



## FRONTLINE PARTNERSHIP

# Upgrade Your Server to Microsoft Exchange Server 2007

## Telesales Script

### NOTE TO PARTNERS:

This document was created to help you prepare for an outbound Microsoft® Exchange Server 2007 upgrade sales call. This script is meant to be used with customers who are already using Exchange 2000 Server or Exchange Server 2003, or who are currently in the market for a new communication infrastructure. It is expected that you will use your experience and judgment to adjust the script as needed.

The following script contains language to address the needs of Microsoft partners who offer Exchange Server 2007 and HP servers and storage (specifically HP ProLiant servers and StorageWorks All-in-One storage systems). We've prepared this document in Word so you can easily update it with your own messaging, offers, and information about your services.

Before phoning the customer, you should already know the business name, their industry, the contact name and e-mail address. If possible, you should also have information on what version of Exchange Server or other software solution they are running, along with information on any support or licensing agreements they have with Microsoft or other software vendors.

### Calls to action

The purpose for the outbound call to the customer or prospect is to help generate a qualified sales lead. Remember that partners like you are the key to successful implementation. 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 client contact information, including contact name, e-mail address, phone number, and mailing address.
- Specific information of the sales lead on the client's current use of Exchange Server or other software solutions and their plans (if any) to upgrade to Exchange Server 2007.
- 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 Exchange Server 2007 and HP servers and storage can help this client meet the ongoing demands of their communication infrastructure.

We suggest you visit the HP/Microsoft Frontline Partnership Upgrade Your Server to Exchange Server 2007 Marketing Campaign at <http://www.exchange.hpmspartnermarketing.com> to find additional resources that can be useful for your sales calls. There you can download a brochure and other marketing collateral. In addition, you can reference <https://partner.microsoft.com/US/salesmarketing/competitiveintelligence> for further assistance when selling against Notes or Novell.

# 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: "Hello, <Contact Name>, this is <Your Name> from <Your Company Name>."

"I am calling today to talk to you about your messaging systems. Are you currently using Microsoft Exchange?"

- If **No**, then ask, "What are you using for messaging?" If they are not using Exchange at all, have some of the competitive resources on hand that can help you point out some key differences between Exchange and the competition. You can access a full range of competitive resources at <https://partner.microsoft.com/US/salesmarketing/competitiveintelligence>

- If **Yes**, then continue.

"That's great that you use Exchange Server. The reason I am calling today is to let you know about our communication solution built on [or, how our services and expertise combined with] Exchange Server 2007 and HP storage and servers can better help you meet the growing demands of your communication infrastructure. Have you heard of Exchange Server 2007?"

- If **No**, then ask, "Would it be OK if I told you a little bit about it?"
  - If **Yes**, then skip to part II: Find Out Their Role.
  - If **No**, then ask, "Would there be a better time for me to call?"
    - 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 then end call.
      - If **No**, then ask, "Would it be OK with you if I mail you some information?"
      - If **Yes**, 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.
      - If **No**, then thank them for their time and then end the call.
- If **Yes**, then ask, "What have you already heard about Exchange Server 2007?" after you listen to their answer then continue with part ii: Find out Their role. When you start to tell them about exchange server in part iii, be sure to skip the information they have already heard about (if it is accurate).

## 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:** “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?”

- If they are the business decision maker in charge of messaging, then use the dialogue in Part III: Role: Business Decision Maker
- If they are the technical decision maker in charge of messaging, then skip to Part IV: Role: Technical Decision Maker
- If they are responsible for deploying, maintaining, or managing the system, then skip to Part V: Role: Deployment or Management
- If they are responsible for user support or training, then skip to Part VI: Role: User Support or Training
- If they are responsible for application development and integration, then skip to Part VII: Role: Application Development and Integration

## Introduce them to Exchange Server 2007.

**Objective:** Mention some key features based upon their role.

### Part III – Role: Business decision maker.

“Do you worry about the cost of downtime for the e-mail system? Have you experienced outages, or are you worried about how users continue working if disaster strikes?”

- If **Yes**, then, “Exchange Server 2007 uses redundant drives and servers to keep the system up and running continuously, and requires fewer backups to tape. The HP ProLiant server platform offers optimal reliability, with redundant and hot-swappable components to keep you running all the time. And the HP StorageWorks All-in-One storage system has integrated data protection capabilities, like the ability to roll back Exchange data. ”
- If **No**, then continue with the next question.

“Do your business users 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?”

- If **Yes**, then, “With Microsoft Office Outlook® Web Access, users can access their e-mail and calendar from any location with an Internet connection via a browser-based, Outlook 2007–like experience. External business partners and vendors can participate in your e-mail system without requiring a VPN connection 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-to-Edge Encryption Server keeps e-mail messages more secure within organizations.”
- If **No**, then continue with the next question.

“Do you have regulatory requirements for maintaining or archiving documents?”

- If **Yes**, 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. HP StorageWorks includes comprehensive and integrated data protection and supports multiple tiers of storage.”
- If **No**, then continue with the next question.

“According to a Pew Research Center survey, 1% of Internet users used a wireless laptop or e-mail enabled cell phone this month. Are you looking at better ways to accommodate remote and mobile users while maintaining security?”

- If **Yes**, 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 and the HP ProLiant server. In essence, your mobile workforce is able to easily and securely connect to your main network and to each other from wherever they happen to be.”

Section complete. Now skip to Part VII: Next steps.

- If **No**, then skip to Part VII: Next steps.

## Part IV – Role: Technical decision maker.

“Do you worry about spam and viruses and how they impact productivity?”

- If **Yes**, then, “Exchange 2007 provides built-in antivirus/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.”
- If **No**, then continue with the next question.

“Do you worry about the cost of downtime for the e-mail system? Have you experienced outages, or are you worried about how users continue working if disaster strikes?”

- If **Yes**, then, “HP ProLiant servers are extremely reliable, with redundant and hot-swap components to keep you running even during hardware failures. Exchange Server 2007 delivers better clustering through continuous replication (local, clustered, or geo-clustered), requires fewer backups to tape, and allows you to make backups from a replica server, which helps avoid impact to the primary server. HP StorageWorks includes comprehensive and integrated data protection to ensure easy roll-back and disaster recovery.”
- If **No**, then continue with the next question.

“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?”

- If **Yes**, then, “Using Exchange Server 2007, 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. IT professionals can deliver these features while improving security and lowering costs and complexity through consolidation of messaging infrastructure. And the HP ProLiant server is an adaptable, scalable platform for Exchange, while the HP StorageWorks All-in-One 400 Storage system consolidates networked file serving, application storage, and data protection capabilities in a single system. ”
- If **No**, then continue with the next question.

“Do you find configuring and managing the Exchange server and storage environment a complex process? Do your most skilled administrators spend time on Exchange that could be spent on other critical projects?”

- If **Yes**, then, “The HP ProLiant servers offer simplified, integrated system management tools and remote management capabilities. And with the HP StorageWorks All-in-One storage systems, you don’t need a storage expert to configure and manage Exchange Server 2007 storage. Configurable wizards and an application-centric interface make storage management simple.”

“Do you have regulatory requirements for maintaining or archiving documents?”

- If **Yes**, 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. HP StorageWorks includes comprehensive and integrated data protection and supports multiple tiers of storage.”

## **Part IV** – Role: Technical decision maker. *(continued)*

- If **No**, then continue with the next question.

“According to a Pew Research Center survey, 1% of Internet users used a wireless laptop or e-mail enabled cell phone this month. Are you looking at better ways to accommodate remote and mobile users while maintaining security?”

- If **Yes**, then, “You can deliver mobile solutions to more of your workforce with Exchange’s built-in mobility support, delivered on the HP ProLiant platform. Direct push technology via Microsoft Windows Mobile® enables real-time 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 Server 2007 System Manager and HP ProLiant system management utilities.”

Section complete. Now skip to Part VII: Next steps.

- If **No**, then skip to Part VII: Next steps.

## Part V – Role: Deployment or management.

Does lack of automation impact your system efficiency and performance in any way?"

- If **Yes**, then, "Exchange Server 2007 with HP servers and storage make system management simpler. Exchange Server 2007 provides new graphical and command-line interfaces for better manageability and increased automation. The HP ProLiant servers offer simplified, integrated system management tools and remote management capabilities. And with the HP StorageWorks All-in-One storage systems, you don't need a storage expert to configure and manage Exchange Server 2007 storage. Configurable wizards and an application-centric interface make storage management simple."
- If **No**, then continue with the next question.

"Do you worry about spam and viruses and how they impact productivity?"

- If **Yes**, then, "Exchange 2007 provides built-in antivirus/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."
- If **No**, then continue with the next question.

"Are you concerned about how much work it will be to upgrade to Exchange Server 2007?"

- If **Yes**, 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. And using HP ProLiant's SmartStart, you can get the server itself up and running in three steps. The StorageWorks All-in-One storage system helps you configure and migrate storage for an Exchange storage group quickly, using expert wizards."
- If **No**, 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 **Yes**, 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 (OWA) gives users a rich Outlook 2007-like experience in a browser—without VPN access. New Link Access gives authorized users access to documents on file shares and SharePoint sites without being connected over VPN connections. And users can access voice mail or faxes over the Internet."

Section complete. Now skip to Part VII: Next steps.

- If **No**, then skip to Part VII: Next steps.

## Part VI – 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 **Yes**, 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 **No**, 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 **Yes**, 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 Link Access gives authorized users access to documents on file shares and SharePoint sites without being connected over VPN connections.”
- If **No**, then continue with the next question.

“Do mobile and remote users find it frustrating to get and stay connected to the messaging system?”

- If **Yes**, 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 **No**, then continue with the next question.

“Do you worry about spam and viruses and how they impact the users you support or train?”

- If **Yes**, then, “Exchange 2007 provides built-in antivirus/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.”

Section complete. Now skip to Part VII: Next steps.

- If **No**, then skip to Part VII: Next steps.

## Part VII – Role: Application development and integration.

“Does your organization use scripts to manage the installation and deployment of programs?”

- If **Yes**, then, “Command-line integration with the Microsoft Management Shell enables you to fully script installation and deployment of Exchange Server 2007, and it is extensible to other programs and tools you use.”
- If **No**, 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 **Yes**, 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.”

Section complete. Now skip to Part VII: Next steps.

- If **No**, then skip to Part VII: Next steps.

## Part VIII – Next steps

**Objective:** Agree on next steps, update contact information

Next steps: “I know that you are busy, and we have just barely scratched the surface of what’s new in Exchange Server 2007, how it integrates with HP ProLiant servers and storage, and what we can offer. I would like to make sure that you get more information about it so that you can hopefully plan to upgrade now that it has been released. I would like to set up a time to meet with you and to talk about our services and solutions and possibly demonstrate the new features in Exchange Server 2007 on the HP foundation. Would you like to set up a time to meet?”

- If **Yes**, then ask for their full name, title, address, and phone number, and set up a time to either come in and do a demonstration or to continue the conversation in more detail.
- If **No**, then ask, “Would it be OK with you if I mail you some information detailing the benefits of Exchange Server 2007 and the services we offer?”
  - If **Yes**, 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. Visit the Exchange Server 2007 partner Web site at [www.mspartnerdirect.com/exchange](http://www.mspartnerdirect.com/exchange) for customizable letters, postcards, e-mails, and more
  - If **No**, then thank them for their time and then end the call.

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