minute of your time, I would like to let you know why I called so then you can decide whether we should keep talking or not. Will that be OK with you?"</b></p> <p>→ If <b>No</b>, then ask, <b>"Would there be a better time for me to call?"</b> → If <b>Yes</b>, then set time for call back and end call. → If <b>No</b>, then ask, <b>"Is there someone else I should talk to instead?"</b> → If <b>Yes</b>, then get their contact name, e-mail address, and phone number, and end call. → If <b>No</b>, then ask, <b>"Would it be OK with you if I mail you some information?"</b> → If <b>Yes</b>, then get their e-mail address, mailing address, and phone number, and then say, <b>"Thank you for your time. I will send the materials right away, and call you back next week to confirm that you received them."</b> Then send them materials. → If <b>No</b>, then thank them for their time and then end the call. → If <b>Yes</b>, then continue.</p> <p><b>"I am calling today because I noticed that your organization is currently using Microsoft Exchange Server &lt;version&gt; for its messaging system. Is that correct?"</b></p> <p>→ If <b>No</b>, then ask, <b>"What are you using for messaging then?"</b> → If they are not using Exchange at all, then refer customers to representatives handling Notes and GroupWise compete activity. → If <b>Yes</b>, then continue.</p> <p><b>"That's great that you use Exchange Server, and we do appreciate your business. The reason I am calling today is that we are hard at work on the next generation of Exchange messaging, called Exchange Server 2007, and I wanted to make sure that as an Exchange Server customer today you were kept up-to-date. Have you heard of Exchange Server 2007?"</b></p> <p>→ If <b>No</b>, then ask, <b>"Would it be OK if I told you a little bit about it?"</b> → If <b>Yes</b>, then <a href="#">skip to Part II: Find Out Their Role</a>. → If <b>No</b>, then ask, <b>"Would there be a better time for me to call?"</b> → If <b>No</b>, then ask, <b>"Is there someone else I should talk to instead?"</b> → If <b>Yes</b>, then get their contact name, e-mail address, and phone number, thank them for their time, and then end call. → If <b>No</b>, then ask, <b>"Would it be OK with you if I mail you some information?"</b> → If <b>Yes</b>, then get their e-mail address, mailing address, and phone number, and then say, <b>"Thank you for your time. I will send the materials right away, and call you back next week to confirm that you received them."</b> Then send them materials. → If <b>No</b>, then thank them for their time and then end the call. → If <b>Yes</b>, then ask, <b>"What have you already heard about Exchange Server 2007?"</b> After you listen to their answer then <a href="#">continue with Part II: Find Out Their Role</a>. When you start to tell them about Exchange Server in <a href="#">Part III</a>, be sure to skip the information they have already heard about (if it is accurate).</p>
Part II: Find Out Their Role	
Objective	Find out their role so that you can target the response to their needs.
Questions about their role	<p>"Messaging involves a lot of different functions, such as deployment, maintenance, management, user support, training, application development and integration, and more. What is your specific role in messaging?"</p> <p>→ If they are the business decision maker in charge of messaging, then skip to <a href="#">Part III: Role: Business Decision Maker</a></p>

	<p>→ If they are the technical decision maker in charge of messaging, then skip to <a href="#">Part III: Role: Technical Decision Maker</a></p> <p>→ If they are responsible for deploying, maintaining, or managing the system, then skip to <a href="#">Part III: Role: Deployment or Management</a></p> <p>→ If they are responsible for user support or training, then skip to <a href="#">Part III: Role: User Support or Training</a></p> <p>→ If they are responsible for application development and integration, then skip to <a href="#">Part III: Role: Application Development and Integration</a></p>
<p><b>Part III: Introduce Them to Exchange Server 2007</b></p>	
Objective	Mention some key features based upon their role.
Role: Business Decision Maker	<p><b>“What happens when the e-mail system goes down or experiences trouble? Do you worry about how users will continue to work if a disaster strikes?”</b></p> <p>→ If <b>Yes</b>, then, “Exchange Server 2007 uses redundant drives and servers to keep the system up and running continuously, and requires fewer back-ups to tape. You can even subscribe to the Hosted Continuity service to get web-based back-ups of up to 30 days of historical e-mail and full e-mail functionality. Exchange Server 2007 is also available as a hosted service where Microsoft hosting partners perform the backups for you and offer Service Level Agreements to insure availability. ”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p><b>“Do your business users have the need to communicate with business partners and suppliers over your e-mail system? Do you ever worry about how to give external partners access to the information they need without compromising security?”</b></p> <p>→ If <b>Yes</b>, then, “With Outlook Web Access, users can access their email and calendar from any location with an Internet connection via a browser-based, Outlook 2007-like experience. External partners and vendors can participate in your e-mail system without requiring a VPN connection into your company that could give them access to intranet sites and file shares that you do not want them to access. You can also rest assured that Exchange Server 2007 Edge Server keeps e-mail messages more secure within organizations. In addition, you can use information rights management features to make sure that only authorized users can access or forward specific e-mail messages.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p><b>“Are you looking for ways to reduce the number of systems that IT must maintain, and decrease the number of servers they have to manage?”</b></p> <p>→ If <b>Yes</b>, then, “New integrated Unified Messaging in Exchange Server 2007 means that you can combine messaging with voice mail and faxing, all in one system. Users like it because they can get e-mail, voice mail, and faxes delivered directly to their Outlook inbox. At the same time, IT professionals can to deliver these features while improving security and lowering costs and complexity through consolidation of messaging infrastructure .”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p><b>“Do you have regulatory requirements for maintaining or archiving documents?”</b></p> <p>→ If <b>Yes</b>, then, “Exchange 2007 incorporates features made specifically for compliance, such as multi-mailbox search, retention rules that are managed via folders, transport rules for messages, and more flexible journaling. Exchange Hosted Services provides additional compliance support with archiving, filtering and encryption services. These services enable organizations to store and search through terabytes of e-mail “in the cloud,” therefore avoiding the cost and complexity of on-premise e-mail management. These add-on services are available to both on-premise and Hosted Exchange customers.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p><b>“According to a Pew Research Center survey, 41% of Internet users used a wireless laptop or email-enabled cell phone this month. Are you looking at better ways to accommodate remote and mobile users while maintaining security?”</b></p> <p>→ If <b>Yes</b>, then, “You can deliver mobile solutions to more of your workforce with real-time cost-effective connectivity between mobile devices and corporate networks. Remote device management features help make provisioning and updating devices more efficient and are built right into Exchange 2007 System Manager. For example, administrators can wipe or lock on-device data, perform password verification, and enforce other security policies over the air to multiple devices simultaneously. So you can do away with expensive and troublesome middleware and give your mobile workers a comprehensive remote communication solution straight out of the box.” Then skip to <a href="#">Part IV: Next Steps</a>.</p> <p>→ If <b>No</b>, then skip to <a href="#">Part IV: Next Steps</a>.</p>
Role: Technical Decision Maker	<p><b>“Do you worry about spam and viruses and how they impact productivity?”</b></p> <p>→ If <b>Yes</b>, then, “Exchange 2007 provides built-in anti-virus/anti-spam/anti-phishing protection and stays up-to-date with frequent and automatic updates. New multi-prong filtering approach (connection, sender, recipient, and content) reduces spam, and attack detection and sender reputation are automatically analyzed. Enhanced attachment filtering and extensibility help reduce viruses.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p><b>“What happens when the e-mail system goes down or experiences trouble? Do you worry about how users will continue to work if a disaster strikes?”</b></p> <p>→ If <b>Yes</b>, then, “Exchange Server 2007 delivers better clustering through continuous replication (local, clustered, or geo clustered), requires fewer back-ups to tape, and allows you to make backup-ups from replica server, which helps avoid impact to the primary server. The Exchange Hosted Continuity service provides a web-based back-up e-mail system that provides access to 30 days of historical e-mail and full</p>

		<p>e-mail functionality. Hosted Exchange also offers organizations a solution for disaster planning since Microsoft hosting partners provide redundancy, backup, restore, and security services.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p>“Do your business users have the need to communicate with business partners and suppliers over your e-mail system? Do you ever worry about how to give external partners access to the information they need without compromising security?”</p>	<p>→ If <b>Yes</b>, then, “With Outlook Web Access, users can access their email and calendar from any location with an Internet connection via a browser-based, Outlook 2007-like experience. External partners can participate in your email system without requiring a VPN connection into your company. You can also rest assured that Exchange Server 2007 Edge to Edge encryption keeps e-mail messages more secure within organizations. In addition, you can use information rights management features to make sure that only authorized users can access or forward specific e-mail messages.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p>“Are you looking for ways to reduce the number of systems that IT must maintain, and decrease the number of servers they have to manage?”</p>	<p>→ If <b>Yes</b>, then, “New integrated Unified Messaging in Exchange Server 2007 means that you can combine messaging with voice mail and faxing, all in one system. Users love it because they can get e-mail, voice mail, and faxes delivered directly to their Outlook inbox. At the same time, IT professionals can to deliver these features while improving security, and lowering costs and complexity through consolidation of the voice infrastructure.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p>“Do you have regulatory requirements for maintaining or archiving documents?”</p>	<p>→ If <b>Yes</b>, then, “Exchange 2007 incorporates features made specifically for compliance, such as multi-mailbox search, retention rules that are managed via folders, transport rules for messages, and more flexible journaling. Exchange Hosted Services provides additional compliance support with archiving, filtering and encryption services. These services enable organizations to store and search through terabytes of e-mail “in the cloud,” therefore avoiding the cost and complexity of on-premise e-mail management. These add-on services are available to both on-premise and Hosted Exchange customers.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p>“According to a Pew Research Center survey, 41% of Internet users used a wireless laptop or email-enabled cell phone this month. Are you looking at better ways to accommodate remote and mobile users while maintaining security?”</p>	<p>→ If <b>Yes</b>, then, “ You can deliver mobile solutions to more of your workforce with Exchange’s built-in mobility support. Direct Push technology via Windows Mobile and Exchange Server 2007 enables real-time cost-effective connectivity between mobile devices and corporate networks. It allows mobile users to stay connected, and has a smaller footprint to save bandwidth. Remote device management features help make provisioning and updating devices more efficient and are built right into Exchange Server 2007 System Manager. For example, administrators can wipe or lock on-device data, perform password verification, and enforce other security policies over the air to multiple devices simultaneously. So you can do away with expensive and troublesome middleware and give your mobile workers a comprehensive remote communication solution straight out of the box.” Then skip to <a href="#">Part IV: Next Steps</a>.</p> <p>→ If <b>No</b>, then skip to <a href="#">Part IV: Next Steps</a>.</p>
Role: Deployment or Management	<p>“According to Microsoft primary research, 53-62% of tasks completed by IT staff are manual in nature. Another 14-24% are achieved via scripts. Does lack of automation impact your system efficiency and performance in any way?”</p>	<p>→ If <b>Yes</b>, then, “Exchange Server 2007 helps simplify management and makes automating installation and maintenance easier with a command line tool that is accessible from the Exchange Management Shell, which is extensible to applications. IT professionals and developers can also save time by building Exchange management functionality into existing tools and applications via the Exchange Web service. And for those customers who want the end-user benefits of Exchange 2007 but no longer want to manage the system, Hosted Exchange is available from Microsoft partners.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p>“Do you find that users have a tough time configuring their computers to connect to the Exchange Server today?”</p>	<p>→ If <b>Yes</b>, then, “The good news is that with Exchange Server 2007, users need only their e-mail alias, name, and password in order to connect and configure their connection to the Exchange Server 2007.”</p> <p>→ If <b>No</b>, then continue with the next question.</p>
	<p>“Do you worry about spam and viruses and how they impact productivity?”</p>	<p>→ If <b>Yes</b>, then, “Exchange 2007 provides built-in anti-virus/anti-spam/anti-phishing protection and stays up-to-date with frequent and automatic updates. New multi-prong filtering approach (connection, sender, recipient, and content) reduces spam, and attack detection and sender reputation are automatically analyzed. Enhanced</p>

		attachment filtering and extensibility help reduce viruses.” → If <b>No</b> , then continue with the next question.
	“Are you concerned about how much work it will be to upgrade to Exchange Server 2007?”	→ If <b>Yes</b> , then, “While upgrading to a new system always has its challenges, the upgrade process to Exchange Server 2007 has been made easier with a single migration engine and the integration of the Exchange Best Practices Analyzer, which helps guide you through the upgrade process with suggestions along the way. Exchange 2007 is also available from Microsoft Hosting partners, which reduces future upgrade challenges since you will always be on the latest version of Exchange.” → If <b>No</b> , then continue with the next question.
	“Do you worry that giving too many users VPN access to your corporate network could leave the system less secure than it could be?”	→ If <b>Yes</b> , then, “Exchange 2007 gives you some ways to reduce the need for VPN connections into your corporate network. Users can access the network via the rich Outlook 2007 client using RPC/HTTP – no VPN needed. Outlook Web Access 2007 gives users a rich Outlook 2007-like experience in a browser – without VPN access. New LinkAccess gives authorized users access to documents on fileshares and SharePoint sites without being connected over VPN connection. And Unified Messaging is also integrated with OWA to allow users to access voicemail or faxes over the Internet. OWA users can also scan the global address list to make it easier to locate people.” Then skip to <a href="#">Part IV: Next Steps</a> . → If <b>No</b> , then skip to <a href="#">Part IV: Next Steps</a> .
Role: User Support or Training	“Do you find that users have a tough time configuring their computers to connect to the Exchange Server today?”	→ If <b>Yes</b> , then, “The good news is that with Exchange Server 2007, users need only their e-mail alias, name, and password in order to connect and configure their connection to the Exchange Server 2007.” → If <b>No</b> , then continue with the next question.
	“Do users find it difficult to make VPN connections just to check e-mail or access a document?”	→ If <b>Yes</b> , then, “Exchange 2007 gives you some ways to reduce the need for VPN connections into your corporate network. Users can access the network via the rich Outlook 2007 client using RPC/HTTP – no VPN needed. Outlook Web Access 2007 gives users a rich Outlook 2007-like experience in a browser – without VPN access. New LinkAccess gives authorized users access to documents on fileshares and SharePoint sites without being connected over VPN connection. And Unified Messaging is also integrated with OWA to allow users to access voicemail or faxes over the Internet. OWA users can also scan the global address list to make it easier to locate people.” → If <b>No</b> , then continue with the next question.
	“Do mobile and remote users find it frustrating to get and stay connected to the messaging system?”	→ If <b>Yes</b> , then, “Exchange Server 2007 makes accessing e-mail, calendar, contacts, tasks, and files from a Windows Mobile or third party device a richer experience, while delivering a self-service model to reduce the need for user support and training. Exchange Server pushes e-mail directly to mobile devices, and devices have three levels of security. Outlook Mobile makes it easier for mobile users to access the features in Outlook that they use the most, such as search, flags, and more. Mobile Office and Office Communicator Mobile can enhance productivity on the road.” → If <b>No</b> , then continue with the next question.
	“Do users find it difficult to prioritize and stay on top of tasks when some originate from e-mail, some from voice mail, and some from faxes?”	→ If <b>Yes</b> , then, “With easy access to all communication technologies, users can receive e-mail messages, voice mail, and faxes all in their Inbox so that they can prioritize them appropriately and use all of the tools in Outlook to store and manage them (such as flags, personal folders, search, and more). Exchange Server 2007 allows IT professionals to deliver these features while improving security, and gaining greater visibility into who is connecting and how.” → If <b>No</b> , then continue with the next question.
	“Do you worry about spam and viruses and how they impact the users you support or train?”	→ If <b>Yes</b> , then, “Exchange 2007 provides built-in anti-virus/anti-spam/anti-phishing protection and stays up-to-date with frequent and automatic updates. New multi-prong filtering approach (connection, sender, recipient, and content) reduces spam, and attack detection and sender reputation are automatically analyzed. Enhanced attachment filtering and extensibility help reduce viruses.” Then skip to <a href="#">Part IV: Next Steps</a> . → If <b>No</b> , then skip to <a href="#">Part IV: Next Steps</a> .
Role: Application Development	“Does your organization use scripts to manage the installation and	→ If <b>Yes</b> , then, “Command line integration with the Microsoft Management Shell enables you to fully script installation and deployment of Exchange Server 2007,

t and Integration	deployment of programs?"	and it is extensible to other programs and tools you use." → If <b>No</b> , then continue with the next question.
	"Do you have the need to integrate messaging into existing applications and programs, such as line of business applications?"	→ If <b>Yes</b> , then, "The API set for Exchange Server 2007 is broader and deeper, and includes a web service that you can use to incorporate Exchange Server 2007 data into your business applications." Then skip to <a href="#">Part IV: Next Steps</a> . → If <b>No</b> , then skip to <a href="#">Part IV: Next Steps</a> .
<b>Part IV: Next Steps</b>		
Objective	Agree on next steps, update contact information	
Next steps	<p><b>"I know that you are busy, and we have just barely scratched the surface of what's new in Exchange Server 2007. I would like to make sure that you get more information about it so that you can hopefully plan to upgrade to it after it releases in XXXX of 200X. Are you already working with a Microsoft technology partner?"</b></p> <p>→ If <b>No</b>, then ask, "Would it be OK with you if I introduced you to a Microsoft technology partner or Microsoft representative who could come meet with you and possibly demonstrate the new features in Exchange Server 2007?"</p> <p>→ If <b>Yes</b>, then ask "Exchange Server 2007 is available as an either on-premise solution or as a hosted service from a Microsoft partner. In order to put you in contact with the right Microsoft technology partner, would you say that your organization is most interested in an on-premise solution or a hosted solution?"</p> <p>→ If <b>On-premise</b>, ask for their full name, title, address, and phone number, then thank them for their time and tell them that you will be contacting them soon. Then contact an on-premise technology partner or their Microsoft representative to secure a commitment to contact the customer. Check back in a week or so to see if they have been contacted.</p> <p>→ If <b>Hosted</b>, ask for their full name, title, address, and phone number, then thank them for their time and tell them that you will be contacting them soon. Then contact one of the hosted Exchange partners listed in the "FY07 Hosted Exchange Providers for Exchange 2007 Upgrade" spreadsheet (available at <a href="http://arsenalcontent/ContentDetail.aspx?ContentID=92791">http://arsenalcontent/ContentDetail.aspx?ContentID=92791</a>) to secure a commitment to contact the customer. Check back in a week or so to see if they have been contacted.</p> <p>→ If <b>No</b>, then ask, "Would it be OK with you if I mail you some information?"</p> <p>→ If <b>Yes</b>, then get their e-mail address, mailing address, and phone number, and then say, "Thank you for your time. I will send the materials right away, and call you back next week to confirm that you received them." Then send them materials.</p> <p>→ If <b>No</b>, then thank them for their time and then end the call.</p> <p>→ If <b>Yes</b>, then, "What Microsoft technology partner are you working with? Have they spoken to you about upgrading to Exchange Server 2007?"</p> <p>→ If <b>Yes</b>, then ask, "Are you planning to upgrade to Exchange Server 2007 then?"</p> <p>→ If <b>Yes</b>, then ask, "Is there any additional information you need or anything I can do to help? When do you plan to make the upgrade?" If you can help them, help them. Otherwise, thank them for their time and then contact the partner and their Microsoft sales representative to convey the results of your conversation.</p> <p>→ If <b>No</b>, then ask, "Why aren't you planning to upgrade to Exchange Server 2007?" See the Exchange Server 2007 Upgrade Discussion Guide for some tips on objection-handling. After your discussion, ask if you can mail them information, and then request their full name, title, e-mail address, mailing address, and phone number. Then end the call.</p> <p>→ If <b>No</b>, then ask, "Would it be OK with you if I contacted them to see if they could put together a meeting to discuss your needs and show you some of the new features in Exchange Server 2007?"</p> <p>→ If <b>Yes</b>, then ask, "Is there a particular person you work with at &lt;partner name&gt;? Could I get their contact information?" Collect the partner's contact information, and then tell the customer that you will contact their partner and then get back to them. Thank them for their time and then end the call.</p> <p>→ If <b>No</b>, then ask, "Why aren't you planning to upgrade to Exchange Server 2007?" See the Exchange Server 2007 Upgrade Discussion Guide for some tips on objection-handling. After your discussion, ask if you can mail them information, and then request their full name, title, e-mail address, mailing address, and phone number. Then end the call. Follow up by conveying the information received on this call with their technology partner and/or their Microsoft sales representative.</p>	