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EXHIBIT**  
4193  
Comes v. Microsoft

# Windows 98 launch plan

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February 98

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# Windows 98 Launch Objectives

- Upgrade 5% of the Win98 capable WW installed base within 12 months = 4.4M units FG (vs. 15% penetration w/Win 95 or 8.3M units)
  - Get 30%+ attach with new generation peripherals
  - Must RTM by end of May to ensure W98 is on 80% of the fall consumer PC lines WW
  - Penetrate 11% of W98 capable US home computers (Pentium) = 2.2M units (compares to 25% for W95=2.7M units, capable defined as 486/8)
- Position Win98 as an exciting upgrade for consumers, and a smart upgrade for businesses that cannot go to NT.
  - Move creative emphasis for Win98 to CONSUMER, as NTW moves over even *stronger* emphasis on BUSINESS.
- Prepare the market and customers for a June/July launch and a major fall promotion by educating 250K IEUs on the benefits of upgrading to Win 98.
  - Consumer Preview (n=100k); PC User Group Tour/MS Extreme (15-20k); Reviewers Tours, channel training.
  - Drive a March "Win98 Marketing Day" for 500 OEMs, IHVs, ISVs, & Resellers

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## Business metrics

- Upgrade 5% of the capable US installed base within 3 months after launch (1.1M units FG, 36% of what we did w/W95)
- Reach 75% consumer awareness for Windows 98 at launch (we had 95% for Win 95)
- Exceed \$2.7B Win 9.x in FY 98
- >100 OEMs support at launch, top 20 OEMs shipping pre-installed on consumer systems at launch
- Sign co-marketing agreements with 3 vendors in each relevant key peripherals category
- Reach 80% of the Windows 95 launch channel breadth (15k reseller outlets in the US)

## How is Windows 98 launch different from Windows 95?

- Clearly a 3.0 to 3.1 level incremental upgrade, mostly with sw plumbing and new hw support.
- No big bang with tents on campus, but great level of consumer excitement.
- Requires a different approach to launch
  - Message integration across all components of the mktg mix
  - Joint event with IHVs, OEMs and their resellers
  - Cross-sell: Attach, attach, attach peripherals
  - Opportunity to sell new computers

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# Target audiences

- New PC purchasers:
  - Make sure OEMs are in store with great PCs that take advantage of all Windows 98 features
  - Current Win 95 run rate: 4.3M units/month WW
- Upgraders with new peripherals:
  - Launch Partner Program to promote IHVs with hardware add-ons that add great value to Windows 98 (ex: USB, monitors, digital cameras, tuner cards and RAM)
  - 50% of Win 95 upgraders in the US also add hw to their computer
- Upgraders without new hardware (3.x, 95, 95/IE4 users):
  - Have great in store presence with end caps and launch pallets with signage that points out why Win98 is a great upgrade to Win 95 and Win 3.x
  - Current WW run rate is 500K/month

## Prep the market and customers

- 100K Consumer Preview Program (starting Jan. 5)
  - Consumer IEUs, at cost: \$29.95, time-bombed beta 3
- PC User Group/Extreme Tour (n=15,000) (4/6)
- Reviewers' tour (Dec.)
- Reseller briefings (Jan./Feb.)
  - Comdex briefings, Marketing Day last week of January, key account HQ visits
- Killer target audience-specific demos
  - showcasing corporate and EU related benefits
  - focused on 95 vs. 98 shoot-out
  - great hw support
  - great DirectX 5 games comparison

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# Launch Partner Program

Increase overall channel margins

- Industry-wide attach program
  - Drive at least 30% attach rate to Win 98
  - We want resellers to support our partners
- Partner products identified as “Windows 98 products” at retail
  - Win98 logo certification a requirement
  - MS supplies artwork, messaging
  - MS co-promotion with partners
  - Partners encouraged to incorporate instant or mail-in rebate into their packaging (min. 10%)

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## Win 98 Marketing Day (March 16/17)

- Event for >600 reseller buyers, and OEM, ISV and IHV marketing people
- Designed to roll out partner programs and ensure active channel involvement in launch
- Sets the final internal deadline for Microsoft launch plans and programs prior to CES
- Creates industry momentum and excitement behind the Windows 98 revenue opportunity
- Budget estimated at \$150K

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# Windows 98

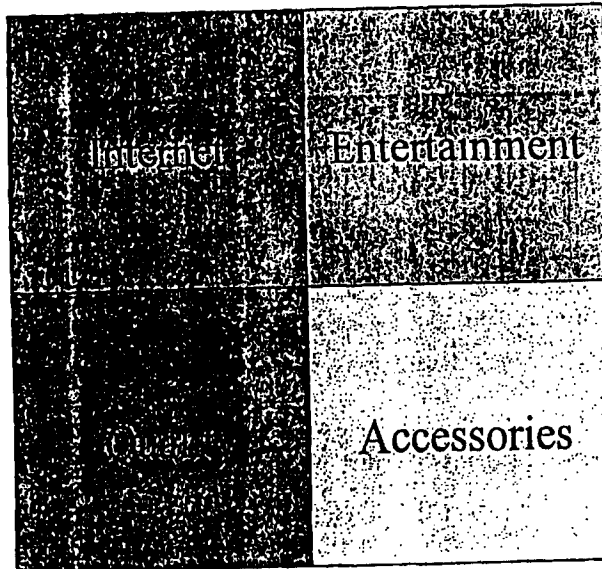
## Consumer Messaging

*“Works better, Plays better”*

Works better      Plays better

‘Tune in’

‘Tune up’

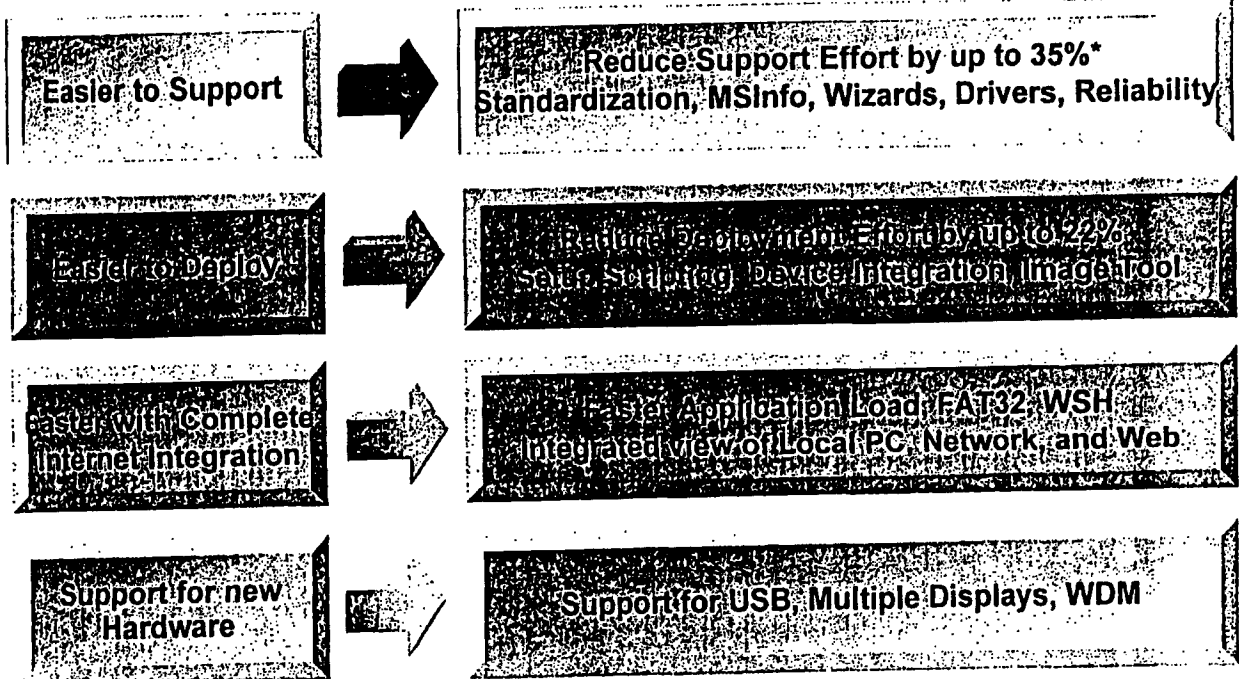


‘Time out’

‘Plug in’

# Windows 98 for Business

A smart upgrade for business desktops that *can't* go to NTW



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\* (Microsoft estimates. Further detail on following slides. 35% is a summation of the following savings - System Information Utility: 12%, Troubleshooting Wizards: 12%, Device Driver support: 6%, Improved reliability: 5%.)

## Win98 Pricing: \$86 to disti, MFR at \$89 (no change from Win95)

### – Pros:

- Protects OEM business
- Optimizes revenue vs. penetration: (\$310 M delta)
  - We risk losing \$210M in DSP if we price at \$49
  - FG Revenue increases by \$100M if we charge \$89: (\$400M @ \$89 vs. \$300M \$49)
- Easier to support today's NTW 4 street price of \$289 (versus \$49).
- A \$49 price-point could set new expectations about the value of an OS, and decrease our ability to charge a premium for NT-C.
- Simplest channel execution with 1 box and 1 price

### – Cons:

- Analysts/press may ding us for a bad value proposition

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## 3 Launch event initiatives

Reach: 19M, Cost: \$33M or \$1.73/head

- Initiative 1: The Microsoft Technology Train
  - A rolling exhibit covering "The PC Past, Present and Future"
  - Launched for a nation-wide cross-country tour at the W98 Launch Event (DC or NYC)
  - Complemented by a fair showcasing our and our partners' products and solutions
  - Goes beyond Windows: This is about educating the American people and bringing PC technology to them.
- Initiative 2: Windows 98 Launch Event
  - Combined with train rollout
  - Pre-event contests via the Web, radio and retail outlets that invite people to win a trip to the live event
  - Technology fair at DC or NYC central station with partners
- Initiative 3: Windows NT5 Launch Event - 'One Small Step for Man, One Giant leap for IT'
  - Conclusion of the Train and NT5 Launch in Cape Canaveral or Houston
  - Live event with Billg and celebrities from the entertainment, sports and aerospace areas
  - Live festival on Satellite Beach with possible live feeds around the world

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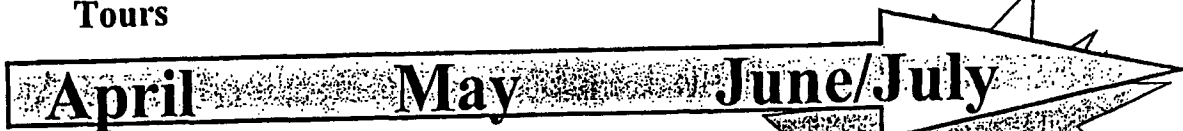
# Timeline



Metro Press Tour	Win95/IE4 Safe Ad	Comdex/ Account Briefings	First merch concepts	Internet World	Beta 3
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Analyst/ Press/ Account Tours	Consumer Preview	First draft sales tools	Marketing Day	Final Sales Tools
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Xtreme User Group Tour	HQ Training Tour	District RSP Training	Windows World/ Spring Comdex	Coming Soon! Program	<b>Launch!</b>
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# Appendix

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# Challenge #1

- **Convince Win 95 users that Win 98 is a worthwhile upgrade**
- **How we are addressing**
  - Provide compelling messaging to the press, analysts, super users, OEMs, resellers, IHVs
    - Reviewers and analysts tours
    - Price research
    - Books
    - Consumer Preview
    - Microsoft UA cinemas broadcast
    - Coming Soon

# Works better, Plays better: Benefits map

	<u>Works better</u>	<u>Plays better</u>	
Internet	<p>Easier to use and connect</p> <p>Complete Internet Integration w/cable access</p> <p>Dynamic, more comprehensive help &amp; support</p>	<p>High-performance graphics for games</p> <p>Full-length movies with surround sound on DVD</p> <p>Immersive sound and video</p>	Entertainment
Quality	<p>Faster and more capacity</p> <p>More reliable with fewer support calls</p> <p>Increased productivity w/multiple monitors</p>	<p>Easier to add and remove add-on devices (USB, 1394)</p> <p>Easier to find out what is playing on TV</p> <p>Interactive Shows enriched with on-screen graphics and videos</p>	Accessories

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# Works better, Plays better: Feature map

Works better

Plays better

Internet

<p>Webview Connection Wizard          URL access throughout the system          Outlook Express          Online Help and Windows Update</p>	<p>DirectX games          DVD support          Fully MMX-enabled          AGP and VPE support</p>
<p>Tune-up Wizard: Apps load up to 40% faster          FAT32: HD capacity increases up to 35%          System File Checker &amp; other utilities          Multiple monitor support</p>	<p>Hot Plug and Play (USB, 1394): Scanners, cameras, videophones, mice, etc          TV          Data Service (Wavetop)          Program Guide          Enhanced Shows</p>

Entertainment

Quality

Accessories

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## Benefits by target audiences

- Upgraders without new hardware (3.x, 95, 95/IE4 users):
  - Faster (applications load 36% faster in average, quicker shut down, better performance with DirectX5 games)
  - Easier to use, communicate and get information on the Web pages (IE4)
  - More disk capacity through FAT 32 (up to 28% in average)
  - More reliable (extra high-quality upgrade, no more installation conflicts, less crashes, always optimally tuned system, better diagnosis capabilities)
- Upgraders with new peripherals:
  - TV integration, Web access via analog TV signal 'datacasting', programming guide, enhanced TV shows
  - Better audio and video through DVD
  - Immediate Plug and Play through USB, IEEE 1394
  - More productive with multiple monitors

### New PC purchasers:

- All of the above PLUS: OnNow

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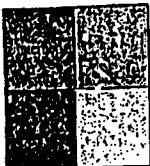
# Windows 98 provides the best Internet experience

- Easiest way for new users to access the Internet
  - Internet connection wizard and the referral server makes connecting only a few easy steps away
- Integrated browser
  - Award winning IE 4
  - Complete collaboration and communication
  - True web integration
- Internet built in
  - 100's of url's throughout the product
  - Integrated local and web HTML help
  - Single click simplicity
  - Broadcast web pages without tying up phone lines

*Enables the web to be an integrated experience rather than a separate one*

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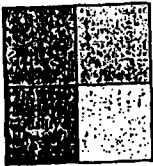
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## Windows 98 provides a higher quality experience for users

- Windows 98 users will have dramatically fewer problems
  - Over 3000 refinements added since Windows 95
  - Fixed or improved over 60% of top support problems with Windows 95
  - Granted the top 76% of requests for features in Windows 95
- Problems that do occur will be fixed in half the time
  - 12 troubleshooting wizards enable users to solve their problems before calling for help
  - System Information Utility gathers system information automatically for the user
- Windows 98 is an easy to maintain platform
  - Windows Tune-Up provides self tuning services to your PC
  - Windows Update provides an central resource site that can update your system automatically
  - Automatically take backup's of your registry and fix if any corruption is detected

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*All on one integrated CD, with single installation*

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## Windows 98 provides a new multimedia experience

- High-performance graphics via DirectX 3D-engine
  - Best gaming experience (performance, realism)
  - Complete integrated DirectX 5 support providing a more robust experience
- Fully MMX enabled
  - Immerse yourself in surround-sound (digital audio) and a new visual experience (multi-monitor)
  - AGP and VPE support
- Easy to add and remove gaming devices (USB)
- Leverage the Internet integration and play with friends across the net

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*Enables the next generation gaming platform*

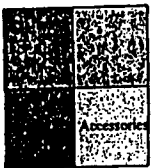
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## Windows 98 will unlock the power of your PC and accessories

- Windows 98 makes it easier to add and use devices that you are familiar with today
  - Enhanced Plug and Play with USB and IEEE 1394 (camera's and scanners)
- In addition Windows 98 will extend the PC with new classes of consumer electronic devices
  - Multi-monitor, DVD, Digital Audio and enhanced broadcast services (TV Tuner cards)
- Windows 98 will increase the typical number of devices that users will attach to their PCs
  - Typically users will have 2 to 3 devices
    - printer, modem and joystick
  - We expect this could treble as Windows 98 enables new hardware
    - printer, modem, scanner, camera, joystick, game pad, DVD, tuner, digital audio stereo

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*Windows 98 and USB will introduce the peripheral cupboard: peripherals can be put away, no need to be permanently attached to PC, saves space on desktop*

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## Other Pre launch communications activities

- Create enthusiasm to result in positive recommendation:
  - Microsoft Extreme (EUCU cinema broadcast) -
    - 25 US cities reaching 15,000- 20,000 Super Users
    - Timing: 4/6 CY98
    - Local MS Reps and user groups host events
    - Product demo and satellite downlinks at UA movie theatres
    - Hardware vendor sponsorship or participation
    - Complemented by User Group Tour
  - Consumer Preview
    - Drive 100k orders for Windows 98 beta 3 with consumer PC enthusiasts
    - Generate positive recommendation to increase sales at launch
      - Upgrade 50% (50K) Beta users
      - Sell additional 25K through Get a Friend promo
- Coming Soon program in the channel
- Books (MS Press: 'Introducing Win 98' launched in October 97)

## Challenge #2

- Don't shoot Win 95/98 in the head as we make the shift to Windows NT 4.0 and 5.0 in the business space.
- How we are addressing
  - Succinct positioning, messaging and training
    - Resource Kit, White papers, Web site materials, field/SP/LARs training, account visits, TSBs
  - PR plans for news, reviews, features
    - Reviewers' Guide, Reviewers' Workshop, Media press event, Weekly Talking Points

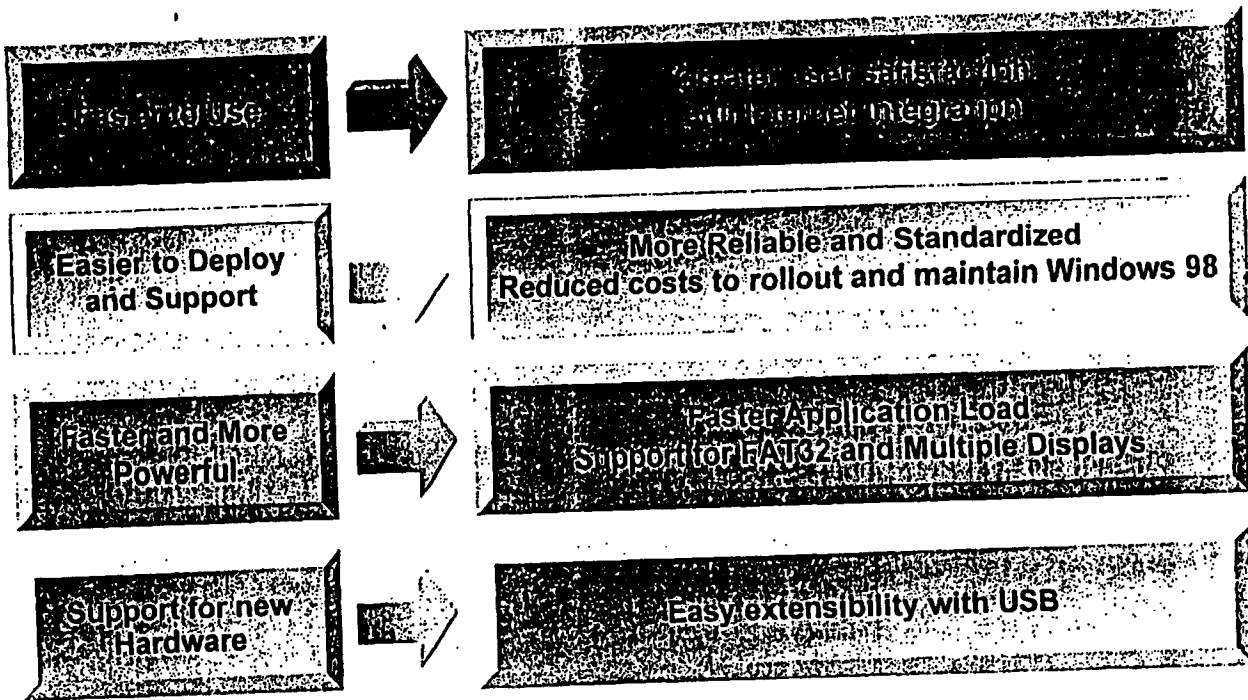
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# Windows 98 for Corporates



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A smart upgrade for business desktops that can't go to NTW

# Win98 Corporate *Upgrade* Feature Summary<sup>1</sup>

- **System Information Utility**
  - System File Checker
  - New Dr Watson utility
  - System Configuration Utility
  - Version Conflict Manager
  - WinRep bug reporting tool
  - ScanReg
- **Improved device driver support**
  - Over 1200 new drivers on Win98 CD <sup>3</sup>
  - Windows Update Wizard
  - Improved .inf installer for new drivers
  - Improved setup process/device detection
  - Win32 Driver Model
- **New troubleshooting wizards**
  - 12 troubleshooters in Win98
- **Fixed server-based-setup issues**
  - New Batch98 tool
  - Tools to deploy pre-configured desktops
  - Full uninstall ability
- **Improved performance**
  - Applications load up to 40% faster
- **Improved reliability**
  - Thousands of bug fixes
  - Improved Memory Management
  - Improved Registry
  - 150+ QFEs (Quick Fix Engineering)
  - Virus scan (boot sector)
  - Boot from CD with Emergency Startup Disk
- **Consolidation of all Win95 updates**
  - Consistent code base
  - Includes all Win 95 updates, service packs, and OSR1/OSR2/OSR2.1/OSR2.5 code <sup>3</sup>
- **Other "power" features**
  - FAT32 <sup>2</sup>
  - Windows Scripting Host
  - Improved backup with SCSI tape support
  - Multiple display support
  - Modem aggregation
  - Improved Dial Up Networking
  - WMI Infrastructure
  - Support for ATM and PPTP
  - New TCP/IP stack

<sup>1</sup> Excluding features related to IE4, new hardware, and entertainment. <sup>2</sup> Included in OSR2. <sup>3</sup> Partly included in OSR2.

# Objectives for Corporate Programs

- Increase 32-bit penetration across Corporates from 40% to 60% by end of FY98.
- Ensure Corporates are committed to continuing investment in Windows, whether Win 95/98 or NT 4.0/5.0.
- Protect Win9x revenue stream (\$3.2B in FY98) in face of move toward NT.
- Ensure Corporates have necessary information and tools (shortly after Windows 98 launch) to decide between Windows 98 and Windows NT Workstation 5.0

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# Issues

- Need to provide Corporates with compelling reasons to upgrade Windows 95 desktops to Windows 98 (if they can't go to NT)
  - Show Windows 98 is the ultimate maintenance release for Windows 95
  - Show software upgrade features that do not require new hardware
  - Show software upgrade features that are not included in the free IE4 download
  - Show how Windows 98 will reduce deployment and support costs relative to Windows 95

# Helping Corporate Customers evaluate Win98 pre-launch

- Beta Program and Accelerated Feedback Program
- Rapid Deployment Program
- S1 TSB updated with Win98/NTW5.0 positioning
- S2 TSB/Roadshow
- Corporate Preview/Resource Kit
- On-line Evaluation and Reviewers Guide

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# Windows 9x Deployment Costs

- We have made estimates of the person-hours required to migrate 2500 desktops from Windows 3.1 to Windows 98 compared to Windows 95, based upon the new corporate deployment tools provided in Windows 98
- Conclusion: Win98 deployment costs will be 22.5% less than Win95 (from Win 3.1)

Migrating 2500 desktops from Win3.1 to:	Win95 Hours	Win98 Est. Hours	Comment
Planning/Coordination	625	438	Reduced 30% due to improved deployment tools and deployment guide
Software acquisition	200	200	No change
IS Preparation	1050	525	Reduced 50% due to increased KB of Win9x, improved Help Desk tools/RK/training courses, and better deployment tools.
OS Installation	4500	2,000	Reduced to 0.8 hr (from 1.8 hr per desktop, due to hands-free installation.
Training End Users	5400	5,400	No change
Additional Technical Support Burden	7500	6,375	Reduced 15% due to improved reliability, help desk tools, and self-help tools to minimize support spike after OS migration
<b>Total Person-Hours for Migration</b>	<b>19275</b>	<b>14,938</b>	<b>Improvement of 22.5%</b>

\* Windows 95 data came from feedback from our business customers

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## Windows expected reduction in support costs

- Windows 98 is expected to reduce Total Help Desk calls by 7.3% (compared with Win 95)
- Windows 98 is expected to reduce OS-specific Help Desk calls by 35%
- Assumes all calls are same length
- Assumes users and help desk staff are trained to use the tools provided in Windows 98

Windows 98 Support Improvements		Expected Support Savings						
System Information Utility		12%						
Improved Device Driver Support		6%	(low end of 6-11% range)					
Troubleshooting Wizards		12%						
Improved reliability		5%	(low end of 5-9% range)					
<b>Total reductions in Windows calls</b>		<b>35%</b>						
<b>OS accounts for approx 23% of Help Desk calls (see below)</b>								
<b>On 1000 calls, Windows 95 reduces this from 230 calls to 180 calls</b>								
<b>Windows 98 reduces this further by 35% to 117 calls</b>								
	H/W	Printing	Network	App'n	OS	Other	Total Calls	
	17%	8%	15%	30%	23%	6%		
Windows 3.x	170	80	150	300	230	60	1000	
Windows 95	170	50	100	300	180	60	860	
Windows 98	170	50	100	300	117	60	797	
	Total Calls	Savings over previous OS						
Windows 3.x	1000							
Windows 95	860	14.0%						
Windows 98	797	7.3%						

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\* Source: Rescue for the HelpDesk (Workgroup Technologies, Inc) April 25, 1995

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## Beta Program and Accelerated Feedback Program

- 15,000 names total on current beta list
- 1000-2000 Corporate Accounts nominated by WW field
- 400 Corporate Accounts included in Accelerated Feedback program with regular email communication and survey's conducted to determine their Win98 intentions
- 26 Corporate sites (listed below) visited by PSS/Testers to test Win98 in different environments

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# Rapid Deployment Program - Deliverables

**Sample Project Plans:** focused on 3 technical scenarios:

- ✓ Unattended Installation of Win98 (Batch and Imaging techniques)
- ✓ Migration from Win95
- ✓ Migration from Win16

**Deployment Guide:** this doc will focus on detailed explanation on above 3 scenarios. Delivery by Product Group will be via the web and other regular CD shipments (MSDN, TechNet, etc).

**Cost of Ownership Update Marketing Bulletin:** focus will be on ZAW and lowered Deployment Cost than any previous Windows!!

**Hardware Compatibility Tool:** this tool will be an automated diagnostic tool to determine whether or not a legacy box is capable of running Win98.

## S2 TSB/Roadshow

- Planning a 15-city roadshow for Feb/Mar 1998
- Audience: Decision makers from MORGs/LORGs
- Present both Windows 98 and Windows NT Workstation 5.0
- Deliver Windows Strategy, How To Choose
- Focus on features/benefits relevant to Corporate customers
- Build Windows 98 interest and momentum pre-launch

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## Corporate Preview/Resource Kit

- Resource Kit Beta bundled with Win98 Beta 3 - available Feb 98
- Provides Corporates with an easy way to review Windows 98 along with detailed technical documentation
- *Price:* \$69.99 SRP
- *Manufacturing:* 40,000 units with Win98 B3 and roughly 45 tools focusing on supportability, deployment, security, and scripting.
- *Distribution:* Sub-set of normal MS Press channels
- *Audience:* Net Admin (50%), Power EU (25%), Developer (25%)
- *Support:* Will be provided by PSS (procedures being established by MS Press)

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## On-line Evaluation and Reviewers Guide

- CBT (Computer Based Training) Systems have created an on-line version of the Windows 98 Reviewers Guide
- Update planned for Windows 98 Beta 3
- Provides an easy to follow, graphical overview of the features in Windows 98
- CBT will allow Microsoft to post to Microsoft.com free of charge
- Expected to be available on Microsoft.com in January 1998
- Links provided to CBT site for further Windows 98 training materials

# Sales Tools

- The following sales tools have so far been provided to the field
  - *Presentation*: Windows 98 standard Corporate Presentation
  - *Demo Script*: Windows 98 standard demo script
  - *White Paper*: Choosing the best Windows Platform - from a Corporate perspective
  - *Talking Points*: Positioning of Windows 95 and Internet Explorer 4 versus Windows 98
  - *Further information*: Windows 98 Intranet site
    - <http://pbsinfo/windows98>
- Key sales tools underway or planned
  - *Presentation*: Why Windows 98 is a compelling upgrade for Corporates running Windows 95 desktops (if they can't go to NT)
  - *Analyst study*: Windows 98 Return On Investment study, showing reduction in deployment and support costs
  - *Deployment Planning Guide*: Key learning and best practices from RDP37

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## S1 District/Channel Tour

- District tour during November/December to present Windows 98 and Windows NT Workstation 5.0 and deliver positioning
- Sessions to be delivered to both Field staff and Channel partners
- Agenda:
  - Presentation and Demonstration of key Windows 98 features relevant to Corporate market
  - Why should Corporates upgrade existing Windows 95 PCs to Windows 98 when IE4.0 is free
  - Windows 98 vs Windows NT Workstation 5.0 - helping Corporates choose the right platform
  - Early look at NTW 5.0 - Presentation and Demonstration
  - Windows marketing programs addressing the Corporate market / Channel opportunities

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# Windows 98 Corporate Launch Activities

- Tie into End User launch activities
- Drive Corporate customers to web for more information
- Customer case studies (from Rapid Deployment Program)
- IT Press advertising
- PR/IT Press reviews
- Analyst reports on Windows 98 for Corporates
- MSTV coverage
- Release of Windows 98 Resource Kit

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## Challenge #3

- **Make Win 98 a strategic part of our OS product line in the consumer space and leverage our partners for the launch**
- **How we are addressing**
  - Huge Reseller, OEM, IHV and ISV partners program
    - Pass Windows Logo testing
    - Buy into ads
    - Incorporate Windows 98 messaging

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## IHV partner program summary

- Potential of getting 30% + hw attach to retail upgrade sales (TV-tuners, monitors, DVD, USB, 3D graphics accelerators)
  - Current run rate for conventional devices was at around 50% in the spring of 97 in the US
- Launch partner program:  
Enlist IHVs to co-promote Win 98
  - Must leverage Win 98 specific capability
  - Must buy ad space
  - Must incorporate “Upgrade to Win 98” messages in their POP/adv
- MS will provide:
  - Artwork concepts and share launch plans
  - Endorse partners publicly as official partners
  - Use their products in demos, tours etc.

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# Windows 98 IHV Partner Program

- Vast majority of HW and OS business overlap in retail
- Potential of getting 30% + hw attach to retail upgrade sales (TV-tuners, monitors, DVD, USB, 3D graphics accelerators)
- Launch partner program:
  - Enlist IHVs to co-promote Win 98
    - Must meet PC97 and Win 98 logo req's
    - Must buy incremental in-store merchandising space for their relevant products during the 98 launch
    - Must incorporate "Upgrade to Win 98" messages in their POP/adv
  - MS will provide:
    - Artwork concepts and share launch plans
    - Endorse partners publicly as official partners
    - Use their products in demos, tours etc.

	Attach	Units (K) off US home installed base	Value/Unit	Total Street \$K	IHV Mktg \$ (K) at 1%
3D Hardware accelerators	20%	420	\$ 99	\$ 41,580.00	\$ 4,158
TV Tuners	4%	84	\$ 299	\$ 25,116.00	\$ 2,512
2nd Monitors	10%	210	\$ 499	\$ 104,790.00	\$ 10,479
DVD Drives	5%	105	\$ 499	\$ 52,395.00	\$ 5,240
USB Devices	6%	126	\$ 99	\$ 12,474.00	\$ 1,247
<b>Total</b>		<b>945</b>		<b>\$ 236,355.00</b>	<b>\$ 23,636</b>

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## Accessory Partners

Feature	Peripherals	Partners
IE 4.0/Channels	Modems, Large HDs	USR, Rockwell, Megahertz, Seagate
USB	Scanners, Digital Cameras Speakers, Joysticks, Mice Keyboards Hubs	MS, Logitech, Altec Lansing, Phillips, Intel, Compaq, Kodak, HP
TV/EPG/Data, DVD	TV Tuners, DVD Player, board	ATI, Creative, Diamond, Rockwell
DirectX 5.0	3D accelerators, DX5 Games	nVidia, Diamond, MS, CUC, Lucas
Multiple Monitors	Monitors, Video cards	Sony, Packard Bell, Samsung, STB
Market Leaders	Memory, CD Drives, Tape Bkup, Printers, etc	Kingston, Iomega, HP <sub>43</sub>

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# Windows 98 ISV Partner Program

- Situation
  - Win95 Logo'd apps will run well on Win98
  - Significant interest from ISVs in partnering w/MS
- Issues
  - No Win98 logo program
  - Apps are not exclusively for W98 - have Win95 logo
  - Need to screen partners for W98 compat. - test MM & OnNow
- Objectives
  - W98 message & Ad \$\$ leverage thru ISV partnership = \$825K
    - #1: Win98+DX5: Games run faster/better than on Win95 w/ DX5
    - #2: Partner (Biz) apps run faster on Win98
    - Totally safe upgrade b/c all your apps still work
  - Sign up top 10 Games ISVs - leverage \$300K incremental advertising \$\$ Sign up top 5 Business ISVs - leverage \$375K incremental advertising \$\$
  - Sign up additional 15 ISVs - leverage \$150K (\$10K each)

# Windows 98 ISV Partner Promos

- Strategy
  - ISV provides:
    - \$10K-\$100K each advertising w/ Win98 messaging
    - Equivalent \$ discounts for Win98 Bundles
  - MS Provides:
    - Web presence, PR support, MM & OnNow testing, performance improvement testing, Co-ordinate: 1 Games ad, 1 Biz apps ad
- Tactics
  - DX5 Games Partner promo - buy 2 and Win98, get 1 game free
  - Highlight Business apps w/ substantial performance improvements (1 Biz partner ad: \$475K, MS contrib \$100K)
  - DVD movie/app promos:
    - buy 2 DVD movies with Win98, get 1 movie free
    - Bundle: buy DVD player + MPEG board + chip set, get 3 movies
  - Equip all 2nd Tier ISV partners (\$10K) with Win98 messaging kit
  - Launch PR - retest & list products supporting MM, OnNow

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## Challenge #4

- **Create positive momentum early on in the super user community despite modest upgrade benefits**
- **How we are addressing**
  - Killer demo
  - 100K Pre-release program
  - PC User Group/Extreme Tour
  - Reviews
  - Reseller briefings
  - Tradeshows

## Creating early momentum

- Killer demo
  - focused on 95 vs. 98 shoot-out
  - great hw support
  - great DirectX 5 games comparison
- 100K Consumer Preview
  - Consumer IEUs, at cost: \$29.95, time-bombed beta
- PC User Group/Extreme Tour
- Reviewers' Workshop
- Reseller briefings
  - Marketing Day, key account HQ visits, Comdex Fall and Spring

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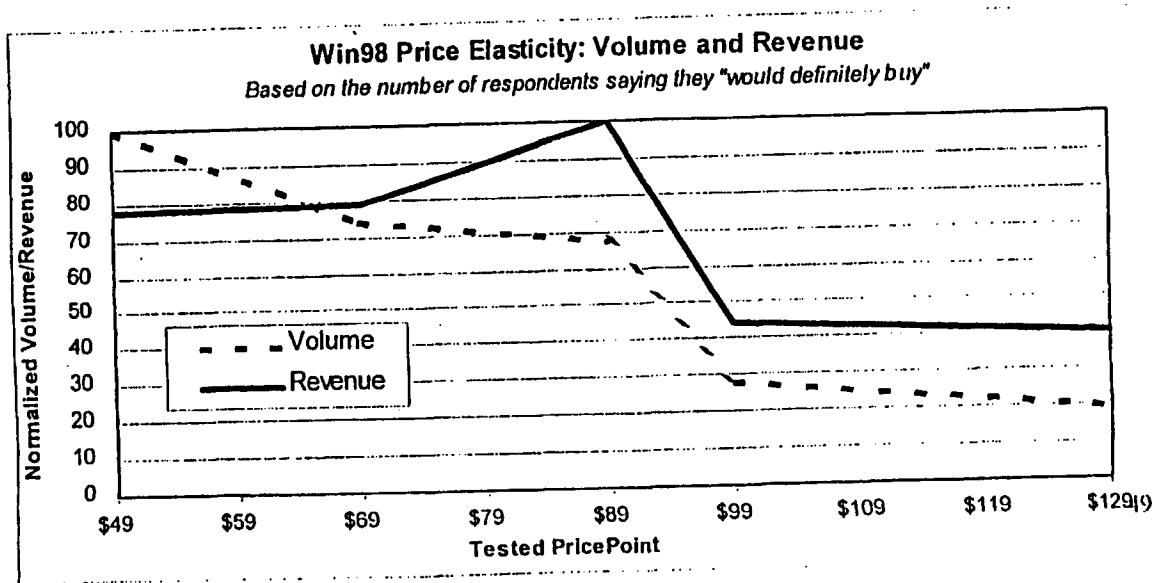
## Challenge #5

- **How to come up with compelling pricing for the retail box given the modest upgrade feature set and analysts feedback, and yet protect the OEM business**
- **How we are addressing**
  - \$89.- street, \$86.- disti
  - Research tells us that feature set is compelling



# Value proposition analysis

- Some reviews editors and analysts saying Win 98 not worth more than \$50.  
**But:**
- Price elasticity research indicates that \$89 street is optimal price point.
- DSP product exposed to \$200M in annually lost revenue at \$49 price point.



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## DSP exposure analysis if Win98 \$49

- DSP channel normally pays \$85/unit for Win95. If we sell RUP for \$49 (and they "cheat" by purchasing this RUP):

- DSP saves \$36/unit cost and \$35/unit for support they don't provide, a total savings of \$71/unit. This will be HIGHLY attractive (despite compliance check built into product).

- Impact of DSP leakage to retail estimated at 3M units per year

- 30% of 10M annual shipments

- MS net revenue loss: \$129M ((3M x \$85)-(3M x \$42))

PSS hit: 3M x \$20 = \$60 M

COGS: 3M x \$7 = \$21 M

Net P&L impact: \$210M

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# Win98 Pricing Research Update

**Latest research provides further validation of \$89 price-point.**

- Interviewed customers who had actually installed and used Win98 in their homes, an average of 6 weeks.
- Measured Willingness to Recommend Win98 at \$89 and \$69.

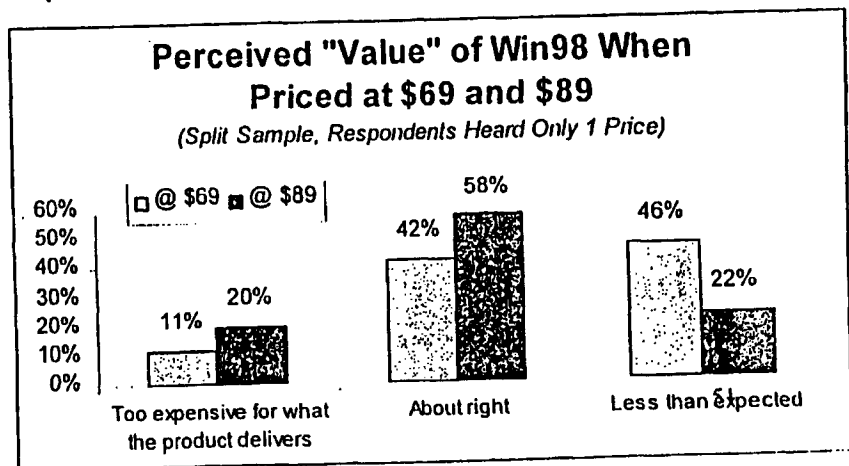
## 1) Revenue Maximization:

- \$89 price point yields 21% more retail revenue, compared to \$69 price-point. Despite 12% drop in volume.

	Retail Price Point		Delta
	\$69	\$89	
Normalized Unit Volume	100	88	-12%
Normalized Revenue	\$100	\$121	21%
Revenue per License	\$63	\$86	37%

## 2) Value Perception:

- \$89 price point is the balance point
- \$69 is a "bargain"



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## Challenge #6

- **Use ms.com and the Web to create upgrade sales and to establish a direct relationship with customers**
- **How we are addressing**
  - Banner advertising with targeted messages for both 3.x and 95 users
  - HW lottery on our Web site with links to resellers
  - Establish support groups online for Prerelease Customers
  - Joint launch with Windows Update

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## Use the Web to drive sales

- Banner advertising with targeted messages for both 3.x and 95 users
- HW lottery on our Web site with links to resellers
- Web countdown to launch
- Establish support groups online for Prerelease Customers
- Joint launch with Windows Update

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## Challenge #7

- **Effectively promote Why To Buy messages to super users during the launch**
- **How we are addressing**
  - Advertising in print and on the Web
  - Co-marketing with hw partners (attach messaging)
  - Buy 98 and get any MS HW product for \$20 less
  - Integration with EUCU National Sales Campaign
  - ‘Breakthrough’ in-store presence (demo days, family nights, RSP cheat sheet, end caps)
  - Self-promoting retail box (aurora)
  - Coming Soon program

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# Advertising

- Objective: Reach 50% of Windows home users within 8 weeks of launch with the average minimum exposure of 4 messages.
- Create high impact launch with maximum reach of target audience through radio, dailies, publications, email, and online beginning at launch.
  - One page ads in dailies (WSJ and USA Today) for high impact announce.
  - Deliver more detailed why-to-buy and extend launch momentum with publications, email and online advertising.
    - Spread ads in computer and consumer publications.
    - Use MS email list servers (+1.5M) to announce Win98 and drive purchase online, awareness of IHV offers, and traffic for Web demo.
    - Online banners at highest traffic web site to drive sales and/or demo.
  - Get ZD, DMRs, and direct OEMs to announce Win98 with pub wrapper.

# Marketing Paradigm

	Awareness	Interest	Consideration	Trial	Purchase
Press relations	■	■			
Pre-Release Beta	■	■	■	■	
User Group Tour	■	■			
Trade Shows	■	■			
Web Site	■	■			
Launch Event	■	■			
Online Auto-demo Promotion	■	■	■		
Online Advertising	■	■			
Advertising	■	■			
Instore POS	■				
Win98/11V instore promotions	■	■	■	■	■
Demo Days/Family Nights/ Seminars	■	■	■	■	■
ISV programs	■				
Logo program	■				

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## Retail: Objectives

- Launch in channel with pervasive merchandising and partner programs
  - Incremental display (pallet or endcap) in EUCU's Top 1000 outlets (represents 70% of EUCU business) for 90 days post-launch
  - 100% execution on merchandising across top 5 accounts in each segment.
  - Match Office 97 NA launch breadth of 16k outlets stocking the product (Windows 95 NA breadth was 22k)
- Ensure customer units totally clear on launch plans
  - Every regional FMM to include local Win98 launch activities in their S2 plans
  - Win98 Retail Channel Champs alias
  - Drive Bi-weekly segment directors meeting

# Retail: Tactics

- Ensure customers can find Windows 98 in stores
  - Incremental display (endcap and/or pallet) in each of EUCU top 1000 resellers
  - Determine incremental funding required to deploy 100% coverage in launch merchandising across top 3 accounts in each segment
- Demo Days in key resellers during first month after launch
  - Budget \$25/hr. Begin planning in January.
  - Reference point: Office spent 800k for 350 outlets in 12 weeks
- Ensure every reseller RSP knows how to sell Win98
  - PIG and reseller ad kit in June/July 98 initiative
  - quick reference card for on-floor/telesales reps
  - demo scripts for demo days
  - RSP and HQ (train the trainer) training kit [quickref cards, t-shirts, NFR product, demo scripts, data sheets]
- Coming Soon' Program
  - Channel program to encourage pre-sell of Windows 98 within 4 weeks of the launch
  - Include TBD incentive

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## Challenge #8

- **Handle the massive logistical requirements**
- **How we are addressing**
  - PSS: Handle call volumes at launch with quality
    - Prerelease program good PSS ramp-up
    - Switch to 3 free incident model?
  - Manufacturing:
    - Ship no more than 3M retail boxes into the US channel
    - Do not stock out
    - Track daily sell-through, evaluate and adjust

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# Logistics

- Initial sell-in to fill channel: Approx. 300,000 US units, based on channel capacity
- Maintain 4 weeks' inventory buffer at MS
- Cap orders at 3M units
- Replenish and build based on "Windows Watch" data
- "Windows Watch" Program:
  - Key feedback mechanism for to provide daily sell-thru data to MS
  - Key Partner resellers and all distributors provide daily sell-thru and inventory data during first 30 days of launch
  - Use Watch data to adjust build quantities accordingly.
  - Review daily and manually allocate product to accounts

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# Win95 Phase Out

**Objective:** Maximize Win98 retail presence by taking Win95 out of the picture.

- Plan of record: Win95 will be no longer orderable as of 4-6 weeks prior to street date. Win 95 will continue to be available via Select/MOLP.
- Rationale:
  - Win98 is an incremental upgrade to Win95:
    - Win95 and Win98 share the same fundamental kernel technology, and hence have the same system requirements. The only difference is Active Desktop, which requires an additional 8 MB to get the same performance. Note, Win98 will ship with Active Desktop not activated.
    - NT 3.51, Win3.0, and DOS 5 were quickly discontinued once their successors arrived.
    - We needed to keep Win3.1 and Win95 because they represented 2 different architectures - We needed to accommodate both. DOS remained because Win3.x is not an OS in itself.
  - Costs of keeping Win95 on the shelf with Win98 is significant:
    - Complicates Win98 messaging and adds potential confusion:
      - With both Win95 and 98 on shelf, it is less clear that Win98 is the successor to Win95.
      - Perhaps Win98 is just an add-on, aka "Plus Pack" for Win95, or perhaps Win95/Win98 are parallel
    - "A great upgrade for Win95" does not ring true when W95 sits on the shelf beside Win98
    - Opportunity cost of multiple OS skus (DOS, WFW, Win95, Win98, NTW) at retail:
      - Resellers would split the limited shelf space between Win98 and Win95.
      - RSP education and stocking are more difficult if we keep both.

## Challenge #9

- **Build up massive pre-launch and launch momentum with OEMs**
- **How we are addressing**
  - OEMs shipping Win 98 at launch
  - Simultaneous launch with retail
  - Joint marketing programs (Wall Street Journal ad, leverage Why to buys)
  - Have Windows logo engraved into PC chassis
  - Push On Now systems

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# Windows 98 OEM Plan

## Current Situation

- In Q1FY98 Windows 95 was pre-installed on 83% of OEM shipments, Win 16 was 9% and Windows NT Workstation represented 8%.
- Expect relatively smooth OEM transition to Windows 98
  - New hardware support key motivator for OEM transition
- Windows 98 will become default OS in place of Windows 95 on new PCs
  - Driving OEMs to pre-install NTW on new business PCs, Windows 98 on new consumer PCs

## Key Objectives

- Successfully launch Win 98 with support from leading OEMs
  - >100 OEMs support at launch, Top 10 consumer OEMs shipping pre-installed at launch
  - Make Windows 98 a "no-brainer" default consumer OS
  - Increase ad dollars spent by 10x by leveraging OEMs
- Leverage Windows 98 to drive hardware excitement for new consumer PCs
  - Leverage excitement around sub \$1000 PCs and drive OEMs to deliver Broadcast PC capabilities
  - Drive OEMs to incorporate new hardware capabilities such as DVD, USB, 1394 AGP
- Use Windows 98 launch to further clarify OEM positioning with Windows NT Workstation

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## **Grand Synch in the Spring:**

- Minimizes potential PR issues
- Maximizes media leverage for end-user marketing (more awareness)
- New PCs show Windows 98 at its best
- Reduce piracy by not having pent-up demand satisfied via OEM CDs
- “Big event” launch creates industry momentum
  - Increased channel commitment and outlet coverage
  - Higher attach rates for MS and 3rd party software and hardware
  - Increased end-user excitement drives stronger upgrade sales



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# Windows 98 OEM Marketing

## Key Issues

- Managing the direct OEMs desire to ship product once we RTM
- Effectively manage smooth Windows 98 OEM upgrade program
- Getting OEMs to refresh product lines off cycle
- Royalty implications
  - Nothing specific to Windows 98
  - MDA incentives are decreasing ~\$2, so net royalties increase for all Windows OS's (we make more money)
- Driving OEMs to build Broadcast PCs while little or no demand or infrastructure exists

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## Challenge #10

- **Make Win 98 the premier multimedia platform**
- **How we are addressing**
  - Killer DirectX 5 games demo
  - Show technology at Comdex, User group tour, retail demo days
  - PR briefing at ECTS in London in September of 97
  - Integrate 3D accelerator cards into IHV partners program
  - Push DVD and AGP in joint programs with OEMs

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# Numbers

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## Current Business Status

- Win32 ships approx 5M WW units/month.
  - 87% Windows 95 at 4.3M units
  - 13% NTW 4.0 at just under 700K units
- Win32 penetration in US business at 40% (OS Tracker)
- NTW shipped 8% of units, accounted for 16% of rev.
  - Key to increased revenue is to accelerate NT shift.

Total revenue & unit share for FY97 \$4.1B

	Rev		Units	
– Win95:	66%	\$2.7B	76%	49.7M
– NTW 4.0:	16%	\$651M	8%	5.2M
– Win16:	7%	\$286M	16%	10.3M
– Other:	11%	\$448M	n/a	

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# FY98 Budget

- Overall desktop business grows by 15%.
- FG decreases 9% with Memphis only accounting for 3 months of FY.
- OEM increases 25% with CAGR driven volume and NTW share increasing. NTW up 193% with corporate shift.
- Biggest upside is NTW OEM shift and Win98 \$99 price point. \$35M increase per % point for OEM share. \$100 if we price Win98 at \$99.

FY98 Windows Desktop Revenue Summary						
	FY97 Forecast			FY98 Budget		
	OEM	FG	TOTAL	OEM	FG	TOTAL
<b>PBSG NA</b>						
Win95	\$1,103,297	\$301,289	\$1,404,586	\$1,383,453	\$104,017	\$1,487,470
NTW 3.5x/4.0	\$147,883	\$208,374	\$356,257	\$379,707	\$178,066	\$557,773
Memphis	\$0	\$0	\$0	\$0	\$96,107	\$96,107
Other *	\$219,467	\$186,560	\$406,047	\$92,905	\$257,075	\$349,980
<b>Total</b>	<b>\$1,470,647</b>	<b>\$696,243</b>	<b>\$2,166,890</b>	<b>\$1,856,065</b>	<b>\$635,265</b>	<b>\$2,491,330</b>
<b>PBSG WW</b>						
Win95	\$2,247,248	\$495,978	\$2,743,226	\$2,761,318	\$252,228	\$3,013,546
NTW 3.5x/4.0	\$219,440	\$431,486	\$650,926	\$649,471	\$354,172	\$1,003,643
Memphis	\$0	\$0	\$0	\$0	\$152,489	\$152,489
Other *	\$430,540	\$303,732	\$734,272	\$187,864	\$348,928	\$536,792
<b>Total</b>	<b>\$2,897,228</b>	<b>\$1,231,196</b>	<b>\$4,128,424</b>	<b>\$3,598,653</b>	<b>\$1,107,817</b>	<b>\$4,706,470</b>
* Includes custom agreements, maintenance, WFW, Win3.x & MS-DOS						

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# Win98 12 Month FG Forecast

## Win98 12 Month FG Forecast

- WW: \$394 Million
- US \$230 Million

## Win95 12 Month Comparison:

- WW: \$741 Million
- US: \$329 Million

### World-Wide 12 Month Forecast

	Units	Revenue	Price/Unit
Pkg Product Upgrade	3.75 M	\$322 M	\$88
Pkg Product Full	0.26 M	\$44 M	\$155
License	0.26 M	\$21 M	\$80
Academic	0.13 M	\$7 M	\$54
Total	4.41 M	\$394 M	\$89

### US 12 Month Forecast

	Units	Revenue	Price/Unit
Pkg Product Upgrade	2.14 M	\$184 M	\$86
Pkg Product Full	0.11 M	\$18 M	\$165
License	0.26 M	\$21 M	\$80
Academic	0.13 M	\$7 M	\$54
Total	2.65 M	\$230 M	\$87

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# US Package Product Forecast

## 12 Month Win98 Forecast

- 2.2 Million Units
- 11% Win98 penetration into US *capable* HOME installed base.

## Win95 12 Month Comparison

- 2.7 Million Units
- 25% Win95 penetration into US *capable* HOME installed base.

Forecast for PSS and mfgt capacity planning			
	Win95	Win98	Win98 Penetration
90 Days	1.6 M	1.1 M	5%
6 Months	2.0 M	1.5 M	8%
12 Months	2.7 M	2.2 M	11%
* Uneven ratio across time reflects a lower launch spike for Win98 than for Win95			
Financial budget forecast:		80% of mfgt fcst	
	Win95	Win98	Win98 Penetration
90 Days	1.6 M	0.9 M	4%
6 Months	2.0 M	1.2 M	6%
12 Months	2.7 M	1.7 M	9%
* Uneven ratio across time reflects a lower launch spike for Win98 than for Win95			
Note: Numbers exclude license business (10% of total fcst)			

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# Win98 Corporate *Upgrade* Feature Summary<sup>1</sup>

- System Information Utility
  - System File Checker
  - New Dr Watson utility
  - System Configuration Utility
  - Version Conflict Manager
  - WinRep bug reporting tool
  - ScanReg
- Improved device driver support
  - Over 1200 new drivers on Win98 CD <sup>3</sup>
  - Windows Update Wizard
  - Improved .inf installer for new drivers
  - Improved setup process/device detection
  - Win32 Driver Model
- New troubleshooting wizards
  - 12 troubleshooters in Win98
- Fixed server-based-setup issues
  - New Batch98 tool
  - Tools to deploy pre-configured desktops
  - Full uninstall ability
- Improved performance
  - Applications load up to 40% faster
- Improved reliability
  - Thousands of bug fixes
  - Improved Memory Management
  - Improved Registry
  - 150+ QFEs (Quick Fix Engineering)
  - Virus scan (boot sector)
  - Boot from CD with Emergency Startup Disk
- Consolidation of all Win95 updates
  - Consistent code base
  - Includes all Win 95 updates, service packs, and OSR1/OSR2/OSR2.1/OSR2.5 code <sup>3</sup>
- Other "power" features
  - FAT32 <sup>2</sup>
  - Windows Scripting Host
  - Improved backup with SCSI tape support
  - Multiple display support
  - Modem aggregation
  - Improved Dial Up Networking
  - WMI Infrastructure
  - Support for ATM and PPTP
  - New TCP/IP stack

<sup>1</sup> Excluding features related to IE4, new hardware, and entertainment. <sup>2</sup> Included in OSR2. <sup>3</sup> Partly included in OSR2.



## Forecasted upgrade paths for Win95 users

RAM	WW Inst Base 2/98		Forecasted Upgrade Path from Win95				Total
	Capable Machines	Percent	No Move	to Win98	to NTW 5	to IE4 only	
32+ MB	7,647,577	7%	72%	6%	2%	20%	100%
16 - <32 MB	68,828,195	65%	82%	4%	1%	13%	100%
8 - <16 MB	29,751,725	29%	94%	1%	0%	5%	100%
<b>Overall:</b>	<b>106,227,497</b>	<b>100%</b>	<b>85%</b>	<b>3.3%</b>	<b>0.8%</b>	<b>11.3%</b>	<b>100%</b>
Breakout among those who upgrade				22%	5%	73%	100%

- Of the people who upgrade, almost a quarter are expected to upgrade to Win98
- Highlights risk of Win95 users only downloading IE4 and not upgrading. Could be potentially as high as 30% of those who 'upgrade' their system. Need to convince them Memphis is best/fastest way to run IE4.

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