Cindy Charleson

From:	Pete Higgins
To:	Cindy Charleson
Subject:	FW: Office and Workgroup (LONG)
Date:	Thursday, January 27, 1994 9:41PM
Priority:	High

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From: Michael Risse
To: Chase Franklin; Chris Peters; Dennis Tevlin; Hank Vigil; Keith Grochow; Lewis Levin; Mark Kroese; Pete Higgins; Robbie Bach; Tina Headley (Chen)
Cc: Michael Risse
Subject: Office and Workgroup (LONG)
Date: Thursday, January 27, 1994 2:55PM
Priority: High

During CY 1994 there will be even more attention on "workgroup computing". Lotus wants it (Notes), Borland wants it (OBEX), WordPerfect wants it (Office), Microsoft wants it (EMS), customers are asking about it (XL pm survey found $25M worth of pending Office sales where Notes support was an issue) and the press is increasing the workgroup volume as new collaborative tools ship each week. And in 1994, with our current plans, MS Office is left exposed without a workgroup story, feature set, or credibility.

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It is my belief that the scenario of a workgroup-less Office for another 15 months is unacceptable. The idea of this mail is to get people thinking about Notes from an Office perspective. Excel seems ready to move in their own direction but if Office is to set the course for DAD, this seems like the right type of issue to take charge of.

Goals; neutralize SmartSuite advantage in workgroup computing; (finally) deliver Office workgroup strategy this spring, including discussion of interoperability with EMS and Notes.

Strategy: support F/X in Office (following investigation, it appears that this will require changing the .EXE file for speed and functionality reasons; it can not be faked using an add-in); follow up on the EMS analyst briefings and announcement with discussion of Office EMS and Notes support.

Tactics: positioning of F/X support: "the last priority for this round of Office, but customers requested it..."
    arm field with information on F/X support in Office to neutralize SmartSuite (May)
    announce F/X and future EMS support in Office on press tour (May)
    ship Office 4.2 (c) w/ F/X support (June)
    deliver to field a complete Office workgroup strategy w/ EMS, Notes, other (June)
    always discuss F/X support in context of EMS futures/plans
    provide analysts with "what makes a good EMS application" document (Feb)

Situation analysis: Over the next few months, MS will use EMS to move against Lotus's workgroup flank in an "enveloping" attack, but this is not going to end the workgroup war overnight. In fact EMSs shortcomings wrt Notes (calculated fields, design environment, industry/VAR acceptence), EMSs positioning as a peusdo-systems product ("maybe just as good as NT - slow, 10 months late, and buggy") and Notes' current momentum with VARs and the press will guarantee that Notes support in Office will be an ongoing issue in 1994, 1995, and probably into the next century.

In the meantime (starting last July), Lotus has been getting away with murder - their "Notes API" support in SmartSuite boils down to F/X support in 3 applications plus version manager in 123 (which doesn't work) and

Freelance's "launch into a presentation" feature. The most common reaction when you show someone the extent of SmartSuites Note's support is "That's it? That's all they do?". There really is very little in SmartSuite that's tied to Notes but it is infinitely more than what Office has (nothing) and Lotus is getting far too much credit for so little work.

So the question is whether or not we update Office to work with Notes. If Office does the work to support Notes in the next few months then MS could then sell Office into Notes accounts for probably 15 months before Office '95 is out, gain valuable experience in Office/workgroup server scenarios and issues that can be used in Office '95, and gain credibility in the year where everyone is focused on workgroup computing. Furthermore, from a MS perspective, as Office is sold into Notes accounts MS reps could pitch EMS at the same time since we would never discuss Office without covering EMS.

If, on the other hand, Office does nothing to support Notes we will have several problems - today, tomorrow, and for the next 15 months. Excel will ship support for F/X in an (a) release in May so the Office Workgroup story will we as messy as the Office Programmability story ("XL - yes, but none of the others"). Office sales and the opportunity for more pro-Lotus press will be a risk (again - $25M in sales is Notes-sensitive TODAY) and MS will be exposed to a huge messaging and awareness vulnerability given the volume on workgroup computing, ie:

"It's MS's consistent Icons vs. Lotus's workgroup support. Which do you care about?"

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ASIDE: There is no reason why Lotus won't have a better EMS suite sooner than MS since the MAPI interface to provide EMS-ness in applications will be public as part of EMS's evanglization efforts. This means the above ad line could refer to EMS or Notes support in SmartSuite any time next fall (and expect SmartSuite to have OLE 2 support).
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If we were actually to implement a plan to make Office work with Notes, what needs to happen?

1) PeteH/ChrisP must require Word, Excel, and PPT to ship a new version ("c" release) of their Office 4.2 Windows applications in May (Windows only, US and international English only) which will be slipstreamed into the Office 4.2 product.

Features: The feature delta in Office 4.2 (c) will at a minimum be F/X support implemented in an easier way. Excel and Word may choose to do additional work (importing Notes views into Excel, for example).

Documentation: Will be found only in a NOTES.TXT file in each application - if Notes is not found during installation, the Field exchange menu option in each application will not appear.

Distribution: Update patch disks will be available for free and the patch will be posted on Compuserve. This should require only a patch disk fix, which means 1 or 2 disks instead of 4 or 5.

2) Office program management must own the field exchange UI, since it will also be used for EMS properties. A more suitable name ("Exchange Links"?) needs to be decided on than the current "properties" or "fields" and the interface needs to be highly discoverable (under the Tools menu?) so that Office wins on ease of use. There should also be a graphical way of displaying the enchange links and what they are tied to (EMS or Notes, and which database or public folder therein).

Office program management will also be involved in release of Office 4.2 (c).

Office program managment will need to work with patch disk technology which could enable a single disk to do all of the updating work on a user's sytem - dramatically decreasing the dollar costs.

3) Office product management must define its PR and sales tools strategy to announce F/X support AFTER EMS

is announced so we can profess neutrality about which back-end workgroup server Office supports ("its just that Notes is out today....").

Office product management will follow up EMS analyst visits with our vision of future EMS/Office interoperability, and will deliver a complete workgroup message when we announce F/X to the press.

Office product management will also create field sales tools and presentations for the field which cover Office workgroup strategy, EMS support, and Notes support.

Finally, Office product management will make sure that F/X support will NOT be a part of general Office messaging/advertising/data sheets - this is a covering move, not a push to Notes.

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Note: What about Office EMS support? Assuming we do the F/X work in Office, won't MS then look stupid for +/-8 months until Office '95 ships when we get EMS support? No - BrianV's team (MarkSe) is working on a toolkit of MS application specific macros and solutions, many of which will support Office. Also, because MAPI has a Basic interface (Notes API does not) it will be much easier to write VBA or WB macros that work against EMS that give Office unique workgroup capabilities.
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