

Excel Business Unit 3-Year Plan

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Mission and Strategies

- ◆ Increase share to 65% over next 2 years
- ◆ Address weakness in workgroup and take the lead
- ◆ Increase share in small organizations and with less technically involved users
- ◆ Win converts from other Windows spreadsheets
- ◆ Grow the market for *useful* add-ins (Excel as a "runtime")
- ◆ Prepare for slower growth by increasing upgrade revenue over 3-5 years

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Category Vision

- ◆ Simplify
- ◆ Understand and exploit structure
- ◆ Most general and flexible tool for working with data
- ◆ Intelligent automation (aka "Intellisense")
- ◆ Development platform
- ◆ Support group work process, not just individual

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Release Calendar

	1994				1995				1996			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	Mac, INT, ppcMac, aNT, mNT, ppcNT											
	Win	Mac, ppcMac			INT??							
					Chicago							
					Chicago							
				Chicago/Memphis, ppcMac								
		S: Mac, ppcMac								Graph '96		
	Mac											

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Notes Support in 94

- ◆ Goal: Reduce Notes obstacle in key accounts
- ◆ Feature: Notes F/X (no UI, names map to fields)
- ◆ When: Demo in March, release by June
- ◆ Ship vehicles:
 - > Demo/Beta in March/April
 - > Fold into 5.00A release or release by June

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Excel '95

- ◆ Themes:
 - > Chicago (be an excellent Chicago app)
 - > Support Microsoft Workgroup strategy
 - > Easy to do specific tasks
- ◆ Design Goals:
 - > Chicago
 - > Try not to change file format
- ◆ Issues
 - > Not enough *spreadsheet* features & competitive response
 - > VBA '94: how expensive in Excel?
 - > InfoCenter development cost
 - > Performance: boot, file i/o, recalc, OLE

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Excel '95: Chicago

- ◆ **Long file names**
 - > File dialogs
 - > References
 - > Window titles
 - > VBA
- ◆ **UNC Support, Links**
 - > Command line
 - > Drag drop
 - > Password protected paths
 - > VBA
- ◆ **Registry**
 - > Small icons
 - > Class ID (no file extensions in shell)
 - > Print To
 - > INI settings

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Excel '95 : Chicago (cont)

- ◆ **Visuals**
 - > Window appearance (scrollbars, toolbar buttons, doc title first, etc)
 - > Dialog controls and layout (SDM)
 - > Dialog tabs
 - > Controls on sheets
 - > System metric smarts (titlebar size, system font, etc)
- ◆ **Plug and Play (drives that vanish)**
 - > Graceful doc save and close
 - > Links on sheets
- ◆ **32 bit performance**
 - > Hand native 32bit assembly optimizations for recalc
 - > A second thread for an as yet to be determined process

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Excel '95: Workgroup

- ◆ **Extended document properties (MAPI/OLE)**
 - > Summary info
 - > Range names ("data" properties)
 - > Process properties
 - > Shared UI with Word
- ◆ **Notes Field Exchange**
 - > Identical with OLE properties, but to Notes d/b via Notes API
- ◆ **InfoCenter: Save/Load docs to EMS store**
- ◆ **Find File 2.0**

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Excel '95 : Wizards

- ◆ **Document Wizard**
 - > Integrated with File New/Open & Templates
 - > Monthly Sales Goals and Performance
 - > Five Year Forecast
 - > Break Even Analysis
 - > Many top business forms (ex: req, expense rept, work order, etc)
- ◆ **List Wizard**
 - > Create top 20 canned lists as mini-applications in Excel
 - > Report Wizard: automation for sorting, grouping, filtering
 - > Flashy UI forms created on sheet: Rolodex, Checkbook, TimeSheets
- ◆ **Task Automation**
 - > AutoQuery: canned queries
 - > Project Management: automatic GANTT chart, tie in to Ren

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Excel '95

- ◆ Conversion filters for 1-2-3 rel 4.x, Quattro Pro/W, Win Works
- ◆ Other
 - > PSS Top 5
 - > Developer problems with VBA/Excel

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Cut from Excel '95

- ◆ Simplify three areas of UI:
 - > Charting UI
 - > Data access UI (ODBC dialogs)
 - > Pivot wizard
- ◆ Sexy presentation as cost allows:
 - > Gradient fills
 - > Rotated text
 - > Chart marker types
- ◆ Query at your fingertips
- ◆ Sheet as form
 - > Vertical and horizontal merged cells
 - > In-cell pick list
 - > Autocomplete in forms and lists
 - > Border dialog improvements to copy appearance of printed forms

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Excel '96

- ◆ **Themes:**
 - > Killer, definitive workgroup spreadsheet
 - > Discoverability—maximize the use customers get from Excel
 - > Intellisense for formulas and structure
- ◆ **Design Goals**
 - > Chicago/Memphis (32 bit only)
 - > PowerMac, drop 68K???

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Excel '96

- ◆ **Workgroup**
 - > Collaboration
 - > Multi-user workbooks
 - > Annotations
 - > Revisions and change tracking
 - > Consolidation, budgeting, reporting/analysis
 - > Simplified spreadsheet sharing: Links/Connection Mgmt
 - > Improved routing and tracking
- ◆ **Printing/Presentation**
 - > Layout view: easier to choose what prints
 - > Fancy objects, fills, borders
 - > Autoformat that does what you actually want
- ◆ **Charting--see Graph**

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Excel '96 Discoverability

- ◆ **Basic spreadsheet UI improvements**
 - Nicer visual appearance (subtle grid, formula bar in place, use less real estate, no more marching ants)
 - Improve navigation/selection on big sheets
 - Format Number for humans
 - More intelligent and complete formula wizard
 - Reduce toolbar clutter
 - Status "tools" instead of status bar
 - Modeless property inspector that scales from toolbars
- ◆ **New user assistance model**
 - Tip Wizard based on inference engine and database of user actions
 - Social interface
 - Sprite wizards (task experts introduced by the character)

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Excel '96

- ◆ **Code re-engineering**
 - Remove internal limitations (cells > 255 chars, dim's in '')
 - Performance and size optimization
 - More separation of UI layer, move to WLM
 - Multi-level undo
 - Simulate use of external clip for cut/copy/paste
- ◆ **Spreadsheet modeling = Formula "intellisense"**
 - Time intelligence throughout
 - Model ranges
 - Auto-recognize structure in shared formulas
 - Map view to highlight possible logic problems (intelligent auditing)
 - Pivot Table modeling

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Excel '96

- ◆ **Programmability**
 - > Integrate VBA 2
 - > New forms model and OLE controls (OCXs)
 - > Consistency: templates, add-ins, dialog/menu editing, programming environment
 - > Usability (ex: checkbox bulletproofing, "view" navigation, improved recorder & object browser, etc.)
 - > Improve Excel object and event set
- ◆ **Improve data access and building corporate systems**
 - > Fully use DAO/DNA for data access (better Access interoperability) in Excel and Query
 - > High level queries based on information content using Pivot like approach
 - > Synchronize Query with Access (in place server) for "plumbing" to data
 - > Make Pivot Wizard and Pivoting UI easier

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Excel '96

- ◆ **Office integration (items to be done in Excel)**
 - > Incorporate Office UI elements (ex: SDI)
 - > UI make-over, radical simplification, nicer visual appearance (256 colors)
 - > Support Memphis/Cairo
- ◆ **PSS Top 10**

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Graph '96: Take no prisoners

- ◆ Excel '95: no separate Graph released
- ◆ Excel '96: Excel charting is Graph
- ◆ Features
 - > Easier UI, more complete drag and drop
 - > Complete inplace editing
 - > New chart types and easier to add future chart types
 - > Chart analysis wizard: helps you create a chart that achieves a purpose
- ◆ Missing
 - > Display time interactivity for PowerPoint

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Query Tool

- ◆ Themes
 - > Automatically inherit Jet, ODBC, Access, DAO enhancements
 - > Sophisticated users create low level queries
 - > Higher level point and shoot queries within Excel
- ◆ Date: with each major version of Excel (6, 7)
- ◆ Who: '95 on by Access group--tbd
- ◆ Features in '95:
 - > Jet replaces SIMBA
 - > Programmatic queries use DAO from VBA in Excel
 - > OLE enabled for data transfers
 - > OLE automation enabled so UI can be driven programmatically

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Other Projects/Products

- ◆ EIS Pak 1.1 (March 1994)
- ◆ SDK (April 1994)
- ◆ Notes F/X support (5.00A or summer '94)
- ◆ Enhanced eSSbase client (work by Arbor during 1994)
- ◆ "Wizard Wizard" (May 1995)

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Add-ins Strategy

- ◆ Make an industry in Excel add-ins
 - > 1st class serious features (not slow, clunky, or inelegant)
 - > Most developed by ISVs. Excel does one as proof of concept and to force product improvements
 - > Few, if any, in the Excel box
 - > Be selfish: focus on add-ins that help sell Excel
- ◆ Examples
 - > Excel for statistics and engineering, financial management, accounting (inc. data access directly from accounting packages), etc.
 - > Excel for budgeting and forecasting
 - > Vertical: Excel for construction estimating, specialized engineering applications, etc.
- ◆ Marketing
 - > Solve the distribution problem
 - > Make add-ins a reason for SMORGs and less technical users to buy Excel

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Dependencies

- ◆ OLE
- ◆ VBA, OLE forms/controls
- ◆ Jet/ODBC/Query
- ◆ Office: Setup, Find File, shared features, User Assistance engine
- ◆ MAPI and Workgroup integration layer
- ◆ Notes SPI for MAPI
- ◆ WLM
- ◆ Localization tools
- ◆ Graph client requests and timing

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International Versions

- ◆ Goals
 - > Tier 1 and 2 languages: 60 day delta
 - > Tier 3 languages: 90 to 120 day delta
 - > Ship one .exe using 16 bit chars worldwide for Excel '96
- ◆ Redmond responsible for some languages
- ◆ Most languages move to Ireland
- ◆ BiDi stays in BiDi group
- ◆ Requires business unit staffing for external localization, product planning, and project management

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Far East Excel

- ◆ **KK:**
 - > Design FE-specific features, research customer needs, ensure competitive superiority of FE features
 - > Implement some FE specific features
 - > All Japanese localization, builds, final testing
- ◆ **Redmond:**
 - > Complete DBCS enabling and testing
 - > Required internals for FE features
 - > Manage DBCS components from other Redmond groups
- ◆ **Korea, Greater China:**
 - > Localization for Hangeul, Chinese and PRC Chinese
 - > FE feature input to KK
- ◆ **Release goals: 60 day delta. Worldwide .exe in '96.**

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PSS Cost and Results

- ◆ Satisfaction improving
- ◆ Calls handled improving: 84.5% < 60 secs., abandonment improved from > 8% to < 2%
- ◆ Total cost, first half FY94:
 - > Incidents 260,811
 - > Min. per incident 11
 - > Cost per minute 2.11
 - > Total \$2,898,569 (phone only, 96% of total)
- ◆ Business Unit primarily impacts:
 - > no. of incidents
 - > length of incidents...by improving the product

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PSS Top 10

in XL4 and response in XL5

Problem response	% of Labor	% of Call:
Creating and defining macros VBA, better recording	16.3%	12.2'
All Excel printing (For Windows) New Page Setup dialog	11.6%	10.3'
Charting Issues Paper Model and new chart wizard	7.2%	7.0%
Other Functions Issues Function Wizard, online help	4.1%	4.0%
General Setup ACME	3.1%	3.1%
Damaged Worksheet/book Docfiles, new workbooks	3.0%	2.4%
All Data Menu Issues AutoFilter, Subtotals, no need to define database/extract, PivotTables	2.9%	2.5%
Array Functions (Sum(if())) New SUMIF(),COUNTIF() functions	2.8%	2.5%
All Options Menu Issues Integrated all options into Tools, Options dialog	1.7%	2.7%
Importing/exporting text files Text Wizard	1.5%	1.8%
		27

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Process Improvements

- ◆ **Manageable specs**
 - > Separate design docs from implementation guide
 - > High level summary and visual portrayal of entire product
- ◆ **Development and testing**
 - > Align Development and Testing teams
 - > Code design, test design, and realistic schedule before coding
 - > Private release testing with criteria for code check-in
 - > Earlier test automation as part of milestone criteria
 - > Metrics for entering/exiting stages of the project
- ◆ **Improve cross-product and cross-platform sharing**
 - > Automated testing for components
 - > Components need to be cross-platform
- ◆ **Localization**
 - > Adopt new tool suite for tokens and documentation

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Plan v. Last Year

◆	<u>Last Year</u>	<u>This Year</u>
◆Query Tool	Q2 93	Q4 93 shipped
◆Excel 5.0	Q4 93	Q4 93 shipped
◆Graph 5.0	Q4 93	Q1 94 shipped
◆Excel 6.0	Q3 94	Q1 95
◆Excel 7.0	Q2 95	Q1 96
◆CD Excel 4.0	Q1 93	cancelled

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29