

From: Robert Crissman (Exchange)
Sent: Thursday, January 21, 1999 5 45 PM
To: DAD Marketing Group
Cc: Sarah Steiger
Subject: Follow-up from "How We Can Serve The Field Better" Presentation

On Tuesday we had Sarah Steiger - Account Executive from New York - talk to DAD product managers about the enterprise sales process and how we could better help the field in their selling efforts. I think all that attended agree it was a very informative session that taught us all what it is really like out in the trenches

Wanted to share some of the key takeaways that I got from the session that might be helpful to the rest of the group as we all prepare our sustaining marketing plans. I also have attached Sarah's presentation below for anyone that was not able to attend.

Key Takeaways

- ECU Account Execs spend their customer face time with IT Director and IT Manager types. They currently have limited or no contact with BDMs. We can help change this if we can assist the field in identifying who BDMs are - profiles, names, etc would all be helpful.
- 50% of Account Exec Goals and Objectives are focused on the SPAR crusades, 30% on revenue objectives, other 20% on administrative and efficiency objectives. Although Office is not spelled out in Crusades we get play because Office is what allows Account Execs to hit their revenue goals and is implicit in some of the crusade objectives. We really need to take it upon ourselves to make sure we make the "implicit" explicit to the field. We can do this by delivering a mail on how Office can help them deliver on the Crusades.
- 75% of Account Execs time is supposed to be spent in front of the customer - anything we can do to help the field spend less time on administrative chores and more time in front of their customer plays well. Net: less is more (less non-actionable e-mail, less presentations to learn, etc)
- Where we have one account exec for a large account, IBM might have 30, 40 or 50 people plus dedicated to the same account. This imbalance makes it important for us in marketing to do a few different things:
 - Get more partners engaged with Office. The larger pool of qualified partners we have to talk about Office, the more "virtual" account execs we will have as these partners can then go out and evangelize Office for us.
 - Make it easy for the account exec to get Office information to their customer. AE does not have time to surf the sight to find info, we need to proactively get new info out to them so they can turn around and forward to customer as needed in an efficient manner.
 - See point above about less is more.
- Y2K lockdowns are a "here and now" reality - with some customers locking down desktops starting this March. For us this means we have a very limited period of time that many customers will be able to deploy Office 2000 in before January 1, 2000. Few things we can do.
 - Make it easy for customers to deploy NOW
 - Make Office 2000 part of the Y2K solution

Suggestions from Sarah for things we can do/improve - see accompanying action items.

- When we send e-mail to field, specify up front whether it is customer ready or not. For those mails that are customer ready, have it formatted so that rep can either forward as is or very easily cut and paste into other mail. **Action:** Lisa Stratton was at presentation and made note of this for future field communications.
- Weekly status and/or technical drill down con calls on Office 2000. Idea would be to take conference calls we currently do for RDP customers and open up to the entire depth/breadth space (could use those with Premier agreements as qualifiers). NT is currently doing this and getting positive feedback. **Action:** I will work with Rise to determine feasibility of making RDP type calls available to a wider audience
- Need presentations that IT Managers and Directors can use internally to sell the product. **Action:** Rick Stenson will be taking this on and deliver by Office 2000 availability date.
- Get Senior DAD Execs in front of customers more often. Customers love to see the Jon DeVaans, Steve Sinofskis and Craig Fiebigs of the world visit them. We obviously need to coordinate but we should have a bit more regular/formal process to do this. Again, something NT is better with then we are. **Action:** I will work with Chris and Craig to determine how we can best leverage our senior executives with customers.
- More proactive analyst work. Field loves any type of analyst info they can give customers on Office - carries much more weight then regular press or info from MS. The sooner they can get analyst reports out in the product cycle and the more of this info they have the better. **Action:** Chris Gibbons is in process of working with W/E to establish more proactive analyst program

Plaintiff's Exhibit

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Comes V. Microsoft

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Office team PPTs ppt

If you have any questions about above or attached presentation, please let me know. Also want to thank Sarah for taking the time to share her insights with us - much appreciated.

Bob

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Enterprise Selling Process
-- the field perspective

Sarah Steiger
Corporate Account Representative
New York Metro

Agenda

- ◆ Customers- who they are
- ◆ Account rep Objectives
- ◆ Sales process
- ◆ Feedback
- ◆ Recommendations
- ◆ Sustaining Marketing-- discussion

Who is my customer?

- ◆ Who is the customer?
 - Depth/Breadth--
 - CIO-- will it make/save me money?
 - IT Director--will I lose my job? (decides the technology)
 - IT Manager-- how fast can I get it out there?
 - Sys Admin-- how do I make sure it works?
 - BDMs-- what does it do?

Level of Interaction

- ◆ Customer involvement
 - ECU Depth- cultivate 1:1 deep, long-term relationships, more time spent on customer management than technology
 - ECU Breadth- more accounts, fewer contacts at each, less time spent on individual problems, more technology tasks because less tech support
 - OCU-- "gun-slinger" mentality, short-term involvement, mainly technology evangelism and licensing, partner-driven

New York District ECU Objectives FY99

- ◆ **Revenue Objectives 30%**
- ◆ **FY 99 Crusades 50%**
 - NOS Space-- Convert 25% of Novell/Unix servers in all accounts
 - EA Madness-- Present EA proposition to 100% of accounts
 - Notes, Notes, Notes-- Convert 10% of Notes seats to Exchange, Convert 50% of OpenMail seats to Exchange
 - ADCU Execution-- Get 1 publicly referenceable ISV win, 10 LOB wins, 3 ISV wins
 - Community Development-- Conduct 2 on-site seminars for IT Pros per account with more than 50 attendees.
 - NT Workstation-- Ensure 75% of all new PCs have NTW pre-installed. Convert 20% of UNIX Workstations to NTW.
 - Customer Satisfaction-- Ensure a high level of customer service and customer satisfaction.

New York District ECU Objectives FY99 (cont.)

- ◆ **Maximize Sales and Service Capacity 10%**
 - Engage partners in at least 50% of all opportunities (Depth)
 - Ensure 75% face time with customer. Sell a Premier contract to every ECU account, Sell an EPM in every account where agreed to
- ◆ **Product/Competitive Knowledge 5%**
 - Demonstrate knowledge of NetWare, Netscape, Notes/IBM, and Oracle solutions, products, strategies, business model and tactics against Microsoft.
- ◆ **Other 5%--** Update Atlas and submit stoplight report of your accounts with month end report

Where/When do I sell?

- ◆ 75% customer face time
- ◆ Presales opportunities
- ◆ Postsales?
 - Opportunity to improve customer satisfaction?
 - Tools to monitor overall satisfaction ("how's it going?")

Where do I spend my time?

- ◆ Selling Enterprise Agreements!
 - Guaranteed revenue, especially in light of Y2K lockdowns
 - Creates incredible pressure on IT departments to deploy/upgrade faster.
 - Address this thru EPMs, SI's, partners, AND PRODUCTS!
- ◆ Managing product and deployment issues
 - Weekly concalls to review W2K pilot issues, and present new features
 - Product group involvement and responsiveness is VITAL

When?

- ◆ Prelaunch activities
- ◆ Postlaunch events to leverage momentum?
- ◆ Enterprise lockdowns 3/99
- ◆ Analyst and press reviews prior to launch are good ways to generate interest
- ◆ Progress reports from RDP customers?

What do our competitors do?

- ◆ MUCH more field penetration-- technical people onsite, both pre and post sales-- for FREE
- ◆ Lab-time to assist with migrations/evaluations

Key Office Selling Points

- ◆ Ease of administration
- ◆ Y2K compliance
- ◆ TCO
- ◆ Web functionality

Customer Issues

- ◆ Y2K-- driven by customers, industry regulators, plans to lock down desktop by June or earlier
- ◆ Deployments-- customers don't want to touch the desktop
- ◆ Enterprise Agreements-- must have 2+ upgrades in 3 years for it to be a valuable proposition

Example-- Windows 2000

- ◆ Weekly concalls to review W2K and increase pilot activity.
- ◆ Webinars-- customers can conference with product managers to view PPTs and give immediate feedback

Example-- Windows 2000/SMS 2

◆ Signoff

- Customers have signoff on builds stating whether they think the quality is good enough to ship
- Wall Street accounts respond especially well to this

◆ Executive Involvement

- Senior execs (Frankar) are very involved with customer feedback. Artale has helped to bypass the beaucracy and process to delight customers.

Sales Process Example

- ◆ Qualify new Opportunity (from partner or customer usually)
- ◆ Assign resources
- ◆ Manage the process (more or less)
- ◆ Take the order
- ◆ Manage deployment issues
- ◆ Start over

- ◆ Example: SMS 2
- ◆ Example: Office 2000

Feedback

- ◆ DAD District program is GREAT! Extremely valuable to have regular visits to the field
- ◆ Proactive communication with customers on service packs, security issues, and customization problems
- ◆ Aggressive remediation where we've made mistakes
- ◆ Office is still the largest source of our revenue stream!

Recommendations

- ◆ Program Manager “internships” onsite with customers-- at least a month
- ◆ Office for financial customers-- or special SDK for Excel
- ◆ More conferences (maybe field led?) and exec visits discussing compelling reasons to upgrade
- ◆ Work more closely with analysts such as Gartner and others to get them on board quicker

Sustaining Marketing

- ◆ Web site info
 - Publish ppts that customers can use to sell internally
- ◆ Customer-ready emails
 - analyst/press endorsements
 - case studies of deployments and business benefits
 - how to categorize? Profile?
- ◆ Other?