

Breaking free of conventional thinking about CRM

HP and Microsoft offer alternative thinking about CRM

Telesales script

Note to Frontline Partners

This document will help you prepare for discussions with small and midsize business customers about deploying customer relationship management (CRM) solutions leveraging Microsoft® Dynamics CRM software and HP platforms. By responding to growing customer demand and interest in CRM, campaign activities can create demand and pull-through for core products, solution sales, additional Microsoft software products and other HP systems.

Before phoning the customer, you should already know the business name, the industry, the contact name and e-mail address. If possible, you should also have information on what HP equipment the customer is using, along with information on any support or licensing agreements the customer has with Microsoft or other software vendors.

Calls to action

The purpose of the outbound call to the customer/prospect is to help generate a qualified sales lead. Remember that partners like you are the key to successful implementations. Don't hesitate to use your expertise, strategy and service as selling points, in addition to the points made in this script. A successful call will result in:

- Confirmation of customer contact information, including contact name, e-mail address, phone number and mailing address.
- Specific information on the customer/prospect's current use of Microsoft software and their plans (if any) to implement a CRM solution.
- Agreement to allow you to schedule time to come in and discuss how your company's service and expertise—combined with the powerful new features of Microsoft Dynamics CRM and HP platforms—can help this customer access and use a 360-degree view of customer information, enhance security of business data, and do more with less.

We suggest you visit the HP/Microsoft Frontline Partnership "Customer Relationship Management" at <http://www.hpmspartnermarketing.com> to find additional resources that will be useful during your sales calls. You will find a customizable brochure and other marketing collateral that you can download and print.

The Script

Part I – Engage the prospect

Objective: Establish who you are and why you are calling, and gain permission to ask questions of the customer/prospect.

Introduction: “Hello, <Contact Name>, this is <Your Name> from <Your Company Name>. I am calling today to talk about solutions that can help you empower your employees through integrated customer relationship management.

Question: Do you have a few minutes for me to share some details with you?”

If **YES**, then skip to **Part II: Introduce the customer to CRM solutions from HP and Microsoft.**

If **NO**, then ask, “Is there a more convenient time for me to call back?”

If **NO**, then ask, “Is there someone else I should talk to instead?”

If **YES**, then get their contact name, e-mail address, and phone number, thank them for their time, and end the call.

If **NO**, then ask, “Is it okay if I mail you some information on CRM solutions from HP and Microsoft?”

If **YES**, then get their e-mail address, mailing address, and phone number, and then say, “Thank you very much for your time. I’ll send the materials right away. I’ll call you back next week to confirm that you received them.” Once off the phone, send the materials immediately.”

If **NO**, then thank the customer for his/her time and end the call.

Part II – Introduce the customer to CRM solutions from HP and Microsoft

Objective: Review key features and benefits of CRM solutions from HP and Microsoft, including discussions on Microsoft Dynamics CRM, HP BladeSystem c-Class infrastructures, HP ProLiant servers and HP StorageWorks storage solutions.

Question: “That’s great. I’d like to focus on how <Your Company Name> can help you take advantage of the latest innovations in customer relationship management from HP and Microsoft.

Question: “First, let’s chat about implementing a comprehensive CRM solution at your organization. Do you envision the implementation process as complex, complicated and expensive?”

If **YES**: “You’re not alone. Many organizations think that if they receive enterprise-level functionality from a CRM solution, then it must be complex and very challenging and expensive to implement. While that may be true with other CRM solutions, HP and Microsoft offer an improved CRM solution can help you break free from conventional thoughts about CRM. HP and Microsoft provide an all-new way to help you enhance customer satisfaction and foster

customer loyalty, while boosting employee productivity, streamlining management and lowering costs. Our comprehensive range of servers, storage, networking and Total Care products and services provides an efficient, reliable business technology platform to run Microsoft Dynamics CRM, with flexible configurations to let you expand the CRM solution as your business grows. It's the only CRM solution you need—whatever your needs may be.

If **NO**: "Then perhaps you've already learned that when you choose HP and Microsoft technology, you receive solutions that are easy to use and implement. You know that our comprehensive range of servers, storage, networking and Total Care products and services provides an efficient, reliable business technology platform to run Microsoft Dynamics CRM, with flexible configurations to let you expand the CRM solution as your business grows. It's the only solution you need—whatever your needs may be."

Question: "Let's talk about information access first. Are your employees able to quickly access all the customer information they need to do their jobs?"

If **YES**: "That's great. Then you must already have a CRM solution in your organization. But CRM technologies have come a long way since they first appeared. Where legacy CRM solutions are often comprised of individual applications for sales, marketing, customer service, training, performance management and more—each with its own user interface, standing isolated from all other CRM applications—today's CRM from HP and Microsoft offers midsize organizations like yours an alternative. With HP and Microsoft, you receive an integrated CRM solution that provides a consistent, 360-degree view of all customer information, available to all employees company wide. And your workers will be up and running in no time, thanks to the familiar end-user environment.

If **NO**: "A CRM solution from HP and Microsoft can help you with that. With Microsoft Dynamics CRM and HP platforms, your teams receive an integrated CRM solution that provides a consistent 360-degree view of all customer information, available to all employees company wide. HP and Microsoft CRM solutions offer an all-new way to boost employee productivity, as well as enhance customer satisfaction, foster customer loyalty, streamline management and lower costs."

Question: "Now let's talk about management. Do your IT personnel spend too much time managing and maintaining your CRM infrastructure?"

If **YES**: "Then you're probably looking for a solution that easy to manage, so that your IT personnel can focus less on management and more on innovation. HP integrated infrastructure and management tools make it simple to streamline deployment and administration. You can quickly resolve performance bottlenecks with HP Insight Control Management Suite. It's a quick and reliable way to configure server hardware to get the most out of your server infrastructure across its entire lifecycle. You will enjoy reliable, affordable availability with HP ProLiant Integrated Lights-Out technology for remote management and system health checks. And you can create automated policies to easily adjust application environments, and assign server, network and storage resources based on business needs. You'll streamline deployment and management throughout the CRM environment, resulting in better end-user support with less stress on IT.

If **NO**: "Then perhaps you've already discovered the benefits of integrated management and infrastructure tools—including HP Insight Control Management Suite and HP ProLiant Integrated Lights-Out technology—one of the key benefits of an HP and Microsoft CRM solution."

Question: “Can we spend a little time talking about infrastructure?”

If **YES:** “CRM solutions from HP and Microsoft enable you to extend your existing technology investments. By taking advantage of the dollars you’ve already spent on your IT infrastructure, a CRM solution from HP and Microsoft offers the customer life cycle management features at a price you can afford. There are no new network components to purchase, no additional networks to manage or maintain, no new software licenses to buy, and no new middleware to add to your IT environment. In short, CRM solutions from HP and Microsoft leverage your existing infrastructure, helping you gain significant productivity benefits without spending additional money on infrastructure enhancements.”

If **NO:** “Okay. Maybe we can talk about some other time, when you have a bit more time to chat with me about CRM solutions.”

Question: “Do you have time to chat for awhile about Microsoft Dynamics CRM?”

If **YES:** “Excellent. Microsoft Dynamics CRM is a line of integrated, adaptable business management solutions that automate and streamline customer relationship processes in a way that helps you drive business success. As you strive to deliver value by satisfying critical needs efficiently, Microsoft Dynamics CRM empowers all your employees to function at optimal productivity levels, deliver high-quality services, and respond quickly to customer questions.

Your marketing personnel receive a clearer view of customers, enabling them to make well-informed marketing investments. Your employees can segment customer lists into distinct benefit groups, and then market to one or more of the identified segments using a workflow-driven model. Your sales representatives can identify more leads and close more business through access to a complete view of customer data online or offline. Your workers can leverage tools that offer real-time access to leads, identify cross-sell and up-sell opportunities, and close more deals in less time. Your customer service personnel can provide more value to customers through faster response to customer service issues. Your service organization will be empowered to anticipate, address and deliver consistent, efficient customer care that contributes to the long-term profitability of your business.

Microsoft Dynamics is one your one-stop shop for CRM support.

- Marketing – Customer segmentation, Campaign planning and execution, Data extraction and cleansing, Analytics and reporting, Marketing/sales collaboration tools, Information-sharing portals
- Sales – Lead and opportunity management, Account and contact management, -Territory management, Forecasting and sales analytics, Offline and mobile device access, Quick access to products, pricing and quotes
- Customer service – Account and contact management, Case and interaction management, Knowledge-base management, Service scheduling, Workflow across teams and groups, Service reporting and analytics

If **NO:** “Okay. But if you decide later that you want to find out about Microsoft Dynamics CRM, you can visit www.microsoft.com/dynamics for details.”

Question: “Next, I’d like to talk about the hardware platform for HP and Microsoft CRM solutions, namely HP BladeSystem and HP ProLiant. Is that okay with you?”

If **YES**: “Great. Let’s talk about HP BladeSystem first. Designed specifically for midsize organizations with big compute and storage needs, HP BladeSystem offers the power and performance you need to get the job done. With the HP BladeSystem “infrastructure in a box,” you can build vital business solutions that are more affordable, take less time to maintain, use less power and are ready to grow right along with your organization.

The HP BladeSystem all-in-one design provides the essentials for building, maintaining and upgrading your infrastructure from start to finish. Inside, you can mix and match your choice of Windows-based applications—including Microsoft Dynamics CRM—with a combination of HP ProLiant server blades, HP Integrity server blades (for SQL Server database), HP StorageWorks storage blades, and a variety of the most popular networking brands and standards.

Growing companies like yours are adopting HP BladeSystem as the foundation for their business because HP BladeSystem offers a unique combination of benefits, all in one box.

- Hassle-free to manage
- Versatile and flexible to fit your changing business needs
- Built-in redundancy to protect your data
- Affordable to buy, own and operate
- Energy-efficient to meet your green initiatives”

As for HP ProLiant servers, organizations around the world trust HP ProLiant technology to drive greater efficiencies in their data centers, while helping them exercise greater insight and control over their systems. You can, too, when you choose HP ProLiant servers to speed the implementation of your new CRM solution.

You can achieve a more efficient IT environment with HP ProLiant because you’ll need fewer resources to do more work—and that means you’ll use less energy. HP ProLiant offers cutting-edge energy efficiency to minimize operational costs and maximize the resources in your data center.

As your business continues to evolve, HP ProLiant servers provide pervasive insight into your environment and control of your systems. HP Insight Control Environment provides total control of your computing environment, as well as maximum flexibility to expand as your business grows. And HP ProLiant offers a broad set of management tools and standards, so you can gain operational transparency for 24/7 system monitoring.

If **NO**: Okay, but if you decide later that you want to find out about the HP BladeSystem “infrastructure in a box,” you can visit <http://www.hp.com/go/bladefsystem>, and visit <http://www.hp.com/go/proliant> to learn more about the world’s best selling server family, HP ProLiant.”

Part III – Wrap up and discuss next steps

Wrap up: I hope that our discussion on CRM solutions has been helpful for you, and that you learned a bit about how your business can benefit by empowering your workers with the latest technologies from HP and Microsoft. At [Partner Name], we specialize in CRM solutions built just for you; customized solutions that best fit your unique business needs. We offer a powerful network of resources that can provide services at every step—strategic advice before you buy, implementation, and ongoing

support—all intended to keep costs down. Our approach is personal and powerful, and it combines the exceptional technology of HP and Microsoft with our local expertise. Together we offer an alliance that you can count on—both today and tomorrow.

Next step: As a next step in your IT evolution, would you like to schedule a no-risk assessment of your business environment?"

If **YES:** Book appointment, and then say, "Thank you very much. We look forward to meeting with you and planning the best solution for meeting your communication needs."

If **NO:** Say, "Thank you very much for your time. If you discover later that you'd like us to assess your business environment, please don't hesitate to call us at [partner phone number] or send an e-mail to [partner e-mail address]. We'll be very happy to talk with you then." End the call.

If **NO, but interested in additional information:** Confirm e-mail address and send template with applicable talking points, as well as a brochure and/or whitepaper (if desired). Arrange a time for follow up. Close by thanking the customer for his/her time, and then end the call.

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