

**From:** Judy Lew  
**Sent:** Tuesday, May 09, 2000 5:35 PM  
**To:** Joseph Krawczak  
**Subject:** FW: G11 Office meeting and your deck

FYI since you were curious. Just got it so haven't looked at this yet.

-----Original Message-----

**From:** Thomas Gruver  
**Sent:** Tuesday, May 09, 2000 5:17 PM  
**To:** Judy Lew  
**Cc:** Whitney Whiton; Scott Bishop  
**Subject:** RE: G11 Office meeting and your deck

Here you go...



Office Productivity  
Mktg track.

-----Original Message-----

**From:** Judy Lew  
**Sent:** Tuesday, May 09, 2000 9:15 AM  
**To:** Thomas Gruver  
**Cc:** Whitney Whiton; Scott Bishop  
**Subject:** G11 Office meeting and your deck  
**Importance:** High

Tom, thanks for your message last night. Just left you vmail letting you know that I've asked Scott and Whitney to present the Office FY01 IEU sustaining plans that we developed to the G11 on Monday morning (prior to your afternoon session). If you could send us the deck you're planning to present (e.g., assuming your WWSMM deck), we can make sure we're in sync. I'm actually out of town this Friday and Monday so it would be best to meet with them on Friday if you have time.

Thanks!!

*Microsoft*<sup>®</sup>

**Wordwide Sales  
and Marketing  
Managers Meeting**

**May 8 - 11, 2000**

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# **Office Productivity *Initiative***

**Thomas Gruver  
*Group Marketing Manager  
Central Marketing Organization***

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How many people are married?

Have children?

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# Situational Analysis

- ◆ Office revenues/EA renewals down
- ◆ Wide variety of disparate competition
- ◆ KM Initiative off-target
- ◆ Current workforce is changing

Established Market	Emerging Market
Demands are higher – changes happen faster	Slower change – but demands may come from understanding what to adopt first with limited resources
Core needs are changing to both personal and professional success	May be more focused on success
IEU growing from 10-70%	Indicator of where market may go w/greater adoption

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Office revenues down:

Seems as platform now... not hip and cool. Too many features when I don't already use the ones I have.

KM initiative unsuccessful:

Comment on how this is not the KM init all over again. Too much solutions focus, not enough product focus.

The current workforce has changed

- IEUs have grown from 10%-70% - more options, more opinions
- Demands are higher -- change happens in a pico-second
- Core need is balance and success in life

Who's meeting their needs?

- Office 97, Palm, Apple, Yahoo, AOL, Desktop.com
- Lack of enthusiasm for Office 2K - not promoting features that meet their needs

Our challenge: Become the leader in providing products that offer balance and success in life!

- Promote the end-benefit of balance or success by using our integrated family of products
- Extend our marketing to reach the new IEU community

# Customer Landscape

*Who is the Knowledge Worker?*

	Profile	Situation Today
Need	Balance & Success	Single products that address a piece of the whole solution
Anxiety	Overwhelmed Loss Failure	10 New Features A whole new way to work World is changing
Defenses	Avoid React Rationalize	"I'll wait until v2 when it's stable" "I won't buy, Microsoft's a monopoly" "What I'm using now works fine."
Challenge	Make balance & success real and possible for everyone Provide comfort, security & assurance Build on existing experience	

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## Balance

Minimize overload of information and tasks

Organize and simplify my life (personal and professional)

Do what I need to do, when and where I need to do it

Get things done faster so I can work less

## Success

Master skills necessary to do effective knowledge work & make a difference

Learn and apply new knowledge in a convenient way

Find and work with the right people and information

Power. Excitement. Fun. Unlimited possibilities. Explore & take risks

Work and home integration.

Increased responsibility

- **Minimize information overload**

The practicing sub phase.

Net Gen Magical Thinking. The world is their oyster

PC Gen

Understanding of self

Increased responsibility

# Initiative Overview

- ◆ Distinct from Platform and LOB
- ◆ Different from KM
- ◆ Grass-roots end-user excitement

# Goals

*A product focus with a solutions strategy*



- ◆ Create excitement via integrated usage scenarios, with primary focus on Office and BTD products
- ◆ Use Visio and Project to increase Office deployment
- ◆ Everybody at MS becomes an Office evangelist

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Create excitement via integrated usage scenarios, with primary focus on Office and BTD products

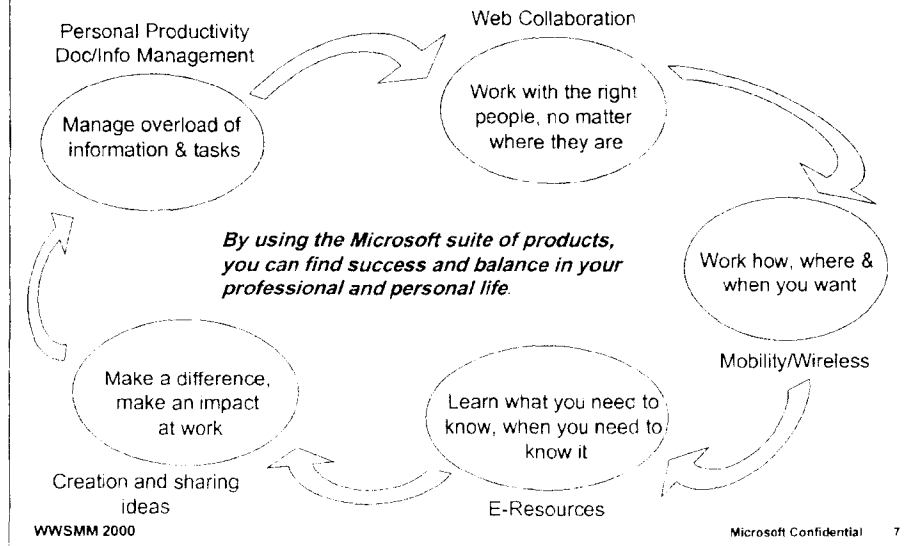
Use Visio and Project to increase Office deployment

Everybody at MS becomes an Office evangelist to increase satisfaction and loyalty for Office

Show people what they are missing

# Key Messages

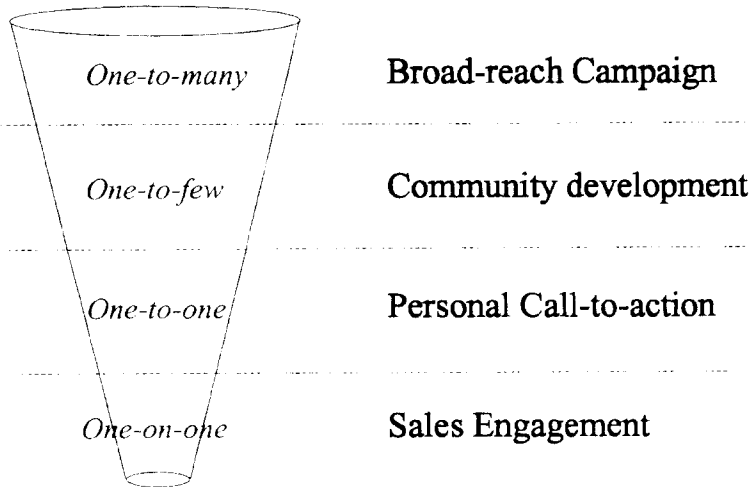
## *Knowledge Worker Value Proposition*



The cycle of life...



# Key Strategies



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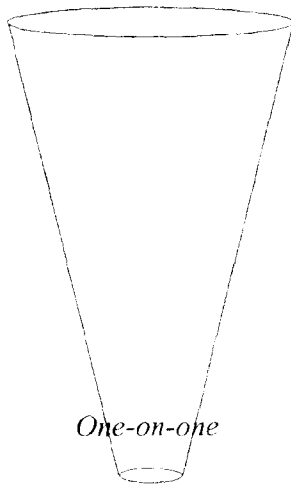
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# Sales Engagement

*Onsite activities within accounts*



- ◆ **Compelling reason to buy**
  - ◆ IT: REJ (Platform init)
  - ◆ BDM: Productivity (LOB init)
  - ◆ KW: Balance & Success
- ◆ **Seminars in depth/breadth**
  - Seed at the high-level
  - Partners for MORG
- ◆ **Data mining for sweetspot**
- ◆ **Sales readiness**

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10-25% FTE SE Allocation

Conduct KW learning seminars in accounts

- Customized by business type or vertical
- Target: Departments
  - Seed influentials in Depth accounts (High Level BDMs, Senior Managers)
  - Lead by example

Partner with Platform initiative for IT

- Sever based Dashboard for IT deployment

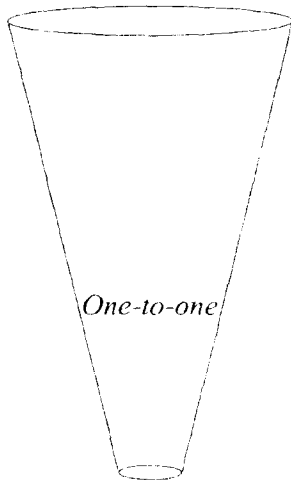
Partner programs (I.e. SS, KPMG)

Additional Deep content

- demos/tools/add-ins

# Personal Call-to-Action

*Web site to learn and buy solutions*



- ◆ **Optimized around workstyle/lifestyle**
- ◆ **Personalized**
- ◆ **Guidance and examples**
- ◆ **See-use-learn-buy**
- ◆ **Updates via relationship marketing**
- ◆ **Localized**

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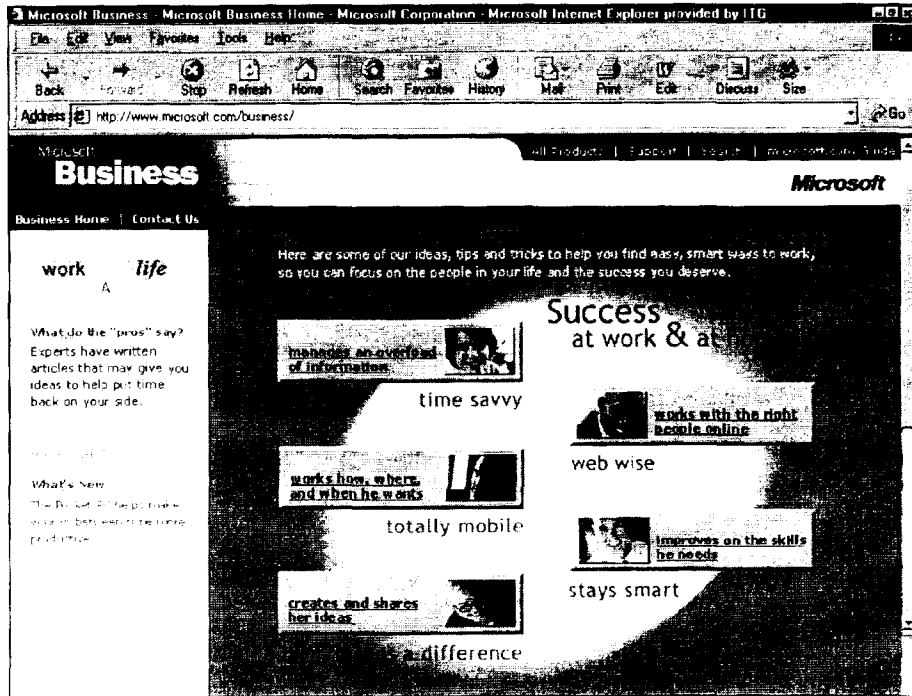
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KW Web (see – use – learn – buy)

- Optimized around workstyle/lifestyle
  - Personalized to who you are (ex: purchaser vs. user)
- Best-of-breed guidance and examples
- Video/audio demo
- Call-to-action

KW resources

- Personal Technical trainer
- Feedback loop
- “expert” guests



Microsoft Business - Microsoft Business Home - Microsoft Corporation - Microsoft Internet Explorer provided by 116

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**Business** Microsoft

**Main Page**

**time savvy**

**productivity**

**stays smart**

**Manage an overload of information.**

Olive has two full-time careers—she's a mother of two and is a catering account representative. To successfully manage information and have more time with her family, Olive adopted the pieces of technology that work for her.

**Select a bandwidth to watch how Olive works:**

[50K](#) [150K](#) [Custom \(at 1000K\) Need a Player?](#)

**Audio Demo**

Follow a quick and easy tutorial to learn how Olive manages her information.

Here's the blurb about other browser versions.

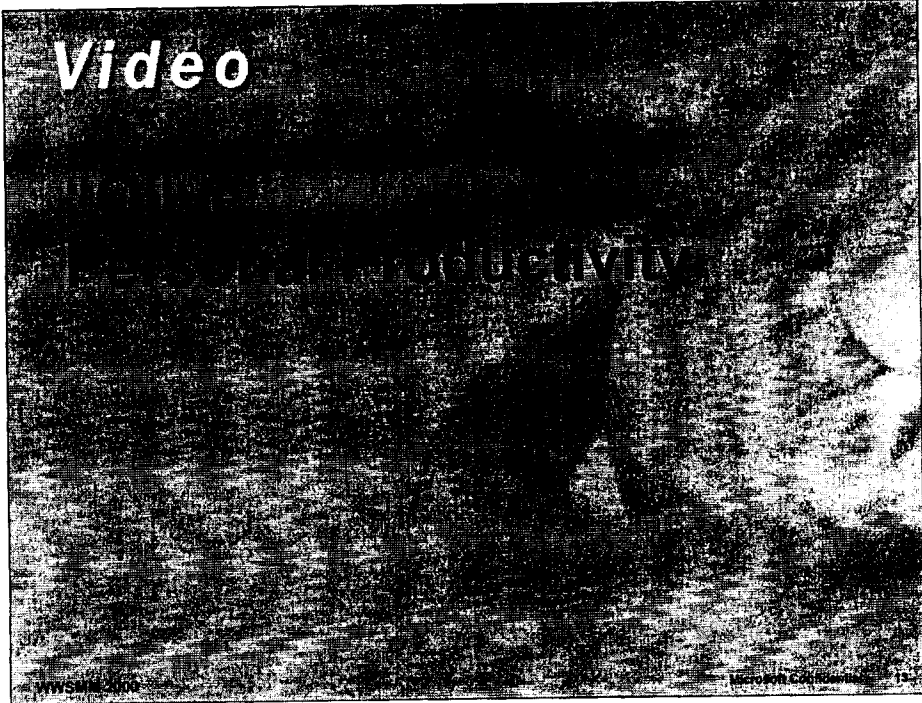
**Summary Sheet**

Find everything you will need to manage your information like Olive.

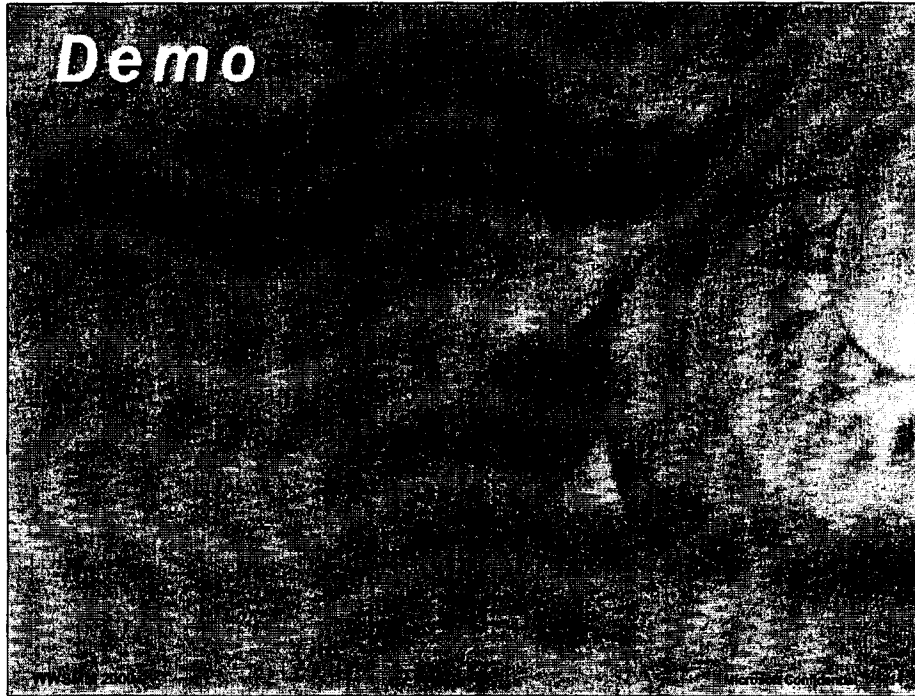
**More Learning**

Check out the training options to find what will work best for you.

Linked sites

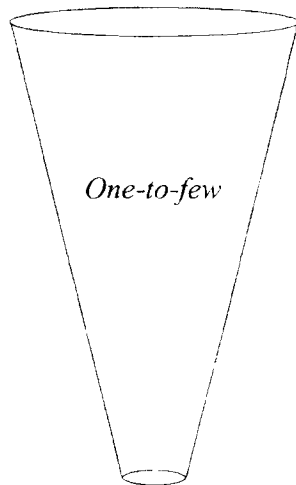


**Demo**



# Community Development

*Building a groundswell of excitement*



- ◆ **Quarterly focus**
- ◆ **Leverage corporate events**
  - **Launches**
  - **Partner events**
- ◆ **Local community groups**
  - **User groups**
  - **Associations**
- ◆ **“Third Place” program**

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Q1, FY '01 “Rejuvenation” Launch (????)

- 12 week WW KW road show and “hype” PR & marketing activities

Community development / events

- Engage with existing community groups (geography, profession, interest)
- Mobilize thought leaders in each geography to be advocates for MS

Relationship marketing campaign

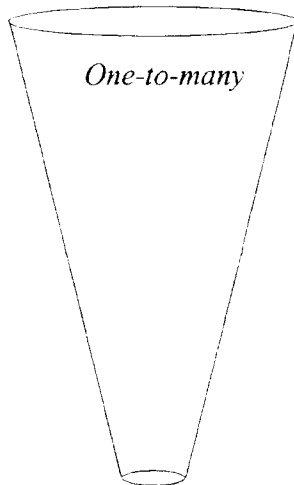
Third Place idea

- Starbucks; B&N; Kinko’s bundles/promotions



# Broad Reach

*Solutions oriented ads and PR*



- ◆ Quarterly focus
- ◆ Centered around scenarios
- ◆ Drive to web
  
- ◆ PR targeting lifestyle and new economy pubs

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## Broad reach advertising

- Solutions oriented advertising to end-users
- Quarterly focus on individual scenarios
- Call to action - [www.formysuccess.com](http://www.formysuccess.com)

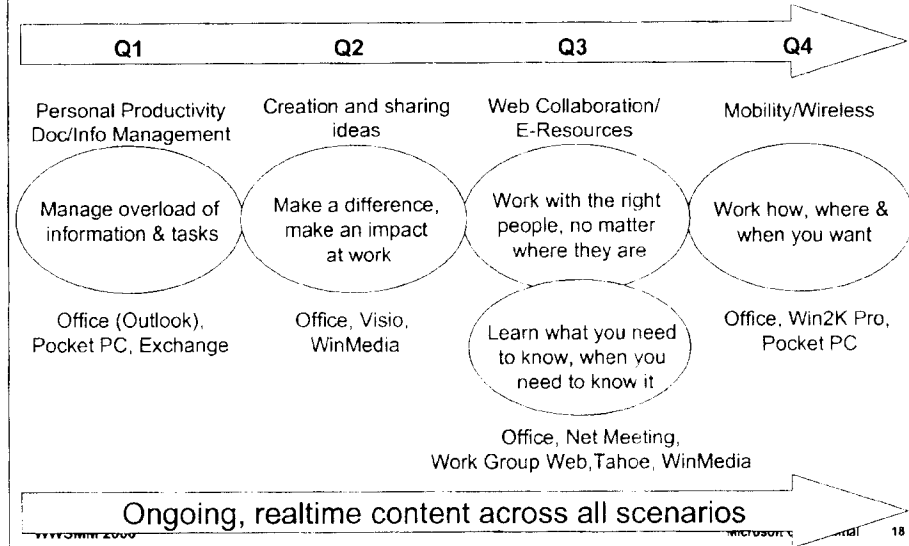
## Sustaining PR

- Lifestyle and new economy pubs
- Gain credibility as the company who continues to offer the best solutions for balance and success through products and services
- Build rich database of end-user best practices



# FY '01 Quarterly Highlight

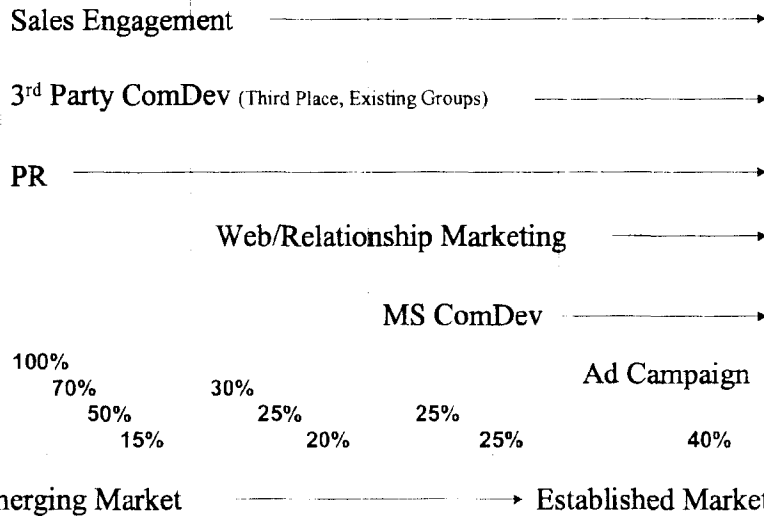
## Advertising and PR Focus



### Map scenario focus for each quarter to:

- Product availability
- Seasonal conditions and annual milestones (WW)

# Worldwide Prescriptions



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# Key Deliverables

	Corp	Sub
<b>Quarterly Content</b> <u>Audiences:</u> ◆ <i>Field Sales</i> ◆ <i>Partners</i> ◆ <i>Telesales</i>	◆ Develop scenario outline and content for all events and audiences ◆ Build PPT, demos, videos and scripts for US	Budget and plan for: ◆ Resource to localize content ◆ Video production
<b>Web/Relationship Marketing</b>	◆ Design and build Web site for US ◆ Develop relationship marketing program for US ◆ Share design and provide guidelines for subs	Budget and plan for: ◆ Web site localization design and test ◆ Relationship marketing program
<b>MS ComDev Events</b>	◆ Deliver WW guidelines for comdev events ◆ Coordinate and fund nationally leveraged resources (speakers, writers, celebs)	Budget and plan for: ◆ Demand Generation ◆ Venue & speakers ◆ Give-aways
<b>Broad Reach Advertising and PR</b>	◆ Run campaigns for US ◆ Share all plans and execution with subs	Budget and plan for: ◆ Media buy ◆ Agency spend

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# Field Prescriptions

Initiative Strategies	LORG	MORG	SOHO
<b>On-site pre/post EA activities</b>			
◆Identify strategic accounts	Sales Rep	Territory Mgrs/partners	
◆Present onsite in strategic accounts	Initiative SE/TSSs, Partners	Partners	
<b>Community Development</b>			
◆Coordinate ComDev activities	FMM/Sub Marketing Mgr	FMM/Sub Marketing Mgr	FMM/Sub Marketing Mgr
◆Present at ComDev activities	Initiative SE/TSSs	Initiative SE/TSSs	Initiative SE/TSSs
<b>Seed Influentials</b>			
◆Target BDMs and IEUs in depth account	Sales Rep		
<b>Ongoing Adv/PR</b>			
◆Management of local advertising and PR campaigns	FMM/Sub Marketing Mgr	FMM/Sub Marketing Mgr	FMM/Sub Marketing Mgr
◆Act as spokesperson in PR	Initiative SE/TSSs	Initiative SE/TSSs	Initiative SE/TSSs

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# Key Milestones

Event	Dates	Audience
WWSMM	May 9 - 11	WW Sales Managers
Initiative Pilot Activities	Mid-June	HQ Initiative Team/ Select Field Reps
US Web site launch (Subs continue to localize for August launch)	July	Knowledge workers
Initiative Plans Final – sent WW	July 1	WW Initiative/ Marketing Leads
Fusion/MGS Internal launch	July 14 – 22	Field/Partners
First Quarter Content Delivered	July 22	Field
Field sales readiness	TBD	Field/Partners
Launch first Initiative Activities	Mid- August/Sept	BDMs, Knowledge workers

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# **WW Scorecard**

*Measuring our Success*

- ◆ **Build enthusiasm through grass-roots campaign**
- ◆ **Drive deployment in existing EAs**
- ◆ **Sell new EAs into Breadth LORG and MORG**
- ◆ **Grow Office revenue 11%**
- ◆ **Grow BTD revenue 25%**



Where do you want to go ~~today~~?

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