

REALIZE

sell more; earn more

HP/Microsoft Frontline Partnership
Storage Infrastructure Virtualization
Event-in-a-Box
Cookbook



An invitation to sell more; earn more money

The marketing approach of a value-add reseller are probably influenced by the current financial crisis. Goals for budget still have to be reached in financially tight markets where customers adopt a wait-and-see attitude by trying to postpone or reverse their investment decisions. At the same time, we are seeing a change in the way customers establish their IT projects. Investment in nice-to-have projects is replaced with investment in need-to-have projects. Customers are evaluating their suppliers more often, and are expecting resellers to both solve their financial pressures and provide strong economic arguments in favor of each proposed investment.





This is where HP/Microsoft Frontline Partnership and our trusted partners come in along with the

HP/Microsoft Infrastructure Virtualization Event-in-a-Box Cookbook.

The whole idea behind this Cookbook is to help you get your prospect and customer-driven events right the first time; ultimately positioning you and HP/Microsoft Infrastructure Virtualization solutions successfully time after time. This Cookbook can help you get your fair share of this growing market by providing comprehensive co-marketing tools including which audiences to target and how to find and drive higher event attendance. It also provides an easy-to-follow event checklist as well as sharing proven best practices from start to finish.

The HP StorageWorks Marketing Team would like to acknowledge the HP Data Protector Marketing Team, as well as the HP Sales Support Centre Team based in Europe for sharing portions of this Cookbook. This team's sales coaches specialize in competence development within the IT area, with specific focus on HP storage, backup and software solutions. They have trained more than 3,500 sales and pre-sales professionals in the HP channel in EMEA over the past 24 months, with high revenue and profit growth as a result.

In addition, thanks go out to the HP US StorageWorks P4000 Marketing Team for sharing best practices and elements of their event marketing approach. This team in conjunction with HP partners has enjoyed outstanding event metrics by utilizing the tools, resources and best practices outlined in this Cookbook. During a 3 month period, HP and our participating trusted partners realized in excess of 5000+ registrations with 2700+ attendees with conversion rates upwards of 64%. Obviously a "recipe for success" marketing event winner!

We are thrilled to share our event-in-a-box assets and this Cookbook guide with you.

Good Selling!

The HP StorageWorks Virtualization Marketing Team
The HP/Microsoft Frontline Partnership



Introduction

We all have tasted a slice of cake that was simply delicious. That cake had it all, and now we want to recreate a similar cake. Therefore, we need a precise recipe. In other words, we need a step-by-step manual to guide us in what to do and how to do it. If we follow this recipe, we can produce exactly the same delicious cake that was previously tasted. The HP/Microsoft Infrastructure Virtualization Event-in-a-Box Cookbook is doing just this – replicating proven and successful processes, sharing the best practice of best-in-class event marketing in a what-to-do and how-to-do-it format.

Use this Cookbook in your preparation phase as a framework or as a checklist for planning and conducting excellent seminar events. Make it one of the standard resources you normally use, and take from it whatever you find most helpful for you.

We feel you'll agree the Cookbook is worth using and anticipate that your events will result in improved attendance and sales conversions to help you increase your HP/Microsoft Infrastructure Virtualization solution sales.



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How to use the Event-in-a-Box Cookbook

We know the integration of virtualization technology in a prospect or customer's infrastructure can address many of their IT challenges including scalable performance and capacity requirements, ease of management, and overall cost effectiveness. But maybe your prospect or customer doesn't know this yet? Perhaps they need a better understanding of how virtualization can solve their business challenges and why you as a value add reseller partner and HP provide superior products, solutions and services that can best address these challenges.

Seminar events can be an effective tactic to use in your existing installed base to develop customer relations and/or to generate net new customers. These more traditional events tend to uncover more sales-ready leads than webinars and are especially effective at later stages of the sales cycle. Careful planning and development, good content and great execution are required to be successful.

The HP/Microsoft Infrastructure Virtualization Event-in-a-Box Cookbook has been designed primarily in support of delivering face-to-face event seminar marketing.

You may find, as you review the assets, tools, guidance and best practices that these tips and tricks can also be leveraged for face-to-face prospect/customer meetings and/or presentations.



Where to start?

Seminars done well can provide a cost-effective, compelling way to reach a qualified audience with your targeted message. The impact of a seminar lies in its timeliness, relevance to the audience needs, and its call to action.

Event intentions:

- **Informative.** A seminar event should be viewed by attendees as an opportunity for them to obtain information about products or solutions they are considering purchasing. Plus, seminars add the kind of quality and value that can lead to further purchases.
- **Controlled.** The location, timing and subject matter of the event are all planned in advance. This gives you the time to plan your approach and develop precise messages to present to your audience.
- **Solution-Driven.** Unlike a product demonstration, which focuses on product features, an event should concentrate on the benefits your solutions can deliver. Time is spent identifying the audience's needs and on how the collective product benefits can provide a solution to meet those needs.
- **Actionable.** Events should provide key takeaway messages to the audience, and close with a clear "call to action" or next step, motivating attendees to purchase or evaluate HP/Microsoft Infrastructure Virtualization solutions.

To help facilitate a successful seminar event, use the steps and recommended lead times in this next section to prepare for your event and set goals. It describes how to undertake customer research and prepare the right questions. It can help you to understand the customer, and how to create a good atmosphere and maximize information exchange during the event.

Included at the end is a comprehensive checklist which you can print off and use to track completion of these key elements.

Define your goals

It's important to consider your business objective for hosting an event – it will keep you focused and confirm your success. Start by asking yourself the following questions:

- What are we trying to accomplish with this event?
- Do I have a strong message and clear value to deliver?
- How will I follow up interested prospects, customers and move them to purchase?
- How will I measure the effectiveness of this event?

An easy way to set up and remember your objectives and measurable targets is by using the **S.M.A.R.T** model:

S = The target or objective of the workshop/presentation should be **S**pecific

For example, I want 20 people in the workshop. I want them all to stay to the end of the workshop. I want an average evaluation score of 4.5 (5 is the best score)

M = The target or objective of the workshop/presentation should be **M**easurable

For example, 10 of the 20 attendees should be VMware or MS customers and existing HP server customers

A = The target or objective of the workshop/presentation should be **A**ttainable

For example, I will arrange a personal meeting after the workshop with 5 out of the 20 attendees

R = The target or objective of the workshop/presentation should be **R**ealistic

For example, I want to get acceptance from 3 out of the 20 attendees to receive an HP virtualization proposal from me

T = The target or objective of the workshop/presentation should be **T**imely

For example, after the first part (1 hour) of the presentation, by a show of hands all 20 attendees should acknowledge they understand the business continuity needs that HP/Microsoft Infrastructure virtualization solutions can address



Who to invite?

A successful seminar starts with audience acquisition. You must effectively promote the event widely in order to reach potential customers. Each positive reply you receive represents a potential buyer who believes they may have a need for the solution and is willing to invest time with you.

Identify target customer: Develop an attendee List (10 – 12 weeks prior)

Options for audience acquisition include your organization's installed-base, a mailing house list, and local organization groups such as VMware or Microsoft® user groups. Consider other possible methods of promotion such as internal and external newsletters, announcements at key meetings, information on news, and events areas of key Web sites.

Other sources to consider:

- Check out potential customer's Web sites
- Search online news resources for information in the last 6 or 12 months about potential customers
- Find out each prospects/potential customer's current success criteria and major challenges by researching Web sites, annual reports, CIO magazine survey, Gartner, Forrester, IDC and the like.

High level attendee profiles include IT Directors, strategic and technical IT managers, CIO's, CTO's, System Administrators and other IT professionals who are responsible for the success of either server-led or storage-led deployments and solutions. These roles may be merged for smaller companies.



More specific midmarket profile*:

- Server administrator; IT/server/storage functions (CIO in upper end of range) in companies or business with limited IT staff
- 100–999 employees (avg. size MM company is around 250 employees*)
- Avg of 5–6 branch/remote offices*
- Typical 8–10 servers (although larger MM company can have 30–50 servers)*
- iSCSI IP environments
- Using Direct Attach Storage (DAS)
- VMware installed based who have virtualized servers
- Microsoft customers
- Aging server/storage infrastructure (via potentially end of lease customers)
- Dell targets, customers

More specific SMB profile:

Organizations adding new business critical applications, expanding their datacenters, consolidating their infrastructure or adding new storage for data tiering

- Ideal Vertical Markets (but not limited to)
 - Health and Life Sciences (HLS) (primarily in provider space)
 - Media and Entertainment (M&E)
- ISV installed base: VMware accounts
- EMC CLARiiON CX300 and CX300i EOL opportunity
- Size: ~1,000 employees and above

NOTE: These profiles can be one or combination of multiple profile/targets and acknowledges

- Various (external and/or internal) list pull parameters
- Partners' installed based parameter capabilities
- Purchase list parameters capabilities

* AMI's 2009 WW Midmarket Study



The three basic types of buyers and their characteristics

	Systems Administrator	IT Manager	IT Director/CIO
Skill set	Very technical, limited business	Balance between technical and business	Focused on business, light technical
Pain types	Operational	Operational and economic	Economic and “bottom-line” Operational
Reports to	IT Manager	IT Director/CIO	CFO/COO/CEO
Measure of performance	Number of projects completed “on time”	Number of projects completed “on time” and “on budget”	Ability to deliver company’s IT needs in a fiscally responsible fashion
Expressions of pain	PNot enough time to complete existing projects, not enough time to train new hires to help	Not enough time to plan new projects, not enough budget to implement existing projects	When will my competitors use their IT department to steal our customers
Typical quote	“The E-mail server is out of space. I have trouble completing my backups on time and it takes a long time to add capacity to my servers.”	“I need to make my people more efficient. I need to choose solutions that meet our needs at the lowest cost.”	“I look at things 12–18 months in the future and plan for the delivery of information services for that timeframe. I minimize the risks associated with any project.”
Planning horizon	This week, next week	This month/quarter, next month/quarter	This fiscal year, next fiscal year
First call sales goals	Collect information and mention high-level benefits, invite them to an event	Collect information about projects (timelines, etc.), mention high-level benefits, invite them to an event	Collect information about projects (timelines, and so.) mention high-level benefits, determine direct reports assigned to evaluate this project, define schedule for follow up conversations



Select a venue location and time (6 – 8 weeks prior)

The location should be convenient for your attendees. Consider a location however that is not so convenient for your attendees that it makes it easier for them to leave or return back to work. Choose a hotel or conference center near your office, use your office location, or a restaurant. Seminars can be held any time of day; we suggest evaluating your particular market, target audience, location to maximize registrations and attendance. Check local calendars in the area to ensure there are no other events that may conflict with your date and time. For any time selected, we strongly suggest providing food and beverage for the attendees.

Prepare seminar event promotion (6 weeks prior)

To promote your event, begin setting up a registration process and create an invitation.

Registration process

An effective registration process provides several things for you. It captures information about attendees, checks registration on a daily basis, and provides another opportunity for you to communicate with your audience. Your registration process should also capture all the information you'll need for an informed follow-up — name, company, e-mail, telephone, business size and market sector.

We strongly suggest an online registration form and process. Customers find it much easier and quicker to register through an online form versus sending an e-mail or making a phone call. However, you should also give your audience several ways to respond to your event; these might include telephone, web or e-mail.

Promote your event on your website and direct interested parties there for information and registration. This provides additional promotion and awareness of your company as part of the overall marketing elements. Highlight the event prominently on your home page, this helps potential registrants avoid searching for the event.



Create event invitation

Use the HP provided templates to produce the invitation for your seminar event. These tools are pre-built to assist you in quickly creating the necessary materials in promoting your seminar event. The templates provided also include areas to add your company's logo providing more awareness for your organization.

Send/Mail invitations (3–4 weeks before)

Your promotional plan should use messaging to both in-house and purchased lists.

Ideal drop schedule

- First e-mail blast 4 weeks prior to the event
- Direct mail drop 4 weeks prior to event (if used)
- Reminder e-mail blast to same list, 2 weeks prior to event (when possible)
- Telemarketing call between 1–3 weeks prior to event
- Reminder phone call 3–5 working days prior to event
- Reminder e-mail and/or phone call 1–2 days prior to event

We recommend a multi-vehicle approach to ensure your message is reaching as many targeted prospects as possible. Personal preference of the customers may vary, so utilizing multiple "touch points" can help increase your response rates. However caution should be used so that your targets don't get the impression of being spammed.

Telemarketing (2 – 3 weeks before)

A couple of weeks before the seminar use telemarketing to follow up with invited guests. Telemarketing can be done internally or by an outside resource.

Confirm participation (immediately upon registration)

Send written confirmation via e-mail as quickly as possible after guests have registered. Include the time and place of the seminar, and confirm that a seat has been reserved for them. This can be done through an automated system.



Prepare handouts, collateral, materials for seminar (2 – 3 weeks before)

Determine the needed number of materials for the seminar. Print hard copies of any co-branded marketing and sales collateral for attendees to pick up.

Potential co-branded marketing collateral can be found on

www.hpmspartners.com. The HP/Microsoft Frontline Partnership (FLP) portal provides technical and marketing resources to joint HP and Microsoft channel partners to grow their HP-based Microsoft solutions business. It is also helpful to have a note pad and pen for customer's to take notes during the presentation. Use company branded materials to help strengthen your awareness after they leave the event.

Presentation and presenters (2 – 3 weeks before)

Confirm presenters and the how the elements will integrate into a cohesive message for the attendees. Discuss transitions, who will be doing what part of the presentation, is there any special equipment that will be needed for the room (such as- Internet connection, remote clicker, microphone, projector). If there will be a live demo, confirm equipment required and have software and programs loaded. The content of your seminar will be the most critical aspect of hosting an effective event. We recommend to have a spare copy of the presentation on another laptop or USB as back up in case your primary source fails.

Keep the following in mind as you consider how to “customize” the H/Microsoft infrastructure virtualization seminar event and make it more about your company's value-add. The presentation deck can lend itself to customization by adding your own slides highlighting particular value-add services, training, offers you want to prominently call out:

Why

- Tell your audience why other customers have chosen your company, and why your company is unique in solving virtualization needs

What

- Tell them what your company is doing; describe its services that link to the topics of your presentation
- Promote your virtualization strengths, competencies, recognition by HP/MS Frontline Partnership; any partnerships/certifications with VMware and/or Microsoft®.



How

- Convey your message clearly, succinctly
- Tell your audience how you are successfully working with customers in quantifiable ways
- Give customer references (explain why they chose you, what you did for them, how you did it, and what benefits/new opportunities the customer has realized with your solution)

Value/What else

- Tell them about the value you have created for your customers
- Tell them how they too could also benefit from working with you
- Have a strong call to action and next steps. What do you want them to do as a result of attending this event?

Purchase raffle prize (1 – 2 weeks before)

Optionally, you can offer a door prize to seminar attendees. This is frequently done to increase attendance and to encourage attendees to stay until the end (since the prize drawing should be at the end). The prize should not be extravagant, but should have a significant value. If you choose to do this, be sure to include this fact in your promotional material.

Remind the participant (2 – 3 days before)

A few days prior to the seminar, send another notice to the participant reinforcing the value of the seminar and the time and place. Even better, give them a call. These repeated contacts will reduce the number of “no-shows” at the seminar which can sometimes be around 40–50%.





Dry run the seminar (the day before)

After the room is prepared for the seminar, have the presenters do a dry run. Make sure equipment is in working condition, a white board or flip chart is available for additional comments, and the layout of the room is suitable. This time is critical for the presenter to become comfortable and confident.

Deliver the seminar (day of event)

Remember, this is your opportunity to meet your prospective customers face-to-face and introduce them to your company's services and products. Please be sure to:

- Arrive early (at least 1 hour prior)
- Check in with venue onsite contact
- Confirm room setup, all AV, food/beverage
- Check all equipment at least one hour prior to event, have backup presentation available
- Have a sign-in sheet and blank name table top cards
- If including a raffle, have raffle cards ready for customers to enter

Event introduction best practice

A good presenter should provide a proper introduction, along the lines of the following communication model:

- Why am I here and why are you here; why do I care; why should you care?
- What is going to be presented today?
- How will I do the presentation; will it be interactive; will there be videos and similar questions?
- What will be the value, what will be achieved by the end of the workshop, and what will participants be able to do when the session is over?



Another key to a successful event is to check the attendees' expectations prior to starting your actual presentation.

Ask them questions like:

- "What specifically would you like to achieve from this event?"
- "Why are you investing your time at this event?"
- "What important project, initiative, job do you have that's prompted your interest in virtualization?"

Presentation best practices

Presentations are often very different from customer meetings, even those with more than one participant. In presentations, you stand in front of a small, medium, or large audience, rather than sit with the participants, and you will have to ask questions in order to start a conversation, as people tend to be less interactive than in meetings.

In a presentation setting, it's a compelling idea to present to everybody. This sounds obvious, but few people really know how to do this. To bond with everybody in the room and let them feel "I know you are here, and I care about why you are here", try as much as possible to look them in the eye during your presentation. Just 1–2 seconds each time to everyone. It's also important to ask questions to everyone during the presentation, and get their personal opinion in relation to the things you present. Utilize the name table top cards and reference the audience by name when addressing them.

Avoid the big "auto pilot" pitfall of presenting how you would like to receive information. For example, if you are a person who likes facts and figures, don't only present these since you might miss an opportunity to effectively communicate with someone who prefers a broad overview with real-life examples. Perhaps describe how you were able to recommend a virtualization solution to current customer? Using real life experiences and stories are a great way to showcase your point and make it memorable for the audience.





Plan your available time to reach customer goals with the workshop/presentation

Plan how long it will actually take you to do the presentation. An agenda is one thing, but time can easily slip away when, for example, you're asking questions and adding your own personal style to the meeting.

On average, you should allow three minutes per slide.

A good way of keeping track of your time is to create two slide sets, almost identical. Slide set 1 is the slide set you present from. Slide set 2 you print out, and insert a blank page between each different topic/ section of the slide set. On these blank pages, write the time it should be when you reach that topic/section. For example, you check your watch and note that the workshop/presentation has been running for 1 hour and

20 minutes; you flip to the next topic/section of your slide side and see an inserted blank page that reads "1 hour". Now you know that you are 20 minutes behind schedule; maybe you will cut something out of your presentation or choose to stop asking so many questions

Remember, you should not measure success in terms of filling up the room with people or finishing all your slides. Your success criteria is to give people what they came for, and to prepare them to move on in their virtualization sales cycle.

Wrap up near the end of your event's presentation with questions that can help confirm you are on track with relevant, compelling content. Reference back to the key learning's and "what you want to achieve" discussion from the beginning of the presentation. Doing this prior to the close of your presentation also allows you any "course corrections" to make sure your audience is still engaged and attentive. You can ask open ended questions such as:

- "What has been the most relevant point made so far based on your need?"
- "What things have you heard in today's meeting that may facilitate a major change in the way you manage your virtual environment?"
- "If you should recall just one thing to take with you from this meeting, what would it be?"





Send thank you notes and requested materials (within one week)

Begin building the relationship as quickly as possible. Thank you notes should be sent within a week of the seminar. Be sure to include any requested materials. Add the customer's name to your database for inclusion in future mailings.

Follow-up, qualify, and sell

The list of attendees is extremely valuable. After your seminar, each one should receive a thank you note reminding them of your offerings and contact information. Find out where each person is in their buying process and align your sales cycle. Ask yourself how you can support and move them forward in their project. What actions would be appreciated and would help the attendee the most? If you don't know, then ask them.

You should also consider sending a note to the prospects who were unable to attend or failed to attend. Let them know you missed them and give them an overview of the event topic, your offerings and contact information.





Checklist for a successful seminar

Running a successful seminar takes a good deal of planning, so it pays to start early. The following timeline includes some key milestones you may need to be fully prepared. The timeline also assumes you have already collaborated with your HP resources, regarding event marketing, and where you and HP will be working together in executing the event.

7 – 8 weeks prior to the event

- Begin venue/location selection and recommendation
- Review seminar/event focus
- Identify target audience and appropriate target lists
- Check availability for speakers and presenters

6 weeks prior to the event

- Finalize topic
- Confirm event date
- Secure an appropriate venue
- Set up online registration form and site—determine the registration process for attendees
- Select appropriate invitation template from the marketing campaigns and tools library
- Modify/complete invitation template fields
- Start collating your target list
- Continue working on event content

5 weeks prior to the event

- Create event collateral using materials from WW FLP partner portal www.hpmspartners.com
- Final invitation review and any last minute changes/corrections

4 weeks prior to the event

- Send out invitations (e-mail, direct mail to prospects, customers, and other lists)
- Create event evaluation form



- Arrange food and beverages as appropriate
- Order any giveaways, materials (pens, CDs, table drape, banners and the like)
- Confirm raffle item for the drawing at event

3 weeks prior to the event

- Analyze registration data and invite more attendees if appropriate
- Finalize agenda and seminar slide content — will there be a demo? If so, confirm all equipment and software is loaded and ready
- Begin telemarketing calls to invite to event

2 weeks prior to the event

- Send out second e-mail invitation
- Visit the venue and ensure room setup and equipment is satisfactory
- Confirm all logistics and details for the event
- Secure/purchase raffle prize

1 week prior to the event

- Create badges with the name and company name for all attendees
- Consolidate all your collateral
- Reminder phone calls to all registrants (prefer live contact versus vmail)
- Confirm that giveaways, materials ordered have arrived or will arrive

2 days prior to the event

- Dry-run of presentation with all speakers/presenters
- Confirm all equipment is ready
- Reminder e-mail sent to all registrants

1 day prior to the event

- Complete reminder phone calls
- Review registration lists



- Print off sign in sheet, name badges
- Organize and pack up materials to take to event for set up

Day of event

- Arrive early (at least 1 hour prior)
- Check in with venue onsite contact
- Confirm room setup, all AV, food/beverage
- Check all equipment at least one hour prior to event
- Confirm all speakers/presenters are present (arrive 1 hour before event)
- Have a sign-in sheet
- Attendee name badges (optional)
- Set out all collateral/handouts on the tables or seats prior to the event registration
- Welcome all your guests as they enter the seminar room
- Complete and collect surveys
- Drawing for raffle prize/gift

After the event – within 1 week

- Review event with all presenters/speakers and participants — what worked, what did not, how to improve, next steps on follow up
- Review all registrations and make specific assignments to sales team for follow up
- Send a follow up ‘thank you for attending’ e-mail to all attendees. Include promised attachments (slides, white paper) and call to action/next steps
- Send out a ‘sorry we missed you’ e-mail to attendees who signed up and missed the event—include call to action/next step

Ongoing

- Continue to have weekly reviews and updates with HP/Microsoft account managers, sales team on the actions/status of the event



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