

Upgrade the Client campaign telesales script

NOTE TO PARTNERS:

Call objective: initiate a discussion with small and mid-sized business customers about upgrading desktop and notebooks to Microsoft Office System 2007 and Windows® Vista® using HP desktops, notebooks and workstations.

Target customer for Microsoft Office System 2007 are midsize-business customers:

- With 50-250 PCs
- Who have an expiring annuity agreement within the next six months
- Who are currently using Microsoft Office XP (or earlier Microsoft Office System versions) and can benefit from the significant new features in Microsoft Office System 2007
- Who have recently upgraded to Microsoft Office 2003 Editions.
- Whose technical or IT decision maker is concerned with risk aversion, improved communication, and increased efficiency

Target customers for Windows Vista are midsized-business customers:

- With 50-250 PCs
- Who have an expiring annuity agreement within the next six months
- Who have made previous purchases of Windows® XP Volume Licensing programs
- Who have server products already installed in their infrastructure and may be more equipped to upgrade to a new Windows client
- Who are in industries requiring a larger mobile workforce (because laptop hardware refresh cycles are considerably shorter than that of desktop computers)
- Whose technical or IT decision maker is concerned with risk aversion, improved communication, and increased efficiency

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 HP equipment they may be 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 prospect's current use of Windows Vista operating system or other software solutions and their plans (if any) to upgrade to Microsoft Office System 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 Windows Vista operating system and Microsoft Office System 2007 on HP desktops, notebooks and workstations can help this client Improve productivity with shared information, keep their business running, reliably and securely and improve IT efficiency and optimize your investment.

We suggest you visit the HP/Microsoft Frontline Partnership Upgrade the Client Marketing Campaign at <http://www.client.hpmspartnermarketing.com> to find additional resources that can be useful for your sales calls. There you can download a brochure and other marketing collateral.

The Script

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 have some important information about Microsoft Office System 2007 and the Windows Vista operating system, and upgrade opportunities from HP for your desktops, notebooks and workstations.

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

If **No**, ask for a good time to call back.

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- Thank you for taking my call. If you'd like to learn more about upgrade opportunities for your desktops and laptops, and upgrading to Windows Vista, my phone number is <Your phone number>. Please don't hesitate to call.

If **Yes**, then continue.

- "That's great, I'd like to focus on how <Your Company Name> can help you take advantage of the latest innovations for business productivity from HP and Microsoft. Upgrading to Microsoft Office System 2007 and Windows Vista on HP business desktops, notebooks and workstations can empower your business by enhancing desktop capabilities."

With regard to your business, which of the following areas would you like to address or improve?

1. Connecting people by streamlining communications and collaboration between team members.
2. Protecting your business data.
3. Reducing the cost and complexity of managing desktop and mobile systems.
 - **[If 1]** Proceed to *Simplify how people work together*.
 - **[If 2]** Proceed to *Protect your data and your business*
 - **[If 3]** Proceed to *Reduce IT costs and complexity*

Simplify how people work together: Microsoft Office System 2007

Can your teams easily share and access essential project and meeting information in a central, Web-based location?

[If no] Now you can improve productivity through easy-to-create, shared documents.

- Office System 2007 makes it easier to share important documents. Right out of the box, it works seamlessly with Windows SharePoint® Services, and features enhanced tools for document review and comparison. This allows your business to 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® 2007 content and the transfer of document libraries offline into Microsoft Office Outlook® 2007 for synchronization with Windows SharePoint Services.

[If yes] Proceed to next question.

Can your team members connect easily with coworkers and colleagues, regardless of their locations?

[If no] Office System 2007 simplifies collaboration instantly, with innovative security technologies and integrated instant messaging—so your teams can communicate effortlessly regardless of location.

- In particular, Microsoft Office Communicator 2007* improves employee productivity by enabling seamless communication with others in different locations or time zones through a range of communication options, including instant messaging (IM)—making it easy for your people to communicate directly within the rich, familiar, and intuitive interface of their Microsoft Office desktops. *General availability for Office Communicator 2007 is targeted for October 2007.

[If yes] Proceed to next question.

Can your employees efficiently track their time?

- **[If no]** Office System 2007 makes it easier to share and coordinate calendars (both inside and outside your organization). With enhanced Office Outlook 2007 features, like To-Do Tracking, you can be sure that your teams are on the same schedule.
 - 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.
- **[If yes]** Proceed to Windows Vista cross-sell.

Can your teams currently share information and ideas without a network?

- **[If yes]** Proceed to next question
- **[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, without the need for a wireless network or projector.

Can your team members simply search their PCs, the network, and the Internet for the information they need?

- **[If no]** Windows Vista can increase employee productivity by simplifying the way people organize and search for files and information. Powerful, integrated search capabilities save your people time by helping them find just about anything on their PCs quickly. Plus, a new user interface (Windows Aero)† provides better stability, an improved user experience, richer visualization, and easier navigation.
- **[If yes]** Proceed to Pitch HP trade-in and Microsoft volume licensing.

Protect your Data and your Business (Primarily Windows Vista)

Have you been the victim of hardware theft, or are you worried that this might happen?

- **[If yes]** Windows Vista helps prevent 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. In addition, HP business notebooks include full drive encryption capabilities to prevent data loss.
- **[If no]** Proceed to next question.

Are you concerned about content security and security compliance?

- **[If yes]** HP business notebooks implement security configuration compliance, and automatically isolate infected PCs. HP desktops offer enhanced user access security.
- **[If no]** Proceed to next question.

Are you worried about users outside the firewall being subject to spyware and attacks?

- **[If yes]** Using Windows Vista, users outside the firewall will be protected against spyware and browser attacks.
- **[If no]** Proceed to Pitch HP trade-in programs and volume licensing.

Reduce IT costs and complexity (Primarily HP)

Are you concerned about the time spent managing and maintaining desktops and notebooks?

- **[If yes]** Using HP business desktops and notebooks, you can discover your hardware and software computing assets remotely and heal systems wirelessly. This significantly reduces the time spent managing the desktop environment, and gives you better insight into the environment.
- **[If no]** Proceed to next.

Are you concerned about deployment costs?

- **[If yes]** With Windows Vista, you can deploy a single OS image and reduce PC boots. HP business desktops and notebooks let you install and update software remotely.
- **[If no]** Proceed to Pitch HP trade-in programs and Microsoft volume licensing.

Pitch HP Trade-In programs and Microsoft volume licensing

Do you have existing HP laptops and desktops in-house?

- **[If yes]** HP has a trade-in program that helps you reduce the cost of the hardware upgrade.
- **[If no]** HP and Microsoft are offering incentives to help you make the transition to the latest Microsoft software on HP platforms.

Do you have Microsoft Volume Licensing?

- **[If yes]** You can move your licenses to new HP hardware, while taking advantage of the latest software updates.
- **[If no]** Microsoft Volume Licensing is the most cost-effective way to get licenses for a PC environment. IT professionals can license the upgrade to Windows Vista at a discounted price.

WRAP UP

As you can see, now is the perfect time to upgrade your desktops and notebooks and enhance the abilities of your people. [Insert Partner Name] can design a solution and pricing plan based on your company's needs. And now it's easier than ever for you to invest in the software, hardware, and services you need, with trade-in and purchase incentives from HP and Microsoft.

Would you like to take advantage of this upgrade opportunity by scheduling a no-risk assessment?

[Partners, please personalize the closing for your customers and known prospects.]

- **[If yes]** Book appointment.
- **[If no, but interested in additional information]** Confirm e-mail address and send template with applicable talking points, as well as a whitepaper (if desired). Arrange a time for follow-up.

Sample closing (please personalize based on preceding conversation):

Would you like to receive a white paper that outlines all the benefits we just discussed? It's a great reference to have as you considering upgrading your desktops.

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