

# Memorandum

To: Michael Hebert, Robbie Bach  
From: Susan Weeber  
Date: August 11, 1999  
Re: WordPerfect Campaign

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The announcement of Novell's desire to sell their desktop applications business has created a significant amount of confusion and uncertainty in the marketplace. WordPerfect accounts, resellers, and end users are now questioning WordPerfect's stability and future product direction. To quote an article in PC Week "It seriously dampens whatever argument people made for sticking with WordPerfect out of product loyalty," said Harris Tilevitz, director of network systems at the New York law firm of Skadden, Arps, Slate, Meagher and Flom. "Obviously, we'll be looking at alternatives." If this attitude is indicative of the overall market this indicates a significant opportunity for Word and Office to capitalize on WordPerfect's users migration. The challenge is getting the right message to the right people with the objective of getting them to take action. It's also important that the tone of the message does not appear to be celebrating their misfortune.

The objective of this campaign is to drive switching from WordPerfect and PerfectOffice to Microsoft Word and Microsoft Office. Below are the strategies, messages and tactics we will use to achieve this objective.

## STRATEGIES

- Arm and activate the Microsoft sales force
- Broad reach PR and communications
- Target Legal with aggressive pricing, promotions and advertising
- Channel promotional offers

**KEY MESSAGES**

- Upgrading to Microsoft Word and Office is easier than ever before
- Microsoft is the leader in desktop applications
- Microsoft is a smart investment for the future

**TACTICS**

**FIELD/CORPORATE ACCOUNTS**

**WordPerfect Switcher Tools Package.** Customer ready tool that will include feature comparisons, migration tools/issues, training options and an overview of Microsoft's vision for the future. This will be a free tool orderable by MS reps, accounts and end users.

Owner: Bryna Hebert

Date: Dec. 1

Budget: \$1,500

**WordPerfect Conversion Program.** An extension of the Office Conversion Program, focusing solely on WordPerfect/Perfect Office accounts that have identified conversion issues as a deal breaker. The objective is to drive switching by providing accounts with funds to cover or subsidize costs relating to migration issues. Accounts must have a minimum of 500 desktops to be eligible for this program.

Owner: Jeff Smith

Date: In progress

Currently Budgeted

**WordPerfect Seeding Program.** The objective of this program is to drive switching in strategic/large WordPerfect accounts. The MS rep will be responsible for working with the key decision makers and proposing the necessary seeding amount to win this account. The proposals will be evaluated based on potential sales and future strategic use. Accounts must have a minimum of 500 desktops to be eligible for this program. This program could potentially be used in conjunction with the WordPerfect Conversion Program.

Owner: Susan Weeber

Date: Jan. 1

Budget: Utilize excess inventory

**PR**

**Switchers Release.** This release will focus on switcher numbers, tools (including PSS Switcher line, Switcher Web page), WordPerfect features (File conversions, WordPerfect Help), testimonials and support. The angle for this release will be a temporary agency, either ManPower or Kelly, announcing their new in-house training course and materials designed specifically for WordPerfect users moving to Word. We will drop this release right before WordPerfect's buyer is announced, so that this is perceived as current news and worthy of a mention in all stories relating to the WordPerfect acquisition.

Owner: Kakers

Date: Jan. 1

Budget: \$1,500

**IEU/END USER**

**Web page.** A comprehensive web page detailing switching issues and our future strategy. The switching component will provide users with training issues/options (links to ATC's, MS

training materials), conversion issues relating to documents and macros (links to SP's), PSS support (Top 10 WordPerfect Questions, PSS Switcher line, PSS support options), sales information (links to Autodemo's, Datasheets, Comparative Reviews, Purchase information) and a WordPerfect survey (asking users to identify their main concerns about moving so we can modify web site information as necessary, and provide us with potential testimonial names). The future strategy component will provide links to the current Office of the Future web page.

Owner: Adamtr/Brynah  
Date: Dec. 15  
Budget: \$10,000

**CHANNEL/SMALL BUSINESS**

**Word & Publisher Bundle.** The objective of this \$99 CD bundle is to provide a compelling upgrade offer for word processing users (2 best of breed applications) and an easy sale (simple value pack message) for RSP's. Anecdotal feedback from the channel is that they expect this bundle to be a "WordPerfect killer" in their stores.

Owner: Susan Weeber  
Date: March 1  
Currently Budgeted

**Word, Excel, Publisher, Bookshelf Bundle.** This \$249 CD offer is an alternative to Microsoft Office standard, and will target SOHO and small businesses who are predisposed to not buying suites.

Owner: John O'Rourke  
Date: March 1  
Currently Budgeted

Both bundles will hit the retail channel March 1<sup>st</sup> and will be supported with POP, incremental merchandising and channel advertising.

**Reseller Training.** Microsoft RMR's will provide RSP and in-store training to tier 1 accounts on effectively selling the promotional bundles. This training will also provide information that addresses switcher's top concerns including file conversions, specific WordPerfect features and support options. This switcher message will also be incorporated into the "training in a box," which will be distributed to approximately 5,000 tier 1 and tier 2 accounts.

Owner: Heidi Morasch  
Date: Feb. 1  
Currently Budgeted

**Seminars.** The SMORG seminar presentation will be targeted at over a 100,000 small business owners that are currently considering a software purchase. These seminars will include the migration message and tools, as well as highlighting Microsoft's future strategy. This program is currently in development and will be finalized in the next 30 days.

Owner: Lynn Williams/Jeff Smith  
Date: Feb. 15  
Currently Budgeted

**Seminars.** The MORG seminars will target 200,000 medium sized organizations with the objective of moving users to Microsoft Office today. These seminars will include a strong migration component, including messages and tools, with a call to action for Trial 95. (Trial 95 is a free trial of Microsoft Office and Windows 95, that time bombs after 90 days).

Owner: Lynn Williams/Cindy Durkin

Date: Jan. 15

Currently Budgeted

#### TRAINING

**Manpower/Kelly Training Switching offers.** We are currently researching the possibility of having Manpower and Kelly temporary agencies create corporate/end user training materials and in-house training courses designed for WordPerfect users moving to Word. We will offer them mentions in our press releases, and referrals from our customer service line. We will have details on this agreement by Dec. 15.

Owner: Lynn Williams

Date: Feb. 1

Cost: Provide necessary salestools and support

**Training Centers.** We are currently discussing with Executrain and Catapult the feasibility of offering special switching courses for users moving from WordPerfect to Word. We will also offer them mentions in our press releases, and referrals from our customer service line. We will have details on this agreement by Dec. 15.

Owner: Lynn Williams

Date: Jan. 15

Cost: Provide necessary salestools and support

**Training Video.** We plan to team with a training organization to create a training video for WordPerfect users moving to Word. This video would address migration issues including file and macro conversions, specific WordPerfect features in Word, PSS support options, and available tools. We will have details on this video by Dec. 15.

Owner: Lynn Williams

Date: Feb. 1

Cost: Provide necessary support

#### ADVERTISING

**Word/Office Advertising.** Over the next 6 months our sustaining print advertising will target end users, IS, and BDM's in the enthusiast press, weeklies, and small business publications. We will incorporate our switching tools/messages and our investment stability message into these advertisements where appropriate.

Owner: John Zagula

Date: Ongoing

Currently Budgeted

#### LEGAL

The negative pr potential in the legal vertical is significantly less, therefore we will take a much more aggressive approach.

**Law student promotion.** Aggressive limited-time offer (current proposed pricing is \$49) for Word/LEXIS/NEXIS and/or Word/Westlaw. We will leverage WestPublishing and LEXIS/NEXIS on-campus sales reps to target law students and drive sales. The offer will also

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include a discounted premium offer to purchase on-line training for legal (via MOLI) and an upsell coupon to Office 95. We will require law student identification to ensure this offer does not reach outside the target audience.

Owner: John Vail  
Date: Jan. 1  
Currently Budgeted

**Law School Donation.** To move Law School computer labs to Office 95, we will provide a donation to all law schools that are willing to convert their labs within 6 months.

We will announce this donation offer at the National Convention for Law Schools.

Owner: John Vail/Gary Cooke  
Date: Jan. 1  
Budget: Utilize excess inventory

**Large Account Legal Summits.** Conduct legal summits to top WordPerfect law firms in major US cities. The goal is to establish Microsoft as the logical alternative/successor to WordPerfect in the legal market and initiate pilot Windows 95 and Office 95 programs in these firms. Marketing will provide follow up support to field as needed, including further account visits, teleconferences and VTC's.

Owner: John Vail/Gary Cooke  
Date: Dec. 10  
Budget: \$15,000

**Legal Account Donation.** We will donate Microsoft Office to 3 high profile law firms to use aggressively for PR and advertising.

Owner: John Vail  
Date: Jan. 1  
Budget: Utilize excess inventory

Other targeted legal programs that are not specific to the WordPerfect campaign, but were incorporated into the Word 95 marketing plan include:

**Tradeshows/Events.** At all major industry events, Microsoft sponsors a computer room for guided hands-on training for users who want to learn how to take advantage of the Internet, Windows 95 and Office 95. The goal is to demonstrate what is possible using Microsoft tools in a fun no-risk trial mechanism. We found this to be very successful at the Internet Law Symposium and we will apply the same programs at tradeshows.

Owner: John Vail  
Date: In progress

**Sponsor Legal Technology Advisory Council.** Establish a council of industry pundits, influential large/small account representatives and ISV's and task them with reviewing Microsoft technology with respect to the legal industry. This will be a bi-annual meeting that corresponds with major industry events. The objective is to get industry buy in and positive coverage in trade publications.

Owner: John Vail/Gary Cooke  
Date: In progress

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**Advertising.** Aggressive advertising in legal publications, highlighting our leadership position, testimonials, and switching message. They will also contain a call to action for the legal resource kit.

Owner: John Vail

Date: Feb. 1