

Upgrade the Desktop

a partner opportunity



“Upgrade your Desktops” Call Script



Call objective.

Initiate a discussion with midmarket customers:

Upgrade their desktops with Microsoft® Office Professional Plus 2007 and Windows Vista™ through the Microsoft Open Licensing program.

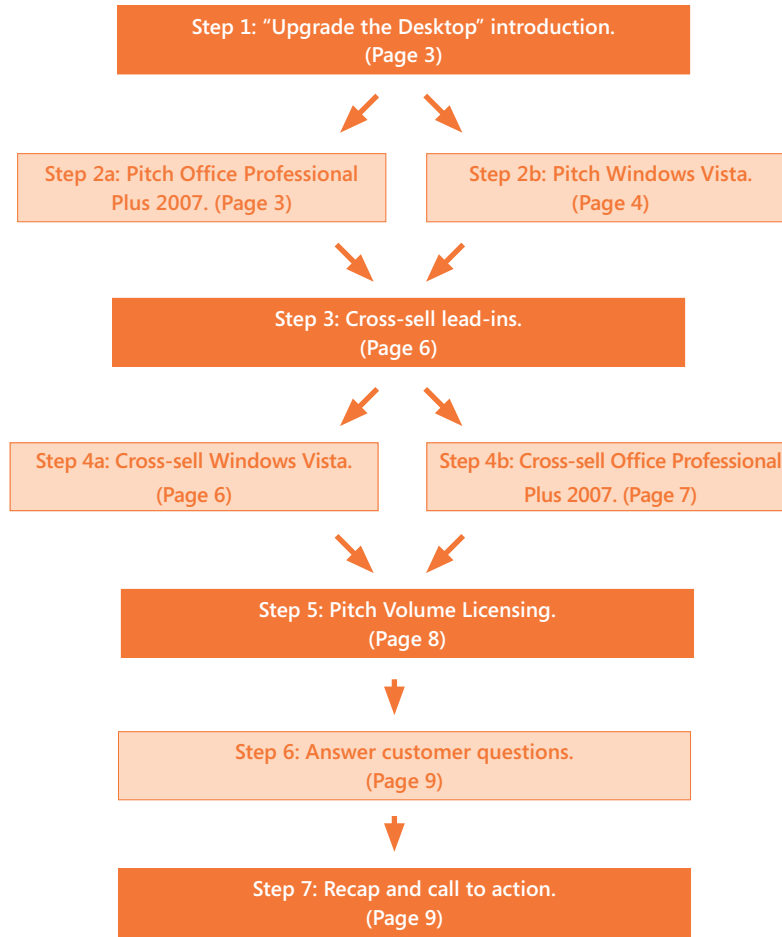
Target customers.

Limited-time offer	Office Professional Plus 2007 target customers	Windows Vista target customers
[Insert offer copy here, if any.]	<p>Midmarket customers:</p> <ul style="list-style-type: none"> • Who generally upgrade to the latest version of Microsoft Office soon after launch. • Currently using Microsoft Office XP (or earlier Office versions). Due to the significant value difference between Office Professional Plus 2007 and earlier versions, partners can get a high return from this customer group. 	<p>Midmarket customers:</p> <ul style="list-style-type: none"> • With an annuity agreement expiring within the next six months. • Who have made previous purchases of Windows® XP Volume Licenses. • Who wish to prolong the usefulness of PCs purchased within the last 18 months. • In industries requiring a larger mobile workforce; laptop hardware refresh cycles are considerably shorter than that of desktop computers.

Strategy.

Keep in mind:	
Call tips	<ul style="list-style-type: none"> • Try to sell IT professionals both solutions: Office Professional Plus 2007 and the Windows Vista operating system. If they are not interested in upgrading both at the present time, you should focus on the single solution that best fits their situations. • Use the “Talking Points” provided. A third-party research group identified these points as the messages IT professionals find relevant. • Refer to resource materials to familiarize yourself with the “Upgrade the Desktop” campaign.
Resources	<ul style="list-style-type: none"> • “Upgrade the Desktop” battle card • “Upgrade the Desktop” objection-handling guide

Suggested conversation flow and table of contents.



Step 1: "Upgrade the Desktop" introduction.

Question	Response
Identify customer knowledge of the upcoming releases of Microsoft Office Professional Plus 2007 and Windows Vista.	
<p>Hello _____, this is _____ calling from _____. I have some important information about Microsoft Office Professional Plus 2007 and Windows Vista. Do you have a few minutes for me to share some details with you?</p>	<p>[If yes] Proceed.</p> <p>[If no] Ask for a good time to call back.</p> <p>OR</p> <p>Thank you for taking my call. If you'd like to learn more about Microsoft solutions, my phone number is [Insert phone number]. Please don't hesitate to call.</p>
<p>Your company's greatest business asset is its people. But in most cases, they can only be as productive as the tools they're given.</p> <p>Microsoft Office Professional Plus 2007 and Windows Vista are designed to empower your people by enhancing their desktop capabilities.</p> <p>Let me tell you about the benefits of buying either Office Professional Plus 2007 or Windows Vista for your business.</p>	<p>Diagnose and pitch either Office Professional Plus 2007 or Windows Vista (there will be opportunities to cross-sell the other solution later in the call).</p> <p>[If Office Professional Plus] Proceed to Step 2a.</p> <p>[If Windows Vista] Proceed to Step 2b.</p>

Step 2a: Pitch Office Professional Plus 2007.

Question	Response
Identify critical problem area.	
<ol style="list-style-type: none"> 1. Connecting people by streamlining communication and collaboration between team members. 2. Connecting information by managing, prioritizing, and acting on important business information. 	<p>[If 1] Proceed to Simplify how people work together.</p> <p>[If 2] Proceed to Find information and improve business insights.</p>

Step 2a: (continued): Simplify how people work together.

Office Professional Plus 2007 simplifies collaboration, instantly and securely, with integrated instant messaging (IM), audio, video, and Web conferencing. So regardless of what teams people work on, or what offices they work in, they can collaborate seamlessly with co-workers, partners, and clients.

Question	Office Professional Plus 2007 talking points
Can your teams easily share and access essential project and meeting information in a central, Web-based location?	<p>[If no] Now you can improve productivity through easy-to-create, shared documents. Office Professional Plus 2007 makes it easier to share important documents. Right out of the box, it integrates with Microsoft Windows SharePoint® Services, and features enhanced tools for document review and comparison.</p> <p>With instant integration, your business can have a powerful, self-service collaboration environment that supports workflow-enabled document review. It also enables the creation of slide libraries for sharing Microsoft Office PowerPoint® content and the transfer of document libraries offline into Microsoft Office Outlook® for synchronization with Windows SharePoint Services.</p> <p>[If yes] Proceed to next question.</p>
Can your team members connect easily with co-workers and colleagues, regardless of their locations?	<p>[If no] Office Professional Plus 2007 simplifies collaboration, instantly and securely—so your teams can communicate effortlessly regardless of location.</p> <p>In particular, Microsoft Office Communicator 2007 improves user productivity by enabling seamless communication with others in different locations or time zones through a range of communication options, including IM and phone, and voice, video, or Web conferencing.</p> <p>[If yes] Proceed to next question.</p>
Do your team members have the tools to make professional and influential documents and presentations?	<p>[If no] Advanced capabilities in Office Professional Plus 2007 make it easy to create high-impact and compelling documents, spreadsheets, and presentations. New 3-D effects, shadows, reflection, glow, and surface texture tools make it easy to add highly professional-looking charts and diagrams. New themes capability simplifies the process of applying a consistent look and feel to documentation, and now users can also share documents in PDF and Extensible Markup Language Paper Specification (XPS) format, without requiring additional third-party tools.</p> <p>[If yes] Proceed to next question.</p>
Can your users efficiently track their time?	<p>[If no] Office Professional Plus 2007 makes it easier to share and coordinate calendars (both inside and outside your organization). With enhanced Office Outlook features, like To-Do Tracking, you can be sure that your teams are on the same schedule.</p> <p>In fact, To-Do Tracking gives a consolidated view of upcoming appointments, tasks, and e-mail messages flagged for follow-up. Allocating time to work on tasks is as easy as dragging and dropping them onto a calendar.</p> <p>[If yes] Proceed to next section. Proceed to next section or Step 3 (if not interested in next section).</p>

Step 2a (continued): Find information and improve business insights.

Question	Office Professional Plus 2007 Talking Points
Do you save time and costs by using electronic forms?	<p>[If no] With Office Professional Plus 2007 you can reduce time and cost with easy-to-use electronic forms. Integration of Outlook and Microsoft Office InfoPath® 2007 can help your users save time and make better and timelier business decisions.</p> <p>Specifically, advances in Office InfoPath 2007 enable users to deploy forms as e-mail messages for completion without leaving the familiar Outlook 2007 environment.</p> <p>[If yes] Proceed to next question.</p>
Do your users spend too much time collecting and collating information from disparate sources?	<p>[If yes] Office Professional Plus 2007 provides employees with the tools to effectively manage an ever-increasing workload, such as e-mail. Innovative Microsoft Office Excel® and Outlook features—including a new, better organized interface—now make it easier to keep track of requests, keeping your team members more productive.</p> <p>[If no] Proceed to next question.</p>
Would your users benefit from a better user experience?	<p>[If yes] A new user interface makes it easier for users to find and use the powerful features of Office Professional Plus 2007. With over 1,500 commands in Microsoft Office Word alone, the new interface is a sophisticated navigational tool that helps users discover the full potential of their Microsoft Office software.</p> <p>[If no] Proceed to next question.</p>
Do your team members have quick access to their data when they need it?	<p>[If no] Enhance sales and reporting features that enable quicker, more informed business decisions. With improved features, such as visualization tools, you can analyze the right data at the right time, helping you make more informed business decisions.</p> <p>In fact, Office Excel 2007 makes sophisticated data analysis available for more information workers through easier access to corporate data sources, redesigned interfaces for Microsoft PivotTable® dynamic views and more powerful and easy-to-use conditional formatting.</p> <p>[If yes] Proceed to Step 3.</p>

Step 2b: Pitch Windows Vista.

Question	Response
Identify critical problem area.	
<p>With regard to your business, which of the following areas would you like to address or improve?</p> <ol style="list-style-type: none"> 1. Simplifying everyday business processes to better control your ever-increasing volume of content. 2. Having secure, cost-effective systems that are easy to deploy. 	<p>[If 1] Proceed to Help protect and manage content.</p> <p>[If 2] Proceed to Reduce security risks and deployment costs.</p>

Step 2b (continued): Help protect and manage content.

Question	Windows Vista talking points
Have you been the victim of hardware theft?	<p>[If yes] Windows Vista prevents the loss of critical or sensitive company information from lost or stolen PCs. Now your data can remain protected with features like Windows BitLocker™ Drive Encryption.</p> <p>[If no] Proceed to next question.</p>
Can your team members simply search their PCs, the network, and the Internet for the information they need?	<p>[If no] Windows Vista can increase user productivity by simplifying the way people organize and search for files and information. Powerful, integrated search capabilities save users time by helping them find just about anything on their PCs quickly. Plus, a new user interface (Windows Aero™) provides better stability, improved user experience, richer visualization, and easier navigation.</p> <p>[If yes] Proceed to next section or Step 3 (if not interested in next section).</p>

Step 2b (continued): Reduce security costs and deployment costs.

Question	Response
Is your business fairly susceptible to security threats and system vulnerabilities?	<p>[If yes] Windows Vista is designed to help minimize security threats and system vulnerabilities. With a more secure environment, you spend less time and money on reactive security measures.</p> <p>In fact, enhanced online security with Windows Vista browser-protected mode and anti-phishing helps protect your users' identities and data. Safety-enhanced browsing in Windows Internet Explorer® 7 Protected Mode mitigates threats from malicious software such as viruses, spyware, and root kits. Plus, User Account Control (UAC) makes it easier to implement standard user privileges. Now you can create a separate account for each user and control which Web sites, programs, and downloads he or she can use and install.</p> <p>[If no] Proceed to next question.</p>
Do you spend too much time responding to help desk calls?	<p>[If yes] Reduce the time and cost of troubleshooting and resolving system issues with Windows Vista. New features keep help-desk requests to a minimum, so you can focus on more strategic initiatives.</p> <p>Advance Group Policies better manage critical usage scenarios and corporate PCs. Plus, with security and management features on each desktop, you can reduce the time spent responding to help-desk calls.</p> <p>[If no] Proceed to next question.</p>
Do you wish you could spend less time configuring and deploying a new PC?	<p>[If yes] With Windows Vista you can reduce the time it takes to configure and deploy a new PC. Tools such as System Image Manager help make installations faster, more manageable, and less error-prone. System Image Manager leverages the modular architecture of Windows Vista and its XML-based unattend format to enable better servicing and language independence.</p> <p>[If no] Proceed to Step 3.</p>

Step 3: Cross-sell lead-ins.

Question	Response
Cross-sell Windows Vista or Office Professional Plus 2007, depending on which product you led with.	
So, we have spend the last couple of minutes talking about the extensive benefits of [Office Professional Plus 2007/Windows Vista]. Would you like to hear how [Windows Vista/Office Professional Plus 2007] can strengthen those benefits?	[If cross-selling Windows Vista] Proceed to Step 4a . [If cross-selling Office Professional Plus 2007] Proceed to Step 4b . [If no] Proceed to Step 5 .

Step 4a: Cross-sell Windows Vista.

Cross-sell Windows Vista with and Office Professional Plus 2007 sale.
<p>If the driver for the customer to upgrade to Office Professional Plus 2007 is:</p> <ul style="list-style-type: none"> • Simplify how people work together [Proceed to Collaboration] • Find information and improve business insights [Proceed to User productivity] <p>If the points above don't apply, refer to Step 2b to discuss how Windows Vista can:</p> <ul style="list-style-type: none"> • Help protect and manage content • Reduce security risks and deployment costs

Step 4a (continued): Collaboration.

Question	Windows Vista talking points
Can your teams currently share information and ideas without a network?	<p>[If no] Windows Vista helps increase your teams' productivity by making it easier to share information and ideas without a network. With the Windows Meeting Space feature, your teams can hold peer-to-peer, ad-hoc meetings to share ideas in real time.</p> <p>[If yes] Proceed to next section or Step 5 (if not interested in next section).</p>

Step 4a (continued): User productivity.

Question	Windows Vista Talking Points
Can your team members simply search their PCs, the network, and the Internet for the information they need?	<p>[If no] Windows Vista increases user productivity by simplifying the way people organize and search for files and information. Powerful, integrated search capabilities save users time by helping them find just about anything on their PCs quickly. Plus, a new user interface (Windows Aero) provides improved user experience, richer visualization, and easier navigation.</p> <p>[If yes] Proceed to next question.</p>
Can your users remain just as productive on the road?	<p>[If no] With Windows Vista you can increase mobile user productivity by making it easier to connect and synchronize remotely. Whether on the road or in the office, your users can remain productive members of their teams. Plus, wireless connections with enhanced security help protect your mobile users.</p> <p>[If yes] Proceed to Step 5.</p>

Step 4b: Cross-sell Office Professional Plus 2007.

Cross-sell Office Professional Plus 2007 with a Windows Vista sale.
<p>If the driver for the customer to upgrade to Windows Vista is:</p> <ul style="list-style-type: none"> • Help protect and manage content [Proceed to Improve security] • Reduce security risks and deployment costs [Proceed to Optimize desktop infrastructure] <p>If the points above don't apply, refer to Step 2a to discuss how Office Professional Plus 2007 can:</p> <ul style="list-style-type: none"> • Simplify how people work together • Find information and improve business insights

Step 4b (continued): Improve security.

Question	Office Professional Plus 2007 talking points
Would you like to better protect your critical information?	<p>[If yes] Help ensure protection of your company's critical information with Office Professional Plus 2007. New features help keep your business's most vital business information safe. Plus, the Information Rights Management feature helps enforce document and e-mail usage policies providing reduced risk of confidential information loss.</p> <p>[If no] Proceed to next section or Step 5 (if not interested in next section).</p>

Step 4b (continued): Optimize desktop infrastructure.

Question	Office Professional Plus 2007 talking points
You could better manage your network bandwidth?	<p>[If no] Office Professional Plus 2007 helps better manage network bandwidth and storage by reducing file size. With smaller files, your network is free to perform at its best. It also helps enable smaller, more robust documents and deep integration with information systems and external data sources, reducing both cost and complexity and helping enable users to work confidently with consistent and accurate information.</p> <p>[If yes] Proceed to Step 5.</p>

Step 5: Pitch Volume Licensing.

Question	Response
Now that we have identified some of the benefits of upgrading your desktops, let's look at your purchasing and maintenance options.	<p>[Background for Volume Licensing]</p> <p>Volume Licensing is a cost-effective means to acquire multiple licenses of Microsoft software. The Open Licensing program is available for mid-sized organizations. The "Upgrade the Desktop" will focus on Open and Open Value Licensing programs.</p> <p>The benefits of Open Licensing are:</p> <ul style="list-style-type: none"> • Cost-effective way to get licenses for a PC environment. • Provides access to Office Professional Plus 2007 (only available through volume licensing). • Allows TDMs to purchase the upgrade to Windows Vista at a discounted price. <p>Microsoft Software Assurance is a maintenance program that helps your organization get the most from Microsoft software through a broad range of benefits. From deployment planning and staff training to software upgrades, Software Assurance benefits help you increase worker productivity, accelerate organizational performance, and realize a return on your software investment faster. Plus, The Windows Vista Enterprise SKU is an exclusive benefit of Software Assurance.</p> <p>Software Assurance is included with an Open Value License and is an additional purchase with an Open License.</p>
What if you could reduce your upfront licensing cost and accurately forecast your software budget over the term of your agreement? Would you be interested?	<p>[If yes] Software Assurance is a maintenance offer that helps you get the most out of the software that you license.</p> <p>If you choose to purchase a license for either Office Professional Plus 2007 or Windows Vista with Software Assurance via Open Value, you will have access to New Version rights, our Home Use Program, and e-learning courseware for your end users for up to two years.</p> <p>Purchasing via Open Value will allow you to split your payments across a three-year term and utilize added training, support, and services benefits as well.</p> <p>Customers who acquire their licenses with Software Assurance also have the ability to renew their coverage in the future, further lowering their annual IT costs.</p> <p>[If no] Proceed to next Step 6.</p>

Step 6: Answering customer questions.

What is/are your primary concern(s)?
Refer to the "Upgrade the Desktop" objection-handling response sheet.

Step 7: Recap and call to action.

Question	Response
Identify interest and steps for moving forward.	
Now is the perfect time to upgrade your desktops and enhance the abilities of your users. Would you like to take advantage of this upgrade opportunity today?	[If yes] Process and fulfill order. [If no, but interested in additional information] Confirm e-mail address and send template with applicable talking points. Arrange a time for follow-up.

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