



# Surface

## FY16 Back To School – Retail Execution Guide



1

### Implement FY16 BTS assets with Windows 10 messaging

- Surface FY16 BTS assets with Windows 10 messaging may be executed on July 14<sup>th</sup> **ONLY IF** retailer has reset Windows 10 assets in store.
- Otherwise, assets to go live on July 29<sup>th</sup>.

2

### LAND Windows 10 messaging across good, better & best framework

- Use the guidance provided here to successfully land good, better & best executions at your partners.
- Online is too important to just execute at Good level. All accounts need to execute at a Better or Best level.

3

### Execute against strategic priorities

- Land Surface Pro 3 (SP3) & Surface 3 (S3) as a laptop and grow share in premium price band.
- Land SP3 & S3 in the laptop and 2:1 categories.
- Drive accessory attach – especially Keyboards and Docking Stations

4

### Embrace Surface principles everywhere

- Improve the customer journey for shoppers, which will in turn help our partners to drive market share, revenue, attach and category profit and build consumer preference and loyalty for Surface products.
- Our goal is to deliver an engaging shopping experience that is inviting for RSPs and consumers, and reflects the clean design of the product:
  - **Feature Devices** as hero products as applicable per market, **(S3 and SP3)**
  - Increase consumers' **confidence** through **hands-on demonstrations, rich PDPs, brand showcase, informative and easy to read fact tags and SKU Chooser**
  - Drive **attach** through:
    - **VM**: adjacent merchandising of accessories and bringing color to the forefront through our keyboards
    - **Online**: attach accessories on device PDPs, interstitial pop-ups, shopping carts and post purchase emails.

Microsoft  
Surface

Online



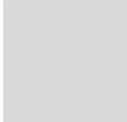
Online

# Online Better & Best Guidance: Checklist

Execution Guidance

101 Merchandising Framework  
[Click HERE](#)

Drive Demand / Awareness	Exploring/ Finding	Evaluation/ Purchase	Attach / Cross-Sell	Experiencing / Post-purchase
<p>✓ Execution Guidance</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Execute <b>banners</b> on relevant home and category pages</li> <li><input type="checkbox"/> Showcase Surface devices in <b>featured placements</b></li> <li><input type="checkbox"/> Leverage <b>email blasts and newsletters</b> to drive customer awareness</li> <li><input type="checkbox"/> Work with your retail partner's <b>social</b> channels: Facebook, Twitter, etc use to facilitate awareness and interest in the Surface brand</li> <li><input type="checkbox"/> Work with your local team to connect the BTL spend with retail.com to maximize investments</li> </ul>	<p>✓ Execution Guidance</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Optimize retailers internal <b>search</b> to help customers easily find the Surface devices with relevant search terms (reference keyword recommendations)</li> <li><input type="checkbox"/> Ensure devices are easily discoverable through <b>navigation</b> on retailer's sites in the Laptop, 2 in 1s and tablets (only for S3)</li> <li><input type="checkbox"/> Implement <b>brand showcase</b> and landing pages</li> <li><input type="checkbox"/> Co-Invest in external <b>search</b> (SEM and SEO), to drive discovery using MSFT suggested keywords and phrases. Partner with your BTL team to avoid double dipping.</li> <li><input type="checkbox"/> Establish permanent placement for Surface in global and category <b>navigation</b></li> </ul>	<p>✓ Execution Guidance</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Execute <b>rich product detail pages</b> with graphics, video and messaging (either via syndication or retailer-hosted)</li> <li><input type="checkbox"/> Utilize product selector tools, <b>360 animations, 3D module &amp; apps widget</b> to help users find the exact product they need</li> <li><input type="checkbox"/> In-store Mobile: Utilize QR codes on fact tags / brochures and <b>execute responsive PDPs</b> and Brand Showcases as the destination.</li> </ul>	<p>✓ Execution Guidance</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Drive accessory <b>attach</b> on device PDPs and shopping carts</li> </ul>	<p>✓ Execution Guidance</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Utilize CRM activities (Social, Email, Mobile, etc) to enable post purchase accessory attach, renewal, reduce returns and increase overall lifetime value of the customer</li> <li><input type="checkbox"/> Set up Concierge Services (Click to Chat, Review Response, Question &amp; Answer)</li> </ul>

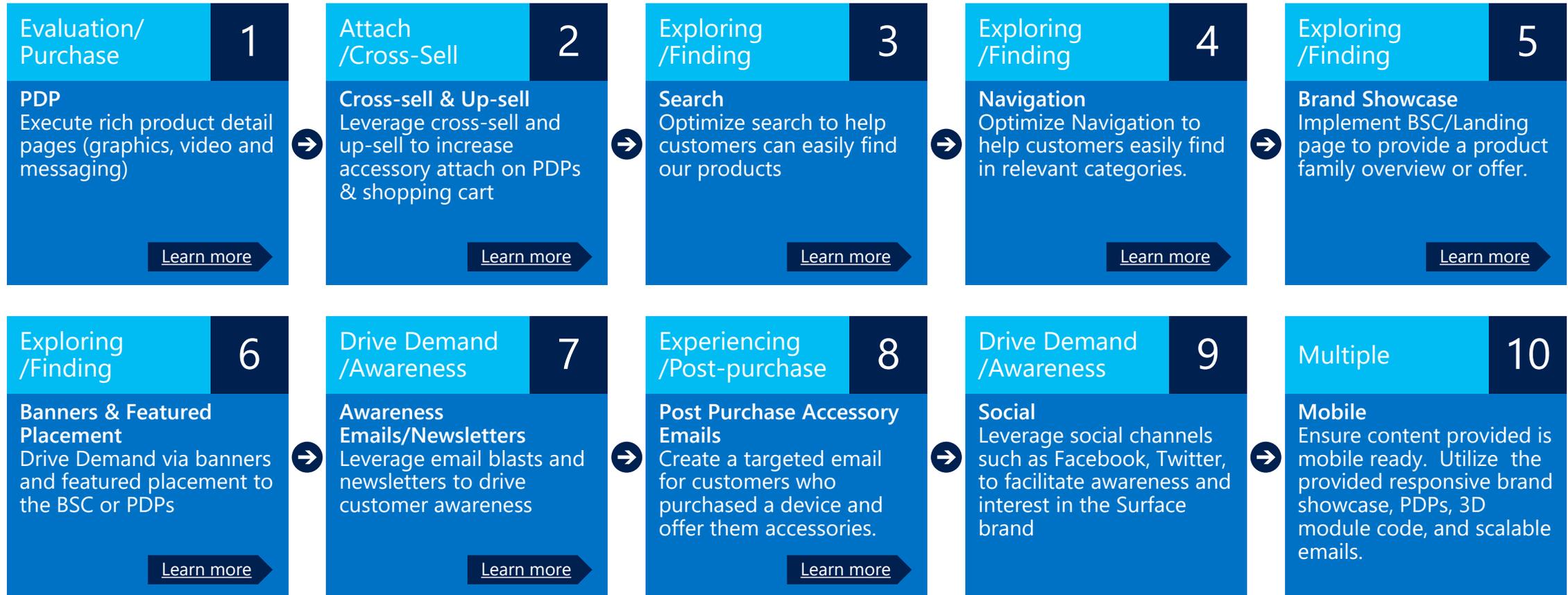
 Better

 Best



# Prioritized list for the customer journey

While the customer journey starts at driving demand, it is important we create some of the fundamental assets like PDPs & navigation prior to driving the demand. Below we have prioritized the assets in order the field should execute.





Online

# Priority 1: PDPs – Windows 10

Phase	Drive Demand / Awareness	Exploring / Finding	<b>Evaluation / Purchase</b>	Attach / Cross-Sell	Experiencing / Post-purchase
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[Back to Customer Journey](#)

## Delivered

### Product Detail Pages on RAD (S3 shown but applies to SP3 as well)

#### Surface 3/Pro 3 PDP – Now

Add to S3 and SP3 PDPs  
Logo + Windows Copy + Disclaimer

#### Logo:



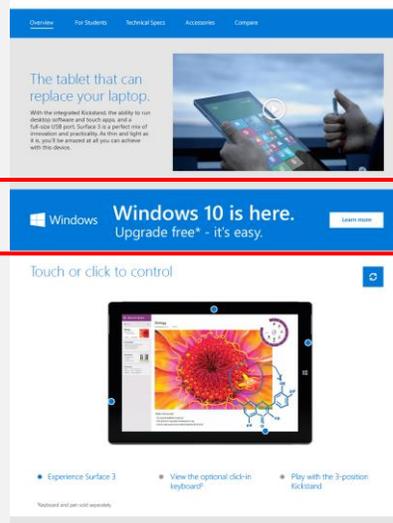
#### Copy:

**Free Windows 10 upgrade**  
Upgrade for free to Windows 10 when it's available\*, and get the best combination of the Windows you know, plus lots of improvements you'll love.

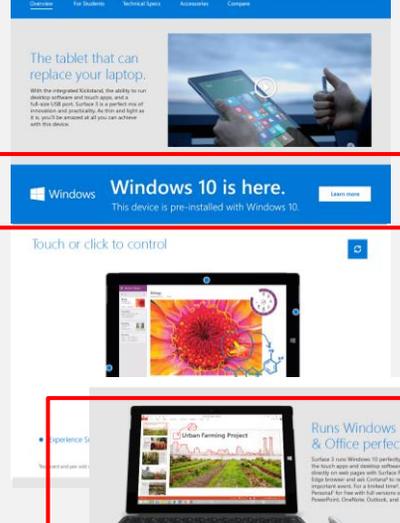
#### Disclaimer

\*Free upgrade to Windows 10 for qualified Windows 8.1 devices that upgrade in the first year. More information and additional offer terms available in the coming months.

#### Surface 3/Pro 3 PDP – Before Hardware Transition



#### Surface 3/Pro 3 PDP – After Hardware Transition



## Retailers Actions:

### Windows 10 – Before Hardware Transition

- Add Windows 10 is here. Upgrade free\* – it's easy in leading bullet points on the PDP.
- On the Surface 3 and Surface Pro 3 PDPs, add "Windows 10 is here. Upgrade free\* – it's easy." banner. Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. **Do not take the customer out of the purchase funnel.**
- Disclaimer is MANDATORY: \*Offer valid for qualified Windows 8.1 devices for one year after Windows 10 upgrade availability. Windows 10 features vary by device. See [www.windows.com/windows10specs](http://www.windows.com/windows10specs) and [www.surface.com/upgrade](http://www.surface.com/upgrade) for details

- Overview copy: 1) Add upgrade messaging to "Runs Windows & Office" pillar, after the sentence about Windows 8. 2) Add Windows 10 Upgrade free messaging to Tech Specs > Software 3) Add Windows 10 Upgrade free messaging to Compare chart > Software 4) Add Windows 10 disclaimer to footnotes. **All changes are highlighted in the copy doc.**

### Windows 10 – After Hardware Transition

- Once retailer has begun selling SKUs with Windows 10 pre-installed, implement the "Windows 10 is here. This device is pre-installed with Windows 10." banner. Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. **Do not take the customer out of the purchase funnel.**
  - Remove the Windows 8.1/Windows 10 disclaimer.
  - Overview copy: 1) UPDATE Runs Windows & Office reason with new Windows 10 copy. 2) UPDATE Tech specs > Software to Windows 10 3) UPDATE Compare chart > Software to Windows 10 4) UPDATE battery life (TBD) and battery life footnote **All changes are highlighted in the copy doc.**
  - UPDATE Windows 8.1 GIF under "Runs Windows and Office Perfectly" to Office screenshot provided.
  - Update battery life (TBD)
- All PDP content is available through syndication.

## Resources:

### Links

- PDPs on RAD:
  - [Surface 3 – Before & After Hardware Transition](#)
  - [Surface Pro 3 – Before & After Hardware Transition](#)
- [Asset library](#)

### Formats Available:

- PSD
- Copy Doc
- Syndication
- \*we will not create new HTML since this is an update to the current PDP

### KPIs

- # impressions (total & unique)
- # clicks (total & unique)
- # video plays
- # attach offer clicks/add to carts
- # add to cart
- % conversion
- Average order value



Online

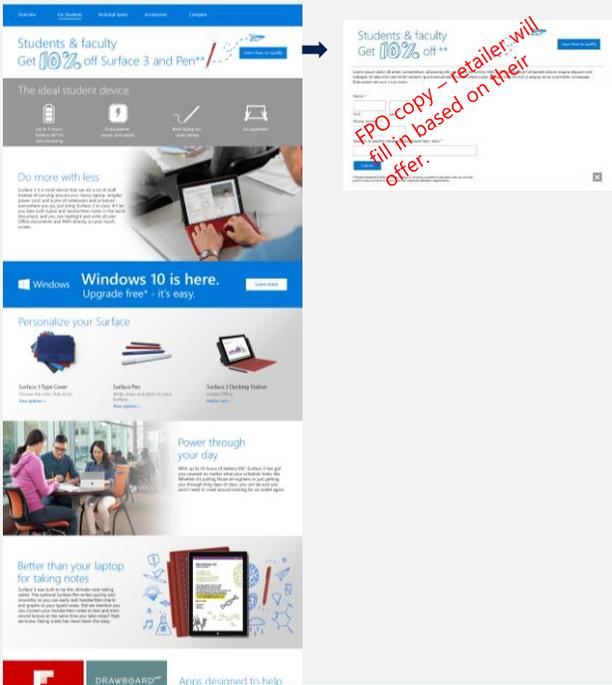
# Priority 1: PDPs - Student

Phase	Drive Demand / Awareness	Exploring / Finding	Evaluation / Purchase	Attach / Cross-Sell	Experiencing / Post-purchase
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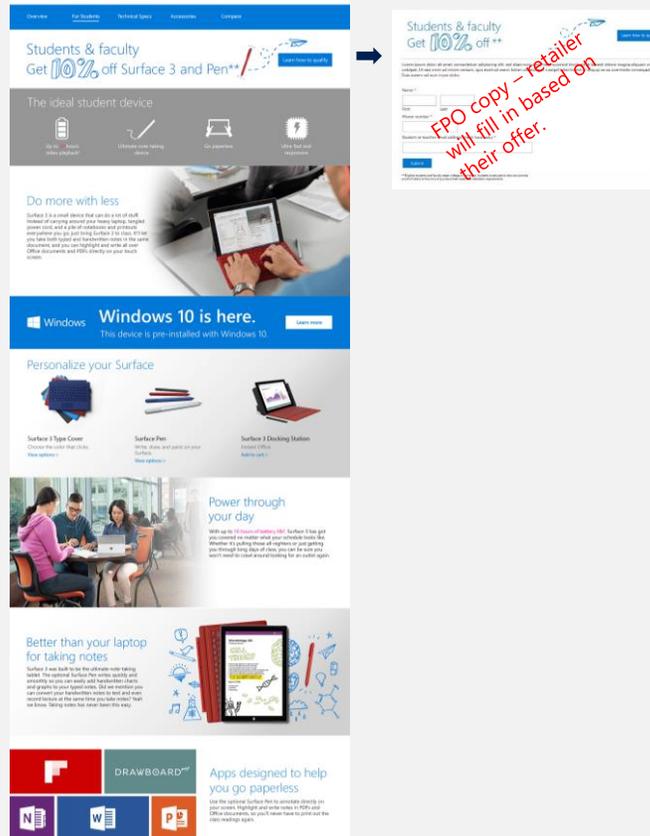
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## Delivered

### Surface 3 & SP3 Student PDP Tab – Before Hardware Transition



### Surface 3 & SP3 Student PDP - After Hardware Transition



If you launch BTS assets BEFORE 7/29 –you **NEED TO REMOVE** the Windows 10 banner and Windows 10 Disclaimer

## Retailers Actions:

### Add a tab for Student messaging on the current product detail pages for Surface 3 and Surface Pro 3.

- Overview tab should remain the same (with the updates of Win 10)
- Student tab has student-targeted messaging
- If the retailer is utilizing the offer, include the customizable offer banner with the "Learn how to qualify" CTA directing to the offer drop-down (**exact how to qualify messaging, offer copy and LCA needs to be customized by retailer based on their agreement**). If the retailer does not have a student offer, remove the offer banner and drop down box .
- Choose 5-8 locally relevant student-focused apps to populate the apps collage. Current apps only approved for US.

### Windows 10 – Before Hardware Transition

- Use Windows 10 is here. Upgrade free\* - it's easy. Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. **Do not take the customer out of the purchase funnel.**
- Disclaimer is MANDATORY: \*Offer valid for qualified Windows 8.1 devices for one year after Windows 10 upgrade availability. Windows 10 features vary by device. See [www.windows.com/windows10specs](http://www.windows.com/windows10specs) and [www.surface.com/upgrade](http://www.surface.com/upgrade) for details

### Windows 10 – After Hardware Transition

- Implement or update asset. What changed?
- Switch Windows 10 is here banner. Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. **Do not take the customer out of the purchase funnel.**
- (Review Copy doc for all specific changes – highlighted in yellow)
- UPDATE battery life under icon, in copy, and battery life footnote (TBD)

All PDP content is available through syndication

Mobile: All PDPs are built responsive

## Resources:

### Links

- PDPs on RAD:
  - [Surface 3 PDP – Student tab – before & after Hardware Transition](#)
  - [Surface Pro 3 PDP – Student tab – Before & After Hardware Transition](#)
- [Asset library](#)

### Formats Available:

- HTML
- PSD
- All PDPs are built responsive with 3 break points: 700, 500 and 320
- Syndication

### KPIs

- # impressions (total & unique)
- # clicks (total & unique)
- # video plays
- # attach offer clicks/add to carts
- # add to cart
- % conversion
- Average order value



Online

# Priority 2: Attach/Cross-Sell

Phase	Drive Demand / Awareness	Exploring / Finding	Evaluation / Purchase	<b>Attach / Cross-Sell</b>	Experiencing / Post-purchase
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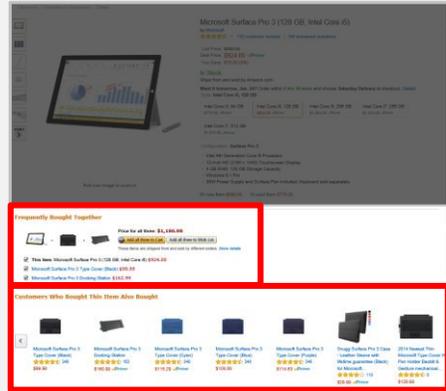
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## Delivered

## Retailers Actions:

## Resources:

### PDP Attach Module



### Interstitial pop-up (between PDP & Cart)



Increase attach rate with priority on **Keyboards & Docking Station**. Using these tactics below can increase attach rates up to 20%.

Accessory Priority:

- All up priority: Keyboards, Dock, Designer Bluetooth Desktop & Wireless Display Adapter
- S3: Keyboards, Pens, Dock, Wireless Display Adapter, Designer Bluetooth Desktop, Arc Touch Mouse
- SP3: Keyboards, Office, Dock, Designer Bluetooth Desktop, Wireless Display Adapter, Arc Touch Mouse, Pen

Product Detail Page Attach:

- Ensure accessories are included in retailer attach functionality on the PDP in the above order.
- All accessories should have an **add to cart button** on the device PDPs
- Create virtual bundles to include top prioritized accessories with an add to cart button

Shopping Cart Attach:

- Create an interstitial page/pop up promoting top accessories with an add to cart button
- Once in shopping cart offer top accessories with an add to cart button

### Links

- [Attach Office Evergreen Guidance](#)

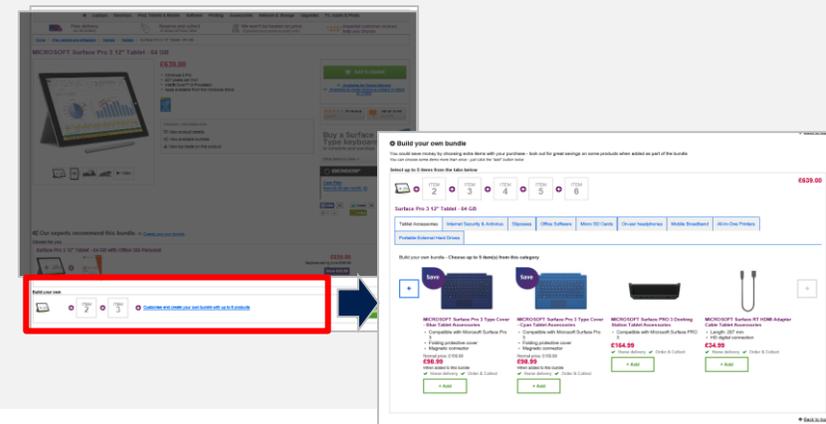
### Formats Available:

- NA

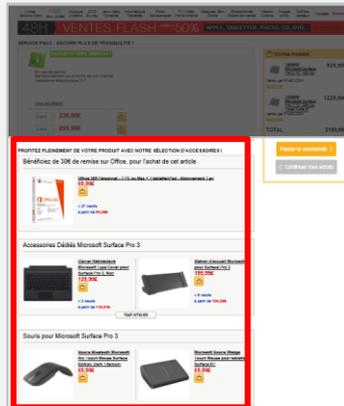
### KPIs

- Attach offer clicks
- # add to cart
- % conversion
- Accessory attach rate

### PDP Bundle Configurator



### Shopping Cart Recommendations





Online

# Priority 3 & 4: Search and Navigation

Phase	Drive Demand / Awareness	Exploring / Finding	Evaluation / Purchase	Attach / Cross-Sell	Experiencing / Post-purchase
	<a href="#">Back to Customer Journey</a>				

## Delivered

### Search

Add the following terms:

- Windows 10
- Cortana (based on market)
- Windows 10 release

Surface 3	Surface 3 4G LTE	Surface Pro 3	Surface Brand Showcase	Surface 3 Dock
laptop	laptop	laptop	Microsoft Surface	Dock
2 in 1	2 in 1	2 in 1	Microsoft Surface tablet	Docking station
tablet	tablet	Microsoft Surface	Surface	Instant office
Microsoft Surface	Microsoft Surface	Microsoft Surface Pro	Surface laptop	Surface 3 Dock
Microsoft Surface 2	Microsoft Surface 2	Microsoft Surface Pro 3	Surface laptops	Surface 3 4G LTE Dock
Microsoft Surface 3	Microsoft Surface 2 4G LTE	Microsoft tablet Surface pro	Surface 2 in 1	Surface Dock
Microsoft Surface tablet	Microsoft Surface 3 4G LTE	Surface	Surface 2 in 1s	Surface charging station
New Microsoft Surface	Microsoft Surface tablet	Surface 256 GB	Surface tablet	48W power supply
Surface	New Microsoft Surface	Surface 3 pro	Surface tablets	Mini DisplayPort Video Output
Surface 128 GB	Surface	Surface 128 GB	Surface Windows	USB Ports
Surface 2	Surface 2	Surface 512 GB	Windows Surface	Gigabit Ethernet Port
Surface 3	Surface 2 4G LTE	Surface 64 GB	Microsoft 2 in 1	USB 2.0
Surface 64 GB	Surface 3	Surface laptop	Microsoft 2 in 1s	USB 3.0
Surface laptop	Surface 3 4G	Surface laptops	Microsoft laptop	
Surface laptops	Surface 3 4G LTE	Surface 2 in 1	Microsoft laptops	
Surface 2 in 1	Surface 128 GB	Surface 2 in 1s	Microsoft tablet	
Surface 2 in 1s	Surface 64 GB	Surface Pro	Microsoft tablet pc	
Surface tablet	Surface cellular	Surface Pro 3	Microsoft tablets	

### Navigation

## Retailers Actions:

Ensure S3 and SP3 are discoverable via both Laptop and 2 in 1 in Search and Navigation.

Search

- Add new Windows 10 search terms.
- Use the excel sheet provided to set search terms for S3, S3 (4G LTE) SP3 & Surface accessories
- These search terms are incorporating Bing top search terms for laptops/Surface
- Keywords should be submitted when setting up the PDPs with the retailers
- Category search terms such as laptop, 2 in 1 and tablet (in priority order) are key terms and we should show in the first results page
- Product specific terms such as Surface, S3 & SP3 - devices should show up as the first results
- If buying SEM make sure that the BTL campaign is not bidding for the same keywords

Navigation

- SP3 and S3 should be discoverable in the following categories (priority order): laptops, 2 in 1s, tablets.
- If available call out Surface as a category with like brands

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## Resources:

### Links

- [Surface Keywords on RAD](#)
- [Search Marketing 101](#)
- [Asset library](#)

### Formats Available:

- Spring Excel File (Search Terms)

### KPIs

- Proper execution



Online

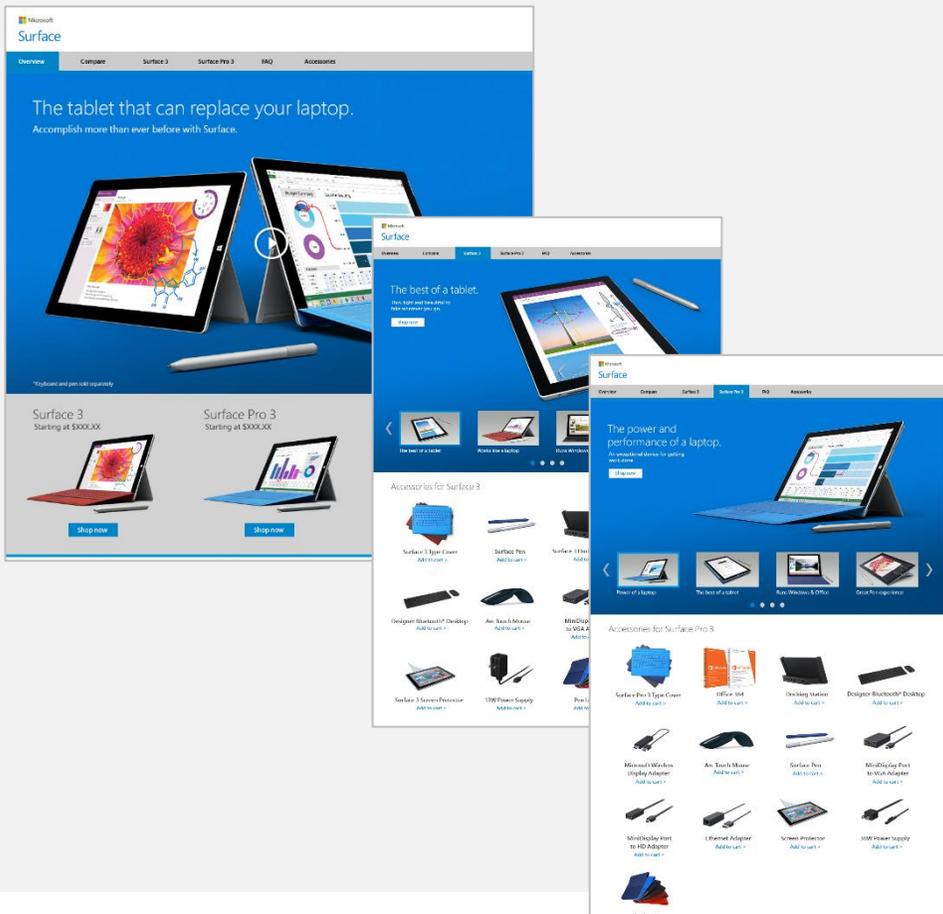
# Priority 5: Brand Showcase

Phase	Drive Demand / Awareness	Exploring / Finding	Evaluation / Purchase	Attach / Cross-Sell	Experiencing / Post-purchase

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## Delivered

### Brand Showcase



## Retailers Actions:

Make the brand showcase easily discoverable through search, navigation and CRM.

### Windows 10 – Before Hardware Transition

- ADD Windows 10 Upgrade free messaging to Compare chart > Software / Add footnote
- ADD Windows 10 Upgrade free messaging to FAQs tab
- Disclaimer is MANDATORY: \*Offer valid for qualified Windows 8.1 devices for one year after Windows 10 upgrade availability. Windows 10 features vary by device. See [www.windows.com/windows10specs](http://www.windows.com/windows10specs) and [www.surface.com/upgrade](http://www.surface.com/upgrade) for details
- **All changes are highlighted in the copy doc.**

### Windows 10 –After Hardware Transition

- Compare chart tab: 1) UPDATE Software to Windows 10 2) UPDATE battery life and footnote
- Surface 3 tab: 1) UPDATE Runs Windows & Office pillar with new Windows 10 copy.
- FAQs tab: 1) UPDATE S3 and SP3 FAQs
- **All changes are highlighted in the copy doc.**

## Resources:

### Links

- [Brand Showcase](#)
- [High resolution product renders](#)
- [Asset library](#)

### Formats Available:

- Copy Doc on what to update
- Syndication

### KPIs

- # impressions (total & unique)
- # clicks (total & unique)
- # video plays
- attach offer click & conversion
- Pathing: conversion via brand showcase



Online

# Priority 5: Student landing page

Phase	Drive Demand / Awareness	Exploring / Finding	Evaluation / Purchase	Attach / Cross-Sell	Experiencing / Post-purchase
	<a href="#">Back to Customer Journey</a>				

## Delivered

### Student landing page **BTS (7/29)** **Before Hardware Transition**



### Student landing page **After Hardware Transition**



If you launch BTS assets **BEFORE 7/29** –you **NEED TO REMOVE** the Windows 10 banner and Windows 10 Disclaimer

## Retailers Actions:

### Make the landing page easily discoverable through search, navigation and CRM.

- If the retailer is utilizing the offer, include the customizable offer banner with the “Learn how to qualify” CTA directing to the offer drop-down (to be customized by retailer). If the retailer does not have a student offer, remove the offer banner.
- Use provided content & imagery for S3 and SP3
- Ensure accessories are in priority order and have both a link to their PDPs and an add to cart button.
- Update keyboard colors to represent the products available in your country.

### Windows 10 – Before Hardware Transition

- (Windows 10 is here. Upgrade free\* - it's easy.) – Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. **Do not take the customer out of the purchase funnel.**
- Disclaimer is MANDATORY: \*Offer valid for qualified Windows 8.1 devices for one year after Windows 10 upgrade availability. Windows 10 features vary by device. See [www.windows.com/windows10specs](http://www.windows.com/windows10specs) and [www.surface.com/upgrade](http://www.surface.com/upgrade) for details

### Windows 10 - After Hardware Transition

- Implement or update asset. What changed?
- Switch Windows 10 Banner
- Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. **Do not take the customer out of the purchase funnel.**
- UPDATE battery life footnote (TBD)
- Remove Windows 10 disclaimer
- UPDATE Windows 8.1 screen under “Ultra-fast and responsive” to Office screenshot provided.

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## Resources:

### Links

- [Student Landing page](#)
- [High resolution product renders](#)
- [Asset library](#)

### Formats Available:

- HTML
- PSD
- Syndication

### KPIs

- # impressions (total & unique)
- # clicks (total & unique)
- # video plays
- attach offer click & conversion
- Pathing: conversion via brand showcase



# Priority 6: Banners – Windows 10



## Delivered

### Windows 10 Banners – Back to School Before Hardware Transition



### Windows 10 Banners – After Hardware Transition



## Retailers Actions:

### Promote Surface Banners on Laptop, 2 in 1, computer & homepage.

- Promoting on the tablet category page is the lowest priority of pages to invest in.

#### Windows 10– Before Hardware Transition

- Use Windows 10 Upgrade banner
- The destination of the banner should be (in priority order)
  - List page for all S3 and SP3 devices, linking to PDPs.
  - Banner destination needs to have the Windows 10 disclaimer. **This is a MANDATORY.**

#### Windows 10 Banners – After Hardware transition

- Use “Now with Windows 10” banner
- Destination (in priority order)
  - List page for all S3 and SP3 devices

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## Resources:

## Links

- Banners on RAD:
  - [Online Banners: Windows 10 – Before Hardware Transition](#)
  - [Online Banners: Windows 10 – After Hardware transition](#)
- [Asset library](#)

## Formats Available:

- PSD
- JPEGs
- Sizes: 540x200, 160x600, 300x250 and 728x90

## KPIs

- # impressions (total & unique)
- # clicks (total & unique)
- Pathing: % conversion



Online

# Priority 6: Banners – Student

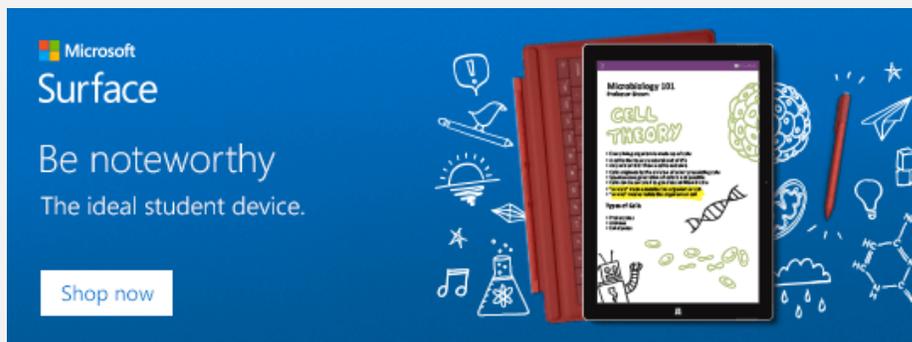
Phase	Drive Demand / Awareness	Exploring / Finding	Evaluation / Purchase	Attach / Cross-Sell	Experiencing / Post-purchase
	<a href="#">Back to Customer Journey</a>				

## Delivered

### Student Offer Banner: **Use NOW**



### Student (no offer): **Use NOW**



## Retailers Actions:

Promote Surface Banners on Laptop, 2 in 1, computer & homepage.

### Retailers who implement Offer

- Use the Offer banner (need to ensure you have the promo disclaimer on PDP or landing page.)
- The destination of the banner should be (in priority order)
  - Student Landing page (if live)
  - List page for all qualified S3 and SP3 devices (if landing page not live).

### Non-offer retailers

- Use non-offer banner
- Destination (in priority order)
  - Student Landing page(if live)
  - List page for all S3 and SP3 devices (if landing page not live).

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## Resources:

## Links

- Banners on RAD:
  - [Online Banners: BTS Student Offer & No Offer](#)
- [Asset library](#)

## Formats Available:

- PSD
- JPEGS
- Sizes: 540x200, 160x600, 300x250 and 728x90

## KPIs

- # impressions (total & unique)
- # clicks (total & unique)
- Pathing: % conversion



Online

# Priority 7: Student Emails

Phase

Drive Demand / Awareness

Exploring / Finding

Evaluation / Purchase

Attach / Cross-Sell

Experiencing / Post-purchase

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## Delivered

### Student Offer Email – Before Hardware Transition

### Student Offer Email – After Hardware Transition

If you launch BTS assets BEFORE 7/29 –you **NEED TO REMOVE** the Windows 10 banner and Windows 10 Disclaimer

## Retailers Actions:

### Generate offer awareness by sending out emails.

- Destination should be landing page (if live) or a list page for all qualified S3 and SP3 devices (if not live).
- Add retailer logo and store finder link to the bottom of the email.

### Windows 10 – Before Hardware Transition

- Windows 10 is here. Upgrade free\* - it's easy. – Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. Do not take the customer out of the purchase funnel.
- Disclaimer is MANDATORY: \*Offer valid for qualified Windows 8.1 devices for one year after Windows 10 upgrade availability. Windows 10 features vary by device. See [www.windows.com/windows10specs](http://www.windows.com/windows10specs) and [www.surface.com/upgrade](http://www.surface.com/upgrade) for details

### Windows 10 - After Hardware transition

- Implement or update asset. What changed?
- Switch Windows 10 Banner
- Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. Do not take the customer out of the purchase funnel.
- Remove Windows 10 disclaimer
- UPDATE battery life under icon and battery life footnote (TBD)

Post card version available to be used as part of a larger newsletter from the retailer.

Mobile: All emails are built scalable

## Resources:

### Links

- [Surface Offer Emails on RAD:](#)
  - Before Hardware Transition
  - After Hardware transition
- [Asset library](#)

### Formats Available:

- HTML
- PSD
- All Emails are built scalable

### KPIs

- # emails sent
- # opens
- # clicks
- Pathing: % conversion
- Clicks to store finder

# Priority 8: Post Purchase Accessory Emails – Windows 10 Update

Phase	Drive Demand / Awareness	Exploring / Finding	Evaluation / Purchase	Attach / Cross-Sell	Experiencing / Post Purchase
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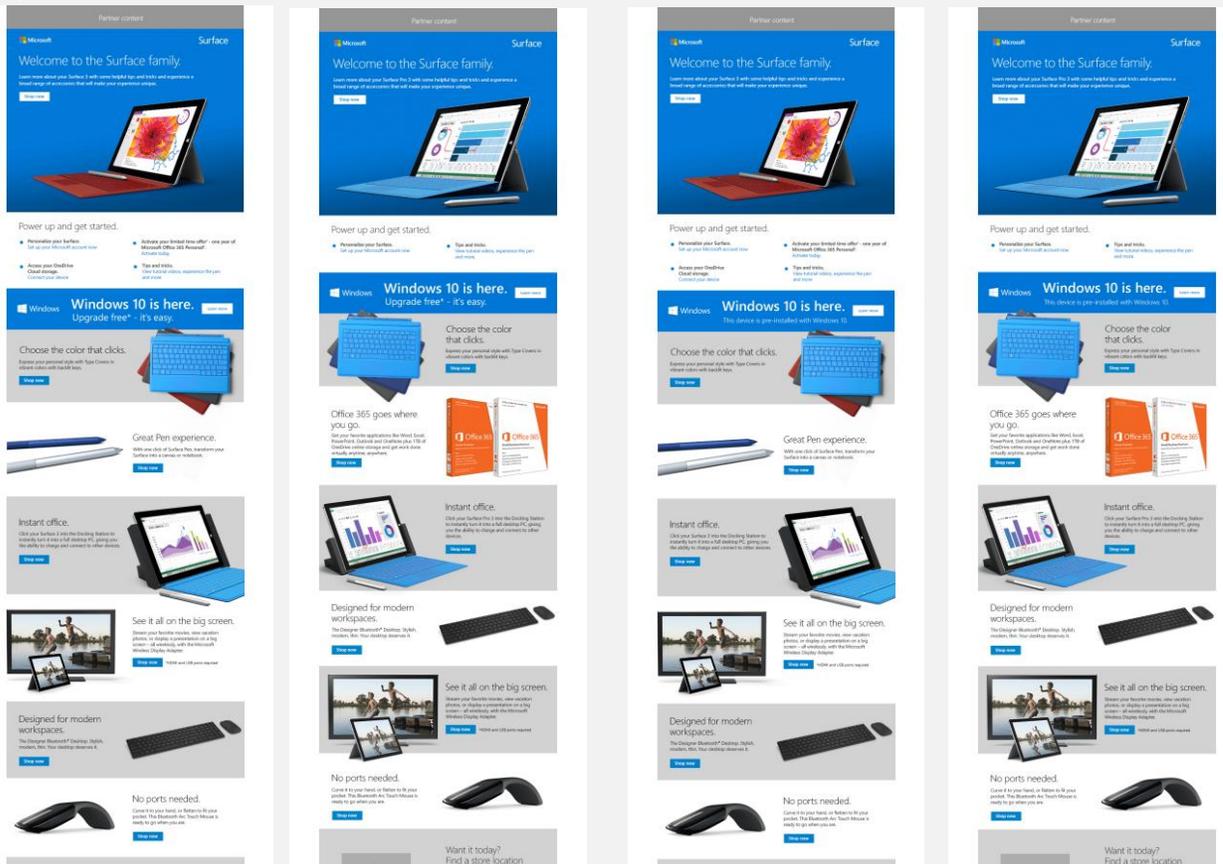
Delivered

Retailers Actions:

Resources:

## Surface 3 Post Purchase Email – Windows 10 Update – Before Hardware Transition

## Surface Pro 3 Post Purchase Email – Windows 10 Update After Hardware transition



## Send a targeted accessory email 10-14 days after a customer has purchased a Surface device.

- We have updated the current post purchase emails with the new Windows 10 banners.
- Overall strategy and guidance has not changed from spring. Please just add in the banner and legal disclaimer.**

### Windows 10 – Before Hardware Transition

- Add Windows 10 banner for BTS (Windows 10 is here. Upgrade free\* - it's easy.) – Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. Do not take the customer out of the purchase funnel.

- Disclaimer is MANDATORY: \*Offer valid for qualified Windows 8.1 devices for one year after Windows 10 upgrade availability. Windows 10 features vary by device. See [www.windows.com/windows10specs](http://www.windows.com/windows10specs) and [www.surface.com/upgrade](http://www.surface.com/upgrade) for details

### Windows 10 – After Hardware Transition

- Implement new asset

### What changed?

- Switch Windows 10 banner.
- Direct the CTA to the Windows 10 landing page (see RAD link in the resources) via a lightbox/pop-up, or opening another tab in browser. Do not take the customer out of the purchase funnel.
- Remove Disclaimer for W10.

## Links

- Surface Accessory Emails on RAD:
  - [Surface 3 Post Purchase – BTS & Hardware transition](#)
  - [Surface 3 4G LTE Post Purchase – BTS & Hardware Transition](#)
  - [Surface Pro 3 Post Purchase – BTS & Hardware transition](#)
- [Asset library](#)

## Formats Available:

- HTML
- PSD
- All Emails are built scalable

## KPIs

- # emails sent
- # opens
- # clicks
- Pathing: % conversion
- Clicks to store finder

Microsoft

Surface

Visual  
Merchandising

# VM Good, Better & Best Guidance: Checklist

	Land displays at retail that are equal to <b>or better than the competition</b>	Create a <b>consistent and engaging</b> purchase experience	Present the <b>value proposition</b> of Surface vs. the competition	<b>Primary placement</b> is on hero fixtures and in the <b>PC aisle</b>	<b>Drive Attach</b> by highlighting first and third party accessories
	✓ Execution Guidance	✓ Execution Guidance	✓ Execution Guidance	✓ Execution Guidance	✓ Execution Guidance
Good					
Better	<input type="checkbox"/> Table/Display should be positioned in highly visible, high traffic locations, visible from all approach angles	<input type="checkbox"/> Maintain clean, working, organized Surface displays in aisle (double inline or placemat fixture) - Keep front edge of counter clean so customer can interact with the device	<input type="checkbox"/> <b>Windows 10 specific:</b> Display new Windows 10 placemat and fact tags on tables, and new SKU Chooser and fact tags on endcaps/inline, to showcase Windows 10 on Surface. *Every device needs to have a 'screen violator' displayed.	<input type="checkbox"/> Implement Surface fact tags with every device, and a SKU Chooser when we show different devices	<input type="checkbox"/> Land seasonal Surface offer messaging to drive device sales
Best	<input type="checkbox"/> Land NEW store assets for Surface at the 30' Hi, 10' Eye, and 2' Buy levels of the customer journey	<input type="checkbox"/> Always display a pen for both devices	<input type="checkbox"/> PC aisle: Clearly brand space for Surface by using placemat and fact tag	<input type="checkbox"/> If the endcap is located in the tablet section, move it to the PC section	<input type="checkbox"/> Merchandise all accessories adjacent to fixtures and follow prioritized color order on planograms
	<input type="checkbox"/> Show Surface in an inviting way that encourages the customer to interact	<input type="checkbox"/> Remove all non Surface approved materials from fixtures as well as any old Surface POP	<input type="checkbox"/> Make sure all devices are powered on and running the Surface Demo	<input type="checkbox"/> <b>Windows 10 specific:</b> For table displays, take a Surface 3 from the table and move it to the Windows Feature Table. Move a Surface Pro 3 to the front of the Surface table so there are 2 devices per side, and 1 on the end facing the drive aisle.	<input type="checkbox"/> Drive attach awareness and motivation by merchandising keyboards and accessories near Surface devices and in a branded area in the Accessory department, to ensure the entire assortment is merchandised
	<input type="checkbox"/> Land Omni-channel consumer experience with use of QR code to drive to Surface.com or retailer landing page	<input type="checkbox"/> Use updated POP directly from the BOM	<input type="checkbox"/> In hero locations – Follow device planogram guidance for tabletop, i.e. tables use pedestal and keyboards for Surface 3, Endcaps display both devices with color keyboards		
		<input type="checkbox"/> Follow placement guidelines for retailer price tickets – ensuring they do not block the Surface device or clutter the counter	<input type="checkbox"/> Showcase Surface family devices using hero merchandising for Best placement, i.e Retailer window, poster, banner standee		

# Hi/Eye/Buy – Principles for the Customer Journey

While the customer journey starts at attracting customers to drive demand, it is imperative to land the fundamental assets on Surface fixtures, like fact tags, SKU chooser and a demo on every device. Below we show the assets that the field should execute to drive a strong Surface experience.

## Consumer Electronics



**10m/30'**  
Window, standee  
displays

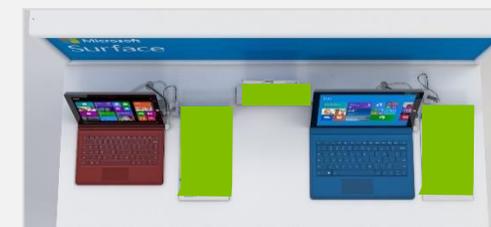


**3m/10'**  
Poster, backer  
graphics



**1m/2'**  
SKU Chooser, fact  
tags, signage  
on shelf

## Mass Merchant



# Visual Assets & Field Actions - Table Layout per Fixture

## Delivered



Surface Table



Endcap



Inline

## Retailers Actions:

- ✓ Land Surface fixtures with correct assortment of S3 and SP3 devices, depending on fixture (see 'Top-down table set up' slide for detailed table planogram guidance)
- ✓ Display tabletop layout plus pens, docking station and color keyboards per planogram
- ✓ Keep Spring Backer graphic and update with new fact tags, table top layout, screen lug-on sticker, and Windows 10 placemat
- ✓ Merchandise adjacent accessories by following accessory planogram

## Resources:

### Links:

[Surface Table Backer Graphic](#)

### Endcap Backer graphic

- [4 ft](#)
- [1.8m](#)
- [1.6m](#)
- [1m](#)

• [Inline](#)

## Delivered

Surface Table with Placemat (Pinball backer graphic)



SP3, fact tag + pen moved to front of table on placemat

3<sup>rd</sup> S3 device from Spring moves to Windows Feature Table

Endcap (Endcap backer graphic, 1.8m, 1.6m, 1m)



Updated SKU Chooser w/Windows 10 messaging

## Retailers Actions:

- ✓ Adjust devices per guidance below. Maintain docking station and color keyboards (KB) as shown in Spring table top planogram.
- ✓ Updated Table set-up Planogram: Retrofit existing tables with the following updates:
  - ✓ Tables will contain 5 devices, (2) Surface 3 on the left side of the table, 2 (Surface Pro 3) on the right side of the table, (1) Surface Pro 3 on the front of the table.
  - ✓ The Surface 3 that was removed from the table moves to the Windows Feature Device table
  - ✓ Endcaps continue to display 2 devices, (1) Surface 3 and (1) Surface Pro 3
- ✓ Display new Windows 10 placemat on the front of the table, move the Surface Pro 3 that was on the right front of the table, to the placemat, as well as its fact tag and Pen display.
- ✓ For Placemat: Insert Pen display in the die cut section of the placemat to ensure it adheres to the table.
- ✓ All devices will have a screen lug-on sticker placed on the top right of the monitor (see pg. 27 for details)
- ✓ Display the docking station specific fact tag, next to the SP3 in the dock.
- ✓ Ensure the S3 on the pedestal is displayed in portrait mode.
- ✓ Display a pen with every device; use the pen color that coordinates with the keyboard color, if available in your market. If matching pen is not available, default to silver.



# Visual Assets & Field Actions – Placemat for Tables in Cortana Markets

Delivered

Retailers Actions:

Resources:



Pen display section with die-cut

Cortana

Placemat with Device + Fact Tag – Cortana Markets

30"W x 16"H

- ✓ Land Surface-version Windows 10 vinyl placemat to highlight Windows 10 messaging. If Cortana is available in your market, use this version.
- ✓ Place adhesive sticker on both sides of the placemat to ensure it remains in place.
- ✓ Place the pen display in the die-cut section of the placemat, and use new adhesive on the base of the pen holder.

Link:

[Placemat for Cortana Markets](#)



# Visual Assets & Field Actions – Placemat for Tables in Non-Cortana Markets

## Delivered

## Retailers Actions:

## Resources:



Non-Cortana

Pen display section with die-cut

Placemat with Device + Fact Tag – Non Cortana Markets  
30"W x 16"H

Link:

[Placemat for Non-Cortana Markets](#)

- ✓ Land Surface-version Windows 10 vinyl placemat to highlight Windows 10 messaging. If Cortana is not available in your market, use this version.
- ✓ Place adhesive sticker on both sides of the placemat to ensure it remains in place.
- ✓ Place the pen display in the die-cut section of the placemat, and use new adhesive on the base of the pen holder.

# Visual Assets & Field Actions – SKU Chooser | Endcaps Only

## Delivered

## Retailers Actions:

## Resources:

Windows 10 is here. Upgrade free<sup>1</sup> – it's easy.

Do things confidently. It's the familiar feel of Windows – only better.

Do things naturally. Cortana<sup>2</sup> your personal digital assistant<sup>3</sup>.

Do things simply. Windows detects when you switch from desktop to tablet.

Do things easily. A web you can write on.

	Surface 3	Surface Pro 3
	The best of a tablet. Works like a laptop.	All the power and performance of a laptop.
Screen	10.8" display 1920 x 1280 resolution	12" display 2160 x 1440 resolution
Battery Life <sup>4</sup>	Up to 10 hours of video playback	Up to 9 hours of Web browsing
Storage and Memory Options <sup>5</sup>	64GB 2GB RAM 128GB 4GB RAM	64GB 4GB RAM 128GB 4GB RAM 256GB 8GB RAM 512GB 8GB RAM
Processor	Quad Core Intel® Atom™ v7 processor 1.8GHz	i7 Gen Intel® Core™ i7, Core™ i5, Core™ i7 processors
Camera	3.5 megapixel front-facing and 8 megapixel rear-facing	Two 5MP HD camera, front and rear-facing, with 1080p HD video recording
Kidstand	3-position	Multi-position
Surface Pen	Compatible (sold separately)	Included
Office	Limited time offer: 1-year Microsoft Office 365 Personal <sup>6</sup> included – a \$69.99 value – plus 1 TB OneDrive cloud storage.	Runs the full Microsoft Office suite (sold separately)

**Build your ultimate work station**

<sup>1</sup>Limited time offer. Availability of Windows 10 feature update. See [www.windows.com/featureupdate](http://www.windows.com/featureupdate).  
<sup>2</sup>Cortana experience may vary by device.  
<sup>3</sup>Feature available on all Surface devices during the update, or feature browsing over Wi-Fi (browsing) on popular web pages. All settings were default except Wi-Fi was associated with a network and Auto-Play was disabled (the network feature is turned off for network browsing). Settings are subject to change without notice and are subject to change without notice.  
<sup>4</sup>System software uses significant storage space. Available storage is subject to change based on system software updates and apps usage. 1 TB = 1000 GB. See [surface.com/storage](http://surface.com/storage) for details.  
<sup>5</sup>Available on the new 2-in-1 Surface Pro 3 purchased by December 31, 2015. Wi-Fi is required.  
<sup>6</sup>Office activation required within 60 days of Windows activation date.

Windows 10 is here. Upgrade free<sup>1</sup> – it's easy.

Do things confidently. It's the familiar feel of Windows – only better.

Do things naturally. Touch, type, pen – choose what works best for what you're doing.

Do things simply. Windows detects when you switch from desktop to tablet.

Do things easily. A web you can write on.

	Surface 3	Surface Pro 3
	The best of a tablet. Works like a laptop.	All the power and performance of a laptop.
Screen	10.8" display 1920 x 1280 resolution	12" display 2160 x 1440 resolution
Battery Life <sup>4</sup>	Up to 10 hours of video playback	Up to 9 hours of Web browsing
Storage and Memory Options <sup>5</sup>	64GB 2GB RAM 128GB 4GB RAM	64GB 4GB RAM 128GB 4GB RAM 256GB 8GB RAM 512GB 8GB RAM
Processor	Quad Core Intel® Atom™ v7 processor 1.8GHz	i7 Gen Intel® Core™ i7, Core™ i5, Core™ i7 processors
Camera	3.5 megapixel front-facing and 8 megapixel rear-facing	Two 5MP HD camera, front and rear-facing, with 1080p HD video recording
Kidstand	3-position	Multi-position
Surface Pen	Compatible (sold separately)	Included
Office	Limited time offer: 1-year Microsoft Office 365 Personal <sup>6</sup> included – a \$69.99 value – plus 1 TB OneDrive cloud storage.	Runs the full Microsoft Office suite (sold separately)

**Build your ultimate work station**

<sup>1</sup>Limited time offer. Availability of Windows 10 feature update. See [www.windows.com/featureupdate](http://www.windows.com/featureupdate).  
<sup>2</sup>Feature available on all Surface devices during the update, or feature browsing over Wi-Fi (browsing) on popular web pages. All settings were default except Wi-Fi was associated with a network and Auto-Play was disabled (the network feature is turned off for network browsing). Settings are subject to change without notice and are subject to change without notice.  
<sup>4</sup>System software uses significant storage space. Available storage is subject to change based on system software updates and apps usage. 1 TB = 1000 GB. See [surface.com/storage](http://surface.com/storage) for details.  
<sup>5</sup>Available on the new 2-in-1 Surface Pro 3 purchased by December 31, 2015. Wi-Fi is required.  
<sup>6</sup>Office activation required within 60 days of Windows activation date.

SKU Chooser - Cortana Markets

SKU Chooser – Non-Cortana Markets

- ✓ Land the new SKU Chooser for Endcaps only. The Windows 10 content is leveraged from the Placemat, which is displayed on Table fixtures.
- ✓ SKU Chooser placement is between devices. Use the A5 size for smaller fixtures.
- ✓ Display Cortana SKU Chooser for markets where Cortana is available.

Links:

- [SKU Chooser Cortana Markets](#)
- [SKU Chooser Non-Cortana Markets](#)

# Visual Assets & Field Actions – Surface 3 Fact Tags | All Fixtures

## Delivered

## Retailers Actions:

## Resources:

### Available Now

### Before Hardware Transition (Front)

### After Hardware Transition (Back)

- ✓ Land new, approved fact tags adjacent to Surface devices.
- ✓ Fact tag placement is next to each device.
  - Both vertical and horizontal versions available
  - Versions with and without retailer price ticket area available
- ✓ Do not modify Windows 10 and Office message.
- ✓ Each fact tag is double sided except the 'available now' version
  - Display the front side of the fact tag at launch
  - Display the back of the fact tag after hardware transition and all devices are pre-installed with Windows 10

- ### Links:
- [Surface 3 Fact Tag \(vertical\) – Available Now](#)
  - [Surface 3 Fact Tag \(horizontal\) – Available Now](#)
  - [Surface 3 Fact Tag \(vertical\) – Before/After Front & Back](#)
  - [Surface 3 Fact Tag \(horizontal\) – Before/After](#)
  - [Surface 3 Fact Tag \(vertical\) with Retailer Price – Before/ After Front & Back](#)

**Microsoft Surface 3**

**Windows 8.1:** Install desktop software like iTunes and browsers like Chrome.

**Keyboards:** Click in a backlit Type Cover to turn your tablet into a laptop. (sold separately)

**Kickstand (3-position):** Use the built in Kickstand to conveniently work and play.

**Limited time offer, 1-year of Microsoft Office 365 Personal<sup>1</sup> included – a \$69.99 value:** Get your subscription of Word, Excel, PowerPoint, Outlook and more.

**OneDrive Cloud Storage:** Save all your documents, photos and videos in the cloud (1-year subscription).

**Ports:** Print, connect and share using the multiple ports available.

**Battery:** Up to 10 hours of video playback\*      **Screen size:** 10.8" 1920 x 1280

**Storage:** 64GB or 128GB      **Camera:** 3.5 megapixel front-facing and 8 megapixel rear-facing

**Memory:** 2GB RAM with 64GB version      **Ports:** Full-size USB 3.0, Mini DisplayPort, microSD™ card reader  
4GB RAM with 128GB version

**Processor:** Quad Core Intel® Atom™ x7 processor 1.6GHz

---

**Free Windows 10 upgrade**  
Upgrade for free to Windows 10 when it's available<sup>2</sup>, and get the best combination of the Windows you know, plus lots of improvements you'll love.

**Windows 10**

---

**Office 365** Limited time offer: 1-year of Microsoft Office 365 Personal included — a \$69.99 value.

\*Available on Surface 3 with Windows 8.1 purchased prior to December 31, 2015. While supplies last.  
<sup>1</sup>Office activation required within 60 days of Windows activation date.  
<sup>2</sup>Offer is available for eligible Windows 8.1 devices. See surface.com/windows10 for details.  
 \*System software uses significant storage space. Available storage is subject to change based on system software updates and apps usage. 128GB - 128GB bytes. See surface.com/storage for more details.  
<sup>3</sup>Limited time offer valid for qualified Windows 7 and Windows 8.1 devices (including devices you already own). See surface.com/windows10 for details.

**Microsoft Surface 3**

**Windows 8.1 pre-installed:** Install desktop software like iTunes and browsers like Chrome.

**Keyboards:** Click in a backlit Type Cover to turn your tablet into a laptop. (sold separately)

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**Limited time offer, 1-year of Microsoft Office 365 Personal<sup>1</sup> included – a \$69.99 value:** Get your subscription of Word, Excel, PowerPoint, Outlook and more.

**1TB OneDrive Cloud Storage:** Save all your documents, photos, and videos in the cloud (included in 1-year of Microsoft Office 365 Personal subscription).

**Ports:** Print, connect and share using the Full-size USB 3.0, Mini DisplayPort, microSD™ card reader.

**Battery:** Up to 10 hours of video playback      **Processor:** Quad Core Intel® Atom™ x7 processor 1.6GHz

**Storage:** 64GB or 128GB      **Screen size:** 10.8" 1920 x 1280

**Memory:** 2GB RAM with 64GB version      **Camera:** 3.5 megapixel front-facing and 8 megapixel rear-facing  
4GB RAM with 128GB version

---

**Windows** **Windows 10 is here.**  
Upgrade free<sup>2</sup> - it's easy.

---

**Office 365** Limited time offer: 1-year of Microsoft Office 365 Personal included — a \$69.99 value.

\*Available on Surface 3 with Windows 8.1 purchased by December 31, 2015. While supplies last.  
<sup>1</sup>Office activation required within 60 days of Windows activation date.  
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 \*System software uses significant storage space. Available storage is subject to change based on system software updates and apps usage. 128GB - 128GB bytes. See surface.com/storage for more details.  
<sup>3</sup>Limited time offer valid for qualified Windows 7 and Windows 8.1 devices (including devices you already own). See surface.com/windows10 for details.

**Microsoft Surface 3**

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**1TB OneDrive Cloud Storage:** Save all your documents, photos, and videos in the cloud (included in 1-year of Microsoft Office 365 Personal subscription).

**Ports:** Print, connect and share using the Full-size USB 3.0, Mini DisplayPort, microSD™ card reader.

**Storage:** 64GB or 128GB      **Screen size:** 10.8" 1920 x 1280

**Memory:** 2GB RAM with 64GB version      **Camera:** 3.5 megapixel front-facing and 8 megapixel rear-facing  
4GB RAM with 128GB version

**Processor:** Quad Core Intel® Atom™ x7 processor 1.6GHz

---

**Windows** **Windows 10 is here.**  
This device is pre-installed with Windows 10.

---

**Office 365** Limited time offer: 1-year of Microsoft Office 365 Personal included — a \$69.99 value.

\*Available on Surface 3 with Windows 10 purchased by December 31, 2015. While supplies last.  
<sup>1</sup>Office activation required within 60 days of Windows activation date.  
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 \*System software uses significant storage space. Available storage is subject to change based on system software updates and apps usage. 128GB - 128GB bytes. See surface.com/storage for more details.  
<sup>3</sup>Limited time offer valid for qualified Windows 7 and Windows 8.1 devices (including devices you already own). See surface.com/windows10 for details.

# Visual Assets & Field Actions – Surface 3 Pro Fact Tags | All Fixtures

## Delivered

## Retailers Actions:

## Resources:

Now

Before Hardware Transition (Front)

After Hardware Transition (Back)

**Microsoft Surface Pro 3**

- Windows 8.1 Pro:** Install desktop software like iTunes, Adobe Photoshop, and browsers like Chrome.
- Surface Pen (included):** Take notes and mark up presentations with the Surface Pen.
- Kickstand (Multi-position):** Use the built-in Kickstand to conveniently work and play.
- Install Microsoft Office (sold separately):** Get work done with Word, Excel, PowerPoint, OneNote and Outlook.
- Touch Display:** Get the best of a tablet with a Full HD Plus screen touch display.
- Ports:** Print, connect and share using the multiple ports available.

**Battery:** Up to 9 hours of web browsing\*    **Screen size:** 12" 2160 x 1440

**Storage:** 64GB, 128GB, 256GB, or 512GB    **Cameras:** Two SMP HD cameras, front and rear-facing, with 1080p HD video recording

**Memory:** 4GB RAM with 64GB or 128GB version    **8GB RAM with 256GB or 512GB version**

**Processors:** 4<sup>th</sup> Gen Intel® Core™ i3, Core™ i5, Core™ i7 processor

---

**Windows 10** Free Windows 10 upgrade. Upgrade for free to Windows 10 when it's available<sup>1</sup>, and get the best combination of the Windows you know, plus lots of improvements you'll love.

---

**Office 365** Don't miss out. Save \$20 on Office when you buy a new Surface Pro 3 today.<sup>2</sup>

\*Battery life varies with usage and settings. See store associate for details.  
<sup>1</sup>From upgrade to Windows 10 for qualified Windows 8.1 devices that upgrade in the first year. More information and additional offer terms available in the coming months.  
<sup>2</sup>See store associate for details.

**Microsoft Surface Pro 3**

- Windows 8.1 Pro pre-installed:** Install desktop software like iTunes, Adobe Photoshop, and browsers like Chrome.
- Surface Pen (included):** Take notes and mark up presentations with the Surface Pen.
- Kickstand (Multi-position):** Use the built-in Kickstand to conveniently work and play.
- Install Microsoft Office (sold separately):** Get work done with Word, Excel, PowerPoint, OneNote and Outlook.
- Touch Display:** Get the best of a tablet with a Full HD Plus screen touch display.
- Ports:** Print, connect and share using the Full-size USB 3.0, Mini DisplayPort, microSD™ card reader.

**Battery:** Up to 9 hours of web browsing    **Screen size:** 12" 2160 x 1440

**Storage:** 64GB, 128GB, 256GB, or 512GB    **Cameras:** Two SMP HD cameras, front and rear-facing, with 1080p HD video recording

**Memory:** 4GB RAM with 64GB or 128GB version    **8GB RAM with 256GB or 512GB version**

**Processors:** 4<sup>th</sup> Gen Intel® Core™ i3, Core™ i5, Core™ i7 processor

---

**Windows 10 is here.** Upgrade free<sup>1</sup> – it's easy.

---

**Office 365** Don't miss out. Save \$20 on Office when you buy a new Surface Pro 3 today.<sup>2</sup>

\*Testing consisted of full battery discharge while internet browsing over Wi-Fi. Internet browsing was tested browsing 25 popular web pages. All settings were default except Wi-Fi was associated with a network. Audio (Ringtone disabled) and Bluetooth (Audio was turned off). Battery life varies with usage and other factors.  
<sup>1</sup>System software uses significant storage space. Available storage is subject to change based on system software updates and apps usage. See store associate for more details.  
<sup>2</sup>Unlimited time offer valid for qualified Windows 7 and Windows 8.1 devices (including devices you already own). See www.microsoft.com/windows/upgrade. See store associate for details.  
<sup>3</sup>See store associate for details.

**Microsoft Surface Pro 3**

- Windows 10 Pro pre-installed:** Install desktop software like iTunes, Adobe Photoshop, and browsers like Chrome.
- Surface Pen (included):** Take notes and mark up presentations with the Surface Pen.
- Kickstand (Multi-position):** Use the built-in Kickstand to conveniently work and play.
- Install Microsoft Office (sold separately):** Get work done with Word, Excel, PowerPoint, OneNote and Outlook.
- Touch Display:** Get the best of a tablet with a Full HD Plus screen touch display.
- Ports:** Print, connect and share using the Full-size USB 3.0, Mini DisplayPort, microSD™ card reader.

**Storage:** 64GB, 128GB, 256GB, or 512GB    **Screen size:** 12" 2160 x 1440

**Memory:** 4GB RAM with 64GB or 128GB version    **8GB RAM with 256GB or 512GB version**

**Cameras:** Two SMP HD cameras, front and rear-facing, with 1080p HD video recording

**Processors:** 4<sup>th</sup> Gen Intel® Core™ i3, Core™ i5, Core™ i7 processor

---

**Windows 10 is here.** This device is pre-installed with Windows 10.

---

**Office 365** Don't miss out. Save \$20 on Office when you buy a new Surface Pro 3 today.<sup>2</sup>

\*System software uses significant storage space. Available storage is subject to change based on system software updates and apps usage. 1GB+ 1 billion bytes. See store associate for more details.  
<sup>2</sup>See store associate for details.

- ✓ Land new, approved fact tags adjacent to Surface devices.
- ✓ Fact tag placement is next to each device.
  - Both vertical and horizontal versions available
  - Versions with and without retailer price ticket area available
- ✓ Do not modify Windows 10 and Office message.
- ✓ Each fact tag is double sided except the 'available now' version
  - Display the front side of the fact tag at launch
  - Display the back of the fact tag after hardware transition and all devices are pre-installed with Windows 10

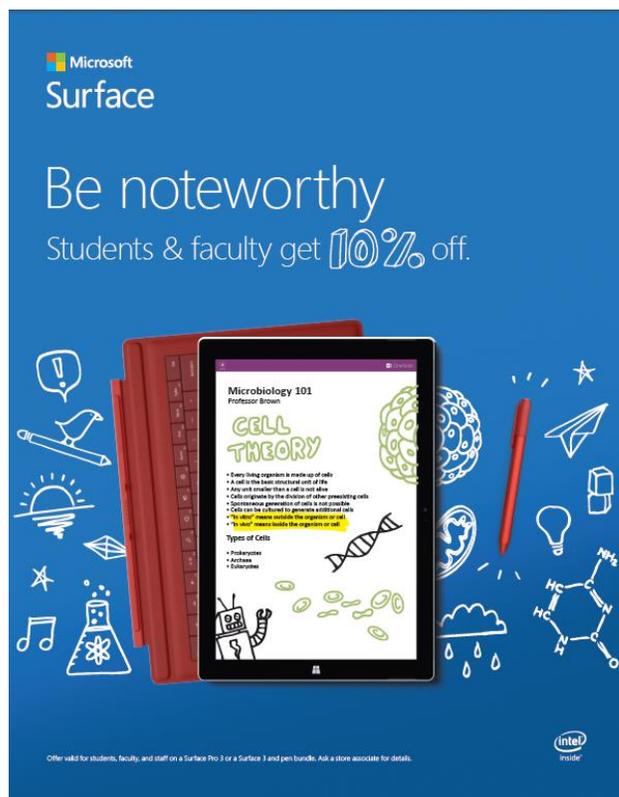
- Links:**
- [Surface Pro 3 Fact Tag \(vertical\) – Available Now](#)
  - [Surface Pro 3 Fact Tag \(horizontal\) – Available Now](#)
  - [Surface Pro 3 Fact Tag \(vertical\) – Before/After Front & Back](#)
  - [Surface Pro 3 Fact Tag \(horizontal\) – Before/After Front & Back](#)
  - [Surface Pro 3 Fact Tag \(vertical\) with Retailer Price – Before/After Front & Back](#)



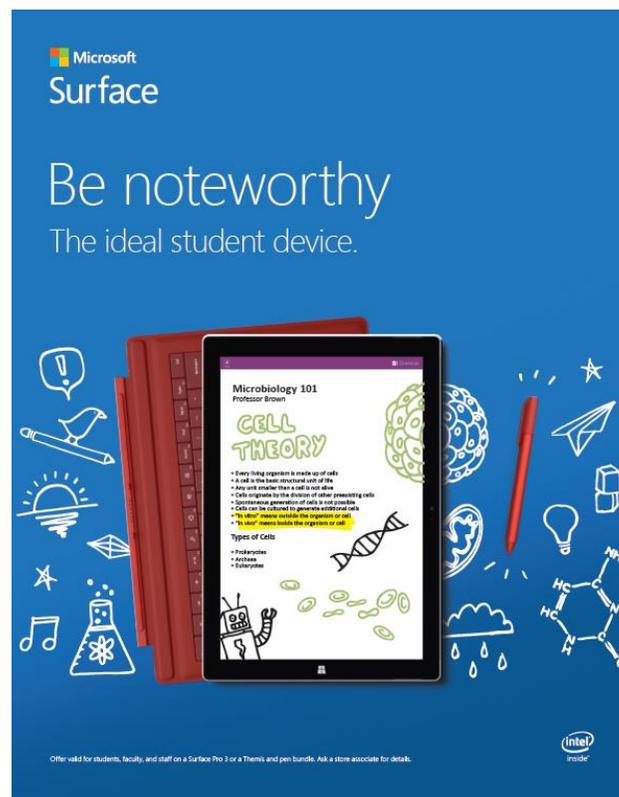
# Visual Assets & Field Actions – Posters

## Delivered

### Poster with offer



### Poster without offer



## Retailers Actions:

- ✓ Student Offer Poster – Optional asset for retailer to display, to drive demand and awareness for the Evergreen Student Surface offer.
- ✓ Student Poster without offer – Optional asset for retailers who are not participating in the student offer, however want to drive awareness for Surface as the ideal student device.

## Resources:

### Links:

[Poster with offer](#)

[Poster without offer](#)



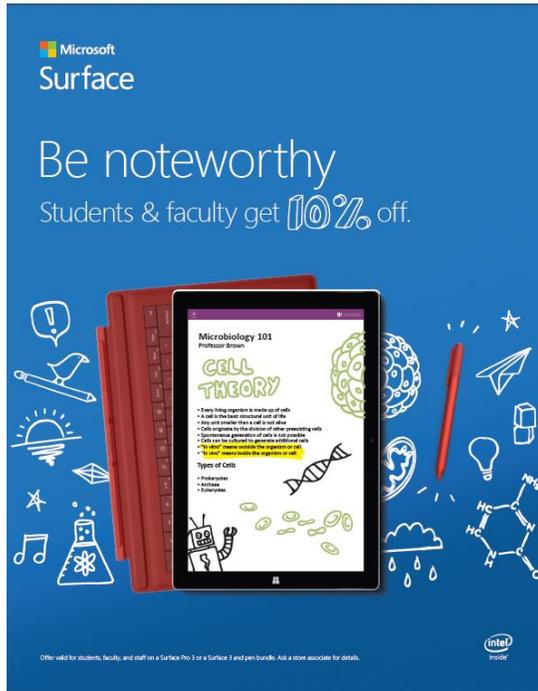
# Visual Assets & Field Actions – Shelf Signs

## Delivered

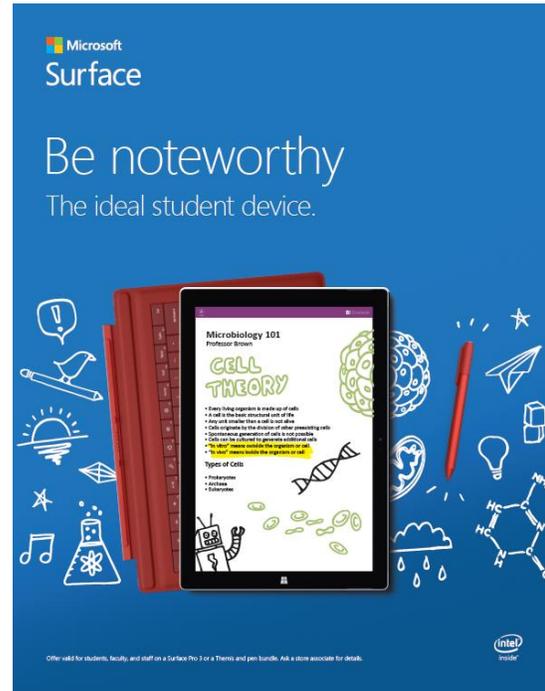
## Retailers Actions:

## Resources:

### Shelf Sign with offer



### Shelf sign without offer



- ✓ Student Offer shelf sign – Optional asset for retailer to display, to drive demand and awareness for the Evergreen Student Surface offer.
  - ✓ Placement is only for Tables and will be displayed on one side of the SKU Chooser holder.
- ✓ Student shelf sign without offer – Optional asset for retailers who are not participating in the student offer, however want to drive awareness for Surface as the ideal student device.
  - ✓ Placement is only for Tables and will be displayed on one side of the SKU Chooser holder.

### Links:

[Shelf sign with offer](#)

[Shelf sign without offer](#)

# Visual Assets & Field Actions – Out of Stock Placards

## Delivered



Other assets available, not shown here:  
Ethernet Adapter, Mini DisplayPort to HDMI VA Adapter, Mini DisplayPort to VGA Adapter

## Retailers Actions:

- ✓ Suggested material for all placards: 24 pt. C2S Board
- ✓ Placards to be used for the following reason:
  - ✓ Low inventory due to stock sell out. Placards fill in the empty accessory slots to create filled in displays. The QR code leads consumer to purchase the sold out accessory on retailer website.
- ✓ Add the correct QR code for your retailer's website

## Resources:

### Links:

[OOS Surface Pro 3 Type Cover](#)

[OOS Surface Pens](#)

[OOS Arch Touch Mouse](#)

[OOS Surface Pro 3 Docking Station](#)

[OOS Wireless Display Adapter](#)

[OOS Ethernet Adapter](#)

[OOS Mini DisplayPort HDMI VA Adapter](#)

[OOS Mini DisplayPort VGA Adapter](#)

# Accessory Planogram Guidance

## When merchandising Surface accessories always follow the principles below:

- 'Like' products grouped together, as shown in renders
- 1<sup>st</sup> party accessories merchandised directly below devices on table, if more space is needed, merchandise additional accessories within 1 – 2 meters of hero fixture
- Allocate 70% of hero fixture accessory space to Surface keyboards (A quantity of 4 minimum keyboard covers should be on display)
- Allocate 30% of hero fixture accessory space to Surface small accessories (pens, adapters, mice, etc.)
- Priority order of accessories:
  - 1<sup>st</sup> party Surface accessories
  - Small accessories on top followed by keyboards: SP3 keyboards above S3
  - 3<sup>rd</sup> party Surface accessories
  - Microsoft PC accessories

## Keyboard colors vary by market – adjust your presentation to reflect your market assortment

### Large market options:

- SP3: Bright Blue, Black, Blue, Red + 1 of: (Purple or Bright Red)
- S3: Bright Blue, Red, Black, Blue + 1 of: (Purple or Bright Red)

### Small market options:

- SP3: Bright Blue, Black, Blue
- S3: Bright Blue, Red, Black



# Accessory Planogram: Back of Pinball, Wallbay, Endcap

## Back of Pinball/Wallbay



### Accessory Sign



**1<sup>st</sup> party** pen 3x, wireless display adapter 2x, Ethernet adapter, 36W SP3 PSU, MiniDisplay Ports, S3 PSU, Arc touch mouse



**1<sup>st</sup> party** SP3 Keyboards top row, S3 Keyboard on row below, (display colors per market variance)



**1<sup>st</sup> party, 3<sup>rd</sup> party + PC Accessories** 1<sup>st</sup> party screen protector, 3<sup>rd</sup> party accessories, Designer Bluetooth Desktop

## Endcap



**1<sup>st</sup> party** S3 black Keyboard, pen 2x, wireless display adapter, arc touch mouse, SP3 cyan keyboard

**1<sup>st</sup> party** S3 red Keyboard, S3 blue or cyan keyboard, SP3 cyan keyboard

# Accessory Planogram: Under Table Cabinets

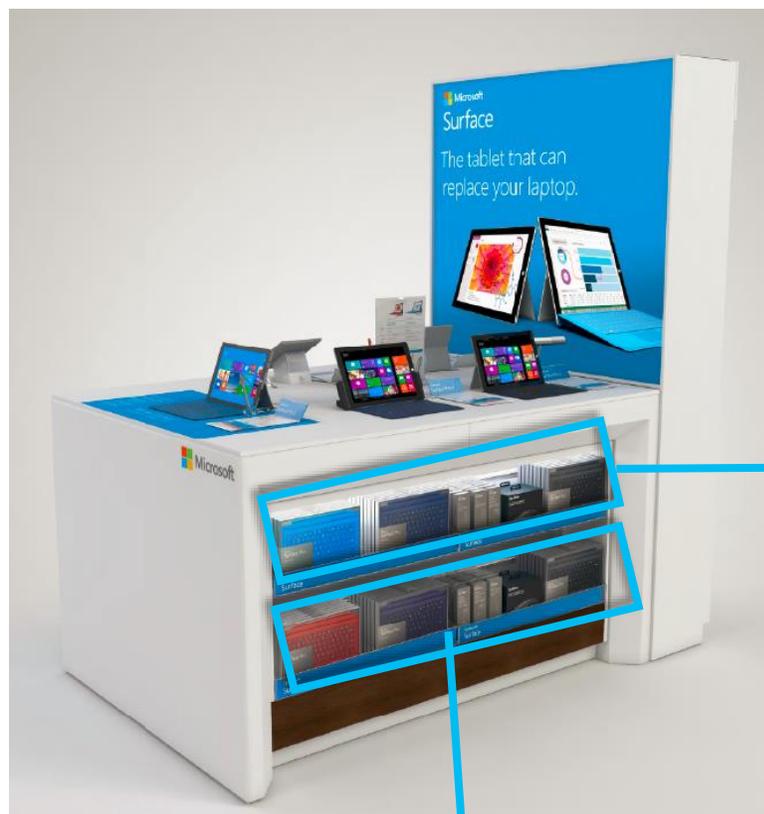
Pinball table – S3



**1<sup>st</sup> party:** S3 black keyboard, pen x2, wireless display adapter, arc touch mouse, S3 blue keyboard, S3 red keyboard

**1<sup>st</sup> party:** S3 black keyboard, MiniDisplay port to HD, MiniDisplay port to VGA, arc touch mouse, S3 cyan keyboard, S3 purple or poppy keyboard

Pinball table – SP3



**1<sup>st</sup> party:** SP3 cyan keyboard, SP3 blue keyboard, pen x2, wireless display adapter, arc touch mouse, SP3 black keyboard

**1<sup>st</sup> party:** SP3 red keyboard, SP3 purple keyboard, 36W SP3 PSU, MiniDisplay port to HD, MiniDisplay port to VGA or ethernet adapter, arc touch mouse, SP3 black keyboard

# Accessory Prioritization – All Up

## Keyboard priority

Priority	Keyboards - Order dependent on assortment in store
1	SP3 Type KB, black
2	S3 Type KB, black
3	SP3 Type KB, blue
4	S3 Type KB, bright blue
5	SP3 Type KB, purple
6	S3 Type KB, red
7	SP3 Type KB, bright blue
8	SP3 Type KB, red
9	S3 Type KB, purple

## Small accessory priority

Priority	Small Accessories – Order dependent on assortment in store
1	Surface Pen: silver, blue, red, black
2	Wireless Display Adapter
3	SP3 Dock
4	S3 Dock
5	SP3 Screen Protector
6	S3 Screen Protector
7	Microsoft's Designer Keyboard and Mouse
8	Arc Touch Mouse
9	36W – SP3 PSU
10	MiniDisplay Port to VGA Adapter
11	MiniDisplay Port to HD Adapter
12	Ethernet Adapter
13	13W or 24W – S3 PSU



# Device Security & Field Actions – Top-down Set-up

## Delivered

### Surface Table



Remove and replace adhesive on Pen Stand. Place Pen Stand into cut-out area of placemat after placemat has been positioned at the end of the table.



Final placement of placemat at end of table with pen in place.

## Retailers Actions:

- SURFACE TABLE
- ✓ Re-use existing Alarm Systems
- ✓ Leave SP3 security in place when moving SP3 to end of table
- ✓ Position Placemat at end of table and SP3 device onto placemat
- ✓ Clean and adhere replacement adhesive to bottom of pen stand
- ✓ Place pen stand in mat cut-out as shown
  
- Endcap | Inline
- ✓ No change to Spring execution

## Resources:

Pen Stand replacement Adhesives (PN ADH2065) will be shipped to each country channel manager

NOTE: 2 per table will be shipped. Only 1 is required for each table

# In-Store Fixture and Product Cleaning

Fixtures Maintenance – MANDATORY ON ALL VISITS

## **POWDER-COATED MDF**

### **Normal Cleaning**

- ❖ Wipe clean with a soft, damp cloth only.

## **SOLID SURFACE MATERIAL**

### **Normal Cleaning**

- ❖ Wipe clean with a soft, damp cloth or sponge with mild detergent or general purpose degreaser
- ❖ Do not use strong acids or caustic agents such as those in drain, toilet bowl, and oven cleaners.

### Step 1: Pat Dry

- Ensures no spread of the stain during cleaning and will absorb any liquids before applying tape

### Step 2: Tape Clean

- Using tape with certain pressure to clean area. Repeat this step a few times until no further improvement
- This will help clean small residual and help to recover the texture

### Step 3: Apply cleaning sponge with soapy water

- Soap foam is effective to clean the surface. Make sure foam is well generated and no excess water is in the sponge.
- Do not use Q-tip

Microsoft

Surface

Evangelism

# Education & Evangelism: Spring Overview

As education and evangelism continues to evolve, we will support Field Labor and educate RSPs through ExpertZone with monthly guidance. An overview of Surface topics can be seen on Opal and will be supported by the below core assets. Questions or suggestions for Surface evangelism please contact Jason Dukes

## Field Labor

In-person training experience

Takes place on sales floor or in classroom environment

Includes PPT deck with instructor notes; may include participant guide, activity, assessment rubric, etc.

Individual topics can be combined to create longer presentations

## ExpertZone

Primary EZ training experience

Deep-dive posts on a single topic will be in an article style format

Replaces conventional e-learning (OLT) with shorter, more interactive learning experience

Supported by:

Fact Sheets

Field labor instructions

Videos

Infographics

Battle Cards

Pocket Guides

Quizzes

FAQs

Lanyard Cards

Social Network  
Content

# Asset Strategy & Execution

Phase

Drive Demand / Awareness

Exploring / Finding

Evaluation / Purchase

Attach / Cross-Sell

Experiencing / Post-purchase

## Fact Sheet

## Definition / Action

## Resources

**Microsoft Surface**  
The ideal student device

Help students find the Surface that's right for them  
Ask questions and listen for keywords

Besides schoolwork, what else do you want to do?  
What applications do you use the most?

**Surface 3**  
High School Tablet Internet Email  
Light Photo Editing Casual Games All day usage

**Surface Pro 3**  
College Powerful Laptop Large Screen  
Adobe Suite Desktop Games Large Office Files

**Recommend the right device**

**Why Surface 3**  
**Run Windows and Office**  
Run all your desktop apps, even iTunes. For a limited time purchase a Surface 3 and get a 1 year subscription to OIGS Personal which includes Word, Excel, PowerPoint, and Outlook.  
**The Best of a Tablet**  
Your bag is lighter than ever, and with all day battery life you don't need to search for a plug.  
**Works like a Laptop**  
Use the optional Type Cover, when needed, to knock out term papers with ease.  
**Great Pen**  
OneNote is available everywhere you go, on every device. And with the optional Surface Pen it's just like taking notes on paper.

**Why Surface Pro 3**  
**Power and Performance**  
Lift your laptop with a big screen that lets you run the most demanding apps like Photoshop.  
**Best of a Tablet**  
Fold back the optional Type Cover, and kick back between classes. Catch up Facebook, read news on Flipboard and more.  
**Runs Windows and Office**  
With Windows, you can connect to more devices at school, whether it's the library printer or the classroom projector.  
**Great Pen**  
Whether it's note-taking in OneNote or designing in Photoshop, the Surface Pen provides a best-in-class experience.

**Recommend accessories essential for students**

**Surface 3**  
**Type Cover**  
Turn your Surface into a term paper machine with a Type Cover.  
**Surface Pen**  
Did you know that taking written notes engages both sides of the brain? Remember more by using a Surface Pen to jot down class notes.  
**Office 365**  
Office is a no-brainer for students off all types. It's the best software for papers, whiteboards, and the things you do every day. Get all of it, plus an 1TB 120 GB OneDrive storage, for all of your stuff.  
**Docking Station**  
Turn your Surface into a desktop powerhouse. Connect a Surface keyboard and mouse, camera, phone and more, all at the same time.

**Surface Pro 3**  
**Type Cover**  
Turn your Surface into a term paper machine with a Type Cover.  
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**Office 365**  
Office is a no-brainer for students off all types. It's the best software for papers, whiteboards, and the things you do every day. Get all of it, plus an 1TB 120 GB OneDrive storage, for all of your stuff.  
**Docking Station**  
Turn your Surface into a desktop powerhouse. Connect a Surface keyboard and mouse, camera, phone and more, all at the same time.

**Why students will love Surface**

- Battery lasts from class to class.
- Runs all your desktop apps from Office to iTunes.
- Write or draw your class notes naturally in OneNote.
- Replace your text books and notebooks with one device.
- Upgrade for free to Windows 10 when it's available.\*

\*Free upgrade to Windows 10 for qualified Windows 8.1 devices that upgrade in the first year. More information and additional offer terms available in the coming months.

[Insert your regions Surface education promotion here, or remove if not executing]

Microsoft

Used standalone or in conjunction with other core assets

- Links**
- [BTS Fact Sheet on RAD](#)
  - [Publisher PDF](#)
  - [Opal Asset library](#)

Localize and add to the REP Tool for field labor training

## Instructor-Led Training

Help students find the Surface that's right for them

What kinds of questions should you be asking?

What key

Surface Pr

College

Powerful

Laptop

Large Scree

Desktop Gam

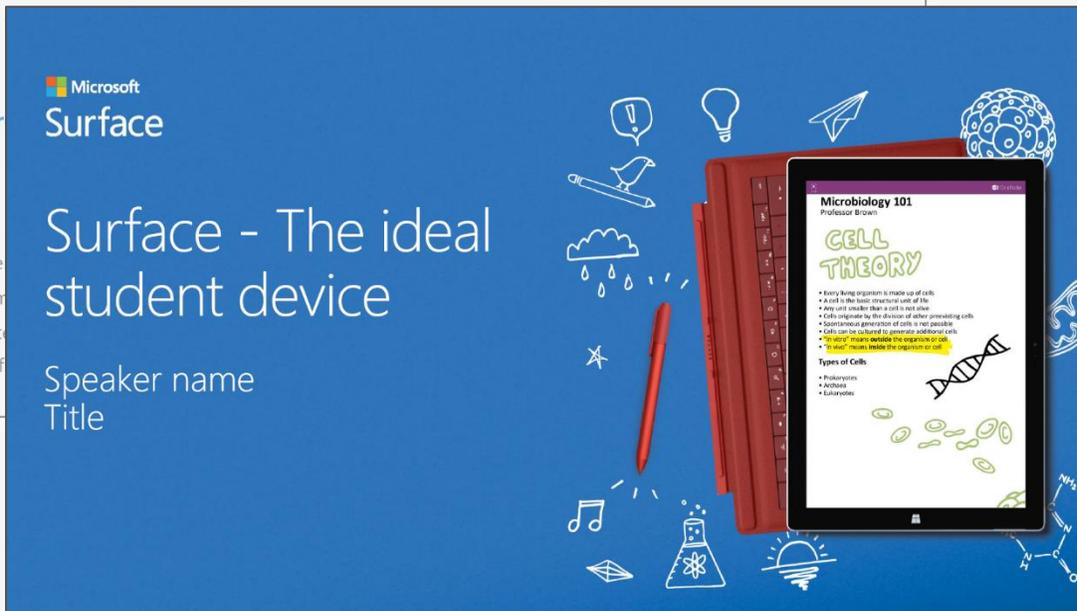
Adobe Suit

Large Office f

Microsoft  
Surface

Surface - The ideal  
student device

Speaker name  
Title



## Definition / Action

In-person training  
experience, 1:1 on sales  
floor or 1:many in  
classroom environment

Localize and add to the  
REP Tool for field labor  
training

## Resources

## Links

[BTS ILT on RAD](#)

[PowerPoint](#)

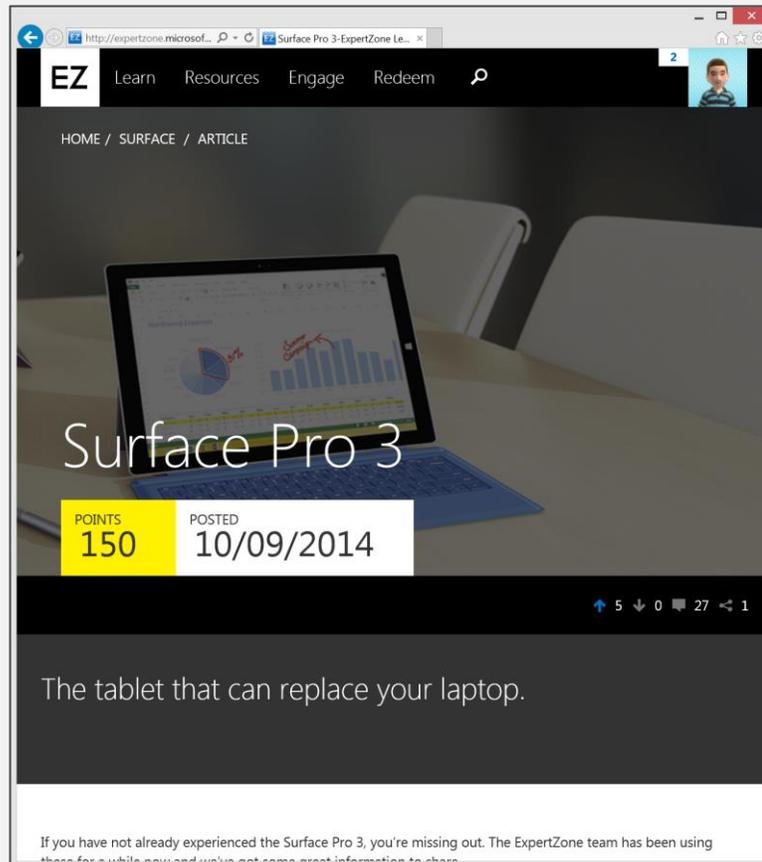
[PDF](#)

[Opal](#)

[Asset library](#)

# Asset Strategy & Execution

## Expert Zone Article



## Definition / Action

Replaces conventional e-learning with shorter, more frequent learning experiences

Localize the Master Asset in Content Creator and publish on your local ExpertZone site

## Resources

See execution/planning dates.

RAD and CC links via Opal

<https://microsoft.ouopal.com/>

# Surface

# Demo

# Demo

Add Demo on all Surface devices

Continue to run Surface Pro 3 script after demo installation

Script allows users to directly access OneNote when clicking the Pen Script. It also prevents the Attract Loop from freezing.

If the Surface device comes with a pen, It is best to pair the pen to the device prior to installing the demo

Additional troubleshooting steps can be found in the Demo Installation Instructions



Surface Pro 3

Larger screen, lighter form  
The thinnest and lightest in our Pro family with a 12" screen to help you be productive.

Connects like a laptop  
Store, print, and share with micro-USB, FireWire, DisplayPort, Mini DisplayPort, and Thunderbolt.

Run your favorite programs and apps  
Since Pro 3 runs Windows 8.1 Pro, you can install the full Microsoft Office Suite.<sup>1</sup>

Keeps you entertained  
The multi-position Kickstand lets you watch videos hands-free on the Full HD display.

Revolutionary laptop  
Click in a backlit Type Cover to turn your tablet into a laptop.<sup>2</sup>

Write naturally  
Use the Pen to mark up present documents, or enjoy art apps.

Microsoft Surface Pro 3  
With a stunning 12" display in a sleek magnesium frame, Surface Pro 3 has all the power and performance of a laptop in a lightweight, versatile form.

Surface Pro 3

With a stunning 12" display in a sleek magnesium frame, Surface Pro 3 has all the power and performance of a laptop in a lightweight, versatile form.

Tech specs

- Powerful 64-bit Intel® Core™ i7 processor delivers smart, fast performance
- 7.68 TB hard drive so you can store movies, music, and docs
- Multi-tasking made easy with 8GB of RAM
- Enjoy side-by-side views of apps, documents, webinars and more
- Get work done with Word, Excel, PowerPoint and Outlook
- Amazing apps built in with thousands more in Windows Store
- Touch like a tablet, type like a laptop
- Productivity of a PC. Fun of a tablet.
- 2.8 lbs
- 12 inch screen size

Touch the screen to try Windows

Microsoft

Surface

Resources

LINK: [Surface FY16 BTS Retail Assets on RAD](#)

## ONLINE:

[Surface 3 PDP – Before & After Hardware Transition](#)

[Surface Pro 3 PDP – Before & After Hardware Transition](#)

[Brand Showcase](#)

[High resolution product renders](#)

[Student Landing page](#)

[Surface Offer Emails on RAD:](#)

Surface Accessory Emails on RAD:

[Surface 3 Post Purchase – BTS & Hardware transition](#)

[Surface 3 4G LTE Post Purchase – BTS & Hardware Transition](#)

[Surface Pro 3 Post Purchase – Before & After Hardware transition](#)

Windows 10 Banners

[Online Banners: Windows 10 – Before Hardware Transition](#)

[Online Banners: Windows 10 – After Hardware transition](#)

[Banners: BTS Student Offer & No Offer](#)

## VM

[Placemat for Cortana Markets](#)

[Placemat for Non-Cortana Markets](#)

[SKU Chooser for Cortana Markets](#)

[SKU Chooser for Non-Cortana Markets](#)

[Surface 3 Fact Tag \(vertical\) – Avail Now](#)

[Surface 3 Fact Tag \(horizontal\) – Avail Now](#)

[Surface 3 Fact Tag \(vertical\) – Before/After](#)

[Surface 3 Fact Tag \(horizontal\) – Before/After](#)

[Surface 3 Fact Tag \(vertical\) w/ Retailer Price Before/After](#)

[Surface Pro 3 Fact Tag \(vertical\) – Avail Now](#)

[Surface Pro 3 Fact Tag \(horizontal\) – Avail Now](#)

[Surface Pro 3 Fact Tag \(vertical\) – Before/After](#)

[Surface Pro 3 Fact Tag \(horizontal\) – Before/After](#)

[Surface Pro 3 Fact Tag \(vertical\) with Retailer Price – Before/After](#)

[Windows 10 Screen Violator](#)

[Poster with offer](#)

[Poster without offer](#)

[Shelf sign with offer](#)

[Shelf sign without offer](#)

## VM:

[Surface Table Backer Graphic](#)

[Endcap Backer graphic](#)

[4 ft](#)

[1.8m](#)

[1.6m](#)

[1m](#)

[Inline Backer Graphic](#)

[OOS Surface Pro 3 Type Cover](#)

[OOS Surface Pens](#)

[OOS Arch Touch Mouse](#)

[OOS Surface Pro 3 Docking Station](#)

[OOS Wireless Display Adapter](#)

[OOS Ethernet Adapter](#)

[OOS Mini DisplayPort HDMI VA Adapter](#)

[OOS Mini DisplayPort VGA Adapter](#)

## EVANGELISM

[BTS Fact Sheet on RAD](#)

[Publisher](#)

[PDF](#)

[BTS ILT on RAD](#)

[PowerPoint](#)

[PDF](#)

# Surface review process

Following the approval process is required by all field partners. If there are questions, please reach out to your regional lead or Dave Andresen, WWCRM VM Campaign Execution Manager for Surface and Xbox [daandr@microsoft.com](mailto:daandr@microsoft.com) or Tricia Flajole for online execution [tricifl@microsoft.com](mailto:tricifl@microsoft.com)

Do send for approval	How to send	Do not send for approval
<p>Ensure approval from region / time zone lead, and then send to WWCRM VM/online team respectively:</p> <ol style="list-style-type: none"> <li>1. All Best executions.</li> <li>2. Any Good and Better executions that deviate from RAD assets.</li> </ol>	<p>VM Review via Approval Alias: <a href="mailto:surfaceVM@Microsoft.com">surfaceVM@Microsoft.com</a></p> <p><i>Standard response time is 72 hours, though 24 hours is the goal, Monday-Thursday (Redmond time). For Best executions, more time will be needed as multiple rounds of review will be needed with key stakeholders. It is always better to engage with the WWCRM Visual Merchandising team early and often.</i></p> <p>Online review: <a href="mailto:tricifl@microsoft.com">tricifl@microsoft.com</a></p>	<p>Good and Better executions that are pulled directly from RAD</p>