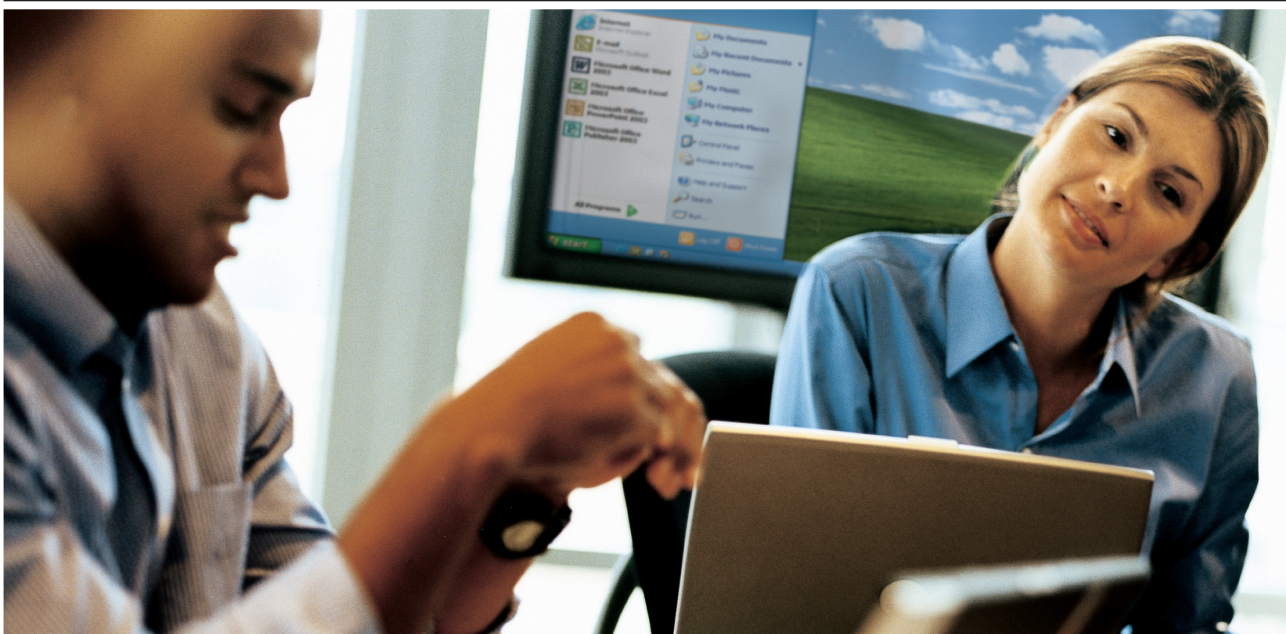


ENTERPRISE SEARCH

PARTNER *Call Script*

Partner Call Guide for Microsoft Midmarket Accounts



Target audience	Microsoft® Partners delivering to their customers in Midmarket. (Note that ISVs and VARs may customize this guide to address their Microsoft solution.)
Target roles	Customers concerned about strategic IT investments and charged with solving business problems with technology: <ul style="list-style-type: none">• Information Technology Decision Maker (ITDM)• Senior IT (Director level)
Key message	Empower people to quickly find the information they need from content repositories, intranet, and Internet Web sites.
Key products	Primary: <ul style="list-style-type: none">• Microsoft® Office SharePoint® Server for Search 2007• Microsoft® Office SharePoint® Server 2007 Secondary: <ul style="list-style-type: none">• Microsoft® Office 2007 Client and Services (with enhanced search capabilities)• Windows® SharePoint Services (free add-on to Microsoft® Windows® Server®)• Windows® Desktop Search (free add-on for Windows® XP)• Windows Vista™
Customer offers	<ul style="list-style-type: none">• Optimize Your Business Productivity Infrastructure (BPIO) University—To Partner workshops, to learn about the workloads of BPIO and acquire training on how to re-offer these workshops to customers• Through Partner BPIO online materials• BPIO infrastructure optimization assessment• SharePoint Server 2007 evaluation kit• Bridging the Gap between Information Management and Enterprise Search—a white paper

Enterprise Search Campaign

Campaign overview

The Microsoft Enterprise Search vision is about providing software and services that deliver pervasive capabilities to enable people to find information more quickly and easily. Microsoft's enterprise search capabilities empower people to quickly find the information they need from content repositories, and intranet and Internet Web sites, through a familiar, Web-style interface. Microsoft is addressing the four main enterprise search business challenges that customers face today: relevancy, familiarity, security, and enterprise-class.

Objectives

- Follow up on MQPs and nurture leads.
- Educate and drive interest in Microsoft Enterprise Search solutions.
- Build relationships with customers and follow through with enterprise search capabilities.

0-20% Qualification	<p>1. Prepare for the call.</p> <p><i>Prospect</i></p> <p>Successful sales representatives prepare for the call by learning all they can about the customer and creating a goal or outcome for the conversation before calling the customer. Here are some ideas to think about:</p> <ul style="list-style-type: none">• Review the profile—Review the customer profile to gain a holistic understanding of your customer.• Understand who you are calling—Know the difference between a Technology-Influencing Business Decision Maker (TI-BDM), Technical Decision Maker (TDM), or Information Technology Decision Maker's (ITDM) concerns.• Know the history—Review past customer relationships with Microsoft and your organization. Does the customer currently own Microsoft products?
	<p>2. Conduct the call.</p> <p><i>Listen</i></p> <ul style="list-style-type: none">• Open—You only have 11 seconds to capture a customer's interest. Ask questions to determine the customer's specific pain point.• Probe—Listening is a prerequisite to high-performance selling. Take the time to understand the customer's specific needs, determine the impact of those needs on the organization, ask what plans the customer has for addressing any issues, and learn the time frame in which they plan to address those needs.• Prove Value—Offer testimonials to help the customer understand how he or she might benefit from Microsoft enterprise search solutions.
20-40% Qualification	<p>3. Develop the lead.</p> <p><i>Qualify</i></p> <ul style="list-style-type: none">• Qualify the opportunity—Ensure that the customer meets the six qualification check points.• Answer customer concerns—Address any concerns or objections your prospect has.• Track the call—The next call to the customer will be more successful if there is more information about the customer. Be sure to enter notes and update the field and pipeline information in your database.
40-100% Qualification	<p>4. Present the solution.</p> <p><i>Solution</i></p> <ul style="list-style-type: none">• Develop and present a preliminary solution—Include a high-level deployment strategy and value proposition.

1. Prepare for the call

Prospect

What is the Enterprise Search campaign?

Key Message

Empower people to quickly find the information they need from your organization's content repositories, and intranet and Internet Web sites, through a familiar, Web-style interface.

Provide relevant search results—Microsoft's Enterprise Search capabilities provide quick delivery of high-relevancy search results for business information from multiple sources and sites, which empower people to find the information they need through a search capability optimized for business data to deliver high-relevancy results.

Provide a familiar interface—Microsoft delivers a familiar, consumer Web search-styled interface that diminishes user training costs and adoption challenges as it enables users to easily search for the information they need.

Help maintain the security of information—Microsoft enhances the security of information by only displaying search results that can be accessed by the user.

Deliver an enterprise-class search solution—Microsoft delivers an enterprise-class search solution, providing interoperable server manageability and the ability to scale deployment as a business grows.

Who will I call?

Title	Key Concerns
Information Technology Decision Maker (ITDM)	<ul style="list-style-type: none"> Needs to enable search across the entire organization (communications, documents, people, and business data). Needs to reduce the estimated 15–30% of Information Worker's time spent looking for information (source: IDC, 2003). Needs to provide access to a comfortable search interface that indexes all network content—as opposed to searching each content repository, intranet, or Web site separately. Needs to regulate the display of search results to which users do not have access, for information management reasons—from the protection of intellectual property to compliance.
Senior IT (Director level)	<ul style="list-style-type: none"> Needs search technology that can be managed along with other servers, and allows the flexibility to scale with business growth—without forcing a rip-and-replace upgrade.

What products do I sell?

Note: Although the Enterprise Search capability focuses primarily on selling Microsoft SharePoint Server for Search 2007 in order to offer an affordable search option to Midmarket companies, there is also an opportunity to “sell” Windows Desktop Search and Windows SharePoint Services. Since customers who use these free services are more likely to purchase Microsoft Office SharePoint Server 2007 or Microsoft Office SharePoint Server for Search 2007, it is important to “sell” them to customers using Windows XP and Windows Server in order to cultivate future sales opportunities.

Product stack	Why customers buy
Relevancy	
<ul style="list-style-type: none"> Microsoft SharePoint Server for Search 2007 	<ul style="list-style-type: none"> Designed with the knowledge that searching business data is different than searching Web content, high-relevancy search results are achieved through the coupling of new and improved search algorithms with a broad range of ranking factors developed by Microsoft Research. Index and display results from content repositories supported out-of-the-box, including file shares, Web sites, SharePoint sites, Exchange public folders, and Lotus Notes databases—with support for over 200 common file types. Search scopes can be easily defined to suit specific business needs—where it is desired, say, to only search HR or Marketing department information, versus searching the entire intranet.
Familiarity	
<ul style="list-style-type: none"> Microsoft SharePoint Server for Search 2007 	<ul style="list-style-type: none"> The Search Center provides a single, integrated location for users to find the business content they need. Features like query hit highlighting, duplicate collapsing, and “did you mean...?” query correction help users quickly locate information they want within search results. Alerts and RSS feeds provide a quick and easy way to notify users of new results for common and frequent searches. Working seamlessly with Windows Desktop Search and other third-party, desktop search tools allows users to easily search local and remote content sources. Out-of-the-box features, as well as optional integration with technologies such as real-time communications, delivers actionable search results—allowing users to easily use content they find.
Security	
<ul style="list-style-type: none"> Microsoft SharePoint Server for Search 2007 	<ul style="list-style-type: none"> The search engine utilizes your user authentication infrastructure—for example, Active Directory® service in Microsoft Windows Server—to prevent the display of results of content that cannot be accessed by the user. Security permissions are indexed along with content and are respected when displaying search results. Search results filtering helps provide necessary levels of compliance, privacy, and protection of intellectual property.
Enterprise-class	
<ul style="list-style-type: none"> Microsoft SharePoint Server for Search 2007 	<ul style="list-style-type: none"> Utilize interoperability with your existing server management applications for Windows-based servers. Manage content sources, relevance, search scopes, and other settings through a powerful, easy-to-use management console. Monitor search engine performance with query and results reporting. Scale your deployment to meet the needs of your business through flexibility in server hardware, operating system, and database implementation that avoids rip-and-replace upgrades. Seamlessly scale your maximum document search capacity by moving from the Standard edition to the Enterprise edition of Microsoft Office SharePoint Server 2007 for Search to increase search capacity from 500,000 to up to 50 million documents—while preserving the installation and index. Built on a common platform, Microsoft Office SharePoint Server 2007 for Search can be upgraded to Microsoft Office SharePoint Server 2007 to enable the broader information management capabilities it provides, including Portals, ECM, WCM, and BI.

2. Conduct the call.

Listen

OPEN

Hi, I'm _____ from [partner name], a Microsoft [partner type] Partner.

I've been working with other companies like yours and I have a proposal that could help you provide enterprise search to your organization.

GET PERMISSION: *Do you have 10 minutes to explore this messaging proposal?
Before I share my proposal, let me be sure I understand the challenges you are facing.*

PROBE

PAINS	<i>What are your greatest challenges today around enterprise search technologies?</i>	<p>Ask questions to uncover these types of pains:</p> <p><i>Customers similar to you are challenged by enabling employees to provide enterprise search capabilities:</i></p> <ul style="list-style-type: none"> • Time and cost of searching for current, accurate information across disparate servers or systems. • Steep learning curve for developers and end users. • Lack of secure results when searching for business-critical data. • Lack of scalable investment.
PLAN	<i>Where would you like to go?</i>	<p>Help them build a vision of:</p> <ul style="list-style-type: none"> • Improving search relevance and speed—taking advantage of new features that make the crawl faster, so content is fresher and more relevant. • Using familiar desktop and business applications—reducing training costs and support call volume. • Managing a secure and controlled environment—providing enterprise search while ensuring data protection and compliance with corporate security policies by only displaying results to which the user has access. • Using a scalable enterprise-class search solution—reducing development time and costs by leveraging existing IT investments.
PROCESS	<i>How will you get there? What solutions are you planning on evaluating? When are you planning on deploying?</i>	<p>Listen for competitors:</p> <ul style="list-style-type: none"> • Google—Microsoft provides broad, integrated, enterprise find capabilities plus use and share capabilities—beyond anything Google offers.
PEOPLE	<i>Do you have the staff or a partner that can help you provide Business Intelligence solutions?</i>	
PRICE	<i>Have you already allocated budget for Business Intelligence enhancements?</i>	

SUMMARIZE: *Great. Let me see if I've captured correctly what you would like to do.
I understand that you would like to [x/y/z]. Is this correct?*

PROVE VALUE

I think I can help you provide enterprise search capabilities.

Benefits	Customer Testimonials
<ul style="list-style-type: none"> • Improve search relevance and speed—Use features like query hit highlighting, duplicate collapsing, “did you mean... ?” query correction, and alerts to help users locate what they want within search results. • Use familiar desktop and business applications for searching—Help employees search across their own computer; across the company, including unstructured data sources like file shares, structured data, such as line-of-business applications (for example, CRM) and people; and across the Internet—with familiar and easy-to-use tools. • Enable a secure and controlled search environment—Enable end users to easily search for information while maintaining the protection of that information through search security designed to display only user-accessible results. • Use a scalable search solution—Invest in a solution that will grow along with business needs. 	<p>Note: Although the following case studies feature Microsoft Office SharePoint Server 2007, they can be leveraged for Microsoft Office SharePoint Server for Search 2007 because it features Microsoft Office SharePoint Server 2007’s document and Web search functionality that comes with Microsoft Office SharePoint Server for Search 2007.</p> <ul style="list-style-type: none"> • HealthSTAR Communications, a marketing services company that assists healthcare clients through the full life cycle of their marketing activities, began receiving requests for more comprehensive proposals, which took more time to create. HealthSTAR began using Microsoft Office SharePoint Server 2007 to build a searchable document library and Microsoft Office Word 2007 to search for needed material. The solution has reduced proposal creation time by 60 percent and helped people produce higher-quality proposals. A planned move to the Windows Vista operating system will give HealthSTAR even better information search capabilities, help provide portable computers with enhanced security, and lower IT support costs. • Kinex Medical Company, which provides physical therapy devices that help patients regain mobility after surgery, leases its devices through 125 distributors in 23 states. Paper-based processes slowed communication between Kinex and its distributors, which, in turn, slowed insurance payments to Kinex. Employees wasted time hunting down information and tracking hours for management. Kinex then turned to Microsoft Office SharePoint Server 2007 and Microsoft Office InfoPath® 2007 and created a paperless workflow and searchable document portal for its employees and distributors. The innovation is saving the company US\$200,000 in faster information searching, \$75,000 in new-patient processing, and \$100,000 in time tracking, annually. Moving the portal to Windows Vista will broaden its search capabilities, enhance desktop security, and reduce IT support costs. • NNIT employees have found themselves more and more overwhelmed with e-mail messages, software documents, and other customer files. To improve their file-searching ability, some employees downloaded Internet-based computer search tools. However, these tools were not secure and exposed classified information on the Internet. To solve that issue, NNIT deployed Windows Desktop Search, a tool that employees can use to find computer files simply and quickly. NNIT now has an easily managed search tool that has increased employee productivity.

CONFIRM: *Would this be of interest to you?*

3. Develop the lead.

QUALIFY

Qualify	<i>Let me recap.</i>	Confirm the six qualification criteria: <ul style="list-style-type: none"> • Pain is admitted by the sponsor or compelling event is identified. • Sponsor has buying vision. • Sponsor agrees to explore. • Access to power is negotiated (key decision maker identified). • Budget is determined and timeline established. • Microsoft solutions are a good fit for the customer.
Offer	<i>I'd like to talk with you about an offer to help you deploy Microsoft's enterprise search solutions.</i>	Offer customers one of the following: <ul style="list-style-type: none"> • BPIO University—To Partner workshops, to learn about the workloads of BPIO, and training on how to re-offer these workshops to customers • Through Partner BPIO online materials • BPIO infrastructure optimization assessment • SharePoint Server 2007 evaluation kit • Bridging the Gap between Information Management and Enterprise Search—a white paper

Objections	<i>Do you have any questions?</i>	<ul style="list-style-type: none"> • Isn't Google the market leader in search? Microsoft Office SharePoint Server 2007 for Search offers a competitive product to the Mini, with a per-server SKU in both a Standard version (index limited to 500,000 documents) and Enterprise version (unlimited index size). The Standard version is ideal for the midsize businesses looking for an unstructured data search across their business, without the requirement of Client Access Licenses. Microsoft has launched leading-edge technology for access to LOB data (Business Data Catalog), as well as new innovations around People Search—something Google doesn't have. Microsoft provides a more flexible, richer platform and toolset that allows people to customize the way searches are performed, visualized, and integrated into applications—whether that is a portal, ECM, BI, or collaboration systems. • Can I implement search capabilities leveraging my current investment? Windows Desktop Search can work with Office SharePoint Server for Search 2007 to provide a unified tool to search your desktop, your intranet, or the Web. • I like this solution, but I don't see it as a priority to invest in right now—versus other business needs. Microsoft products are built to keep critical business information synchronized and accessible across a wide range of devices—so people can stay better organized, find information when they need it, and work more productively when and where they need to.
Next steps	<ul style="list-style-type: none"> • Review open action items from the call. • Identify what actions you will own and provide a timeframe for following up. • Identify what actions are needed by the customer and ask for a timeframe for following up. 	

THANK YOU: *Thank you very much for your time. Please feel free to call me at any time if I can help you with anything*

4. Present the solution.

SOLUTION

Develop and present a preliminary solution—Include a high-level deployment strategy and value proposition.

If your primary business need is...			
Relevant search results	A familiar interface	The security of information	An enterprise-class search solution
Microsoft enterprise search solutions can help you ...			
Provide quick delivery of high-relevancy search results for business information from multiple sources and sites, which empowers people to find the information they need through a search capability optimized for business data to deliver high-relevancy results.	Deliver a familiar, Web-style interface that diminishes user training costs and adoption challenges as it enables users to easily search for the information they need.	Enhance the security of information by only displaying search results that can be accessed by the user.	Deliver an enterprise-class search solution providing interoperable server manageability and the ability to scale deployment as business grows.

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Partner resources

- BPIO infrastructure optimization assessment, to offer to customers: http://www.microsoft.com/technet/infrastructure/iom_assessment.mspix
- Microsoft SharePoint Server 2007 evaluation kit: <http://office.microsoft.com/en-us/sharepointserver/default.aspx>
- Bridging the Gap between Information Management and Enterprise Search—a white paper, to offer to customers: <http://infoweb/C5/C14/googlecompete/default.aspx>
- Enterprise Search Battlecard, to get a quick ramp-up on Enterprise Search: [http://cespro001p/sites/bmo/Customer%20Campaigns/FindUseShareInformation/CoreBOM/Campaign%20Elements/FUSI%20Field%20Execution%20Guide%20V1%20\(Battlecard%20+%20Pitch%20+%20Obj.%20handler\).ppt](http://cespro001p/sites/bmo/Customer%20Campaigns/FindUseShareInformation/CoreBOM/Campaign%20Elements/FUSI%20Field%20Execution%20Guide%20V1%20(Battlecard%20+%20Pitch%20+%20Obj.%20handler).ppt)
- 2007 Office System Partner Readiness Playbook: http://iwpartnercenter/IWPRC_Readiness_Planning.html
- Microsoft Search Strategy and Futures, to drive search-only discussions with customers: <http://infoweb/C5/C14/googlecompete/default.aspx>
- Find Anywhere Promotion (available through the Quick Start program); Quick Start for Microsoft Search portal: <https://www.quickstartmicrosoftsearch.com/login/signin.aspx?ReturnUrl=%2f>
- Portals and content management partner program: <https://partner.microsoft.com/US/program/competencies/iwsolutions/portalsolutions>
- Search competency information (coming 2008): <https://partner.microsoft.com/US/program/competencies/iwsolutions/40029080>
- BPIO University, the working title for a 4-day, in-depth, instructor-led sales readiness workshop. BPIO University will provide a one-stop shop for partners to understand Microsoft's 2007 Office system sales strategies, priorities, and tactics. Partners will understand how to work effectively with Microsoft field and to execute their own BPIO customer campaigns and selling activities independently. Additional information is available at: <http://sharepoint/sites/bpio/default.aspx>. Upon completion partners will understand:
 - The "All-Up" partner opportunity in Office system and BPIO Campaign (Business Productivity Infrastructure Optimization).
 - The BPIO maturity model and the customer value proposition.
 - How to engage with and support Microsoft's field execution model.
 - Capabilities and sub-capabilities in depth.
 - The importance of Microsoft Enterprise Search technologies in BPIO.
 - How to expedite the sales process by leveraging Customer Engagement Solutions (CES) tools.
- Office System Showcase (showcases partners with specific solutions, by industry or solution): <https://partner.microsoft.com/global/productsolutions/40019825>
- BPIO campaign materials: <https://partner.microsoft.com/global/40031794>
- Microsoft Infrastructure Optimization Partner kit: <http://www.microsoftio.com/>