

# Document Separator Sheet

Plaintiff's Exhibit

6846\_P

Comes v. Microsoft

MS/CR 0051574

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**1 Introduction**

Created by the Microsoft Office Web team with input from the Office Solutions and Solutions Marketing groups, this is the plan of record for the May 2001 Office XP-related refresh of the Office Web site. It is a living document and will be used as a blueprint for the production and maintenance of the site.

## **2 Business Overview: Product**

### **2.1 Product Background: Office 2000**

Office XP hits the market almost two years after Office 2000 (released 6/7/99). Office 2000 was a heavily IT-responsive release built around the primary promise of Web-enabled/group collaboration features. It has been slow off the ground and on the desktop. To date, the overall pace of sales is comparable to Office 97, but the volume of retail sales has dropped launch over launch. Revenue was down during fiscal year 2000, and deployments in accounts with Enterprise Agreements were slower than expected. According to the METAGroup report of Sept. 2000, 25%-30% of the installed base migrated to Office 2000 (compared with 80% for Office 97). Forecasts for the beginning of the new fiscal year indicate a continued decline in Office 2000 revenue.

Factors include:

- Saturation and slowdown of the desktop productivity market.
- Over-exposure in the market pre-launch, with release-to-market slippage contributing to the loss of momentum.
- High installation overhead for the group collaboration features that were central to this release.
- Lack of enthusiasm among a historically key Office audience segment: end-users. End-user enthusiasm peaked early/pre-launch, and this segment did not evangelize the product as it had done in years and versions past.
- No clear sustaining marketing plan.
- The combined effect of Y2K and the lead-up to and relatively slow adoption of Win2K.

### **2.2 Market Conditions: Setting the Stage for Office XP**

#### **2.2.1 High-level roadmap/schedule**

- Feb 01: PR around 10 increases
- Feb. 12: Corporate Preview Program (CPP, a k a Enterprise Trial and/or Corporate Enterprise Program/CEP)
- March 01: RTM
- 30 days (early to mid 4/00) before retail availability (5/17): Trial availability
- 5/17: Retail availability and site launch

#### **2.2.2 Product challenges**

Office revenues have dropped and enthusiasm is low. Among the many challenges the newest version of the product must overcome are:

- Negative perceptions:
  - Office 2000 won product reviews on feature sets, but the product size has given Office a reputation as "bloat ware."
  - High-end suite pricing creates perceptions of Office as a premium/expensive product – particularly in the retail space where Office sits alongside products in the \$29 to \$99 price range.

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- o The brand is seen as cold and impersonal.
- Relevance in the post-PC market: Many consumers think of Office as "the PC desktop." The new product needs to make an effective case for its wealth of innovative and Web-based services, including speech recognition, smart tags, and collaborative features.
- Brand challenges:
  - o Multiple brand models and consequent dilution of benefits message: Office represents both a product (master brand) and family brand (endorsement brand).
  - o Brand Consistency: The Office brand has made progress in consistent usage across packaging, advertising, and the web, but does not have strong integration with the product UI.
- Competition:
  - o Microsoft Office dominates the market place. Previous versions, particularly Office 97, constitute the newest version's primary competition. Many are satisfied with their current version and do not perceive a need to upgrade. Additional system requirements for Office XP may create further hesitation to upgrade.
  - o Retail competition includes Lotus SmartSuite and Corel Office. Office is also facing new competition from .coms who offer simplified versions of the key applications.
  - o Sun offers StarOffice, a thin client version of productivity apps.
- .NET: Integration with Microsoft's .NET strategy is still a work in progress.

**Target Audience**

Office marketing is moving away from the traditional Influential End User (IEU) marketing approach and toward the latest corporate Microsoft Taxonomy 2000 audience categories. Within this taxonomy, Office XP primarily targets the "Tech Savvy Knowledge Worker," who is identified and screened with these questions:

1. At work, do you spend more than a quarter of your time making strategic business or business policy decisions?
2. In your job, do you regularly perform functions that would fall into the MIS, IT, IS, or DP category?
3. Do you spend more than 50% of your time on Data Entry or Word Processing?
4. Do co-workers regularly come to you for advice about computers and technology?
5. Do you seek out the latest information on technology on a regular basis?

Individuals can respond with one of three combinations to be classified as Tech Savvy. These combinations are highlighted below.

Tech Savvy Knowledge Worker		
1.	Yes/No	Yes/No
2.	Yes/No	Yes

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3.	No	No	Yes
4.	Yes	Yes on	Yes
5.	Yes	Either 4 or 5	Yes/No

Generally speaking, the TSKW also has the following characteristics:

- Spends a majority of time creating, analyzing, manipulating, reporting, and otherwise "touching" information as primary function at work.
- Has a job that entails doing work for which there is no set process. Tasks are not prescribed in advance, being determined "just-in-time" in response to issues, opportunities or problems as they arise.
- Gathers, analyzes, modifies, and adds value to information, then communicates and shares that information with others.

**Office XP Product Positioning**

As of (1/21/2001), Office XP is being billed as, "The Smart Work Experience." Its core positioning pillars are:

**Experience...**

*The Smarter Way to Work*

*The Effective Way to Collaborate*

*The Tools You can Rely On*

See current positioning framework below:

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# Office XP Global Positioning

"Experience the *Smarter Way to Work*.  
Experience the *Smarter Way to Collaborate*.  
Experience the *Tools You Can Rely On*."

## Individual Benefits

- Work Smarter**
- Simplifying the way you work
  - Effective Resource Use
  - Developing Creative Solutions

- Tools You Can Rely On**
- Working with confidence
  - Protecting work

## Team Benefits

- Collaborate Effectively**
- Clear and timely communication
  - Storing and sharing information and knowledge
  - Coordinating and connecting with others

## Organizational Benefits

- Org. Productivity**
- Extensible platform & tools
  - Ease of deployment & increased control
  - Reliability, data recovery & security

Enhance your work with the Web  
• Knowledge hub for the workplace

## Desired Response

Office XP should evoke the following response: "I am very familiar with Office and this sounds exciting, I need to check it out." We want customers to feel as if they are missing out by not having Office XP installed on their machine. Secondly, we want to engender positive perceptions about Microsoft as company. We want the TSKW to think:

Personal

- Microsoft gets it. It understands key issues that I face on a day-to-day basis.
- This is a credible message. I believe Microsoft can deliver this.
- Office can help me do my job.
- I want to learn more. I want to try the product.

Evangelical

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- Hey, look at this site. Have you seen it?
- Have you seen Office XP?
- Where do I find out more?

#### **Office XP SKU Strategy**

There are significant changes to the SKU offerings in Office XP:

- Some SKUs have been dropped from the lineup, and some have been renamed.
- Office XP will offer a subscription license version.
- Office XP will offer SKUs that can be ordered only through volume licensing. The "volume" SKUs actually contain different code from the retail SKUs.

However, one theme remains the same: Office (the suite) is the hero, the product we want customers to evaluate, try, and purchase. The site will continue to feature separate home pages for each app, but the app sections do not aim to generate standalone app sales. See Individual Programs Home Pages section of this plan.

#### **2.6.1 Retail SKU Lineup**

There are five Office XP suites available for retail and OEM channels: Standard, Professional, Professional SE, Developer, and "Essentials" (AH1). See table below specific on each:

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	Excel	Word	Outlook	PowerPoint	Access	FrontPage	Publisher	SB Tools	Developer Tools	Workflow (SAL/EC/CH)	Open	Contract Agreements
Standard	X	X	X	X							Y	Y
Professional	X	X	X	X	X						Y	Y
Professional with FrontPage	X	X	X	X	X	X					Y	Y
Volume License Bundle												
Developer (Professional w/FP)	X	X	X	X	X	X	X	X	X	X	Y	Y
***** Separate media for "Open" / Combine All Others in "Select"												

### 2.6.3 Subscription License

Microsoft will offer a subscription license (also known as ESL) version of Office XP targeted at home and small business customers. You can read more about the specifics of this licensing model in this [Press Release](#). ESL will add a new dimension of complexity to our pricing, ordering, and licensing information, and may require us to revise all the pricing-related pages and form factors on our site.

Note: "Essentials" and Professional are the only Office XP suites that have an ESL version. None of the standalone apps have ESL versions.

### 3 Business Overview: The Office Web Site

#### Web Site Background: The Office 2000 and "Life Cycle" releases

The Office site underwent a major refresh on 6/6/99 (the Office 2000 release). Consistent with the launch positioning of the product, the launch Office 2000 site was IT-focused. The next six months (and data-gathering that included the Office Web site survey (11/99) revealed:

- The limitations of an information architecture paradigm based primarily on audience: By 11/99, the end user and not the IT pro was the marketing target, and the site was out of step. It was clear we needed a more evergreen structuring principle if the site was to adapt to changing market conditions.
- Flat is good: The 6/99 version of the Web site was narrow and deep, and customers were unable to get quickly to the information they wanted.
- Customers identify strongly with the individual applications that constitute the Office suite.
- Dropping all previous-version information was a mistake and negatively affected customer satisfaction with the site and Microsoft.

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The site team determined that the customer/product life-cycle model served at least the first three needs identified above. The site was restructured in the first part of 2000 and launched 4/18/2000. While the life-cycle model does not explicitly address previous versions, the 4/18 site offered top-level integration with Microsoft Product Support Services, which hosts much of the available previous-version content.

### **3.2.2 Site Planning Process for Office XP**

#### **3.2.2.1 Office-site-specific planning**

The process started on parallel tracks

- **Inventory and Audit** of the current site, including updating of the master page list.
- **Data gathering/analysis of customer use** of the Office 2000 site: A progressive plan tracked customer usage over the 18-month period following the Office 2000 launch. The goal: to use this data to influence site and content planning. The feedback was generated by two customer surveys (11/99 and 7/00), a field survey, site traffic across 3 reference points (spaced approximately 6 months apart: 7/99, 3/00, 10/00), and a subsidiary survey.
- A nine-month, high-level plan, ending at launch, that identified **key month-by-month site team planning milestones and deliverables**.
- **Communication with the Office and BTG SGs**: Early in 10/00, we met with representatives from the solutions groups (audience and family app marketing teams) to kick off Web planning. That meeting established a list of key contacts (see Appendix), apprised the SG of planning documents and dates (see Appendix for the Web briefs submitted by the marketing teams), and outlined the process leading up to launch. A follow-up conversation with Joe Krawczak, director of Office marketing, identified Baris Cetinok as the Web team's primary point of consolidation and contact for the Office XP plan.
- **Creation of the site plan**, currently in progress.

#### **3.2.2.2 Products.com v.1 planning**

The April 2000 reorganization placed the Office Web team in Products.com, which comprises all major Microsoft business product Web sites: Office, Windows, Servers (and Training and Services). Soon after its conception, Products.com identified the following vision, mission, goals, and key strategies for its family of sites (see Appendix for a full enumeration of the list of sites).

#### **Vision (1-3 years)**

A world-class, networked Web experience that enhances worldwide customer and partner satisfaction and loyalty and increases sales of Microsoft products, by improving customers' ability to find the information they need to make decisions and accomplish tasks at each stage of the customer/product lifecycle.

#### **Mission (FY01)**

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To create and release an integrated family of product sites that improve customer/partner satisfaction and drive revenue for Microsoft products.

Goals

- Generate a unified, global product-site experience
  - Deliver actionable content to all key audiences, throughout the customer/product lifecycle
  - Help advance key MS initiatives
  - Streamline and transform content development, delivery, and management, via new technologies
  - Deepen customers' experience with our products
- Key Strategies
- Move to common code base, IA, navigation & labeling systems across all Products.com sites
  - Create and implement an overarching content strategy
  - Create and implement a well-defined planning, ongoing communication and project-management process with the SGs
  - Hit all key site-release and Editorial Programming dates
  - Help develop end-to-end CMS solution; move sites to solution as soon as possible thereafter
  - Collaborate with product teams & CDDG teams on developing content as a .NET service.

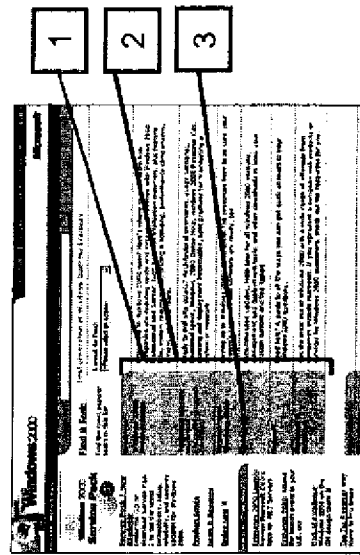
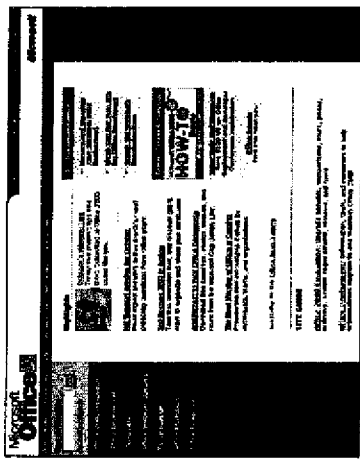
Here is an alternate view of the problem statement:

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JimAll Review (12/8)

## PRODUCTS.COM USER EXPERIENCE TODAY



- 1 Inconsistent: confusing navigation, information architecture, labeling
  - 2 Content for all lifecycle stages, per audience – not integrated or complete
  - 3 Downloads in different locations, and with different labels
- Content planning not always proactive
  - Key content missing from some sites; often inconsistent quality when present
  - Product/Web integration: unsystematic, partial

Products.com identified a four-phase path to realizing its mission:

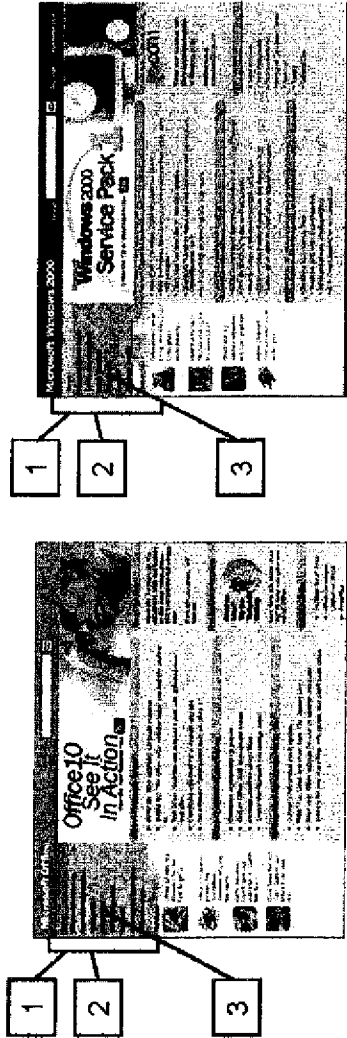
- Brainstorming: 8/00
- Prototyping: The generation of static screenshots and internal HTML version of its next-generation, more integrated set of Web sites. Completed 9/00
- Pilot phase: The Visio Web site was identified as the Pilot release candidate, with the idea that it would serve as a “living laboratory” in which to test the assumptions made in Steps 1 and 2. The process started in 10/00 and ended with the Visio rollout on 12/20/00.
- Products.com v.1: The phased release, in Q3 and Q4, of its integrated network of sites, taking us a step closer to realizing our vision and mission.

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JimAll Review

## PRODUCTS.COM USER EXPERIENCE, NEXT GENERATION



- 1 Consistent: clear navigation, information architecture, labeling
  - 2 Content for all lifecycle stages, per audience -- integrated and complete
  - 3 Downloads in same locations on all sites, and with identical labels
- Content planning is proactive
  - Key content present on all sites -- quality and form are consistent
  - Product/Web integration: ubiquitous, systematic

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Products.com Web Product Unit - All-Hands (12/14/00)

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### 4 Office Web Site Goals and Key Strategies

#### 4.1 Goals

The following are based on the Office product and Products.com goals captured in Sections 1 and 2 above.<sup>1</sup> The Office Web site will

<sup>1</sup> The goal set draws on the consolidated Office Marketing Web brief. Also see Appendix for a list of specific goals culled from the audience/application marketing teams' Individual Web briefs.

- Help the product overcome market conditions outlined in Sections 2.1 and 2.2.2 above, and accelerate the purchase of Microsoft's (Office) products and platform offering by driving evaluation and trial of Office XP.
- Increase customer satisfaction by providing support for all customers through all versions of the product and stages of the customer and product life cycles.
- Design and present a single, unified, and comprehensive site experience for Office customers worldwide. It should exemplify and reinforce the perception of Microsoft.com as an integrated network of task-based sites.
- Build a stronger relationship with our customers to gather profile data and feedback.

## **4.2 Strategies**

Each of the strategies below is followed by specific challenges that our implementation must overcome.

- **Strategy:** Create a next-generation Web site that serves as a top-class showcase for the latest version of Office, educating customers about the features and benefits of the new product and driving trial. Promote usage of trial product with compelling how-to content. Offer a clear path to purchase, adoption, and deployment.  
**Challenges:** Negative perceptions (nothing new that's worth the price/too expensive/complicated to deploy; "bloat ware"; irrelevant in post-PC market); competition (previous versions; retail; free Internet-distributed thin client productivity apps)
- **Strategy:** Ease customer access to relevant, actionable content. Support all segments (knowledge worker/end user, IT Pro, Business Decision Makers, developers, small businesses), worldwide and through all phases of the customer lifecycle (awareness, evaluation, purchasing, deployment, using, support). Explore customization of home page offerings by geography, audience (including expertise level), and product version.  
**Challenges:** Office has more than 100 million licensed users worldwide—and only one home page. The site aims to give each customer content that is relevant, actionable, and targeted, so as to simultaneously grow customer satisfaction and advance Microsoft's business goals. Personalization is currently in the specifications stage and may not be a viable near-term option.
- **Strategy:** Establish [www.microsoft.com/office](http://www.microsoft.com/office) as a single-destination portal for Office-related information and resources, to which all customers and marketing activities are directed worldwide. Develop the information architecture, user interface, features and content in close concert with other major Products.com and Office-related sites so customers coming to microsoft.com/product have a consistent, high-quality experience.  
**Challenges:** Internal org structure fragments the offering. Efforts to date have yielded no results.

## **5 Site Plan: Pre-Launch Product and Web Site Strategy**

The **Office 2000** release marked the culmination of a months-long buildup, during which the press and a wide swathe of customers were given considerable exposure to the new product. The product made its debut at COMDEX, nine months before launch, winning Best-of-Show. It was orderable off the Web site for \$19.95 and distributed widely: In total, almost 0.5 million people got this early preview of the product. Hindsight and data confirm that the wave crested too early, with press coverage and accolades peaking around Beta 2 and much of the energy, advertising activity, and hype dissipating soon after launch.

**Office XP** will be kept under wraps, by contrast. Beta 1 was limited to a select group of beta testers, key customers and partners numbering fewer than 10,000; Beta 2 went out to 50,000. The Office site has stayed dark on the new product, its sole contributions to date taking the form of short-term links to beta-announce press releases. The site will remain dark until or after RTM. Trial availability in 4/01 will give end users the broad first preview (target 88M) of the product, via a Trial section that is featured in the current site UI. This will inaugurate a short, rapid-thunder approach to launch, during which period the Office site team will engineer the placement of headlines on key sites across microsoft.com.

**5.2 Milestone 1: CPP (2/12/01)**

No new content. Potentially a link to a press release.

**5.3 Milestone 2: RTM (3/2/01)**

No new content. Potentially a link to a press release.

**5.4 Milestone 2: Office XP Preview/Trial Availability (4/15)**

**5.4.1 Office XP Trial Overview**

The first Office trial program for end-users, the XP trial offers an opportunity to impact revenue getting out of the gate. Key points:

- CD-only, 30-day, with a worldwide distribution goal of 88 million.
- Price is TBD, but estimated at \$12.

**5.4.2 Trial Content Plan: Overview**

- At trial availability and until product release, the Office site must effectively juxtapose trial and Office 2000 content and messaging.
- At trial availability and beyond:
  - The Offers, Events, and Services area on the bottom right of the Office Home Page (above the Site Guide/fold) will focus exclusively on promoting the Office XP trial. This area may need a slight design modification to suit its redeployment. The number of links in this area is TBD. Trial content will be aggregated on a Trial section/navigation page. All the content on and below this page will live directly under the home page in the IP tree. The eyebrow will identify the content as pertaining to Office XP.

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- o The app home pages will include an Office XP trial highlight with a link to the trial navigation page.
- After the product is launched, the site will provide one-click access to the trial ordering mechanism at all levels of the site, with a prominent, immediately identifiable graphic.
- The site will possibly link to buzz-generating contests and promotional payoffs, the scope and number of which are TBD. It will also link to key trial-related events.
- The scope and means of customer profiling is TBD. We need to understand proposed data use and privacy issues at stake.

#### 5.4.3 Trial Content Plan: Details

- The Trial section/navigation page should visibly and dramatically differentiate the new version of the product as a revolutionary, end-user-focused release.
- It should provide users with the ability to sign up for the trial. International customers should be appropriately directed.
- Links include:
  - o Fast Facts (see Evaluation section below for details)
  - o Tour
  - o Office Product Guide
  - o Trial registration page
  - o XP/Trial FAQ, an anchored link to a new section of the Office FAQ, which will be reformatted to include a TOC/anchor approach.
  - o Technology guarantee
- Additional:
  - o Office XP Trial blurb to Trial Software page.
  - o Link to Office Developer Center on MSDN (<http://msdn.microsoft.com/office/>) from Office XP preview area as well as the Office developer home page. They will feature Office XP technical content starting around 4/1.
  - o Put a call out for Office 10 tips and tricks submissions.

#### **5.5 Milestone 3: Office XP Launch (5/15)**

- When the Office XP site launches, the XP preview section will go away, but the key (still-relevant) content in it will be updated if necessary and distributed to appropriate sections of the new site.
- Fast Facts will move to "Why Office XP" and updated with pricing and ordering info.
- Trial registration page will move to Why Office XP.
- Office Product Guide will move to Office XP in-Depth.
- Trial FAQ will be updated to announce retail availability.

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#### 5.5.1 Open Issues

- Need to develop editorial programming/headline plan for period from trial to launch (bCentral, ms.com, MSN).
- When does the technology guarantee start?
- Form factor/design work required on Trial navigation page, fast facts, registration page, and potentially the FAQ.
- How do we get OU to link to us when we start featuring trial info?
- Should we launch trial content in new UI?

### **6 Office XP Launch Site Information Architecture**

#### **6.1 Overview and Goals**

Much of the groundwork for the information architecture of the next version of the Office Web site is complete. The current Office site is a lifecycle-driven portal. The model has been validated and refined (by usability, live time, and customer feedback) since the last major refresh of the site on April 18, 1999. Other major Microsoft business product Web sites (Windows, Servers) expect to adopt it before the end of this fiscal year; it has been tested further on the Products.com v.1 prototype (Office—10/00) and pilot (Visio—12/00). The IA of this site is central to its presentation as a portal to all Office-related information. It builds on the categories enumerated below, which together cover the full customer life cycle and get customers quickly to the information they want. Most of the categories are already in existence (labels not final). Each category represents a section front. XE "section front" }, with content as follows:

- **Why Office XP:** Evaluation content including demo/product tours, fast facts, reviews and awards, product comparisons, system requirements, etc.
- **How to Buy:** Pricing, licensing and purchasing options.
- **Office Deployment:** Deployment information for IT pros.
- **Using Office:** Tips and tricks, how-to articles, task-based usage scenarios, eServices, Clip Gallery Live, Template Gallery, training materials (potentially pulled into Office site UI); special offers, events, links to newsgroups,
- **Downloads:** Product enhancement add-ons, patches/fixes.
- **Support:** PSS content, pulled into Office site UI.
- **Office Products:** Individual-application-specific content.

Site-wide left navigation gets customers quickly to the primary information/content sections. A single level of cascading menus exposes an additional layer of premium content in each section. Other navigation includes, but may not be limited to, an eyebrow/breadcrumb trail and the next version of Toolbar 2.0. In addition to the nine primary information categories, the site will also offer each primary audience (IT Pros/BDMs, Developers, Small Businesses) a single page that aggregates all relevant information. These "Centers" will live under the Office home page in the Office tree. End users being the target of the full site, they will not have a dedicated center or hub.

## **7 Content: Home Page**

### **7.1 Overview and Goals**

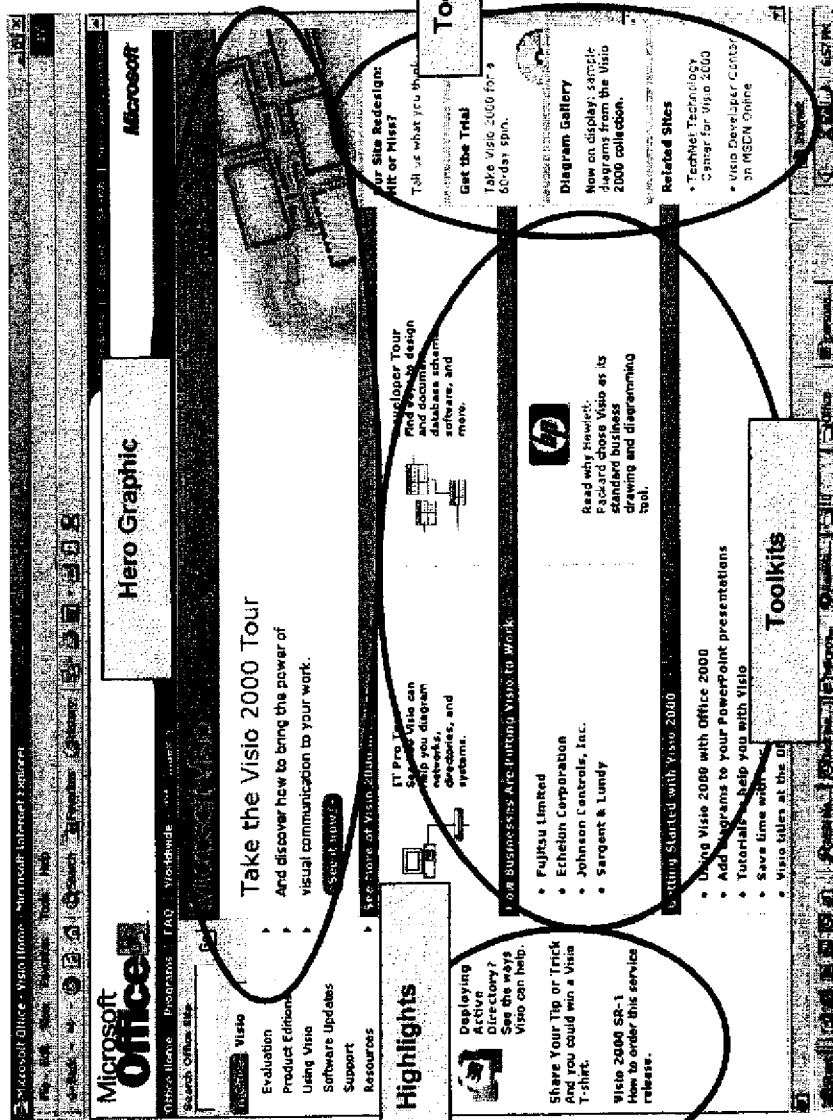
The Office home page is where it all begins: It is the portal to all things Office. The home page must put the product and site clearly and dramatically on the path to overcoming their challenges (see 1.2.2 above) and achieving their goals (1.4, 3 above). It must bring the product positioning to life. In the context of a new, end-user-focused release, it must present Office as fresh and dynamic; fun, relevant; and worth trying, evangelizing, paying for, and deploying. Individual audience segments must feel included, addressed, in terms and language they understand. They should be fed relevant content, and feel supported through the full life cycle.

### **7.2 Page Elements and Content**

(NOTE: The screenshot below marks a step in the evolution of the design, and is included here as a conceptual aid.

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7.2.1 Home Page "Hero" Graphic: The main visual element on the home page, the hero graphic will be used to present high-profile content and messages supporting the appropriate stage of the product life cycle. For example, during the launch phase, this area will highlight content that supports the product evaluation content and messaging. As the product moves through the lifecycle, the focus of this area will change to reflect the messaging and focus of the moment. Thus, later in the cycle, it will support major product updates (service releases) or fixes, services, and so on. Key navigation pages under the home page will feature an introductory text blurb that captures audience/life-cycle-relevant positioning. Graphical treatment is TBD.

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**7.2.2 Toolkits { XE "Toolkits" }**: These are temporary aggregations of relevant content, organized by topic or theme. They do not mirror primary-left-navigation categories, but rather serve as virtual collations of content exposed at a higher level. Toolkits allow content to be grouped according to specific audiences ("IT corner"),\_tasks ("Getting started with Office XP"), motifs ("tip of the day"), and so on.

**7.2.3 Highlights**: This area will contain graphics and links highlighting key content and messages such as trial, purchase graphics/pushes, product reviews, and special offers. These highlights will change frequently (frequency to be determined). Key navigation pages under the home page will feature contextually-relevant highlights. In addition to other highlights, core Office sections (apps and other section fronts) will feature a persistent link to the Office trial; family-app home sections will highlight their own trials. Note: The sections that follow do not call out introductory blurbs and highlights unless necessary.

- Home Page Personalization: Office marketing, the CMO, and the Office Web team have made a persistent case for basic personalization that accomplishes the following (see Appendix for a detailed requirements document that includes customer scenarios). We will take initial steps toward accomplishing some level of personalization. The scope is TBD.

- Home page links will include:
  - o Related sites: OU, Office for Mac, TechNet, Office Resource Kit, Office Dev Center on MSDN
  - o Resources for: IT Pros, Developers, Small Business (go to the respective audience centers on /office)
  - o Newsletter sign-up
  - o Special Offers
  - o Events
  - o Worldwide Sites
  - o Sitewide tools: FAQ, Index/Site map, etc.

## **8 Content Section: Why Office XP /Evaluation**

### **8.1 Overview and Goals**

This critical section front addresses the full range of audiences, but should be designed to appeal to end users. It must

- Communicate the value proposition, features, and benefits of the new version in a compelling and effective manner.
- Inspire its audience to learn more.

The "Why Office XP" page and all other evaluation sections (e.g., Office Developer Center) must make the information and reading hierarchy clear. Each piece of content must be discrete (unlike our current set) and take its place in a well-structured, comprehensive offering. Layout and design must reinforce ease of use, but go farther, and communicate the dynamism and end-user focus of this release.

### **8.2 Page Elements and Content (Labels TBD)**

The main content area of this navigation page will feature five distinct sections: Why Upgrade; Evaluation Materials For; System Requirements; Trial; How to Buy.

#### 8.2.1 Content Section: Why Upgrade

This section presents key end user evaluation content. All the pieces of collateral detailed below need to work in concert, each adding unique value, with minimal overlap. The content in this area will be co-developed by the Office Web Team, Office SG End User Marketing team, with support from external vendors.

- Experience Office XP Demo: This interactive demo will be created by an external vendor, [circle.com](http://circle.com), in collaboration with Office Marketing and the Office Web Team. It will be the showcase piece of Office XP eval content, presenting the overall story and positioning pillars and bringing them to life to create end-user excitement for Office XP. It will be engaging, dynamic, and visually interesting.

This demo will be Flash-based. We expect that Circle.com will handoff to us final Flash files, which we host from our site. (We are still investigating the technical issues with hosting this content from our site.) By using Flash, as opposed to ShockWave, we will virtually eliminate the customer plug-in issues and maintenance problems that plagued the Office 2000 demo. According to MediaMatrix, "96.4% of Web users can experience Macromedia Flash content without having to download and install a player". Even so, we will provide troubleshooting information for those that have problems, as well as offer a link to the HTML-based Office XP tour as a down level option.

- Fast Facts: The baseline tier of evaluation material, Fast Facts serves as a one-stop cheat-sheet for those who want a quick look at key Office XP features and key information (see this example from Money Central: <http://www.microsoft.com/money/productinfo/products/stdfacts.htm>). **This page must be ready in time for the Office XP Trial—4/1.** Fast facts will:
  - o Be highly designed, because we expect it will be printed and passed, from TSKW to IT/BDM. It should present the product as we want it received.
  - o Present product positioning
  - o Establish visual identity of the product through a screenshot or other visual elements.
  - o Overview new features, pricing, and system requirements
  - o Feel scannable and short, and be printable
  - o Sell the product





- Office Programs Tours: This will be a custom-designed navigation page to the animated tours for the Office programs. On this page, the core application tours (Word, Excel, Outlook, Access, PowerPoint) must be clearly differentiated from family application tours.


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The Office XP tours will be developed by a vendor, circle.com, and based on our current tour template, which uses static and animated gifs to illustrate key feature/benefits. For Office XP, the template will be updated to provide a fresher look and allow contextual links to learn more about a specific feature. For example, a customer who wants to learn more about Refreshable Web Queries can link from the feature overview to a white paper or how-to article on that topic.

- **Office XP In-Depth:** Features deeper content for users who are doing a thorough evaluation of Office and want more details than the demo or Fast Facts provide. (Note: There will be separate sections for deep IT and developer-specific content.)
  - **Product Guides:** Also known as Reviewers Guides or Product Enhancements Guides, these downloadable Word documents are the comprehensive resource to all that's new and improved in Office XP. This section will feature the Overall Office XP product guide as well as the guide for each of the core apps.
  - **Version comparison:** The most detailed evaluation piece in this section, It must show the added value of the new version at a feature level. The form factor must be visually compelling, scannable, and allow users to drill into more information. As a conceptual starting point, we will use the blue-bar idea that is currently in wide use throughout the current Office site. Here are the key elements (see mockup below):
    - User clicks version-comparison link. Goes to a nav page populated by a blue-bar set that is organized by positioning pillar.
    - Features are further organized into categories (e.g., "reliability" or "familiar Office interface").
    - Each category includes a set of features. Each feature is listed thus:
      - Name of feature
      - Short benefit statement
      - Graphical markers indicating whether this is a new or improved feature.
      - Set of icons that link to more information.
        - Icons (starter list): screenshot; animated screenshot; streaming video; how-to article/tip.

Work Smarter			
KEY: ✓ = new feature	⊕ = improved feature	⊞ = continued feature	
	Office 97	Office 2000	Office XP
<b>FAMILIAR OFFICE INTERFACE</b>			
<b>Region Copy and Crop</b>			✓
Use convenient toolbar access to quickly select an area of a picture to copy or crop.			
    ( NOTE: These icons link to deeper content related to that			

feature such as a how-to article on Office Update, a video, or a screenshot)				
<b>Visual Open</b>				
Save time by previewing images before you open them. 				
<b>Commitments Effectively</b>				
<b>Tools You Can Rely On</b>				

- o Link to task-based usage scenarios: This content lives in the Using section and brings the product to life from a scenario/task-based view.
- **Reviews and Awards:** In a departure from our current Reviews and Awards strategy, the Office XP page will serve up blurbs that link to reviews. Awards will feature logos, the "Good Housekeeping" stamp of approval.

**8.2.2 Content Section: Evaluation Materials For**

This section contains evaluation materials for different Office audiences. The entire site targets end users, who are not, therefore, called out separately in this section.

- IT Pros (content lives on IT pro center—details below. Includes content for BDMs)
- Developers (content lives on Developer center—details below)
- Small Businesses (content lives on small business center—details below)

**8.2.3 Link to Page: System requirements**

Documenting sys reqs for Office XP suites, it must be more comprehensible than the corresponding Office 2000 page (<http://www.microsoft.com/office/sysreq.htm>). The mix of horizontal and vertical barring on the current page makes already detailed content difficult to read. The Visio system requirements page might offer a starting point for the revision (see <http://www.microsoft.com/office/visio/requirements.htm>).

**8.2.4 Content Section: Trial**

This is the primary call to action for the Why Office XP section. This page will feature buttons to order the Office XP trial as well as frequently asked questions and disclaimers, such as "Support not available for trial version."

**8.2.5 Link to Content Section: How to Buy**

- "Buy Office XP"—this is the ultimate call to action for the evaluation section and the whole site. After we've told them why they need it and they've tried it out, this is how they get it. The heading/link and blurb take users to the How to Buy section of the Web site (see [How to Buy Section](#) for details). Individual links go to:
  - Choose Your Suite

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- Look Up Prices
- Check Upgrade Eligibility
- Order Online or In Volume

## **9 Content Section: How to Buy**

### **9.1 Overview and Goals**

On 11/15/2000, as part of a Products.com-wide effort to elevate "why and how to buy" content, the Office site launched a new "How to Buy" section (<http://www.microsoft.com/office/easysteps.htm>). This section is currently accessible via site-wide left navigation, and attempts to help customers negotiate the purchase morass by structuring it into a self-explanatory, four-step roadmap:

1. Choose Your Suite
  2. Look Up Prices
  3. Check Upgrade Eligibility
  4. Order Online or in Volume (where we provide different options for each audience)
- Customer tracking suggests a sharp drop in customer confusion, and we hope to use this model again for Office XP. Feedback from customers, marketing partners, and the subs has identified three purchase-related areas where the site needs to improve its offerings:
- Upgrade eligibility: This occasions the most sales-related question to ContactUs. We are investigating new form factors/tools (wizards?) that make this information more digestible.
  - Downgrade rights: Another source of customer frustration—the lack of information on how to obtain a previous version of Office.
  - Worldwide pricing & ordering: Customers and internal partners have asked repeatedly for the site to feature pricing and licensing information that isn't just US-specific.
- This section, to summarize, must present customers with a simple, globalized view into the complexities of pricing and licensing. However, pricing and licensing models are still developing at this time, and we need more information before we can settle on a particular implementation.

### **9.2 Page Elements and Content to come**

#### **9.2.1 Open Issues**

- The Office 2000 How to Buy content includes a Guide to Office Licensing that we will need to reassess for Office XP.
- Should this page feature, perhaps in Highlights, a "Top Question of the Month/other frequency" that connects the site explicitly with customer issues?

## **10 Content Section: Deployment**

### **10.1 Overview and Goals**

The deployment section supplies the IT Pro and Business Decision Maker audience with necessary content and resources for deploying Office in a large organization. Currently, this section is part of the overall lifecycle; The label "Deployment" will be tested to determine if it resonates with the audience and correctly identifies the type of content to be offered in this section.

#### **10.1.1 Content Section: Office Resource Kit**

Office UA produces the Office Resource Kit, which will provide core planning, deployment, and administration content for this section. Top-level categories include:

- o Getting Started
- o Deployment
- o Maintenance
- o Worldwide Deployment
- o Messaging
- o Appendix/ORK Journal

#### **10.1.2 Content Section: Deployment Experts (link and blurb)**

Goes to the Microsoft Certified Solution Provider web site (<http://mcspreferral.microsoft.com>), which allows customers to search for companies offering Office deployment expertise in their area.

#### **10.1.3 Content Section: Deployment Resources (link)**

This section provides a list of resources for the IT professional deploying Office XP. Links include:

- o Evaluation Content for IT Pros (link): to the IT Pro Audience page.
- o Project Resource Kit (link): similar to the ORK, but specific to Project. Subject to availability at launch.
- o Visio Resource Kit (link): similar to the ORK, but specific to Visio.
- o FrontPage Resource Kit (link): similar to ORK, but specific to FP.
- o Training (link): to Office training area, where IT pros can search for training targeted at specific audiences and in various media formats.
- o Events (link): to Office Events page, where IT pros can search for deployment-related events in their area.
- o Support (link): to Product Support home page
- o TechNet (link): to Office home page on TechNet <http://www.microsoft.com/technet/office/>.
- o MSDN (link): to MSDN's Office Dev Ctr (<http://msdn.microsoft.com/office/>).
- o Bookstore (link): to the Office Bookstore on TechNet, where IT pros can view recommended titles/search for books on Office Deployment.

### **11 Content Section: Using Office XP**

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## **Overview and Goals**

NOTE: This section is expected complete 1/26. What follows is a first draft.

The Using Office becomes particularly important in Office XP: The end-user trial demands that the evaluation-payoff trajectory be minimal. This section will pay off "Office experience" evaluation promises, and inspire deeper engagement among customers who have installed the trial. To this end, it will

- Offer task-based demos of how to use the product. Increase end-user excitement about the product by bringing Office XP to life.
- Link to Office Update how-to content that supports with detailed instructions the tasks we're illustrating. Fill gaps we discover in the Office Update content.
- Promote the ease-of-use message through a tips and tricks section.
- Offer additional resources to aid customer learning and engagement.

The comparable page on the current site, Using Office 2000 (<http://www.microsoft.com/office/using.htm>), provides a clunky experience for the customer. It does not deepen the skim-the-surface presentation of features in the Why Office 2000 section, and it doesn't adequately guide people to and through the Office Update user assistance content. The Using Office XP section will not only overcome these shortcomings but will also provide a fuller, more engaging experience for the customer with original content that bridges the gap between evaluating the product and actually engaging with it.

## **Page Elements and Content**

We will develop content for the section with two key considerations: What will make the product seem most appealing, and what are the customers' business needs? To help make this section more digestible and personal, we will investigate ways to help the customers sort the offerings listed below.

The primary elements of this section will include:

- How-to articles (OU)
- A tips and tricks center that provides:
  - User-generated tips
  - Featured tips of the week that provide a quick snapshot for those who aren't interested in an entire demo; could occasionally include a celebrity tip or a Microsoft VIP/MVP tip to show that "important" people use the product too.
  - Distinct and clearly defined access to good tips on other sites, especially Office Update
- A set (number TBD 1/26) of task-based scenarios that will address a broad array of work styles
- A resources section that includes links to:
  - Training & Certification

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- o Office Bookstore/MS Press
- o eServices
- o MOUS
- o Newsgroups

## **12 Content Section: Downloads**

### **12.1 Overview and Goals**

This will be a single page with links to sections of the Office Update site. The exact contents of this page are dependent on the final organization of the Office Update 10 site, but this is what we aim to provide:

- Immediate access to critical Office updates and patches. Link to Auto-Update section of Office Update and provide highlights/promo area to call out new and important downloads.
- Easy access to noncritical downloads for Office overall. Link to Office Update download catalog.
- Easy access to app-specific downloads including Office family apps: Link to app-specific, filtered view of Office Update Download catalog. (Need to confirm with Office Update.)
- Discoverable access to downloads for previous (pre XP) versions of Office. Link to current Office Update, which they are leaving as is, in an archived state. (Need to confirm with Office Update.)

## **13 Content Section: Support**

### **13.1 Overview and Goals**

Technical support is one of the Top 5 reasons why Office customers return to the Web. Office Support, therefore, is a top level navigation page linked to directly from the left navigation bar. This page must get customers (of Office and the individual apps) quickly to content produced and hosted by Microsoft Product Support Services.

### **13.2 Page Elements and Content**

The Support navigation page will contain much the same content as it does today:

<http://www.microsoft.com/office/support.htm>. As today, we will continue to pull PSS content into the Office site UI, and have confirmed with Kym Hargett, PSS content lead, that PSS does not expect to alter its offerings and presentation in the Office XP launch timeframe.

We expect to offer a redesigned Support navigation page that reinforces the visual elements of the new product and is user-friendly.

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- 13.2.1 Introductory blurb should include a link to KB search and Support phone numbers for customers who know they want these resources asap.
- 13.2.2 Main content area will help users navigate to the app and version of their choice.
- 13.2.3 Customer experience once on PSS is expected to continue as is. The information hierarchy in the main body of the PSS pages was developed through several rounds of usability, and is sound.
- 13.2.4 Open issue: We are working on an Office-only Support phone numbers page that aggregates content that is currently split among several pages. This page should be maintained by PSS and assist customers seeking personal and professional support, as also Office Mac and individual app customers.

#### 14 Content Section: Office Programs

##### Overview and Goals

- Office Programs is a top level navigation page linked to directly from the left navigation bar. This page must:
- Provide a complete, scannable list of every current Office program and suite, making it easy for customers to find information about the product they are looking for.
  - Reinforce relationship and difference between suites, core apps, and the family apps hierarchy. By doing this, create awareness of the full offering of Office products, particularly the Office family apps, which represent new markets and revenue growth opportunities. See Appendix for visual representation of Office Xp Suite and Programs Lineup.
  - Reinforce visual identity of the individual apps. Carry-through into visual identity of the app home pages. See Macromedia for an illustration of this concept <http://www.macromedia.com/software/>.
  - Provide easy access to major sections within the individual app sub sites. For example, Word Downloads.

##### The Office Suites and Programs

The following table lists the Microsoft Products listed on this page:

Office Suites	Core Apps	Family Apps
(We will not enumerate the full line of Office suites on this page, but rather provide a prominent link to the "What's in each suite page.")	Word	FrontPage
	Excel	Publisher
	Outlook	Microsoft Project
	PowerPoint	Visio
	Access	MapPoint
		PhotoDraw (discontinued)

Note:

- **PhotoDraw** has recently been discontinued, though we will continue to list PhotoDraw on the Office Programs page for 90 days after the release of Office XP.

- **Team Manager** and **Schedule+** will no longer be listed on the Office programs page as they have been obsolete/discontinued for several years.
- **Office Developer** will no longer be listed on the Office Programs page and will be added to the "What's in each suite page." See [Office Developer](#) for more details.

## 15 Content Subsections: Individual Programs

### Overview and Goals

In addition to the overall Office home page and site, we need to create a home page and subsection for each Office program. These subsections fall into two categories:

- **Core Office App (e.g., Word)**: Core Office apps (Word, Excel, Access, PowerPoint, Outlook) are those programs whose primary distribution vehicle is the Office Suites. They do not have significant standalone businesses, though they command strong customer loyalty. Many "Office" users, for example, identify themselves as Excel users first. The goal in marketing these programs is to upsell to one of the Office Suites. These sites will provide only core app-specific content and need to be very low maintenance, yet dramatic and compelling enough to create excitement about the program and Office overall. Since the content is relatively thin in this class of subsection, the design will have to work harder to help achieve these goals.
- **Family App (e.g., Project)**: Family apps (FrontPage, Project, Visio, MapPoint, Publisher), on the other hand, are sold as standalone software packages, and represent new markets and revenue growth opportunities. These areas merit a higher level of attention and a different visual treatment than the core Office apps.

NOTE: Refer to the [Office XP Suite and Programs Hierarchy](#) to see how these two classes of programs are treated in the packaging.

### App-specific navigation.

Within a program subsection, the primary/left Office navigation links will be replaced/supplemented by program-specific navigation. For example, the Support link in the Word subsection left nav will link to the Word-specific Support page. This "app-nav" will provide speedy, discoverable access to Office home page. It should also visually reinforce the fact that the user is still within the Office site. See the [Visio pilot site](#) for a working example.

The left nav items and labels will be consistent across all the Office programs, and as consistent as possible with the labels on the main Office navigation. (Note, some family applications may require additional left nav items if the content/business situation warrants. For example, Visio may have a Deployment section. Today, Project has a Solution Providers section.)

### Differences and similarities between Core and Family program content

The table below lists the Microsoft products featured on this page:

Core Programs	Family Programs
---------------	-----------------

<b>Masthead</b>	To reinforce that all of the Office programs are part of an overall Office family, the Office masthead graphic and toolbar will be consistent throughout the entire /office site. The masthead will not be customized for each program.	
<b>App-specific/left nav links</b>	<ul style="list-style-type: none"> <li>• Evaluation</li> <li>• Using</li> <li>• Software Updates</li> <li>• Support</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation</li> <li>• Using</li> <li>• Software Updates</li> <li>• Support</li> <li>• (others possible)</li> </ul>
<b>Home page</b>	Content probably static through product lifecycle. Permanent graphic promoting Office 2000 trial. May need additional promo graphics.	Content likely to be added to during product lifecycle. Permanent graphic promoting trial for that program. Expect to need additional promos.
<b>Evaluation</b>	Designed to accommodate the limited amount of content that core apps have. Eval content limited to tour, product guide, system requirements, trial, pricing and ordering System requirements for that app, with a link to overall Office system requirements page.	Designed to accommodate more content than a core app home page, but less than Office home page. In addition to core content, expect additional eval content such as white papers and case studies. System requirements for that app.
<b>Using</b>	Trial link goes to Office XP trial page and links to central Office trial offers pages. Pricing and ordering page leads with pricing and ordering info for the Office suites, followed by less-prominent prices and order links for the standalone app. Using section links to app-specific	Trial link goes the trial page for that program and links to central Office trial offers pages. Pricing and ordering page contains info on that program Same as for core app. May also

	content on Office Update and the Office using section.	feature more app-specific using resources.
<b>Software Updates</b>	This page links to app-specific download pages on Office Update and Office critical updates page.	Same as for core app.
<b>Support</b>	Support page links to app-specific FAQs and Highlights page maintained by PSS.	Same as for core app.

**Note:**

- o We are cutting the **Resources** section. Important related links will go on the home page.
- o Previous version info, where appropriate, will have a permanent spot on all app section fronts (last content section on page).

**16 Content Subsection: FrontPage**

This section is currently in development, and will be added once it has been reviewed with the FP marketing team

**17 Content Subsection: Publisher**

This section is currently in development, and will be added once it has been reviewed with the Publisher marketing team

**18 Audience Center: IT Pros**

**Overview and Goals**

IT pros are a key audience segment for Office. Office 2000 was an IT-responsive release. It aimed to redress past-version grievances, and its signal feature set, group collaboration, targeted the IT pro. However, the high installation overhead that accompanied the group collaboration feature set did not sit well with this segment. For a variety of reasons, Office 2000 deployment has been poor across the board.

While the IT pro is not the primary target of Office XP, the segment remains important. If the enterprise is to invest in and deploy Office XP, the product must offer cost justification and a clear measure of productivity increases as a result of that investment.

The product pitches itself to IT pros as:

- Easy to deploy and control
- A robust platform on which to rapidly build and integrate business solutions
- Reliable, with advanced data-recovery and security features.

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IT pros are among the most highly engaged visitors to the Office Web site. Thirty-six percent and 32% of respondents to the first (11/99) and second (7/00) online site surveys respectively self-identified as IT pros. The Office Web site aims to get IT pros quickly to the information they need, and to present that information as usefully as possible. To this end, the new version of the site will feature a center for IT content, with its own URL to which IT-specific marketing activities will be directed (potentially [www.microsoft.com/office/IT](http://www.microsoft.com/office/IT)). It will aggregate content (or links to content) that spans the IT lifecycle. Overlaps (with the Deployment content section, for instance) will be cleanly rationalized.

#### **18.2 Page Elements and Content (labels TBD)**

##### **18.2.1 Content Section: Evaluation**

- **Overview Document**: This document will spell-out the benefits of Office XP for IT Professionals. It will include key features designed to make deployment and management of Office XP easier for the IT Pro.
- **Fast Facts**: High-level overview of IT Pro positioning, key features, benefits, system requirements for Office XP deployment.
- **Business Value (document/link)**: an introductory paragraph (or document) that summarizes the business value proposition for IT Pros. Also will link to the [Microsoft.com/business](http://www.microsoft.com/business/value/) site for information on REJ business value methodology (<http://www.microsoft.com/business/value/>).
- **Compare Versions (link)**: links customers to the version comparison page of the site; allows customers to see the difference between current versions of Office.
- **System Requirements (link)**: links customers to the system requirements page.
- **Trial (Office)**
- **How to Buy (link)**: links to the main How to Buy navigation page of the site. Could also have links directly to the Buy Online page targeted at Enterprise customers (depends on the content being created for the How to Buy section).

##### **18.2.2 Content Section: Deployment (link and blurb)**

- Goes to the Deployment section of the Office site.

##### **18.2.3 Content Section: Business Solutions**

- **Introductory blurb** explaining page content. Content will consist of Rapid Deployment Program (RDP) content focused on several deployment scenarios, white papers and case studies. Currently, we are scheduled to have eight white papers and four case studies ready for launch.

##### **18.2.4 Content Section: Deployment Experts**

- **MOSP (link)**: links customers to <http://mcsprefferal.microsoft.com/> where they can find contact information for Microsoft Certified Solution Provider that can assist with deployment of Office XP.

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### 18.2.5 Content Section: Deployment Resources

- o Office Resource Kit (link): Goes to ORK home page. (The ORK is produced by Office UA and will be the main content in the Deployment section of the site.)
- o Project Resource Kit (link): similar to the ORK, but specific to Project. Subject to availability at launch.
- o Visio Resource Kit (link): similar to the ORK, but specific to Visio.
- o FrontPage Resource Kit (link): similar to ORK, but specific to FrontPage.
- o Training (link): links to the Office Training page that allows customers to search for training targeted at specific audiences and in various media formats.
- o Events (link): links to Office Events page so customers can search for deployment-related events in their area.
- o Support (link): to Product Support home page
- o TechNet (link): to Office home page on TechNet <http://www.microsoft.com/technet/office/>.
- o MSDN (link): links customers to Office Developer Center on MSDN <http://msdn.microsoft.com/office/>.
- o Bookstore (link): links customers to the Office Bookstore on TechNet where they can see recommended titles or search for books related to Office Deployment.

### 19 Audience Center: Developers (/office/developer)

#### **Overview and Goals**

Office is the 3<sup>rd</sup> most targeted development platform (behind Windows and the Web).

There are more than 2.5M developers worldwide who currently build solutions using Office or Office components. Microsoft produces an Office suite specifically targeted at developers who build Office solutions: Microsoft Office Developer. This suite includes all the core Office XP programs as well as additional development tools and documentation.

The Developer area of the Office site has two goals

- Promote the platform: Explain the benefits and pieces of the Office XP platform and motivate developers to build Office XP-based solutions.
- Promote the Office XP Developer SKU: Create awareness, demand, and purchase of the Office Developer Suite.

We plan to create a single, centralized "Office developer" page that serves both objectives. To do this, we will create a discrete section or sidebar on the Office developer page that promotes the Office Developer suite and links to the main content related to that SKU. This section will need to be visually distinct from the main content area of the overall page. We may use a box shot of Office Developer to make it clear that this content is about a specific product.

#### **19.2 Page Elements and Content (labels TBD)**

- 19.2.1 Introductory text will introduce the Office XP platform as well as position Office Developer as the premier tool for building Office solutions.
- 19.2.2 Left column under navigation area of this page used for developer-relevant highlights. At launch, this area will feature the Office Developer trial and the Office XP SDK.
- 19.2.3 Content Section: The Microsoft Office Platform will feature evaluation content that describes the elements and benefits of the Microsoft Office XP platform. As in the "Why Office XP" section, evaluation materials will build from a brief overview to full detail. This section will contain:
- o Fast Facts: A 1-2 HTML page overview of the platform and new Office XP technologies. This page will repurpose the content in the Office XP Platform datasheet, but display it in our Fast Facts form factor.
  - o An Overview of the Office XP Platform: A 3-5 page strategic overview of the Office platform.
  - o Office Development Reviewers' Guide: A 15-30 page document that provides detailed information on platform services (XML, Smart Tags, etc.)
  - o Office XP Technologies: Articles on specific Office XP technologies and features:
    - New Object Model Enhancements in Office XP
    - Introduction to Smart Tags
    - Introduction to XML Support in Excel
    - Introduction to XML Support in Access
    - Introduction to Programming Office XP Web Components
    - Introduction to Office XP Developer
    - Building Digital Dashboards with Office XP Developer
  - o Business Value: links to Business Value area of Office Web site.
- 19.2.4 Content Section: Success Stories/Case Studies shows how others are benefiting from Office XP solutions. This section will contain:
- o Businesses Who Use Office Solutions link to the REJ solutions case studies in the IT section.
  - o Partners Who Develop Office Solutions: Up to six 3-page case studies highlighting a partner success story. As many as 4 of these will be supplemented with streaming video testimonials.
- 19.2.5 Solutions Powered by Office (Link and Blurb): will give developers a jumpstart in building their own Office XP solutions. It links to the sample "Cranium" solutions on MSDN being developed by Doug Yoder in Office marketing.

19.2.6 Office Developer Center on MSDN (link and blurb): provides developers all of the technical resources they need to develop Office solutions. Technical articles, support, bookstore, code samples, and further documentation. <http://msdn.microsoft.com/office/>

19.2.7 Office Developer SKU Sidebar: This area of the Office Developer audience page will feature content and links specifically related to the Office Developer SKU: evaluating it, buying it, using it—we will need to address all aspects of the customer lifecycle related to this product.

- o Content Section: Evaluating Office Developer:
  - Animated tour, to be developed by circle.com. Will link to downloadable datasheet.
  - Overview document, a 5-page strategic overview of Office Developer.
  - Office Developer In-Depth:
    - Product guide: 15 - 30 page document that provides detailed information on Office Developer.
    - An Overview of the Workflow Designer for SQL Server.
    - An Overview of the Workflow Designer for Exchange Server.
  - Reviews & Awards specific to Office Developer from developer-oriented publications.
  - System Requirements: for Office Developer SKU and its components.
  - Order trial version, single page with FAQs and link to order trial CD.
  - Pricing, Licensing, and Ordering for Office Developer SKU and Office Developer tools SKU.
- o Software Updates: Software updates for Office Developer are stored in MSDN Online Downloads.
- o Support: This page will link to an Office Developer-specific FAQ's and highlight page maintained on the PSS site.
- o Previous Versions: Product and ordering info, crucial for this product as developers in orgs that still have Office 97 will need to order Office 97 Developer Edition. This content will live in the archive.

In addition to the Office Developer SKU sidebar, we will also create a separate Office Developer nav page that enumerates the Office Developer SKU related links and content with blurbs.

## **20 Audience Center: Small Business**

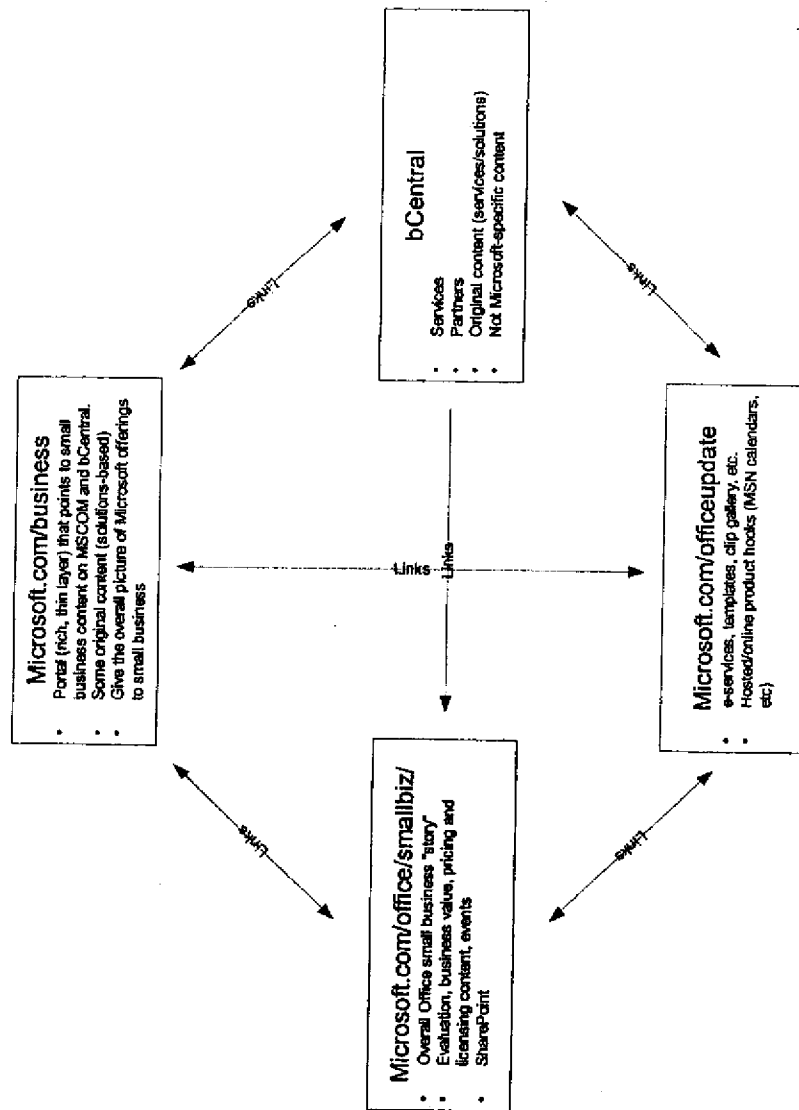
### **20.1 Overview and Goals**

#### **20.1.1 Microsoft's small business landscape**

Microsoft presents a fragmented small business story on the Web, an uneven cobbling of several sites: bCentral ([www.bcentral.com](http://www.bcentral.com)), the Business site ([www.microsoft.com/business](http://www.microsoft.com/business)), Office Update ([www.microsoft.com/officeupdate](http://www.microsoft.com/officeupdate)), and the Small Business section of the Office site (<http://www.microsoft.com/office/smallbiz/default.htm>). Each of these sites must take its place in the overall content and services offering to the small business customer, and attempt, together, to

- Establish a home for the small business customer on Microsoft.com.
  - Minimize customer confusion about where to get the content/services they need.
  - Provide easy access to all Microsoft content targeted at meeting the needs of these customers.
- The Office web team offers the following diagram of the small business landscape as it stands today. This diagram draws on information shared during a meeting among the U.S. sub small business marketing, /business, /office, and bCentral teams.

### Microsoft Small Business Web Landscape



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## Figure 1<sup>2</sup>

Here's an alternate view of the diagram above:

- Microsoft.com/business: The "home" for the small business customer on Microsoft.com, this site offers a portal that gets small business customers to relevant information on Microsoft's platform, key technologies, applications and services. It also offers solutions-oriented content for this audience. It links to all parts of the tree below.
- Microsoft.com/office/smallbiz: Offers evaluation, business value/solutions case studies, pricing and licensing, and other content specifically related to Office. Links to other parts of the site value chain.
- Microsoft.com/office/officeupdate: Offers e-services, templates, and other Office bits targeted at small business customers.
- bCentral: Offers services and content to small businesses—and is not focused exclusively on Microsoft technologies or services.

### 20.1.1.2 The small business section of the Office Web Site

Based on this landscape and input from the Office Small Business Marketing team, the Office Web team has developed the following goals for the small business section of the site:

- Promote evaluation and trial of Office XP.
  - Provide information on purchasing options and a clear purchasing path for this audience.
  - Get customers to attend the Big Day seminar (US only)
  - Provide access to tools and services that extend the value of Office, i.e., Template Gallery, hosted services, SharePoint, etc.
  - Integrate Office XP with online services i.e., bCentral
- The site will advance these goals via its Small Business center, which will aggregate content (or links to content) that spans the small business lifecycle, and provide links to resources across Microsoft.com targeted at these customers.

### 20.1.1.3 Audience Profiles

The following is a list of Office XP small business target profiles

- Primary:
  - Small Businesses with 1-50 employees
  - Professional Services, i.e., Accounting, Medical/Dental, Architect, Insurance
  - Production Ops: i.e., Distribution, Manufacturing, Wholesale,
- Secondary:
  - Small Businesses with 51-99 employees
  - Retail: i.e., stores and shops, small repair shops, restaurants

<sup>2</sup> Other product sites (Windows, Servers, etc.) will also be part of this relationship but are not shown in this diagram. We assume that these product sites would fulfill the same role as the Office site in providing small business content directly related to Microsoft products and technologies.

- o Other Services: i.e., Carpenters, Plumbers, etc.

## **20.2 Page Elements and Content (labels TBD)**

### **20.2.1 Content Section: Evaluation (or Why Office XP)**

- o Small Business Overview (document): Highlights the small business value proposition and positioning, as well as key features and product improvements for small business customers.
- o Microsoft's Web Offerings for Small Businesses (label TBD): Provides an overview of all the microsoft.com resources and sites for small business, including Office Update, /business, and bCentral.
- o Compare Versions (link): Goes to the Office version comparison page, which details the differences between current and previous versions of Office. This page is not uniquely calibrated to the needs of small business customers.
- o Reviews and Awards (link): Goes to Office reviews and awards page, which aggregates third-party endorsements and reviews of Office XP.
- o System Requirements (link): Goes to the Office system requirements page.
- o Trial

o Content Section: How to Buy (link): Main link goes to the Office How to Buy section front. Secondary links detail each step of the roadmap so small business customers can get more quickly to the information they need. Depending on the content in the How to Buy section, it might be possible to link directly to a small business "roadmap" that clearly spells-out the purchase/upgrade options for small business customers.

### **20.2.2 Content Section: Business Solutions**

- o Case Studies: Contains 1-2 page case studies from small business customers. We are currently planning on at least five case studies to be ready at launch.

### **20.2.3 Content Section: Using Office**

- o Articles: This section will link to articles on [www.bCentral.com](http://www.bCentral.com); articles that pertain specifically to Office could potentially be highlighted or pulled into the Office site UI.
- o Tips and Tricks (link): links to the Office tips and tricks page.
- o Template Gallery (link): Goes to the Office Template Gallery, which offers this audience numerous document templates.

### **20.2.4 Content Section: Experts/Partners**

- o VAP/MCSP (link): Goes to <http://mcspreferral.microsoft.com/>, where customers can find contact information for Microsoft Certified Solution Provider that develop solutions using Office XP.

### **20.2.5 Content Section: Small Business Resources**

- o Training (link): Goes to the Office training page, which allows customers to search for audience- and media-format-specific training.

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- o Events (link): Goes to the Office Events page, where customers can search for small-business specific events in their area. This section also would have a link (or highlight graphic on the home page) that points directly to Microsoft's Big Day ([www.msbigday.com](http://www.msbigday.com)). [LG2] The Big Day seminar series is targeted at the small business customer. The seminar provides attendees a chance to learn about what Microsoft products can do for them, and it explains how these products can be tied together in integrated solutions to help people and businesses become more productive using Office and other Microsoft products for the small business, including Windows 2000 and Small Business Server.
  - o Support (link): Goes to Product Support home page.
  - o Bookstore (link): Goes to the Office Bookstore front.
- 20.2.6 Content Section: Related Microsoft Products
- o Small Business Server (link): Goes to the Small Business Server Web site <http://www.microsoft.com/sbserver/default.htm>.
  - o Windows 2000 for Small Business (link): Goes to the Windows 2000 small business home page. <http://www.microsoft.com/windows2000/smallbiz/default.asp>.
  - o SharePoint Team Services (link): Goes to SharePoint Team Services section of the Office site. This content focuses on SharePoint Team Services (which will ship with FrontPage 10) as a collaboration/intranet solution for small businesses.

## **21 Content Page: Site Map/Index**

### **Overview and Goals**

The current Office Web site hosts an estimated 1,000 pages of content. With such a large site, getting our customer base (which includes a vocal 12% novice component) quickly to the information it wants is difficult. Search can only fill this role to a point. For example, a simple search engine query can produce hundreds of "hits" that a customer must comb through before they find what they want. We expect to offer improved search with the new release, but must provide customers with viable alternatives to search engines. The site map and site index are proven means of easing access to key information.

The site map is a new feature. The index, on the other hand, is not. But it has proven problematic (the overhead associated with manually updating the index in IqterPress is part of the issue) and is invariably an afterthought—and therefore often out of date.

For the Office XP release, not only do we plan to update our Site Index in "real time", but we also plan to add another tool for the customer to use – a Site Map. Both tools will be offered off a single page, reinforcing their relationship as alternatives. This page will live under the Office Home Page in the tree, be available throughout the site. Precise location on site TBD.

### **Page Elements and Content**



21.2.1 Introductory text explains the structure and relationship between the two information-retrieval options.

21.2.2 Navigation: Leveraging the work done on the Visio pilot, we propose a "tabbed" approach as shown below.



### 21.2.3 Content Section: Site Map

- o Overview: The site map acts as an "at a glance" pictorial of our navigation tree, and will contain headings that reflect our top-level navigation items:
  - Evaluation
  - Deployment
  - Using Office
  - Downloads
  - Support
  - Office Products

Each category lists key information (tasks, content offerings, etc.) Most of this content will live on the navigation page itself. However, we expect to augment this list with key task-based items that help improve the customer experience (such as "Support Telephone Numbers" and "Product Registration" under the Support heading, and so forth).

- o Plan and Work Items:
  - Agree on implementation for overall site map/index page, and confirm Visio work can be leveraged. If not, schedule dev and design.
  - Help inform requirements for site map form factor (see [www.adobe.com](http://www.adobe.com) for a possible option).
  - Transfer data from evolving Office XP site map (in Visio) to new form factor.
- o Maintenance: Since the site map will closely resemble the site navigation construct, it will require little updating. Most of the work for the site map will be done prior to launch. However, automation will greatly simplify maintenance and has been identified as a Priority 1 cross-site feature.

### 21.2.4 Site Index

- o Overview: The content piece of the site index will not look or work differently from our current model; the only difference is that it will be updated with much greater frequency. The index is a living, breathing account of all content on the web site, with information sorted alphabetically by subject matter and/or product set.
- o Plan and Work Items:
  - Help inform requirements for automation of site index, also identified as a Priority 1 cross-site feature.

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- All project schedules must include a line item for the index.
- All Office XP Raid bugs must include a line item for the index.
- Maintenance: In the event that the index is not automated, we have three options for maintenance, stacked below in order of preference.
  - Ongoing: Index time factored into any/all work assignments.
  - Weekly: Create a Site Index Raid bug every Monday. Ask all editors/producers to record work completed within it. Update Site Index every Friday (with editors switching off week to week so that one editor does not become overburdened with site index maintenance).
  - Fortnightly: Create index bug every time a biweekly report is released. Update index within a week of the issued report.

## 22 Plan: Features

As part of the planning process for Products.com v.1 and Office XP, we have created a prioritized list of features, excerpted below and included in full in the appendix. This excerpt reflects Priority 1 features. Asterisks indicate Office-specific Priority 1 requests (the other items are Pri 1 cross-site features). All features are currently in the specifications stage, and scope is tbd.

Feature Name	Type	Description
Feature outside content in our UI	New	Pull content from other sites into Office site UI for a seamless customer experience
Search	Update	Text box and button that submit a query to the ms.com search engine
Automated site index	New	Single page providing links to main site areas down to 2nd level
Automated site map	New	Single page providing links to main site areas down to 2nd level. Key novice-user feature
Personalization*	New	Baseline customization of home page
Upgrade Eligibility Wizard*	New	Walk customers through upgrade scenarios and recommend a path
Course finder frameset	Update	Displaying Training & Certification course search tool within individual site shells using frames
Publish FP using FP	Update	Use FP to publish the FP site

## 23 Plan: Localization

### Background

Localization and communication with the subsidiaries have been given short shrift in previous Office site releases. It has fallen to the subs to evaluate the content on /office and decide what to localize. Communications have been ad hoc. There has been little opportunity for the subs to plan ahead to leverage the work done by the US Office Web Team, give feedback, or be involved in site planning.

### 23.1.1.1 Plan

For the Office XP release, the site team aims to engage early with the subs. Key partners (CDDG Platform Localization Team—Angela Viesse; Office International Marketing Team—Guy Gilbert; the Office Web team) have agreed to the following approach:

- By end January 01:
  - Office site team to finish stable draft of plan; site map (3 levels deep); page list (in progress); schedule (in progress).
  - Office IPM to contact key PMs in the subs, cull a prioritized list (1, 2, 3) of content the subs would like localized, and return the list mid-Feb.
  - CDDG Platform Loc team to contact Web masters in subs around the same time, directing them to communicate closely with the PMs on planning.
  - OWT, IPM, and AngelaV to participate in international conference call to subs.
- Feb 01:
  - IPM to rationalize (collate) and return prioritized list mid-month.
  - AngelaV to work independently with BretM (development manager, Products.com) on Loc. team template requirements.
  - Based on the list, AngelaV to determine full scope of localization project. Material that does not make the collated list but is identified as key by important subs will be made available (plan TBD).
- Other milestones TBD (week of 1/22)

### 23.2 Key Assumptions

- It is up to the subs to decide if the information architecture of Microsoft.com/office suits their needs. We are optimistic that the IA is comprehensive and general enough to serve a wide variety of needs, and have received mail from our worldwide customers that suggests we are on track. We do not expect to alter the site IA at this time.
- Products.com and the CDDG loc. team will do up-front work on identifying localization requirements. Once this work is done, Products.com will hand off the files to DDG loc. d off and will worldwide customers alter at this time.
- ascertain handcommunicate closely with the PMs oAngelaV's team, with no commitment to doing further work upstream.
- To prevent confusion, the three teams will work closely on identifying key communication milestones and strategies.

### 23.3 Steps for handing U.S. content to the subs

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Content to be localized will be made available to CDDG Loc and the subs as follows (dates will hinge on on-time delivery of content from marketing and templates from the Products.com cross-site teams).

Word docs: The Office site producers will post downloadable Word docs on an accessible file share or team intranet (final location TBD). Content will be posted to a page or share that organizes localizable content into the same information categories as the new Office site. As content is added to the share/site, Office Producer will send e-mail notification to Guy and Angela, who will own communications and Q and A.

### **23.5 Templates**

Since templates are critical to site development, we have asked that they be made available early in the process so the subs can build their sites. Templates will be posted to an accessible file share or intranet site. The decision on what to hand off—HTM templates or ASP files—is not yet final. Nor is the level of detail of the templates. They may contain the Office colors, or they may simply be the code for the navigation. If the latter is true, the subs would need to add color coding and localized text to the navigation. More details to follow as development progresses.

### **23.6 Project Scope/Out of Scope**

The scope of this project is to work with CDDG localization and the Office International Marketing Teams to provide a plan, process and timeline for localization of the Office XP Web site content. This plan addresses the needs of the Office XP Web site. It will not be used for any maintenance of the Office 2000 site, and may be revised after launch of the Office XP site. The scope of this project does not include creation or maintenance of subsidiary Web sites, including propping of any localized content to subs virtual roots.

## **24 Plan: Archive**

### **24.1 Overview and Goals**

Feedback on the Office 2000 site has reinforced the importance of continuing to support previous-version customers while making way for the newest release. The Office XP site will do this by:

- Archiving previous-version content logically and discoverably.
  - Logical grouping: Create an Office Archives area that consolidates all previous version content, making it more maintainable longer-term. This archive will live under the Office home page in the IP tree.
  - Discoverability:
    - The home page will offer a prominent link (“Looking for Office 2000 information?”) to the Office Archives for at least six months after launch.
    - Key Office XP navigation pages such as Deployment, Using, and Individual Office XP app home pages will feature links to the archive. Support and Downloads being particularly relevant life-cycle stages for Office 2000 customers, these two navigation pages will link directly to the appropriate sections on PSS and Office Update.

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- From the index, under "Previous Versions," "Office 2000," "Archives," and "Downgrade."
- Stripping out most previous-version evaluation and all purchase content, because it conflicts with Office XP goals.

## **24 Page Elements and Content**

- Home page: Tabbed implementation that leverages Visio Pilot Product Editions design. Tabs for Office 2000, Office 97/95, and Individual Programs.
- Links and blurbs connect the home page to a series of navigation pages and a select group of end node pages. (See Office page list for details)
- An Office Archives graphic/stamp that designates an archive page as such, setting expectations on currency of content.

See Appendix for research on archiving strategies employed by other sites (competitors and cross-Products.com).

## **25 Plan: Research and Usability**

The new Office site will draw on usability work begun in late 2000 en route to Products.com v.1. We expect to continue refining current thinking on labeling, designs, and layout.

## **26 Plan: Feedback, Metrics, and Tracking Overview and Goals**

At launch and beyond, the Office Web team expects to use customer usage data to gauge reception of the Web site and product, and to make improvements.

- The Office site currently gets data from the following sources:
- WebMetric: The system has been broken for months, but the remaining showstopper bugs that compromise the data are expected to have been resolved by mid-January 2001.
  - Contact Us: The Contact Us (e-mailbox) feature was released on the Office site on April 18, 2000. We currently get hundreds of pieces of customer mail a week, and use the feedback to inform site changes and planning.
  - Rate this page: This feature was developed by the CDDG Platform team and piloted on the Visio site on 12/20. Traffic and reporting structures are still in development.
  - Periodic online surveys (roughly twice a year).
  - One-offs: The Visio Pilot site allows users to comment on the new site design.

### **26.1.1 Overview and Goals**

The Office Web site periodically receives customer feedback from several sources but lacks a process for aggregating and applying that feedback to the site.

**1.2 Plan**

Each feedback mechanism produces unique data ranging from page hits to customer comments. The following table demonstrates how the Office Web Team will use each data source.

	<b>CONTACT US</b>	<b>RATE THIS PAGE</b>	<b>WEBMETRIX</b>	<b>ONLINE SURVEYS</b>
<b>Overview</b>	<p><b>Data:</b> Qualitative</p> <p><b>Scope:</b> Full site</p> <p><b>Frequency:</b> Ongoing</p> <p><b>Reports:</b> Weekly</p> <p><b>Source:</b> Feedback Services</p>	<p><b>Data:</b> Qualitative and quantitative.</p> <p><b>Scope:</b> Key pages.</p> <p><b>Frequency:</b> Ongoing</p> <p><b>Reports:</b> Weekly and monthly, a list of highest-/lowest-rated pages and sample verbatims</p> <p><b>Source:</b> Feedback Services Team and/or WebMetric group</p>	<p><b>Data:</b> Quantitative</p> <p><b>Scope:</b> TBD</p> <p><b>Frequency:</b> Ongoing</p> <p><b>Reports:</b> TBD</p> <p><b>Frequency:</b> Tracks hits, and unique users.</p> <p><b>Additional reporting (e.g., navigation path analysis and referrals, unlikely at launch.</b></p> <p><b>Source:</b> BPP</p>	<p><b>Data:</b> Qualitative and quantitative.</p> <p><b>Scope:</b> TBD</p> <p><b>Frequency:</b> Twice a year</p> <p><b>Reports:</b> Include recommendations, analysis, verbatims.</p> <p><b>Source:</b> Web team and vendor (TRG to date)</p>
<b>Preparing for Launch</b>	<p>AimeeH, Ryan, to work with SMs to set flags in gathering customer feedback about the Office 10 site.</p>	<p>Aimee to work with SMs to identify pages/features, then to serve as contact w/ Feedback Team</p>	<p>Aimee, Dianala to check in monthly w/ Cynthia K (BPP) on tool status. They will also help create a master list of content to be tracked by WebMetric.</p>	<p>A survey is not scheduled before or at Launch. However, AimeeH will continue using past surveys to support monthly reports.</p>
<b>Reports after Launch</b>	<p>AimeeH, Ryan to meet weekly on feedback trends.</p>	<p>AimeeH to receive custom ratings reports from the Feedback</p>	<p>AimeeH to receive custom data reports from Web</p>	<p>AimeeH to work with Diana and SMs on the next online</p>

	new issues, and the status of current analysis projects. They will inform the OWT of the top 5 customer issues of the week.	Team. She will include the top highest and lowest rated pages in her monthly reports. Sample customer comments will also be included.	Metrix Team and fold info into monthly reports. Diana and AimeeH to apprise Cynthia of site changes	survey, which should occur no later than 6 months after launch.
<b>Functions</b>	<ol style="list-style-type: none"> <li>1. Ongoing connection to customers.</li> <li>2. Help identify ongoing customer issues.</li> <li>3. Flag specific pages and/or issues for feedback</li> <li>4. Provide verbatims</li> <li>5. Alert site team to site problems</li> </ol>	<ol style="list-style-type: none"> <li>1. Gauge success of key content</li> <li>2. Gauge effectiveness of site changes</li> <li>3. Provide verbatims</li> </ol>	<ol style="list-style-type: none"> <li>1. Provide key numerical data</li> <li>2. Keep track of new user counts</li> <li>3. More functions to be added as tool is further developed.</li> </ol>	<ol style="list-style-type: none"> <li>1. Audience data</li> <li>2. Gauge sat and response to changes</li> <li>3. General site analysis</li> <li>4. Verbatims</li> <li>5. Identify areas for improvement</li> </ol>

**Using the Data: Reports and Deliverables**

- Aimee will create a monthly customer feedback report to inform the site team of ongoing or pressing customer issues. These reports will provide a rundown of feedback statistics from each feedback mechanism, a summary of findings, and suggestions for improvements. The Office Team can expect these monthly reports to include the following:
  - o Contact Us:
    - The top 5 recurring customer feedback issues of the month and the volume of mail each has received.
    - An explanation of each issue. It will be noted when an issue is unique to that month, such as a broken link.
    - Any initial conclusions about each issue and how those conclusions relate to the Office site.
    - A select group of verbatim customer comments.
    - A short summary of escalated customer emails.
  - o Rate this Page:
    - The top 10 rated pages for the month, and the lowest rated.

- Initial conclusions about pages or features that received low ratings.
- A select group of verbatim customer comments
- WebMetric
  - The top 10 pages with the most page hits, and those pages that received few or no hits.
  - Initial conclusions about pages that received either no hits or an extraordinary amount of hits.
  - Unique user counts.
- Status Reports:
  - A status report for any current feedback analysis projects (e.g., the How/Why to Buy project).
- Aimee will also generate supplementary reports that cover a single customer feedback issue, especially those issues that appear in reports from multiple feedback mechanisms. These reports will draw on data from every feedback resource and offer solutions for improving the customer experience. Any analysis of an issue will occur over a designated period of time, depending on the scope of the problem. At the end of the analysis, the final report will include:
  - A summary of the problem
  - Solutions for fixing the problem and the resources required
  - Supporting data or statistics from all feedback mechanisms
  - Sample verbatim customer comments from Contact Us and/or Rate this Page

## **27 List: Postponed Items**

This section of the plan will be filled in closer to launch.

## **28 Project Out of Scope**

### **28.1 A Single Office Web Site**

The end user and FP marketing briefs voiced the teams' concern with the split Office site experience, the resolution of which they identified as a key priority. However, the integration of the Office Update and Office Web sites remains an unresolved issue, and is out of scope for this plan.

Let the record reflect that Dec. 1 marked the suspension of four months of planning and effort on the issue, which the Office Web team and SG hoped to resolve with Office Update. For details, including plans and presentation materials, contact lakshmi.g.

## **29 Ongoing Maintenance and Updates to Launch Site**

This section of the plan will be filled in closer to launch.



### 30 Milestones

Milestone	Date
RC-1 of Web plan distributed	1/22
All comments returned to Web team; Products.com internal review	1/24 (end of day)
Revisions	1/25
Target date for presentation of plan; will reflect SMG input and SG feedback	1/26
Web team kickoff (content development begins)	Week of 1/29; (content development for tours began 1/22)
All source content complete and delivered to Web team (except late-breaking reviews and awards)	3/16
Trial content goes live on current site	4/1
Handoff of completed site to Products.com test team	4/16
Target site launch date	5/17

### 31 Appendix

#### List of Key Contacts

##### Office Web Team

Lead Site Manager - Lakshmi Gopalkrishnan ([lakshmi.g](#))  
 Site Manager - Alex Heaton ([aheaton](#))  
 Site Manager - Keith Calleja ([kcall](#))  
 Producer - Diana Lawson ([dianala](#))  
 Producer - Aimee Haeussler ([aimeeh](#))  
 Technical Editor - Elise Daniel ([elised](#))  
 Technical Editor - Terry G. Lee ([tglee](#))

##### Office Marketing

Director, Office SG - Joseph Krawczak ([joseph.k](#))

Lead Product Manager – Baris Cetinok (barisc)  
Product Managers – Scott Bishop (sbishop)  
- Tomme Rosner (trosner)  
- Parri Munsell (parrim)  
Small Business – Liz Keyser (lizk)  
IT Pro/BDM – Mike Meltzer (mmelt), Nicole von Kaenel (nicolev)  
Developer – Doug Yoder (dougyo), Anders Brown (andersb), Michelle Dumler (mdumler)  
MapPoint – Angie Gulik (angieo)  
FrontPage – Kelly Weadock (kweadock)  
Visio – Brenda Narciso (brendana)

Central Marketing Organization -- Office Productivity

Director - Peter Cray (petercr)  
Tom Gruver -- (tomgrv)  
Jennifer Stevens (jensteve)

Products.com (include org chart)

General Manager - Jack Litewka (jacklit)  
Director, Site Management – Don Hall (donhall)  
Group Manager, Design and Editorial – Larry Sisson (larrysi)  
Art Director – Doug Montague (dmontag)  
Director, Tech Team – Scott Smernis (scottsm)  
Development Manager – Bret Mulvey (bretm)  
Group Program Manager – Stefan Sierakowski (stefansi)  
Test Manager – Arlene Peterson (arlenep)  
Test Lead - John Darrah (jdarrah)

Vendors

To be added

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**32 Personalization and Customization for Products.com Web sites Requirements Document**

This document is a requirements document for including personalization and customization features in the Products.com V 1.0 release. It includes goals, a set of requirements, and customer scenarios.

## Definitions

There is a fine distinction between personalization and customization features; the information in this document is based on the following definitions:

- **Personalization:** presenting or serving content based on information about the site visitor. This information can be gained through a profile or some other method of detection (for example, presenting specific content based on a visitor's browser).
- **Customization:** presenting or serving content based on customer-defined preferences (similar to MSN home page customization concept).

## Goals

- Raise customer satisfaction with Microsoft products (by raising customer satisfaction with Products.com Web sites) by providing the most relevant content to site visitors. Deepen customer experience so they get the most out of their visit to Products.com Web sites.
- Increase our ability to tailor specific messages to different audience segments; this is particularly important for tier one sites like Windows and Office that have to meet the needs of many audiences.
- Increase site effectiveness by providing targeted messages and content to customers based on their audience, location, and where they are in the life cycle.
- Increase the global reach and appeal of Products.com sites by providing non-U.S. customers with the ability to customize the home page with geographic-specific content.
- Satisfy needs/wants of internal partners (SGs, SMGs), who are putting a high priority on this functionality because it will allow us to market more effectively to specific customer segments.
- Make Products.com Web sites more "sticky" by encouraging repeat visits.
- Reinforce CDDG's efforts at personalization by utilizing Microsoft technologies/features such as Passport; become more integrated into the network of task-based customer destinations.

## Assumptions

- 1) The level of personalization and customization we are referring to applies to the home page only; it does not extend down to the level of controlling all of the content that would appear on the home page or the site. The site teams will retain overall editorial programming control of the content. This is a limited amount of personalization and customization targeted at specific content areas of the home page.

## Requirements

This set of requirements is based on what kind of information we would like to personalize/customize from the home page.

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We have identified two primary ways that customization might be used on the Products.com web sites to enhance the customer experience. Here are the two approaches (and a basic scenario for each) that demonstrate the different options that might apply:

- 1) Presenting specific content based on a set of customer attributes stored in a profile.
  - a) Customer fills-out a profile on MSCOM that includes (but is not limited to) information about their job function (audience), what version of Microsoft software (Windows, Office, etc.) they are using, and where they are located. This profile is then used to determine what content the customer is presented with in several areas of the home page.
- 2) Presenting specific content based on customer choices that are stored in a profile.
  - a) Customer comes to the home page and is presented with the option to customize certain areas (toolkits) based on their preferences. These preferences are stored and used to present the customer with content that is most relevant to them on repeat visits.

### **Scenarios**

We identified several categories of content that we consider the best candidates for personalization and customization. These are shown in the table below, as well as scenarios for basing personalization/customization schemes.

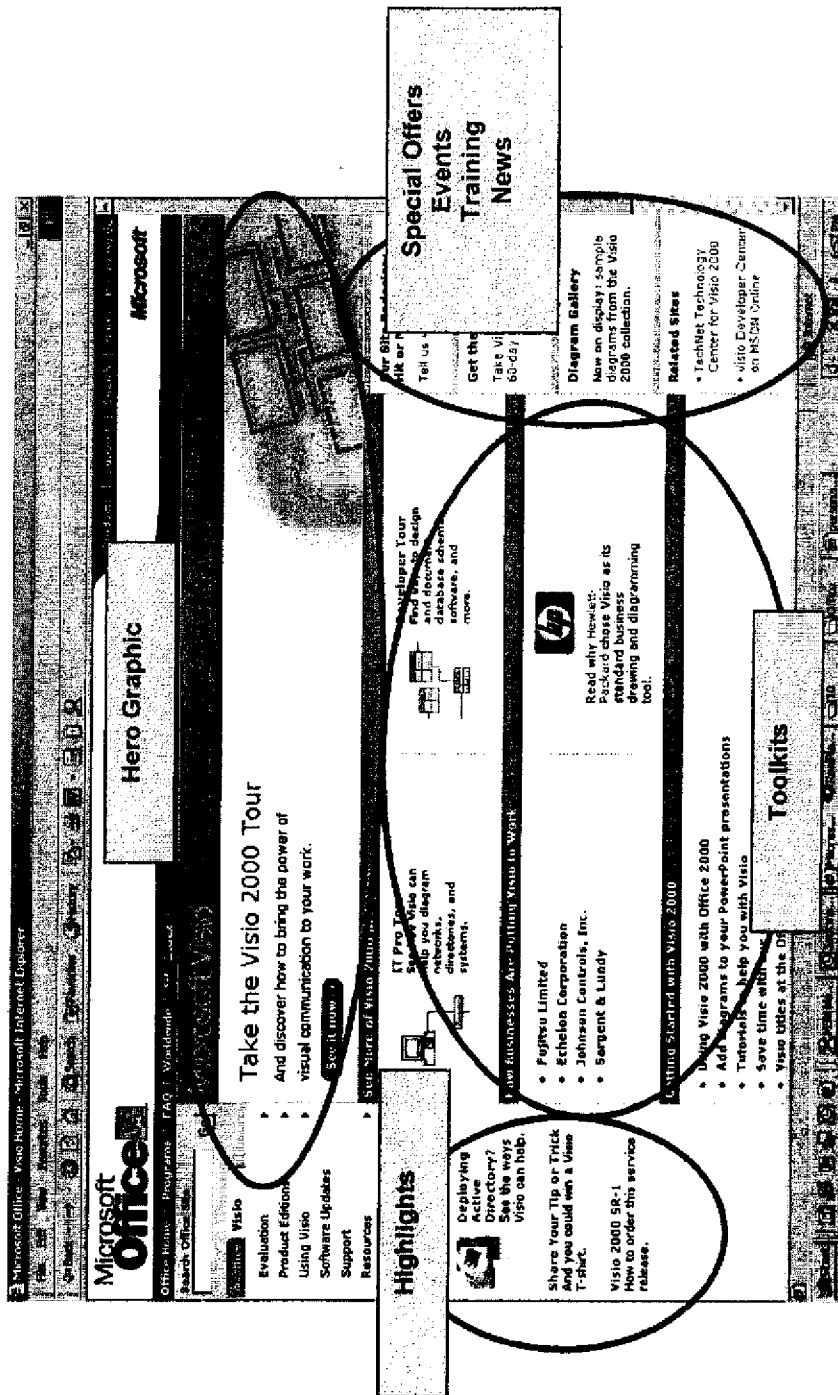
The categories are as follows:

- A. Hero Graphic: this is the main graphic element on the top of the page.
- B. Highlights: these are the items in the left column underneath the main site navigation.
- C. Toolkits: the generic name for the content that is in the middle column of the V 1.0 home page design.
- D. Special Offers: while there is no specific area for special offers, this type of content is sometimes put into the highlights area, or in the right column as shown in the attached diagram.
- E. Events: an events toolkit that could be placed in the middle or right column.
- F. Training: same as events; a toolkit that could be in the middle or right column.
- G. News: same as events and training.

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The following graphic shows the relative placement of these items on the current Products.com V 1.0 pilot site (Visio):



The following chart shows the categories and the possible criteria for personalization and customization. The numbers in the chart correspond to the type of personalization/customization mentioned in the previous section:

- 1) Personalization: Presenting specific content based on a set of customer attributes stored in a profile.
- 2) Customization: Presenting specific content based on customer choices that are stored in a profile.

Hero graphic	Highlight	Toolkit	Special offers	Event	Training	New
	1	2	1	1,2	1,2	1,2
1	1	2	1			2
	1		1	1,2	1,2	1,2
	1	2				1

**1) Personalization: Presenting specific content based on a set of customer attributes stored in a profile.**

- a) Customer profile includes the following information: an end-user running Windows 2000 and Office 2000 in the United States; customer comes to the Office XP home page.
- i) Hero graphic: (version) upgrade to Office XP
  - ii) Promo graphics: (version) try Office XP (Office XP trial)
  - iii) Special offers: (audience) buy Office XP and get a free Microsoft Explorer mouse
  - iv) News: (audience) news for end users
- b) Customer profile includes the following information: IT Professional running Windows 2000 and Office XP professional in the United States; customer comes to the Office XP home page.
- i) Hero graphic: (version) downloads and templates for Office XP
  - ii) Promo graphics: (audience) Office XP Notes from the Field book now available
  - iii) Special Offers: (audience) Buy Office XP Premium for the price of Professional (volume purchasing only).
  - iv) News: (audience) news for IT professionals
- c) Customer profile includes the following information: Developer running Windows 98 and Office 97 outside the United States; customer comes to the Office XP home page.
- i) Hero graphic: (version) Upgrade to Office XP
  - ii) Promo graphics: (version) Business Desktop content (Windows 2000 + Office XP)
  - iii) Special offers: (audience) Office bookstore specials on developer titles.
  - iv) News: (audience) news for developers

**2) Customization: Presenting specific content based on customer choices that are stored in a profile.**

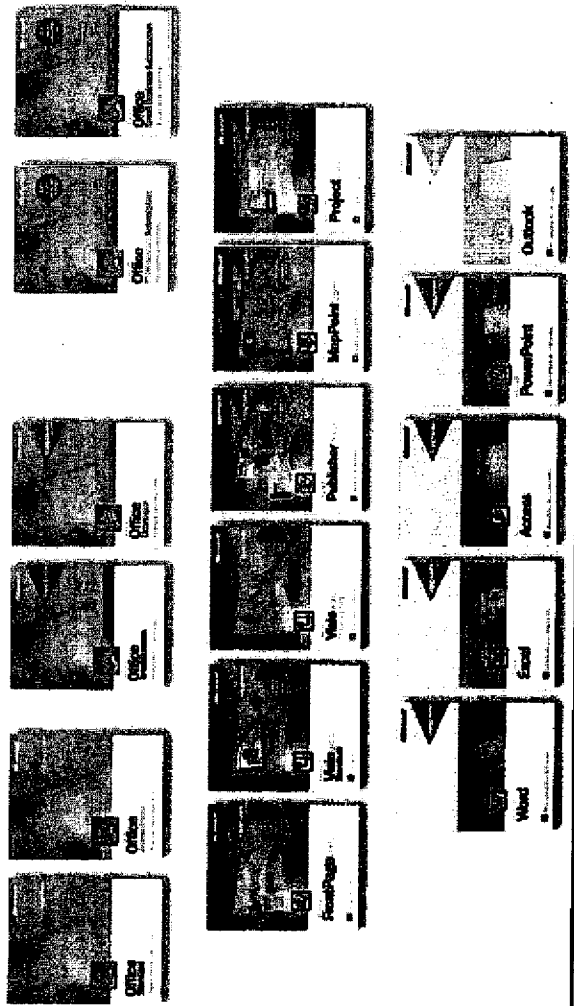
- a) Customer comes to the Office home page and clicks a link to personalize the page. Customer gets a page that allows them to personalize the following parts of the home page:
- i) Events: (location) customer can choose to have events from their region or targeted at their audience segment appear on the home page
  - ii) Training: (location) customer can choose to have training offered in their region appear on the home page

- iii) News: (application) customer can choose to get news on a specific application (Word, Excel, etc.) or for specific audiences (IT Pro, Developer)
- iv) Pricing: (location) customer can add a link to the pricing information on the subsidiary Web site for the their region to the home page
- v) Toolkits: (audience, version, application) Customers can choose to collapse/expand/rearrange toolkits. For example, an end user who is not interested in IT content can collapse that toolkit and put it the bottom. See right column of Microsoft home page for example of this type of customization. Other examples of toolkits and personalization scenarios: Users can customize the contents of a toolkit. For example, to display Word tips instead of Excel tips. Users can pick and choose from a catalog of WebParts to build their "dream page." Catalog would include some WebParts that are not part of the home page by default. For example, Office for the Macintosh information.

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**33 Office XP Suite and Programs Lineup**



**34 Specific Marketing Goals (from audience/app team Web briefs)**

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#### End User

- Drive evaluation, trial, and awareness for Office XP by providing audience-specific information to build awareness and trial.
- Single destination for customers to go for all Office-related resources
- Continuously add value to Office and promote as part of the Office product
- Build the relationship with our customers to gather profile data and feedback.

#### IT Pro/BDM

- Provide a logical and clear path to a site for ITPro/BDM's who are interested in learning more about Office 2002 features and technology.

#### Developer

- Convey that Office provides a rich platform for developing solutions.
- Illustrate the types of solutions and scenarios that can leverage Office.
- List the key developer features available in each Office suite.

#### Small Business

- Generate awareness of Office XP and how to see Office XP at Big Day seminar (US only)
- Promote trial of Office XP
- Extend value of Office with tools and resources, i.e., Template Gallery
- Integrate Office XP with online services i.e., bCentral and Office Update\
- How to buy
- Showcase Small Business Solutions/Case Studies
- Tips and Tricks for Small Business (TBD)

#### FrontPage

- Provide a unified message & single source of information for FP customers & partners.
- Provide a consistent look and feel across all relevant web sites accessed from FP site.
- Generate FP excitement in the 3 distinct communities: end user, developer, & partners.
- Sell FP: excite people with what FrontPage can do - cool, quick, professional, etc.
- Create an end user experience: FP is a solution for all types and experience levels.
- Develop and build a relationship with FP customers to gather profile data and feedback.

#### MapPoint

- Increase awareness of MapPoint 2002 among Office Knowledge Workers (key IEUs and BDMs) and demonstrate benefits of MapPoint to their everyday work.
- Drive people to purchase the trial version.

#### Visio

- Provide customers with one comprehensive place for evaluating and locating purchase information on Visio 2002

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- Provide an easy place for customers to order an evaluation copy of Visio 2002
- Provide a graphics-rich site to convey the benefits of using graphical communication in business

### 35 Prioritized Feature List (cross-site)

<i>Cross-site features</i>	Must Have	Office	Windows	Servers & Tools	Average Rank	Description
Displaying outside content in our UI	N	1	1	1	1	
Search	U	1	1	1	1	Text box and button that submit a query to the ms.com search engine
Site Index (Automated)	U	1	1	1	1	Single page providing links to main site areas down to 2nd level
Site Map (Automated)	U	1	1	1	1	Single page providing links to main site areas down to 2nd level
Course Finder	K	2	1	1	1.3	Displaying Training & Certification course search tool within individual site shells using frames
Frameset	N	1	2	2	1.7	
Rotating content Partners	N	2	3	1	2	
database/Listing	K	3	2	1	2	Web-based form to send feedback to site owner, different from generic ms.com Contact Us
Contact Us/Feedback						
Compressed downloads & Office docs	K	3	2	1	2	Word docs in self-extracting ZIP EXE format
Worldwide sites dropdown (contextual)	N	1	3	2	2	
Support Frameset	K	3	3	1	3	Displaying PSS content within our site shell using frames
Rotating graphics	S	3	2	2	3	Home page graphics and associated content, randomly selected each time the page is served

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RegSys	K		3	3	1	2, 3	Links to RegSys system (series of forms to collect user data in a common database)
Calculators	N		3	3	2	2, 7	
US-only designation	N		2	3	3	2, 7	
Eyebrow navigation design/template scripting needs	S		3	2	3	2, 7	List of links at top of page below toolbar that shows "ancestor" pages
View page without shell	S		3	2	3	2, 7	misc dynamic HTML effects such as mouseovers and expanding menus, including toolbar 2.0
Multimedia Demos Standardization	K		3	3	3	3	Displaying page contents without toolbar and left nav to better output for printing
Send to a Friend	K		3	3	3	3	
Newsletter Signup	K		3	3	3	3	Send URL of current page to a 3rd party via email
Worldwide sites dropdown	K		3	3	3	3	Implementation of mscom newsletter SDK to allow users to sign up for newsletters

Online product documentation	K						Web-based implementation of product-specific online help (Windows 2000 and Exchange 5.5)
Active Glossary	K						Popup definitions of user-selected words and phrases, used in online product documentation

- N = New Feature
- U = Updated Feature
- S = Standardize Feature x-site
- K = Keep feature as-is

### 36 Planning Materials: Site Map and Page List

List of pages and source content needed from Office Marketing:  
<http://prodweb/Office/Office%20XP%20Web%20Site%20Site%20Planning%20Documents/Content%20Deliverable%20List.xls>

Site map:

[http://prodweb/Office%20XP%20Web%20Site%20Planning%20Documents/Office%20XP%20Web%20Site%20Map%20\(gif%20--%20better%20for%20screen\).gif](http://prodweb/Office%20XP%20Web%20Site%20Planning%20Documents/Office%20XP%20Web%20Site%20Map%20(gif%20--%20better%20for%20screen).gif)

Overall project schedule:

[http://prodweb/Office%20XP%20Web%20Site%20Planning%20Documents/Office%20XP%20Web%20Site%20Map%20\(gif%20--%20better%20for%20screen\).gif](http://prodweb/Office%20XP%20Web%20Site%20Planning%20Documents/Office%20XP%20Web%20Site%20Map%20(gif%20--%20better%20for%20screen).gif)

## **37 Archiving Strategy Research**

### **37.1.1 Competitor Sites**

Sites like **Oracle** and **Adobe** do not have a designated previous versions area, and the content they do have is strictly support-related or knowledge base articles. There is no evaluation content of any kind.

**StarOffice** has a link to 5.1 information right off its home page in the left nav, but it is also very upfront about the fact that it is going away. Their content in the 5.1 section consists mainly of an FAQ and support information. There are links to one white paper, training resources, product registration, and news. Overall, the content is pretty sparse on 5.1, with plenty of plugs for 5.2. They also have something called an End-of-Life Policy. Frightening!

The **Lotus** site was pretty hard to navigate, with the left nav and UI changing frequently as I clicked around the site looking for previous-version information. Most of the previous-version info I found was "Why Upgrade?" content. The rest was training materials and troubleshooting/support information, both of which I only found through Search.

Conclusion: We have not found inspiration among our competitors' sites.

### **37.1.2 Comparable/Products.com Sites**

When developing an archive plan for the launch of Windows 2000, the **Windows** team decided that all previous-version evaluation content was no longer relevant, so site contents for Windows 98 and 95 are limited to:

- "Hero" graphic about upgrading to the latest version
- Using (Windows 98 only)
- Downloads
- Support

Customers can navigate to this archive content directly from the Windows home page. Previously, that home page featured a more prominent presence for those older apps, with mouse-over call outs describing what kind of information is available on the site. Now, they simply have links with the product names listed under a heading called "For Home Use". A particularly cool thing the Windows team is doing is branding the nav pages on the Windows 98 site with an "Archive" graphic.

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The general **Servers & Tools** strategy is to place previous-version information under the Product Information sections of its product sites, but this is not consistently applied. Some of their recent archiving challenges have not been exactly comparable to ours because the product names changed significantly, such as Proxy Server to Internet Security & Acceleration Server. In that specific case, there is a Proxy Server link on the ISAS home page that takes you the full Proxy Server site (including "What's New" information) in a two-year-old UI with no link back to the ISAS site. There is a prominent headline on the Proxy Server home page that explains that it has been replaced by ISAS.

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[AH1]Name not final.

[LG2]Need to say exactly what this Big Day seminar concept is all about. Don't see it anywhere yet.

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