

## Engineering Projects : Try-Buy - XenServer upsell

This page last changed on Jun 10, 2008 by jaguirre.

Revision History Who?	What?	When?
Johnni	Initial design based on Phil's design deck	5/20/08
Johnni	<p>Update based on meetings with Phil and Roger, and OEM information from Peter Blum:            On start-up, not... the dialog boxes cannot display at start-up the system will first have to check the license version of the servers you are connected to... if ANY of the servers that you are connected are using <a href="#">XenServer Express</a>, or <a href="#">XenServer trail</a> you will get a pop-up dialog.            ?? Not sure that to do in the case the user is connected to both a server with a trial license and a server with an Express license, but could "pop-up" both dialogs?            Seems like a very rare occurrence.</p> <p><b>Trial version</b></p> <ul style="list-style-type: none"> <li>-Change wording to read one or more of your server is running the trial edition...</li> <li>- "trial has expired" pop-up (dialog box), add link to express install, and explain roll back with loss of capabilities.</li> <li>-Have days till expired window (same as at launch) display at log-off also.</li> <li>-Type of install (Trial) and when the trial expires available in <a href="#">XenCenter</a> on the "General" tab.</li> <li>-In dialog (launch and log-off dialog) explain that purchase process could be lengthy, so buy now.</li> <li>-On landing page add a link to extend trial (MARKETING DEPENDENCY)</li> </ul> <p><b>Express Edition</b></p> <ul style="list-style-type: none"> <li>-Change wording to read one or more of your server is running the Express edition...</li> </ul>	6/9/08

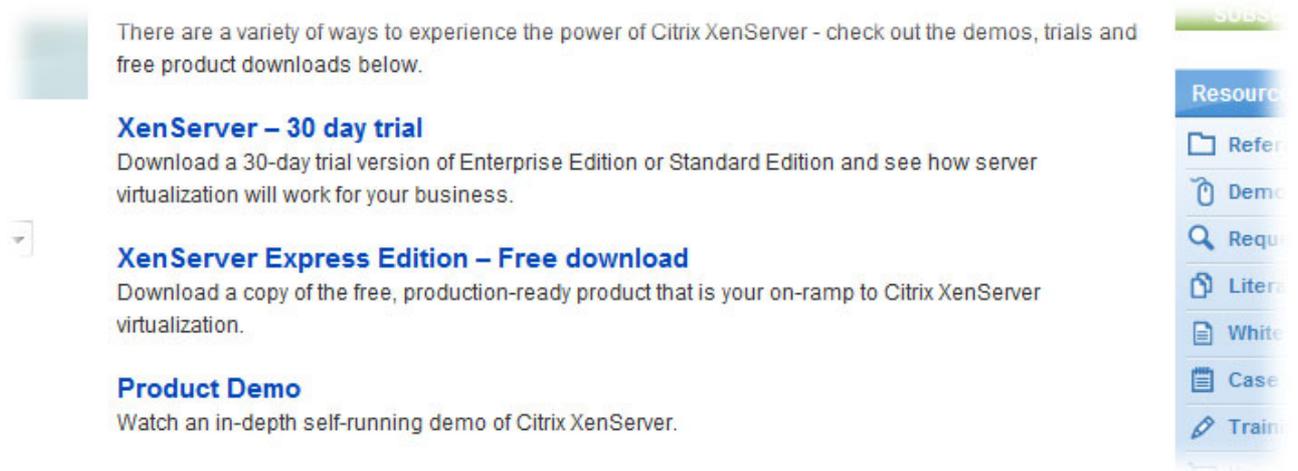
	<p>-Add a never show me this dialog again button to the launch application dialog box.</p> <p><b>OEM Edition</b> Same behavior as other editions, except HP and Dell will have their own landing page and distinct URL.</p>	
Johnni	<p>Couple of changes based on feedback from Benn</p> <ul style="list-style-type: none"> <li>-Do not hard code 30 days in the trial version, as we could lengthen the time and would not want to have to rev the UI</li> <li>-Capitalize the "E" in edition. to match other messaging</li> <li>-couple of typos</li> </ul>	

**What**

One of the Orlando open items is improving the up-sell from XS-Express and XS trial editions.

**Dependencies - Marketing**

1 - Changes made to Xen download page (Marketing)



2 - Marketing to provide Citrix landing pages and URL  
 Trial version (available from Express)  
 Buy Now (available from Trial and Express)

3 - No clear direction on what to do with OEM editions yet.

**Use Cases**

**Case 1 - XenServer Express**

On [XenCenter](#) startup make clear the limitations of the free product, and how to move to a higher edition

When there is just express licenses (i.e. no licenses)  
A start/splash screen that you need to click ok on (like Winzip)  
Make clear to admins what capabilities are provided in the full version  
e.g. "grey out" options that are only available in the full product in menus  
Display message when user attempts to perform function only in full product.  
Have an easily found link to get to the trial version  
e.g. have a "get trial" option in the UI  
Permanent URL 1 - takes to unique Citrix page (so we can track)

### **Case 2 - [XenServer](#) Trial**

On startup make clear the days remaining in the trial, and how to buy (see Winzip)  
Have an easily found link to "buy now"  
Permanent URL 2 - takes to Citrix page (so we can track)  
e.g. have a "try" option in the UI  
On trial expiry, show screen taking you to "buy now" and/or download free express edition  
Better for them to use express than lose completely

### **Case 3 - OEM editions**

How to drive up-sell if [XenCenter](#) is not included?  
How do we enable trial version for OEM partners?  
Drive up-sell through OEM partner

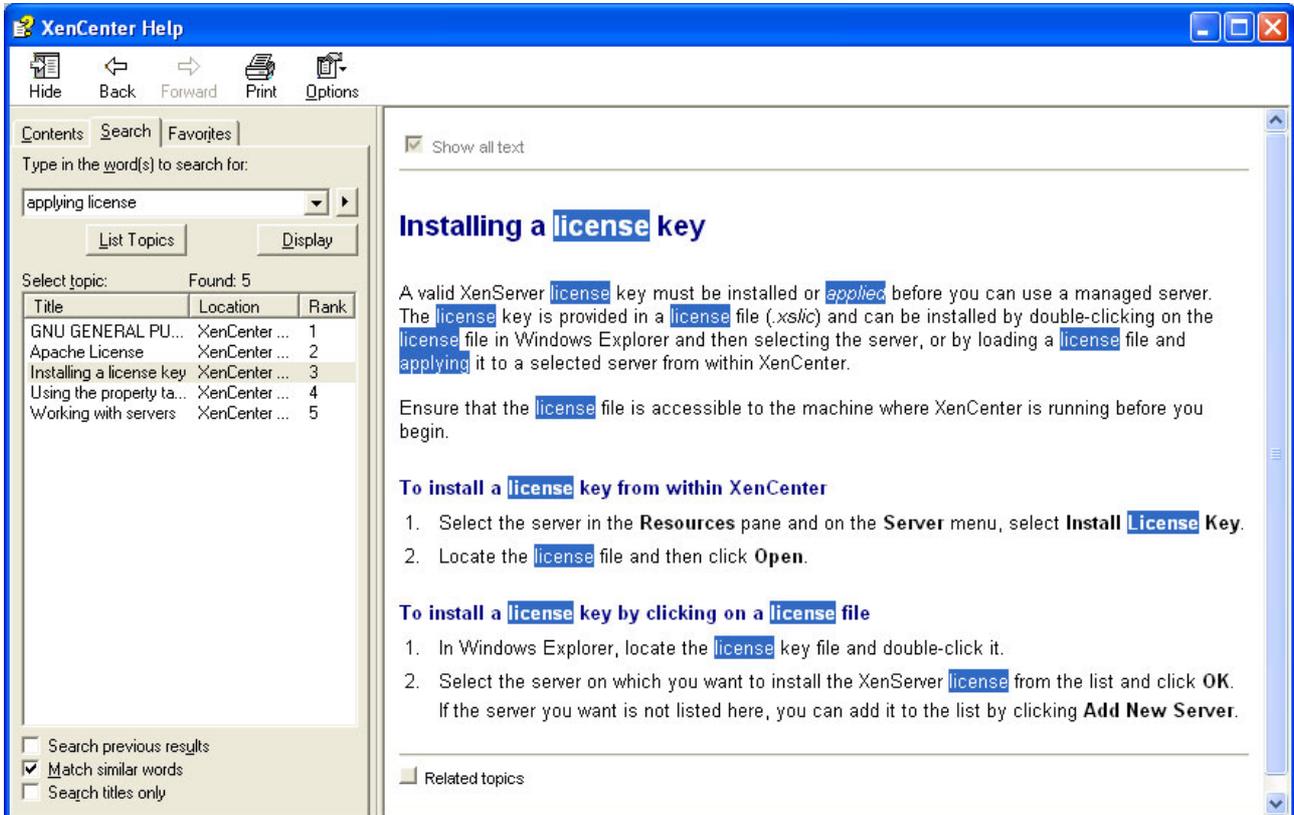
## **Express Edition Experience**

### **Splash screen**

When [XenCenter](#) connects to managed server and an Express license is found:  
OK to continue  
Link AND button to Buy Now - Press to go to Citrix landing page



"Learn more about [XenServer](#) license keys" would have a link to [XenCenter](#) help, perhaps this page...



"Buy it now" would link to a landing page to be provided by marketing.

#### Menu items

Link to trial

Link to buy



## Trial Version Experience

### Splash screen

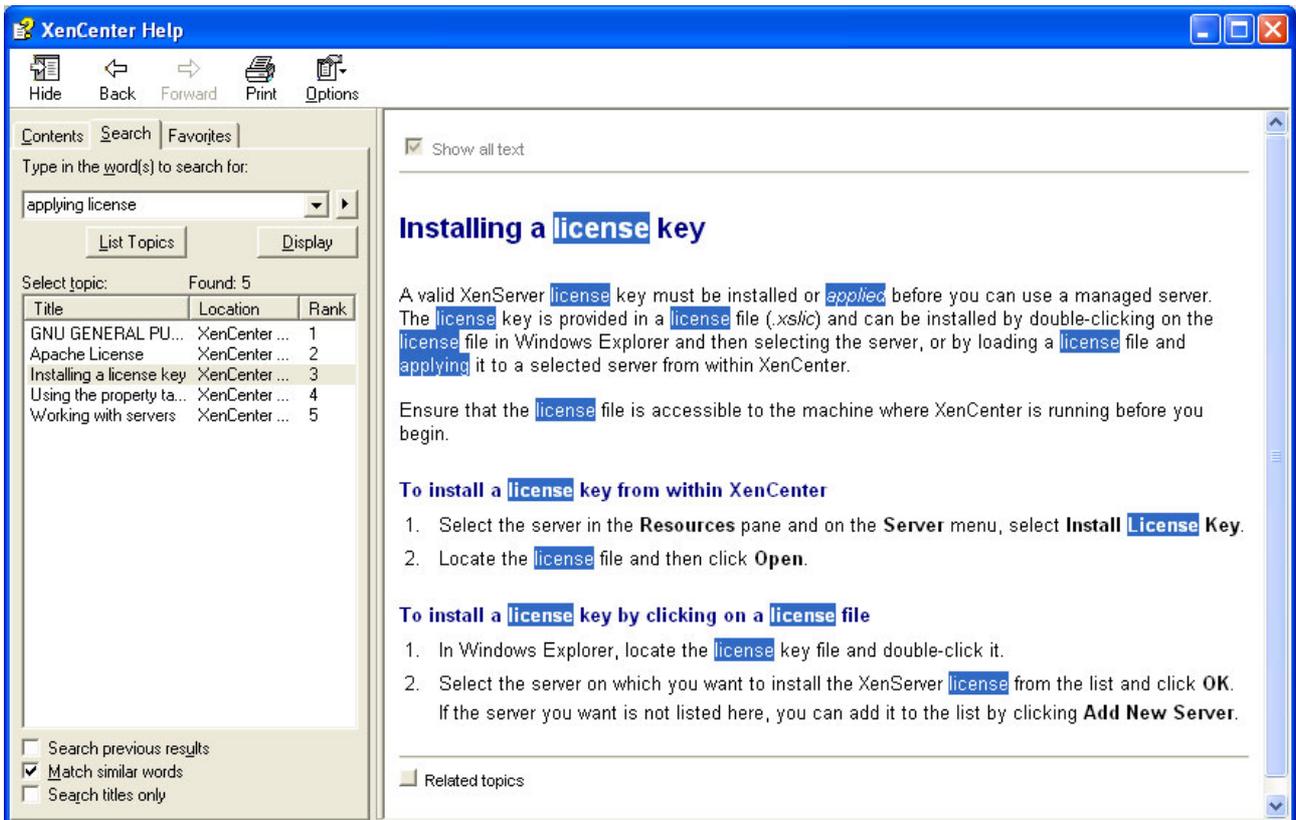
When [XenCenter](#) connects to managed server and a trial license is found:

Days till expiration - OK to continue

Link to Buy Now - Press to go to Citrix landing page

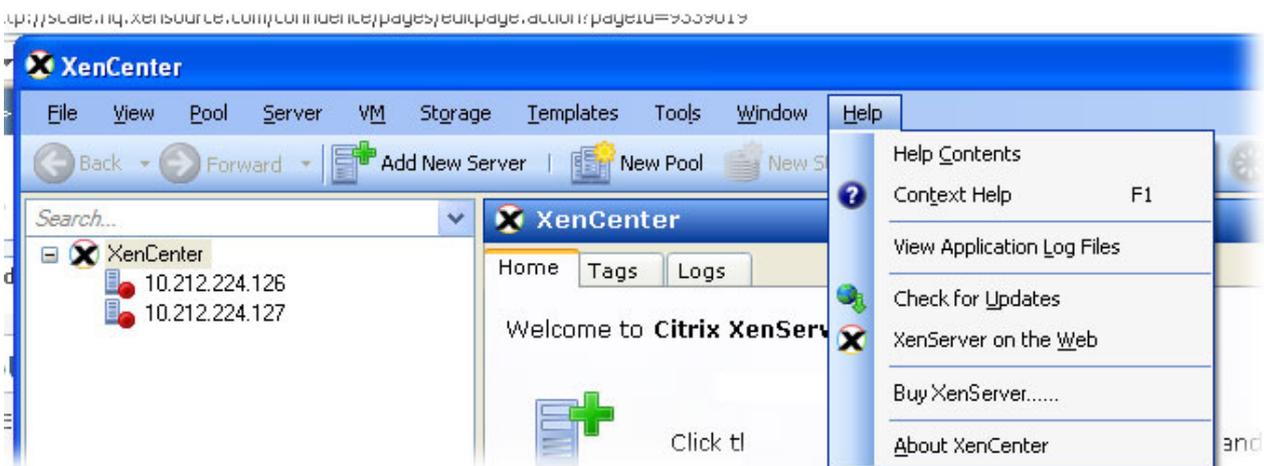


"Learn more about [XenServer](#) license keys" would have a link to [XenCenter](#) help, perhaps this page...



"Buy it now" would link to a landing page to be provided by marketing.

## Menu items



## Expired trial experience

30 day trial has expired pop-up. Explains that the 30 day trial has been used up, has a link to [XenServer Express](#) (limited functionality), and a link to [XenServer Enterprise](#) (Buy now) landing pages.



Ok, dismisses the dialog. If the user later clicks on a [XenServer](#) in the resource pane of [XenCenter](#), that has an expired trial license applied they will again receive this dialog.

## Goals

### Stretch Goal 1

Simplify the selection of trial or express downloads

Create a single download initially installed as Express Edition

Integrate the process of requesting and installing a trial license directly into the express edition UI (see Comodo)

Make trial the default, and the user has to say "no thanks" to end up with express

Have an opt-in process on all editions to collect usage data.

E.g. VM types & numbers, server specs, features used.

### Stretch Goal 2

Reduce number of abandoned downloads (only 30% completion rate)

Current download is too large (250Mb)

Create iTunes like download manager

Automate installation

Include functionality to burn ISO image to CD?

Allow server to boot from single ISO and download support files from web?

### Summary

2 unique, trackable, upsell URLs

Express to trial, trial to buy  
Need marketing & Sales/Vivo buy-in  
Otherwise, these changes are minor and possible for Orlando.  
Look at stretch goals for Tokyo release