Chicago Business Adoption Plan

To: Jeff Thiel

From: Sergio A. Pineda

Cc: Chicago Business Adoption and First Wave Team

Re: Chicago Business Adoption Plan -- Draft

OVERVIEW

The business market segment represents over 70% of the primary PC's used by adults in the US, and businesses with >100 employees represent nearly 40% or 21mm primary PC's. Adoption of Windows in these businesses is broad but very shallow. Only 23% of companies have Windows in use on more than 70% of their PC's, while over half have Windows installed on less than 30% of their PC's (PCWatch, 12/93). There is clearly a long-term revenue opportunity for Microsoft to increase penetration of Windows in business. There is also a near-term opportunity to move companies who have adopted Windows to Chicago.

The decision to move to a new version of Windows will be driven by a combination of MIS push and end-user pull. As companies have standardized on Windows and implemented networks more broadly, the decision to move to a new version of an operating system becomes more and more centralized. In fact, in recent research end users reported that in 7 out of 10 cases the decision to adopt a new version of an operating system would be a centralized one (OS Tracking Study Wave IV, 12/93). Thus MIS can become a barrier to adoption of Chicago if they feel that there is no business case for moving to Chicago. On the other hand, if MIS personnel feel confident that Chicago will benefit them and end-users they can accelerate the movement to Chicago. Also, examples of successful early movers will provide great case studies for PR and advertising purposes.

To make MIS personnel in medium and large companies drive the rollout of Chicago we must convince them prior to the release of Chicago that it is a "no-brainer" upgrade, because it is compatible, performs well on their installed base, will not require extensive retraining, and adds compelling new functionality. This requires that MIS personnel have an early successful trial experience. VARs can play a key role in evangelizing the technical benefits and helping medium and large companies migrate to Chicago successfully.

Therefore, our strategy then is to generate early successful trial of Chicago with medium companies and empower the VAR channel to evangelize Chicago to the corporate customer.

OBJECTIVES

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Specific goals to achieve our mission include:

- Identify at least 100,000 companies across various segments which have high penetration of Windows today.

- Get 25% of targeted companies (25K) to try Chicago 3 months prior to launch

- 75% of early evaluators say they're "likely" or "very likely" to implement Chicago 9-12 months after launch

- Identify at least 10 target businesses which plan to roll-out Chicago after product releases and use as PR testimonials at launch

- Train and motivate the Solution Provider Channel to evangelize and sell Chicago

TACTICS

Business Adoption Program

The effort to roll out Chicago with businesses on a large scale will require a broad business evaluation program which reaches both the Microsoft named accounts and the larger base of sizeable companies who have adopted Windows. The tools required by the Microsoft Large Accounts and other businesses should be identical. However, MS has no contact with companies outside of the F1000 who make up the majority of Windows desktops in business. So the primary purpose of the Business Adoption Program will be to extend the reach of our Large Account marketing efforts with a targetted campaign to reach businesses with >100 employees who have high Windows penetration (Windows adopter companies).

The Business Adoption Program will piggyback on the Chicago "Early Experience Program" (EEP). The early evaluation program will provide positive/structured trial experience for corporate evaluators, endusers and VARs. The trial package will be designed to recover costs (~$20) and provide limited support via CompuServe and PSS.

In addition to EEP, the primary tactics of the Business Adoption Program will be to identify the significant-sized companies with high penetration of Windows, find a way to reach the software evaluators in those companies, and develop a quality tool for business planning and implementation of Chicago that can be distributed through EEP. The basic elements of this program include:

- identification of the universe of Windows adopter companies and development of a database for direct marketing. This effort will leverage the work being done by CSG to identify a list of target companies (outside of named accounts) for Windows NT.

- a small scale test of chicago implementation in the target companies. The plan is to roll out the Chicago Usability Program in March to 6 target profile companies with support from product group and field SEs. The Usability program will enable us to understand key migration issues and develop solutions to resolve those issues.

- development of tools for business evaluation of Chicago. This will be done as a joint effort with the Large Account Transition Team.

- concept test of the program to measure the expected level of participation and perform cost benefit analysis. Also test execution of collateral.

- get VAR channel trained by M7

- large-scale rollout of the trial program and tools to the database of target companies 3 months prior to product RTM through participation in EEP.

Ramp Up Activity	Conduct research and spec program and tools	Dates: Feb 1-Mar 1
Chicago Usability Program	Draft plan to roll-out Usability Program	Start Date: 2/1 Complete Date: 2/15
	Roll-out Usability Program to 6-8 companies	Start Date: 2/15 Complete Date: 2/28
Chicago Migration Tools	Identify potential Chicago migration tools for target businesses	Start Date: 2/1 Complete Date: 2/15
	Test which Chicago migration tools are most compelling to businesses through Usability Program and research	Start Date: 2/15 Complete Date: 2/28
Research	• Identify which market segments are ripe for Chicago – work with NT group to specify	Start Date: 2/1 Complete Date: 2/28
	• Identify approx 100K medium businesses with heavy penetration of Windows and target them for for Chicago adoption	
	• Summarize results	

Pre-M6 Activities	Develop tools and beta Usability Program	Mar 1 - May 1
Migration Tools	Develop migration tools for use by SP channel	Start Date: 3/1 Complete Date: 5/1
	Beta tools when M6 ships	Start Date: 3/1 Complete Date: 5/1
Usability Program	• Develop a plan for rolling out M7 to 25,000 medium companies	Start Date: 3/1 Complete Date: 5/1
	• Work with Solution Provider Channel to help roll out the program	

Pre-M7 Activities	Roll out Chicago to 25K companies and refine migration tools	May 1- July 1
Early Experience Program	Integrate Chicago rollout effort as part of the Early Experience program	Start Date: 5/1 Complete Date: 7/1
Migration Tools	Refine migration tools and roll out when M7 ships	Start Date: 5/1 Complete Date: 7/1
PR	Identify which businesses are likely to adopt Chicago shortly after launch and use as testimonials	Start Date: 5/1 Complete Date: 7/1
VARs	Get VAR Channel trained for roll out of M7 to 25K companies	Start Date: 5/1 Complete Date: 7/1

Pre-Launch	Get PR testimonials and roll out Usability to 250 addl companies	July 1-Sept 1
Migration Tools	Roll-out pre-release version of tools to accounts for final review	Start Date: 7/1 Complete Date: 9/1
Early Experience Program	Get VAR channel to start conducting seminars and tech workshops with targeted companies	Start Date: 7/1 Complete Date: 9/1
PR	• Get testimonials from 10 businesses that will roll-out Chicago 3-6 months after launch • Write-up business cases which demonstrates committment to adopt Windows among med-sized businesses	Start Date: 7/1 Complete Date: 9/1

Launch	Roll out Usability Program with VARs and publish testimonials	Sep 1-Nov 1
Launch Roll-Out Plan	Get retail product and migration tools to businesses	Start Date: 9/1 Complete Date: 11/1
Follow-Up	Conduct survey of businesses which trialed Chicago and document results for Chicago PR momentum	Start Date: 9/1 Complete Date: 11/1
PR	Publish business cases developed in Pre-Launch	Start Date: 9/1 Complete Date: 11/1

BUDGET

Item	Expense	Dept Code
Research:		
• Identify target companies	$200K	TBD
Direct Mail to target companies to get them to enroll in Early Experience Program	$150K	TBD

MISC

Include miscellaneous supporting documents as is applicable.