



From mikemap Sat Nov 09 14:26:58 1991
To: mikecan
Subject: Re: Tom Evslin
Date: Sat, 09 Nov 91 14:26:58 PST

No. He is a good match for us. I am willing to do a lot extra to get him.

>From mikecan Mon Nov 4 14:23:31 1991
To: mikemap
Subject: Tom Evslin
Cc: danielp
Date: Mon Nov 4 14:23:13 1991

Mike,

Daniel and I are working out the offer for Tom. Just a quick question--did you discuss any specifics with Tom? I want to make sure we are all communicating similar info.....thanks.

Mail-Flags: 0001
From mikemap Sat Nov 09 14:27:47 1991
To: billg
Subject: Word Upgrade Price Drop
Date: Sat, 09 Nov 91 14:27:47 PST

We will stay at \$129.

>From jonre Mon Nov 4 12:52:55 1991
To: richmac
Subject: Urgent: Word Upgrade Price Drop
Cc: garygi jeffr johnsch mikemap mikene russw scotto
Date: Mon Nov 4 12:52:19 1991

Rich, you've got good points raised here. Given the need for us to get Win Word 2 out asap, and given your points, we're going to stay at \$129. I think we will lose some incremental opportunities among people don't understand how much better Win Word 2 is than Win WordPerfect, but hopefully if we do a great job marketing and selling Win Word 2 the \$30 difference won't be significant. We should certainly be flexible w/ large accounts that raise this issue.

Mail-Flags: 0001
From mikemap Sat Nov 09 14:30:54 1991
To: arts
Subject: Re: I'm back...
Date: Sat, 09 Nov 91 14:30:54 PST

Hope you are feeling better.

Would like to set down and discuss a apple coordination strategy.

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What do you think -- and then, David, can I get on the agenda still?
Thanks.

From elainew Sat Nov 9 15:08:30 1991
To: chrisp jeffr lpos2wrdr mikemap obumktg
Cc: hankv lewisl pinckney
Subject: The latest on Word for OS/2
Date: Fri Nov 09 22:00:15 PDT 1990
Mail-Flags: 0000

I want to bring everyone up to date on the latest happenings with Word for OS/2.

Current Strategy for PM Word:

A. We want to support our OS/2 customers. Based on IBM's commitment of "a better Windows than Windows", we believe that it is in ours and the customer interest to focus our development effort into more features and less platforms.

B. If IBM does not deliver on the Windows part of OS/2, we will have to re-evaluate our plans and take actions based on the opportunity presented with OS/2 and other operating platforms.

C. If our customers want to move between platforms (OS/2 to Win) we want to have aggressive upgrade programs to help them.

Tactically what does this mean to our customers:

A. Current plans for a PM Word 2.0 release are on hold. If IBM delivers on their promise of OS/2 2.0 being better Windows than Windows, then Winword 2.0 will be the logical product for customers on OS/2. If OS/2 2.0 does not deliver, we will re-evaluate the situation at that time.

B. To make sure OS/2 customers currently have the best word processing product available to them on the PM platform, we will be doing a PM Word maintenance release in the very near future.

C. If customers who are currently on the OS/2 platform want to move over to Windows, there is a new OS/2 to Windows SWAP program available to them. The objective of this program is to generate good will, "a customer for life" and provide an easy migration path from OS/2 to Windows. This program is CONFIDENTIAL and will be available to corporate accounts at the discretion of our field sales force the first week in November.

In a nutshell this program offers corporate accounts with 25 or more existing licenses of OS/2 the option to:

1. SWAP their OS/2 for Windows 3.0 or 3.1 for FREE
2. SWAP their Word for OS/2 to Word for Windows 2.0 FREE
3. SWAP their Excel for OS/2 to Excel for Windows 3.0 FREE

The eligibility factor is the number of OS/2 units they have, so there is no minimum application number for participation. For example, if an account had 50 units of OS/2 and 2 units of PM Word, they could SWAP for 50 units of Windows and 2 units of WinWord.

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If you have any questions on PM Word, the above outlined strategy or the new OS/2 to Windows SWAP program, please feel free to contact me.

Thanks,
Elaine

Mail-Flags: 0001
From mikemap Sat Nov 09 16:48:44 1991
To: billg peteh
Subject: 123 MAC bundling
Date: Sat, 09 Nov 91 16:48:43 PST

I spoke to Dan Eilers, Claris, early this week. He said that it was true that Apple was considering bundling 123Mac on every mac CI and higher for their second quarter (Jan-Mar). He said that he was speaking to Spindler on Wed, and that he had a board meeting on 11/14 (Sculley and Puette are on the Claris board). He plans on making it a major issue.

I spend time giving him argument as to why apple would not sell a single unit more of hardware, and that they we just effecting software guys, that now that there were several ss offering, why did apple want one to win over another,

He said the decision would not be made for a coupel of weeks. He asked that I call him after the board meeting and he will tell me who in Apple is the key sponser for me to call, if he cant kill.

Mail-Flags: 0001
From mikemap Sat Nov 09 16:56:41 1991
To: frankga
Subject: Re: Applications Horizons
Date: Sat, 09 Nov 91 16:56:40 PST

Doing great. Things seem to be moving fast. We should try to go to lunch next week.

>From frankga Sat Nov 9 15:50:45 1991
To: mikemap
Subject: Applications Horizons
Date: Sat Nov 9 15:50:11 1991

how's it going???

i will be there!

Mail-Flags: 0001
From mikemap Sat Nov 09 17:17:19 1991
To: adamb bobga chasst darrellb garygi hankv lewisl markk peteh richt
Cc: billj jonre jonro josephk mikede mikene pinckney
Subject: Re: Launch logjam - Excel plans
Date: Sat, 09 Nov 91 17:17:13 PST

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johnsage johnwil johnwood joser juanhe judithg judyi juliecha
karencan karenfr kateb kates kathmc kayak keithne keithw kellij
kellyca kellys kenc kennw kennyy kentis kimke kimky kimlu krishna
kristd lancec leeth libbyd lindami lisama lynng lynnre marct mariaov
marieel markch markol markusg martabr martas martinem maryd maryo
melissas michael michelsh mikebl mikeha mikehal mikehou mikekoe
mikekub mikemap mikemcc mikeme mikene mikescha miket mugen nickni
norahh pamjo pamk paulel paulkle pedrom phaniv quinnc rachelb
rajeshj richardp richgl rickda roar robertg robinf robing robme
rossy ruthb ruthd ruthl sandram sanjayk sarahlo sarahra scottbe
scottle scottst scottw seanch seanm sharmilg sherrylh shoucl siobhan
sonjas sridhar srinik stacysi stephw steveh stevehe steveol stevesa
stevesaf stevesho suebc sunyw suryanr svets t-katej tammyt terryw
timmu timothym timwo tinak tomis tomj triciag veroni veroniqp wayneh
wendybo wendywa wesleyt xiaoth yasmine

Subject: Celebration Invite

Cc: peggyk susanb

Date: Mon Nov 11 13:18:11 1991

Susanb sent this mail last week. I've heard from several people on the TO list that they did not receive the invitation.

For this reason, we are re-sending the invitation.

Solution Series and Sim-Ship, it was a hard working summer and fall.

Everyone should be feeling very proud of their efforts and the fine products now shipping. Sales have surpassed our expectations!

It's now time to celebrate!!!

Triciag and I would like you and your guest to join us for food and fun at the.....

EBU-IPG Solution Series/Sim Ship Celebration Party
Thursday, November 21st 7:00 PM
Embassy Suites Hotel - Bellevue

Please RSVP to peggyk by Wednesday 11/13 with number of people attending.

Directions:

Embassy Suites - 3225 158th Ave SE
So on 156th to Eastgate Way (156th ends at Eastgate Way)
Left on Eastgate Way
Left on 158th Ave SE

Mail-Flags: 0001

From mikemap Mon Nov 11 14:51:30 1991

To: hankv peteh

Subject: Re: Incremental spending for Excel ***Confidential***

Date: Mon, 11 Nov 91 14:51:26 PST

MS 5047529
CONFIDENTIAL

what do you think.

>From chrissm Mon Nov 11 11:55:37 1991
To: mikemap
Subject: Re: Incremental spending for Excel ***Confidential***
Cc: bernardv bryann chrissm orlando petern stevewe
Date: Mon Nov 11 11:53:59 1991

Mike,
attached is the response from each of the subs
wishing to participate in the program.

The grand total comes to close to \$ 1 million

A summary by sub is as follows;

ARGENTINA..... \$30 K PLUS 20 SAMPLES
VENEZUELA..... \$32K
BRAZIL.....\$130K
MEXICO.....\$85 K PLUS 150 SAMPLE COPIES OF EXCEL
JAPAN.....NO ADDITIONAL NEEDED. BUDGET SUFFICIENT
TAIWAN.....\$75K
KOREA.....NO ADDITIONAL NEEDED... BUDGET SUFFICIENT
HONG KONG.....\$40K
FAR EAST OVERALL..... NEED REDMOND TO MAKE EXCEL 4 DBCS WORK
A HIGH PRIORITY.NEED MORE MATERIALS FOR TRAINING
CENTERS AND CONSULTANTS...EST \$100K
AFRICA/ MIDDLE EAST.....\$175K
SINGAPORE.....\$50K
AUSTRALIA.....\$250K
=====
GRAND TOTAL= \$967k

Per our emails below, we are assuming this excess funding does not hit the
subs p/l's.

The detailed inputs from each region are attached below.

let me know what the next steps are.

-chris-

=====
>From mikemap Sat Nov 9 13:19:45 1991
To: bernardv chrissm
Cc: hankv peteh
Subject: Re: Incremental spending for Excel ***Confidential***
Date: Sat, 09 Nov 91 14:19:45 PST

It can be discussed with your senior managers. Billg has
suggested that we should use some incremental funds to try to
really go after lotus. They would come outside of the budget.
I am not sure how they would be accounted for. The idea is to
only spend where we can really hurt Lotus.

Any ideas or places where I should seek incremental funding for
your business areas would be welcome.

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>From chrissm Mon Nov 4 12:58:40 1991
To: bernardv mikemap
Subject: Incremental spending for Excel ***Confidential***
Cc: chrissm

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Date: Mon Nov 4 12:57:49 1991

Mike,
I assumed this added funding would come out of your P/l,
and would not hit the subs p/l.
was this a correct assumption ?

and what level of justification do we need for the
additional programs/funding ?

=chris=
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>From mikemap Thu Oct 31 15:43:56 1991
To: bernardv chrissm

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Subject: Incremental spending for Excel ***Confidential***
Date: Thu, 31 Oct 91 16:43:51 PST

Bill has asked us to look at how we could attach Lotus in the
next 6 months by having incremental marketing funds and
programs. Do you have any ideas? Could you use some extra
marketing fund to direct at excel and against 123?

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LATIN AMERICAN REGION

Message 91:

>From orlandoa Mon Nov 4 14:46:20 1991
To: chrissm
Cc: carlosf eugenio b gregdi orlandoa philw
Subject: from: Orlando - EXCEL vs LOTUS promotion
Date: Sun Jul 21 18:43:52 PDT 1991

Attached please find LA feedback on the promotion of excel vs Lotus 123.

ARGENTINA

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Program: CROSS UPDATE(6 months)
US\$ 220 update for any competitive spreadsheet(request of
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123 original) --- 20 Excel PP Samples

Marketing Funds Requested: US30k

VENEZUELA

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Program: Excel Tour 4 cities per country (COLOMBIA/VENEZUELA
PUERTO RICO/CENTRAL AMERICA) - 30 Spanish Excel Samples
(6 months)

Marketing Funds Requested: US32k

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BRAZIL

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Program: CROSS UPDATE(6 months)
US\$ 150 lotus 123 replacement - Advertising and promotion
Excel Roadshow + 500 Excel PP in Portuguese

Marketing Funds Requested: US130k

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MEXICO

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Program: THE GREAT OFFICE PUSH - Buy office and get one Excel free
(distributors) mail campaign(dealers).(6 months)

Marketing Funds Requested Mexico : 85k as follows

30k Incremental marketing funds(Excel emphasis)
30k Large account Seminar series(Excel emphasis)
15k Distributor promotion (Buy 1 office and get 1 Excel free)
5k Dealer mailing (Excel emphasis) + 150 Excel PP Spanish Samples

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TOTAL LATIN AMERICA = US\$ 277

Orlando

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MORE DETAIL FROM MEXICO

>From philw Sat Nov 9 22:28:50 1991
To: chrissm
Cc: joelca orlandoa philw teripa
Subject: EXCEL vs LOTUS promotion
Date: Sun Nov 10 22:25:15 PDT 1991

Just in case you need more info on Mexico's plans relative to
Excel emphasis.

After discussions with Mauricio and Felipe, and based on the success
we are having and lotus and quattro's problems in the region, we
did not feel that we needed to cut the price of Excel alone as
deeply as they are with the swaps in the US. We felt this would
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not only cause us to lose revenue, but cause problems with large
customers (Bancomer and Bancomext) that just bought large quantities
of Excel.

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Instead, we decided some time back to promote Win Office very aggressively, at a very aggressive price (\$750, same as US, where spanish Excel is \$570.) If additional funds are approved, here is how we would spend them:

\$30K (more money behind an Office oriented campaign we are already planning that would stress price).

\$30K (more money behind large account seminars we are already planning that would feature Windows and Win Office (and would

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communicate the low Office price)

\$15K A distie promotion. We would encourage dealers to buy Office. perhaps by offering them a free Excel (or something similar)

\$ 5K A mailing direct to dealers, offering them a free sample of Excel and stressing Excel vs. 1-2-3 and the special Office price. (We'd need about 150 samples in addition to the \$5K.)

\$80K plus 150 sample copies of Excel

Hope this helps. Please let us know if you have further questions. We are tightening our plans for Windows promotion for Q3&4 now. Phil

FAR EAST REGION

TO: Chris Smith

>From: Peter Neupert in Hong Kong

Subject: Additional Excel Marketing Dollars in FE

Date: Nov 10, 1991

cc: Esther Dekker

Per your request, I've reviewed the Excel budgets (rev's, units, and marketing dollars) throughout my region. Given the immature infrastructure

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in my region (Windows just getting established, limited marketing staff in the subs, and immature channel structure,) I have given a lot of thought as to whether throwing more marketing dollars for Excel (alone) would be a good or at the best incremental investment. I propose the following:

Overall:

1) Make sure Excel 4 DBCS work a priority in Redmond: Target DBCS release 90 days after U.S. Release. Includes Data Access/SQLC considerations.

2) Provide more materials for training centers and consultants. Either make them modular and easy to localize or provide assistance getting them localized. (I will use additional Marketing \$ to do this locally if

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necessary) - can't estimate costs from here - guess ~\$100k

Japan:

1) I gave them 11.5% Marketing guideline in FY92 budget. I don't think they can wisely spend more \$ at this time on Excel alone. They should spend more \$ on marketing Windows to help Excel.

2) We should consider a mini-Office package of Excel & JWP at a good price.
-No extra \$ required.

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Taiwan:

- 1) Can effectively use extra money - propose \$75k for:
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- more ads
 - more seminars
 - localized ATC materials

Korea:

- 1) Is not planning to ship 3.1 - shipping to 4.0 No incremental FY92
\$ needed \$0k.
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Hong Kong:

- 1) Propose extra \$40k for:
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- more ads to gain awareness
 - development of materials for ATC's to transition Lotus customers to Excel

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AFRICA/ INDIA/ MIDDLE EAST

>From bryann Thu Nov 7 20:13:43 1991
To: chrissm
Subject: excel marketing push
Date: Thu Nov 7 20:12:59 1991

are requesting additional marketing money to push excel into 3 primary markets: South Africa, Middle East & Israel.

Focus of the program in each market is as follows:

ProgrExcel cross-grade

* swap LAs from 123 to excel before they move to 123w.

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- * seminar days within targeted accounts
 - * direct mail to large accounts
 - * Road show seminars
 - South Africa - Joberg, Capetown, Durban, Pretoria
 - Israel - Tel Aviv
 - Middle East - UAE, Saudi, Kuwait

Pricing: 150 dollar upgrade (channel participation)

Funds Requested:

- * South Africa - 80,000
- * Israel - 35,000
- * M.E. - 60,000

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Total requested for Aime = 175K

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let me know if further detail is needed. thanks,....

bryan

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SINGAPORE

>From stevewe Thu Nov 7 08:50:57 1991
To: chrissm
Subject: Singapore Excel Funds
Date: Thu Nov 07 08:49:57 1991

They would like two things:

(1) more US initiated worldwide placed Corporate testimonial advertising. They feel this would add to the momentum of large historical Lotus 123 users feeling comfortable with the move to Excel.

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(2) more \$\$\$ for seeding program. They have to pay a high transfer price for their marketing units and they could use more. I assume \$50,000 would enable them to fund a small seeding/follow up program.

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AUSTRALIA

>From stevewe Thu Nov 7 08:24:11 1991
To: chrissm
Subject: Excel extra funds
Date: Thu Nov 07 08:24:03 1991

Effectively what PTY would like to do is have a white box or lower margins combined with a swat team of telemarketers and direct mail.

What Jen would really like to have is her personal favorite, white box for office, then go after individual lotus or workperfect users with an offer they can't refuse.

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>From jenz Thu Nov 7 03:11:37 1991
To: stevewe
Subject: Excel extra funds
Cc: davidmil jenz neilbu stevewe
Date: Thu Nov 7 06:09:28 1991

OK the key programs we would embark on would be

- a) heavy evaluation programme - white box + telemarketing team
- b) SWAT team - to demonstrate, demonstrate, demonstrate
- c) assist in migration issues from Lotus.
- d) working models to anyone who moves or seed product
- d) SWAP out programme - run by SWAT team of telemarketers

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- e) fund a couple of Beach Head accounts macro conversion from Lotus and watch the rest of them come with us.
- f) Direct Mail to 30K in Institute of Chartered Accountants a Lotus bastion
- g) Advertise the SWAP and working models

All of this would cost more than \$250K

\033BWe are currently at 35% marketshare, I would guarantee you 50%+ in 6 months.

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For \$450K-\$500 I will give you number 1 spreadsheet + 50%
For \$300 neck and neck and 45%

I think we have a fantastic opportunity with Excel 4.0 to really drive the nails in the coffin of Lotus.

We are on a real roll here and if we could get extra support I KNOW we can make it number 1 within 6 months.

We have Lotus' mailing list for their end user magazine I could have a "wow" of a time with this.

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Mail-Flags: 0001
From mikemap Mon Nov 11 14:52:06 1991
To: joachimk
Subject: Re: FW: Oem prices for applications
Date: Mon, 11 Nov 91 14:52:05 PST

Lets discuss today.

>From joachimk Mon Nov 11 11:00:18 1991
To: mikemap
Subject: FW: Oem prices for applications
Date: Mon Nov 11 11:37:20 PDT 1991

You want to answer this? Otherwise I will.

>From billg Sat Nov 9 14:33:12 1991
To: joachimk, mikemap
Cc: mikehal
Subject: Oem prices for applications

Date: Sat, 9 Nov 91 14:32:41 PST

I am reading the 11/1 version of this. I totally disagree with charging for working models. Any support overhead is offset by the benefit of people learning our product. I think it is terrible to charge for these - we should make it free and get lots of people to do it.

I cant say I understand this document. If I read it properly someone think we can charge oems more for our applications than we charge distributors. That is nonsense isnt it?

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I dont understand where the benefit for bundling on a lot of systems is in here. All I see are very high prices and a \$5 incentive for preinstall. I assume the \$5 would include people like Dell who do it on a customers specific request.

I want to understand who can sell 25,000 units of a high end application in 6 months. Can people cross channel onto machines they dont make and act like a distributor or is that prevented? Is so the numbers are very very high. If I rely on MS for support I will almost always go buy the package from the distributor.

I think it is absurd that these prices arent more tied together with our distributors pricing but with special qualifications. Also I would tie royalties more in line with MLP type pricing.

Mail-Flags: 0001
From mikemap Tue Nov 12 08:20:40 1991
To: billg joachimk
Cc: mikehal
Subject: Re: Oem prices for applications
Date: Tue, 12 Nov 91 08:20:38 PST

I agree we should not charge for working models or demo disks. The price was included to give a starting point for neogiation, to get a little more out of Windows.

The general thought on OEM for apps is

1. for distribution deal these are called a per copy deals - that is where a OEM gives the customer a choice of ordering or not - then the OEM gets the same deal as thru distribution. This was not spelled out clearly in the document except for international. We will fix that. We avoiding these as best we can asking the oem to buy thru distribution.
2. When the OEM agrees to bundle with every machine (per system [100% on a single model] or per CPU [100% on a cpu type ie 386]), then the discount conceptual is the same as Windows and DOS OEM royalties (as a % of SRP). The exception to this is for EBU products, where we are more aggressive. Generally the OEM to manufactures the product. There is a provision for the oem to buy finished goods from us (this is called packaged component price), for us or him to give service, and a discount for pre-loading. What is missing from the document is a description of bundling. This is difficult because of legal concerns. We also need to clean this up.

An oem must bundle on there systems. I reseller is not allowed to use this schedule. The pricing looks like this for Excel.

distributor (51% - all)	bundled* (min 2500)	bundled* (min 25000)
\$252.45	\$219	\$182

* this is maximum assumining we do all support.

|>From billg Sat Nov 9 14:32:43 1991

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Subject: Oem prices for applications
To: joachink, mikemap
Date: Sat, 9 Nov 91 14:32:41 PST
Cc: mikehal

I am reading the 11/1 version of this. I totally disagree with charging for working models. Any support overhead is offset by the benefit of people learning our product. I think it is terrible to charge for these - we should make it free and get lots of people to do it.

I cant say I understand this document. If I read it properly someone think we can charge oems more for our applications than we charge distributors. That is nonsense isnt it?

I dont understand where the benefit for bundling on a lot of systems is in here. All I see are very high prices and a \$5 incentive for preinstall. I assume the \$5 would include people like Dell who do it on a customers specific request.

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I think it is absurd that these prices arent more tied together with our distributors pricing but with special qualifications. Also I would tie royalties more in line with MLP type pricing.

Mail-Flags: 0001
From mikemap Tue Nov 12 08:39:08 1991
To: billg stevesh
Cc: bobga darrylr steveb
Subject: Re: Fonts shipped with applications
Date: Tue, 12 Nov 91 08:39:06 PST

SteveSh an I met yesterday on this. I agree with his recommendations.

I also agree that there is room for much confusion here. The font mapper and defaults needs to be really good.

We should not underestimate the weight of the standard 35 postscript fonts. There are several factors which because of their installed base caused them to be required by many users. HP will require a long time to get a new set of fonts installed in enought volumes to eliminate the need for the PS fonts. By PS fonts I mean codepoint and metrics compatable.

1. ATM is heavily used on windows - one of the top win apps in terms of sales, and often promoted with pluspack (addl 22 fonts). Several ISVs bundle also - Aldus, Lotus, ... Therefore there are many documents with these font names embedded. I am sure all of the users would love to go to true type if the fonts were available.

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Not too worried about the slides which I have seen, but more about the speeches from jeff and pete on the help facilities. I'll spare you the tedious legal discussion on "keyboard compatibility", but when we last met with jeff a week or so ago to discuss the legal issues, we left it that jeff would talk with billg to get the blessing on the new, more aggressive approach of placing equal emphasis on "learn and do", rather than the earlier focus of the facility being primarily a learning tool.

Don't know if jeff has gotten to bill yet, and will try to check that out with jeff before tonite, and adjust our "mindset" accordingly.

okay?

Mail-Flags: 0001
From mikemap Wed Nov 13 13:02:21 1991
To: lewisl
Subject: We need a scernario slide. I have the story, do you have a slide
Date: Wed, 13 Nov 91 13:02:21 PST

Mail-Flags: 0001
From mikemap Wed Nov 13 16:11:30 1991
To: roxannaf
Subject: Re: Business Week article/"Slide ware"
Date: Wed, 13 Nov 91 16:11:27 PST

you did great. Would like a copy of the article, but no hurry.

>From roxannaf Wed Nov 13 12:15:17 1991
To: mikemap
Subject: Business Week article/"Slide ware"
Cc: roxannaf
Date: Wed Nov 13 12:14:56 1991

Mike -- below is the article you requested. The quote about "slideware" is quite a ways into the article. The paragraph has the word SLIDEWARE on the left hand margin. Let me know if you need a paper copy of the original. I have it here on my desk.

(PS. Did we pass the test?!)

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October 30, 1989

SECTION: INFORMATION PROCESSING; Number 3131; Pg. 148

LENGTH: 1827 words

HEADLINE: 'MICROSOFT IS LIKE AN ELEPHANT ROLLING AROUND,

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SQUASHING ANTS'

BYLINE: Richard Brandt in San Francisco

HIGHLIGHT: As the company's dominance grows, so have the complaints of other suppliers of software

BODY: There's no doubt about it. Microsoft Corp. wants to dominate the world -- the personal computer software world, that is. And it isn't very far from doing so: It already supplies the core software for just about all of the world's 25 million-plus IBM PCs and their clones. It has done well, too, in many sectors of the huge market for PC applications programs -- spreadsheets, word processors, and the like. All in all, it's the leader in total PC software sales -- Wall Street expects revenues of \$ 1.1 billion for the year ending next June, up 40% from the year before.

Now, Microsoft is beginning to suffer the slings and arrows that often come with such fortune. Other suppliers of PC software are downright angry over its dominance. The company, they say, is just too powerful and its products too pervasive. Its virtual monopoly in PC operating systems -- the software life-support systems that all other programs call upon for access to the PC's memory, disk drives, and display screen -- means that Microsoft's every technical change, strategy shift, or mistake can adversely affect producers of applications software. They argue, moreover, that Microsoft is abusing its systems software edge to put them at a disadvantage -- and win greater control of the market.

INTIMATE TIES. This, critics say, will make it harder for Microsoft's small competitors to prosper. And that hints at less innovation in software, the one part of the world computer market in which U. S. companies still hold an unassailable edge. Says Fred M. Gibbons, president of \$ 100 million-plus Software Publishing Corp.: "Microsoft is like an elephant rolling around, squashing ants."

William H. Gates III, Microsoft's CEO, argues that such fears are misplaced. He contends that his company is so influential simply because it knows more than any other about how the pieces of a PC fit together, from chips to other components to software. Microsoft's intimate ties with leading companies such as IBM, Compaq, and Intel bode well for the U. S. computer industry, he argues. By virtue of those relationships, Microsoft can establish coherent technical standards -- in graphics, communications, or computer languages, for instance -- that if followed by everyone would speed up the process of writing new programs. Those would help sell machines, fulfilling Gates's vision of a PC on every desk and in every home.

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McGraw-Hill, Inc., Business Week, October 30, 1989

What worries other software makers is where they fit into this vision. While tightening its grip on the \$ 1.4 billion systems software market, where its MS-DOS and OS/2 operating systems are king, Microsoft has pushed harder than ever into the \$ 4.4 billion market for applications packages. Its Microsoft Word text-processing program, Excel spreadsheet, and other such products now account for 47% of total revenues -- almost equal to its systems business. And competitors say they're getting squeezed.

Recently, for example, Microsoft stopped providing them with lists of customers that use Windows, its graphical extension to MS-DOS. Instead, it offered to place ads for their Windows-compatible software in a booklet shipped with each copy of Windows. Competitors suspected that Microsoft's own applications group was still getting the lists. So they complained -- and got the lists back.

VOCAL CRITIC. More unsettling are suspicions that Microsoft doesn't keep its systems and applications groups as separate as it promises -- that church and state tend to mingle. Competitors figure that if Microsoft's applications people get peeks at unannounced systems software, they should, too. Otherwise, they're at a disadvantage. Microsoft fuels suspicions by sometimes shifting workers between its groups. And at Agenda 90, a recent trade conference, outsiders were angered to see an Excel specialist demonstrating new operating system features that they hadn't been briefed on. Apple Computer Inc. solved such conflicts in 1987 by spinning off its applications group into an independent company, called Claris Corp. Gates says that's not necessary at Microsoft.

Micrografx, a tiny graphics software company, might disagree. Recently, it approached Microsoft with a program it thought the larger company might want to use. But it showed it only to Microsoft's applications developers -- not to its systems people, who it feared would copy its proprietary ideas. Micrografx President J. Paul Grayson says that one person who saw his program was soon transferred to Microsoft's systems division. Eventually, Gates placated Grayson with a cross-licensing deal, which Microsoft concedes was unusually generous. Still, Grayson says he was "manipulated by Microsoft," which insists it did nothing wrong.

PAINFUL P.S. Whatever the case, Microsoft's tactics have strained relations even with partners. This fall, John Warnock, chief executive of Adobe Systems Inc., had an emotional, public falling out with Gates. Adobe's top product, called Postscript, is a key program for desktop publishing. Earlier this year, Apple, Adobe's best customer, said it would replace Postscript in Apple computers. Microsoft continued to do business with Adobe. Then, in September, Apple and Microsoft surprised Warnock by announcing at an industry conference that they would collaborate in competing with Adobe. Says Warnock: "We

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used to be a strong ally of Microsoft." Now, "it's easier to help their competitors."

The biggest gripes have been with Microsoft's moves in operating systems. Like Microsoft, its competitors use those basic programs as "platforms" upon which to construct applications software. But if the platform is shaky, late to market, or just not selling well, writing software for it can be risky -- as the tale of Windows shows.

Starting in early 1983, Microsoft tried to supplement MS-DOS with Windows, a program that makes PCs act much like Apple's Macintosh. But outside developers were wary of writing programs for Windows, which was 16 months late to market,

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because of its many early technical problems. They say Microsoft also gave them mixed signals: It positioned Windows as a program mainly for low-end PCs, while it worked on a more advanced -- but incompatible -- operating system called OS/2 for more powerful computers. And IBM threw its weight behind OS/2.

Much to the industry's surprise, however, OS/2 has caught on slowly. And Windows has taken off. Microsoft has shipped 2 million copies of it, compared with only 150,000 of OS/2. And next year, it will bring out a major revision of Windows that will be easier to program and more functional than the original -- enough so, in fact, to do many of the same jobs that OS/2 was supposed to handle. Windows, says David G. Bayer, an analyst at Montgomery Securities, "has become the platform of choice."

DUPLICITOUS? Guess which company is poised to exploit that platform? While most competitors concentrated on writing for OS/2, Microsoft has been readying a slew of applications for Windows as well. They include a fancy new word processor, a project management program, and a long-rumored data-base program called Omega. That's leading companies such as Lotus Development and Software Publishing to call Microsoft duplicitous. They charge that Microsoft enhanced Windows just to help its own applications group. And, they claim, the more powerful Windows will further hurt OS/2. "It's irresponsible of Microsoft to do that," says Software Publishing's Gibbons.

Even discounting the effect of a revived Windows, Microsoft has disappointed those counting on OS/2. Introduced in 1987, that program still can't do all it promised, such as use all the power of Intel Corp.'s popular 80386 chip. Worse, perhaps, is that Microsoft still offers no aids for modifying Windows programs to work with OS/2. A recent poll shows that software executives don't expect OS/2 to really catch on until 1993 -- two years later than what they predicted last year. Gates's answer: Microsoft is devoting the maximum feasible engineering talent to OS/2 and Windows, favoring neither.

' SLIDeware. ' On top of all this are wilder accusations -- for instance, that Microsoft peddles nonexistent products to scare off competition. Michael J. Maples, the company's vice-president of applications software, shows slides at trade shows that list the software markets Microsoft intends to enter -- programs for desktop presentations, for instance. One competitor calls that "slideware. They have slides saying they're going to be involved in every conceivable area of innovation five years from now," he says. "It slows the pace of innovation" by intimidating smaller competitors.

Gates laughs off the idea of software companies quaking in their boots. "So what are they doing instead, starting

fast-food restaurants?" he quips. "I've never heard anyone say, 'we're chicken, we can't compete with you.'" WordPerfect Corp., for example, is beating Microsoft in word processing, with a 40% share of the market, up from 16% three years ago. And companies such as Micrografx and Atlanta-based Samna Corp. have drawn technical praise for their applications programs for Windows.

In fact, many of Microsoft's critics helped create their own problems when they ignored its pleas to develop applications for Windows. "Even when Gates makes a mistake, people turn it into a Machiavellian plot," says Gordon E. Eubanks Jr., president of software house Symantec Corp. And Steven A. Ballmer, senior vice-president for Microsoft's systems division, disputes the charge that his people give their counterparts in applications previews of their upcoming

systems products.

Since Microsoft earns more from systems than from applications programs, Ballmer says, he would be foolish to jeopardize his market just to boost applications sales. Indeed, he recounts an occasion when Microsoft's developers of Excel accosted him in the company cafeteria for revealing their work to Lotus, which confers often with Microsoft on changes in its operating systems. "Telling me is as good as telling Lotus," he says, as if to prove his independence.

So, the tension mounts. But what can Microsoft's rivals do? Their dependence on its PC operating systems puts them at a disadvantage. But no company -- not even IBM -- has been able to avoid that. They might try to subvert Microsoft's efforts to win control over every critical software standard in the PC market. "If people are feeling mishandled, they're going to look for other partners," warns Lotus CEO Jim P. Manzi. A likely one would be the group of suppliers backing American Telephone & Telegraph Co.'s Unix operating system, which rivals OS/2 in scope and function.

But Unix' base of existing customers is minuscule compared with MS-DOS's. And Microsoft already has the best-selling version of Unix for personal computers, called Xenix. Perhaps, for competitors, there's just one choice: Learn to dance with the elephant.

GRAPHIC: Photograph, MAPLES, GATES, BALLMER, DOES MICROSOFT USE ITS MONOPOLY UNFAIRLY? PHOTOGRAPH BY CHUCK KUHN; Graph, MICROSOFT'S HEADY

Mail-Flags: 0001
From mikemap Wed Nov 13 16:17:04 1991
To: ms-apps
Subject: Please do not visit building 16 tomorrow (11/14)
Date: Wed, 13 Nov 91 16:17:03 PST

Please avoid visiting building 16 tomorrow unless your office is there. We are having a lot of reporters and analyst in tomorrow and they will be touring and eating in building 16. It is a very significant meeting. I would like to avoid as much congestion as possible.

Thanks, Mike

From susanb Wed Nov 13 16:34:21 1991
To: mikemap
Subject: PC Works Market Share
Cc: donnag ellenm johnsage libbyd melindaf
Date: Wed Nov 13 16:33:41 1991
Mail-Flags: 0000

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Sysgen (408) 263-1043. If you call 408-263-1043 x278 (Todd)
or fax to 408-263-2727
Thanks! Cathy Walker

Remarks to Requisitioner:

Form #: PUR006 Version #: 2.00 Revision Date: 09/24/91

From ralfha Fri Nov 15 10:54:57 1991
To: mikemap
Subject: RE: trip to St Thomas
Date: Fri Nov 15 10:54:01 PDT 1991
Mail-Flags: 0000

Gee, I can't type my numbers straight today. That last one had the wrong exchange.

Here's the final, clean list:
home: 809-774-8343
work: 809-776-1146
 809-776-3737

Sorry for the mail clutter.
Ralf

Mail-Flags: 0001
From mikemap Fri Nov 15 13:16:13 1991
To: w-connib
Subject: Re: more reactions to the seminar
Date: Fri, 15 Nov 91 13:16:12 PST

no problem, but I dont understnd the 90% number. You might suggest that it is really off the wall.

>From w-connib Fri Nov 15 12:10:07 1991
To: mikemap
Subject: more reactions to the seminar
Cc: cathyw w-connib w-maria
Date: Fri Nov 15 12:02:51 1991

I talked to Jane Morrisey, PC Week, just now to clarify some questions she had about \$\$s in your speech
--wanted to know if although apps revs are higher than systems, isn't MS Sys more profitable (told her MS doesn't release info on profitability)
--was confused about the \$1 billion slide, explained that was trailing 12 months compared to FY '91 when MS reported 1.8 billion.

I asked her what she thought of the WSJ article this a.m., she thought it was right on in terms of the overall tone of the seminar yesterday -- that MS APps is no longer the silent step child and will aggressively compete/grow to be a major force in the apps mkt. That is true, but I think you may be unhappy with how she will quote you in her article next week.

"My job is to get a fair share of the apps mkt and to me that's 100%."
(not a disaster depending on the context she puts it in)

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Also said that you said you hope to have 90% of the overall applications sw mkt in one year's timeframe. Seems like a pretty wild number considering that MS Apps was at, what, 26% last year?

Anyway, she said that she will attribute these two things to you, didn't want you to be surprised. I don't think it's bad that people came away thinking that Apps is an aggressive force, just hope the stories don't paint an evil picture (vs. just honest competition) by taking you out of context.

Mail-Flags: 0001
From mikemap Fri Nov 15 13:23:30 1991
To: bobga
Subject: Re: WSJ, Fonts, Mail coming
Date: Fri, 15 Nov 91 13:23:28 PST

Thanks for the input. I think the PS fonts are done, but who knows.

The question of Graph is pretty hard. There is no decision that will make people happy. I am trying to view the total context of resource and product quality - not who shot john in the past.

I think a better define process is required and will do by the end of the year.

>From bobga Fri Nov 15 10:34:12 1991
To: mikemap
Subject: WSJ, Fonts, Mail coming
Date: Fri Nov 15 10:33:42 1991

Mike,
Good story in the WSJ. You sounded very dangerous.

Briefly, on fonts. After the mail from BillG and the replies, I traded a few more notes with SteveB. Steve asked whether we could just write a Geni driver ourselves? I explained in reply that the Geni driver in the box is really just the tip of an iceberg--the serious software is at the centers, where imaging runs as part of the operations control software which is connected to billing, and to their Vax network software, and drives exotic (non-standard) hardware, and on and on. It takes 10 full-time engineers at Geni, led by a VP who was formerly the VP of development for Frame, to get it done--at at much lower profitability than MS has. We should continue to help and guide them, and maybe even provide money at critical times to speed them up, but not take on all that development. Steve replied agreeing.

Geni was going to just use ATM, and be restricted to the 35 fonts for which we have TT matches. That may still be the case when we introduce PP3.0. But on Wednesday, we made two decisions. (1) GBU will make PP3.0 a general encapsulating app--that is, we will be able to put the TT fonts used in a presentation into the document, so that when the PP file is later

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Gateway 486/33 200MB \$2750
NorthGate 486/33 200MB \$4500

PCrepair & Reliability Statistics.

The older clones (Wyse & NCR) are too old to offer valid repair stats. Of the newer clones, NG and Dell have repair history. Since average age of PCs at Msft varies widely (from 21 months for Compaq to 6 months for Dell), we compare first year repair stats (annualized if less than 1 year). After 1 year, service calls reflect the user care of PC more than Mfgr quality.

Helpdesk & PCrepair Calls.

Average Number Calls First 12 Months per PC.

	PCrepair Repairs (Part Failures only)	Total Calls (All PCrepair + Helpdesk)
Compaq	1.5	3.0
Dell	3.0	5.5
NorthGate	3.0	5.5

Conclusion: During the first 12 months, Dell & NG have nearly 2X the part failures and total service calls. Most of these are caused by hardware "infant mortality" and network and software compatibility problems. Once these early problems are resolved, then year 1+ service calls are comparable across all Mfgrs.

From mikehal Thu Nov 14 11:13:46 1991
To: garygi scotto
Cc: billg mikemap steveb
Subject: FW: TV advertising
Date: Tue Nov 12 12:09:11 PDT 1991
Mail-Flags: 0000

I want to see the creative concept. If you can schedule one meeting for steve, mike and I, that would be better.

>From billg Thu Nov 14 09:27:15 1991
To: mikehal, mikemap, steveb
Cc: jeffr, peteh, scotto, garygi, mikede, jimm, jonl, bradsi
Subject: TV advertising

Date: Thu, 14 Nov 91 9:27:06 PST

I spent an hour yesterday with Garygi, scotto, jimm, mikede and adam from the agency looking at their concepts for Tv. The basic approach they are using is significantly better than I expected it to be. They have a format that is usable for windows, mouse, and all of the applications.

If what I saw could be funded out of the current marketing budgets and the product people wanted to allocate their funds this way I would say we should go ahead. Unfortunately thats not the situation. I do think some of the product managers would invest a significant percentage of any ADDITIONAL money they get into this and there is some money in a few product budgets, in a set aside fund that

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Systems have and a little in a Maples fund. It may be that we could find \$3m of this \$8m expenditure in existing budgets. You would this so based on how underspent we are.

What it comes down to is adding another \$5 to \$8M to marketing this year. Please take a look at what they have done since I need more opinions (especially since I dont watch tv!). Make sure you get your key marketing people to weigh in on this.

The big positives for me are: 1) its an event - proves we are serious and winning 2) it can be cut in future years easily 3) Its timely to get a broad windows/windows applications message out to the market 4) its well done.

The negatives are: 1) big expense - maybe competitors will just follow and we will all be locked into this in the future. 2) will people really notice it and do they make a difference?

Seeing the segmentation data reminded me that windows hasnt touched most pc users yet.

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Date: Thu, 14 Nov 91 9:27:06 PST
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We have been in a kind of time-tunnel since I flew home the Monday night of COMDEX to be with her. We pray and hope for the best Tuesday, and throughout the recovery period (few weeks)...and we can use all the prayers and good thoughts of others, I promise you.

Why don't you peck out a quick summary of your comments/announcements and MCI 'em to me? And ask Marty or Sarah to FedEx me the handouts, the day after the event.

Maybe next time....

--Jim

PS: Are you guys shipping the Mac Word and Excel fixes yet -- to make 'em compatible with the Mac Quadras (and other '040 products, like Radius's Rocket)? If so, I'd sure like to see 'em ASAP, for reference in a Quadras-and-alternatives PC Wk column I'm working on. And if you *don't* yet have 'em, do you at least have an est ship date...?

PS#2: You know, we serve chili here in Austin, too... for good friends from afar.

Mail-Flags: 0001
From mikemap Mon Nov 18 09:58:37 1991
To: chasst
Subject: any action oh Jawarski?
Date: Mon, 18 Nov 91 09:58:36 PST

From lewis1 Wed Oct 9 17:52:31 1991
To: mikemap
Subject: Re: FW: HP 9/23 Meeting Summary
Date: Wed Oct 09 17:51:57 PDT 1991
Mail-Flags: 0000

I think what you do is you say in your most august voice, "I think this is important and you should work on it." That is, of course, if you actually believe this.

What you might get for this, if you are lucky, is one of the first machines off the production line. Since that won't be until Q4 1992 you will have to decide what it is worth to you.

My feelings about the HP machine:
They are betting on small size, light weight, very long battery life, and instant on applications to enable them to succeed against small notebooks and to offset the disadvantages of no removable storage medium and limited flexibility. I think it is a long shot.

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We saw a prototype of the machine. It looks nice; is very light; has a reasonable keyboard; it weighs a little over 2 pounds. But I think real notebooks are going to be cheaper and will offer nearly the same advantages. We saw a Dell prototype of a full notebook (hard disk, 3 1/2' drive) that weighed 3.2 pounds and will beat HP to market by 6 months. Instant on is kind of bogus because all of today's machines offer a sleep mode which preserves memory. The convenience of a floppy and hard drive are hard to beat.

I still think we should cooperate with them. If they really do a Microsoft machine it will be a nice way to promote Windows and the apps. It really doesn't hurt us if the machine doesn't sell that well because of notebooks. At a minimum we should get everything to work well in ROM. At a maximum we could really try to make Windows mobile and make it easy for users to keep information on the lap top and desktop in sync, to communicate with their desktop machines, and maybe to communicate with their networks. But, this is a bigger investment we would not do just for HP.

>From mikemap Sat Sep 28 13:00:07 1991
To: lewisl
Subject: Re: FW: HP 9/23 Meeting Summary

Date: Sat, 28 Sep 91 12:34:36 PDT

what does an exec owner do? Do I get royalties?

>From lewisl Fri Sep 27 12:50:06 1991
To: mikemap
Subject: FW: HP 9/23 Meeting Summary
Date: Fri Sep 27 12:49:57 PDT 1991

I think you are the executive owner with Josephr handling all technical and Dalech handling marketing....

>From darcyh Thu Sep 26 18:04:49 1991
To: billj darrenr derekw ericca johnwil kathleen lewisl markche mikehou
Cc: bradc chrisp davidcol jeffl keithla kornelma mikecon pearson peteh p
Subject: HP 9/23 Meeting Summary

Date: Thu Sep 26 17:01:14 PDT 1991

WHO:

HP Corvallis group came for a full day of product presentations for the Lion project (HP's next version of their Palmtop computer).
OBJECTIVE: To close the design win for Lion with MS Mail, Excel 4.0, WFW 2.0, and to introduce Hp to Schedule Plus and MS Money.

HP ATTENDEES:

Dan Terpack--General Manager--Corvalis Division
Tim Williams-R & D Lab Manager
Jerry Erickson-Lab Section Manager
Jim Dickie---Lion Project Manager
Kermit Yenson--Product Line Manager
Shyam Jha----Lion Product Manager

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LION:

Tim Williams presented on the Lion machine: 386SL, < 3lbs, 4-20mg hard disk or some form of mass storage, built-in fax/modem, PCMCIA std, VGA reflectice display. HP's key hardware objectives; size, weight, cost, applications, long battery life. Key software objectives; instantly available applications, companion to the desktop, fully configured, leading apps in their category, Dos 5, Windows 3.1. They see the Win apps defining the market for Lion, as 1-2-3 did for the 95LX. HP brought a prototype--looks great! Will have a functioning model by May '92. Still targeting final release by Q4 CY '92.

SUMMARY:

Tim Williams presented on Lion/configuration/strategy, and this was followed by presentations/demos from the Mail, Excel, Word, and Money groups. The day concluded with a feedback discussion session on how we can work together on this with Lewisl and Philippg. Overall HP feels very good about closing this deal. They see the following issues as outstanding:

- 1.-They see the need to schedule an all day design session with a representative from each of the MS product groups and their project team to figure out optimized configuration for Lion with MS products.--Darcyh to schedule
2. They see the need for an "Executive Owner", as what they had in Lotus, someone who could own this at a high level that crosses the organizations within MS.--Darcyh to work with Lewisl to identify.
3. HP wants terms and conditions of contract to include exclusivity for 6 months and royalties within \$100 range.--Darcyh to resolve.

Product specific issues to be resolved:

MS MAIL:

HP wants terminal emulation, email, and fax capabilities. Hp was impressed by MS Mail, but is not clear if what they need is MS Mail, and will Mail have the features they need in timeframe necessary, or if they need an enhanced terminal emulator. Very Impressed with Schedule Plus, and see it as potential for "PIM" for Lion.

ACTION:

- To identify fax solution/what could be added to Terminal--Josephr
- To estimate ROM size of mail--Ericca
- To estimate ROM size of Schedule Plus,--Kathleen/Davegr
- To propose royalties for Mail and Schedule Plus--Kathleen/Davegr
- Get back to HP by 10/2 with proposal--Darcyh

EXCEL 4.0:

HP was duly impressed. Seems comfortable with Excel's position vs. 1-2-3W. Key areas were market share, marketing plans, and feature set.

ACTION:

- Participate in design session--Josephr

WORD FOR WINDOWS 2.0:

Again, very impressed, with market share information and demo, only apprehension is potential impact on market with Wordperf for Windows. -Get them feature list Wordperf did not include in product/demonstrate weakness' vs. WFW 2.0--Darcyh

- || -Provide international award list--Darcyh

MONEY:

Great product, and HP will consider this is they have room in rom.

Let me know if you have questions or would like more information.
Darcy

From bobwy Mon Nov 11 12:16:51 1991
To: mikemap
Cc: chasst leno tomb
Subject: RE: Embedded Basic isn't dead yet! Just hibernating...
Date: Mon Nov 11 12:15:50 PDT 1991
Mail-Flags: 0000

Mike,

There are no games being played here. The motivation for the mail was a report that folk on the systems side were telling SoftBridge and others that we were out of the embedded language business for a very long time. TomB and I were concerned that it could look bad for Microsoft if either potential customers or competitors were to make plans based on potentially inaccurate and changing information. If we do productize Embedded Basic prior to Object Basic, some of external people could claim that they were misled by Microsoft.

We are not asking Ballmer and Co. to do anything. Rather, we are asking them to appear "neutral" on this subject and not prematurely encourage people to establish or accept competitive solutions.

My primary concern here is to ensure that our options are open. As agreed, we will resubmit our proposal in January once we've got OLE V2.0 settled out. I'm making no assumptions about what the result of the review will be.

My apologies for not having realized that I should copy you on the mail.

bob wyman

>From mikemap Sat Nov 9 10:10:17 1991
To: bobwy
Cc: chasst leno
Subject: Embedded Basic isn't dead yet! Just hibernating...

Date: Sat, 09 Nov 91 11:10:55 PST

I think it would be appropriate if I got copy on mail like this...

I am not sure what you are asking them to do. Looks like you are saying that set in the edge of your seats, we may have something to say in the future.

A decision point in January does not mean to me that systems should do anything now.

Is there some game going on here I dont know about?

From bobwy Tue Nov 5 18:51:02 1991

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