

## Launch Plan--Draft

To: Brad Silverberg, Rich Abel  
From: Joseph Krawczak, Jon Roberts, Rich Tong  
Re: Windows 3.1 Launch Plan--For Discussion Only  
Cc: See Attached List

### A. Overview

In the U.S., there are over 10MM Windows-capable machines installed and over 500K Windows-capable machines ship every month. This compares to a U.S. Windows installed base of 3MM and we ship 200K OEM+Retail units per month.

However, we have a unique opportunity to do better with the launch of Windows 3.1, the most practical way to make MS-DOS PCs easier to use. We can make OS/2 2.0 still born if we can make Windows 3.1 the standard operating system. Here's how:

- **Combine Satisfaction and Demand:** The Champions program will be to combine satisfaction *and* demand generation. The Focus newsletter will also be our update offer. WTW will become a "combo" event that will merges an hour demo with two hours of technical help.
- **More Demand Faster:** We will generate trial on an unprecedented scale: 100,000 IEUs will see a Windows 3.1 launch at WinWorld'92; the entire show WILL be the launch event. We will hold simultaneous events in 25 cities nationwide simultaneously for a week. Prelaunch advertising will drive IEUs not just to update to Windows 3.1, but to attend a combo WTW.
- **Sustain Demand and Satisfaction with Partners:** Resellers, OEMs, and Consultants will all be trained on Windows 3.1 and equipped with 3.1 Satisfaction tools prior to launch. Through the use of co-op advertising we will , like MS-DOS 5, generating retail demand and get an additional 150,000 IEUs to go to a combo event.

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Comes V. Microsoft

**B. Launch Goals**

Our launch goals are:

1. Sell 400,000 upgrades with in the first three months of ship.
2. Sell 500,000 retail units with in the first month of ship
3. Sell 500,000 OEM licenses
4. Train 100,000 people on Win 3.1 with in two weeks of ship
5. Train 4,000 OEM, ISV, Reseller partners prior to ship
6. Sell 250,000 Windows Resource Kits within the first three months of ship.

**C. Positioning**

**Microsoft Windows 3.1 Operating System that is  
Easy and Practical by Design**

There are several important themes here. Most important is that Windows 3.1 compared to Windows 3.0 adds fit and finish. It is more polished in large ways (TrueType, OLE) and small ones (Tutorial, fixes to File Manager).

**Easy to Use by Design**

We've spent a lot of time honing Windows to make it easy for MS-DOS users to get up to speed. Nothing is easier to learn or use.

- Easy to setup. Our setup analyzes the hardware that you are running and automatically installs itself, applications you have running. If you already run Windows 3.0, setup retains all your settings.
- Easy to learn. A new tutorial gets novice users up and running. One line help is always available. And, once you've learned one applications you're well on your way to learning them all.
- Easy to use. Graphical user interface means WYSIWYG and no obscure codes on the screen that you have to learn.
- Improved! File Manager for accessing and managing disk files is much faster and more intuitive. It even remembers you network drives and printer connections.
- Improved! Program Manager with dozens of usability improvements including more flexibility in customizing the desktop and the ability to specify a start-up group of applications.

**Great Application by Design**

Windows has the largest base of applications designed specifically for it. Nearly 5,000 today and growing everyday. And, you can still use your old favorites, the nearly 20,000 MS-DOS applications available today.

- Windows applications allow you to mix text and graphics in a document with full WYSIWYG with no more guess work.
- Improved! Super Cut and Paste use Object Linking and Embedding. When you want to edit something from another application, just double click and the applications appears ready for editing.
- Improved! TrueType provides more complete WYSIWYG. The fonts on screen correspond to the fonts on the printed output. TrueType fonts also allow you to scale the font size to any size.
- DOS Applications. Allows you to run DOS apps next to Windows apps and copy information from them or paste information into them.
- Improved! DOS applications that break the 640KB barrier run under Windows or use full VGA graphics can run in a window.

**C. Positioning (Continued)**

**Powerful Operating System by Design**

- Gets the most out of your 286 by breaking the 640KB barrier.
- On a 386, you get access to 4GB of memory and you can even use your hard disk as memory. On a 386, MS-DOS applications can run in a window too.
- Improved! Performance is even better with a revolutionary new SmartDrive disk caching and you can get full high performance access to your hard disk with our new 32-bit disk access feature.
- Improved! MS-DOS and Windows applications that give you trouble can be ended with no problem thanks to Local Reboot.
- UAEs dramatically reduced through the use of Dr. Watson's diagnostic tool and you can now continue after an application problem occurs.
- Widest beta test of any product Microsoft has shipped means you can trust that your software and hardware are compatible with Windows.
- Improved! Extensions are available to let you use a stylus for handwriting recognition and to attach to a variety of multimedia devices. Improved! Any application can use Multimedia sound. The drivers are built right into Windows. With optional hardware and suitable drivers, you can have video, animation.

**Broadest Support in the Industry Now and in the Future**

- Broadest industry support means 5,000 applications, over 500 displays and 500 printers work with Windows. Look for the Windows compatible logo.
- Today, over 6MM people use Windows everyday. It's easy to find some to help.
- You will soon be able to run Windows on everything from a palmtop to a multiprocessor computer. Buying Windows 3.1 means you can use a family of Windows operating systems.

## D. Competition

IBM is positioning OS/2 2.0 as "The Integration Platform", providing full support for OS/2, DOS, and Windows applications. OS/2 2.0 positive features are:

- Run Windows applications in a full-screen Windows box in Standard Mode, with clipboard support and promised DDE support to PM applications.
- Run most DOS applications well.
- Include a new object-oriented Workplace Shell.

OS/2 2.0's disadvantages are:

- Significantly higher system requirements, including 80386 chip, minimum 4 MB of memory, and 15-30MB hard disk space.
- Will not support many Windows 3.1 features, such as OLE, TrueType, Pen extensions, Multimedia extensions.
- Higher support needs and fewer peripheral drivers available.

OS/2 2.0 currently has very high awareness, particularly among MIS Directors and PCC in large organizations. IBM is attacking key perceived weaknesses in Windows 3.0: reliability and our 16 bit foundation. They are also fighting a fairly effective vapor war. Until they ship they can make unsubstantiated claims that make OS/2 2.0 look perfect and creates FUD for Windows.

The good news is that OS/2 2.0 has slipped and will be launching concurrent to Windows 3.1. Consequently, the real OS/2 2.0, flaws, bugs and all, will have to compete directly with 3.1, opposed to 3.0. Also, it is not likely that IBM will have a coordinated launch which will drive significant end user demand and ensure a high level of customer satisfaction.

We will counterattack IBM in the following ways:

- Trench warfare in OS/2 2.0 inclined large corporate accounts. We will ensure that all such accounts are on the Win 3.1 beta program, are visited by a Corporate Marketing and or Transteam member, and are given our full scalable strategy, including an NT presentation.
- Secure massive 3.1 trial among IEUs within IBM accounts through the Win 3.1 beta program.
- Out shout IBM in the enthusiasts and business press with aggressive pre-launch advertising
- Roll over IBM at launch with our Combo Events and associated programs

### Company Repositioning

We will reposition IBM as a company who can't write PC software. All of their past attempts such as, Office Vision, SAA, Top View, DOS 4, have been dismal failures.

## **E. Customer Analysis**

We will tune and target our marketing messages based on whether we are talking to one of the following five user segments. See attached research.

### **Clerk**

Clerks typically do routine data entry into a mainframe, PC database or spreadsheet application. Customer service representatives, bank tellers, and travel agents are all essentially Clerks. They use custom query/data entry applications and often email. Their median hardware configuration is a dumb terminal connected to a mainframe or a XT class PC. MIS directors or support person buy Windows for the Clerks they support because it is easier to train on and it provides easy access to mainframe information. Their primary concerns are terminal emulation and support.

### **Administrative Assistant**

Administrative Assistants primarily use a word processor to create letters, they also use spreadsheets and graphics packages on occasion. Secretaries, Office Managers and even Lawyers all fit into this category. The median hardware configuration is a 286 or low-end 386. The PCC or IEU, who make the purchase decision for this class of users, appreciate the ability of Windows to mix text, data, and graphics together in a document.

### **Inside Professional**

Inside Professionals typically use a word processor to create memos and often another vertical application, like an accounting package, depending on their function. Product Managers, accountants, sales managers, and small business owners are all Inside Professionals. Inside Professionals use a 386 class machine and often have a home machine as well. The ability of Windows to create compound documents, run multiple apps at the same time, and run some of the powerful vertical apps they enjoy is what attracts them to the product.

### **Mobile Professional**

The Mobile Professional profiles very similar to the Vertical Professional except that he or she spends a great deal of time out of the office. Salespeople, real estate agents, and consultants are all mobile professionals. In addition to having the same needs as the inside professional, the mobile professional also cares about remote communication, either through electronic mail or fax, data exchange, and remote support.

### **Vertical Professionals**

The vertical applications that Vertical Professionals use demand high powered PCs or workstations. Like the Clerk class, this category of users work with one principle application. Circuit designers, theoretical physicists, financial analysts, and engineers are all vertical professional. Powerful specialized Windows Applications are what will draw them to the platform. They are also very interested in being connected to many sources of data. NT, with its multiprocessor support and built-in networking will be very appealing to this group.

**F. Packaging, Pricing, Requirements**

| Package                 | Price      | Part number  | Media        |
|-------------------------|------------|--------------|--------------|
| Retail                  | \$149      | p/n's coming | single media |
| Upgrade - direct        | \$49       |              | single media |
| Upgrade - channel       | \$49       |              | single media |
| Upgrade - bundling WTWs | \$49       |              | single media |
| Academic 10 pack        | \$650      |              | single media |
| Promo                   | \$20       |              | single media |
| MLP                     | \$125      |              | single media |
| Upgrade MLP             | \$40       |              | single media |
| MLP Documentation       | \$25       |              | single media |
| ACIS                    | \$149      |              | single media |
| OEM Windows/DOS bundle  | \$99-\$115 |              | single media |
| 360k Conversion         | \$0        |              | single media |
| 720K Conversion kit     | \$0        |              | single media |

**System Requirements**

- 80286 or higher processor
- One hard disk & one floppy disk drive
- 1 MB memory (2 MB recommended)
- EGA or higher resolution monitor
- MS-DOS operating system version 3.1 or higher

**Hard disk space needed**

- Minimum installation = 4 MB
- Full installation = 8 MB

**Options**

- Microsoft Mouse or compatible pointing device
- Hayes or compatible modem for communications
- Sound board

**Note:**

This package contains 1.2 MB high density 5.25" disks or 1.44 MB high density 3.5" disks. 720KB and 360KB available via fulfillment

**ATTACHMENT L. MAJOR PROGRAMS**

To make Windows a success, we're going to rely on four major programs that cut across different channels:

- Windows Steamroller
- Windows Champions
- Upgrade Program
- Partners



## A. Windows Steamroller

With Windows 3.1, we want our IEUs to do more than just upgrade. We want them to move their workgroups.

By building upon our experience with satisfaction programs and the Windows momentum, we can carry on an extraordinary series of launch programs that will tie the industry into Windows 3.1.

### Prelaunch Awareness (Jan-Mar)

Windows 3.1 is perhaps the worst-kept secret in the industry. We will take advantage of the interest in the industry before the official launch of the product on April 6.

- Train our partners. Starting in February, begin WTW 2.0 to reseller, OEM, ISV and IHV partners. They should know all about 3.1 the day it launches.
- IEU Awareness. Starting March 1, begin a countdown to the Windows launch in the trade and business press. Begin to accept registration for the event itself via 800 number.
- IEU Updates. Starting March 15, drop IMM piece Windows Newsletter mailing that pops a special offer for Windows updates that cost \$49 and include the cost of going to a three hour Windows launch events.

### Windows Week

At the start of Windows World, we launch the product..

- The main city will be Windows World where we expect attendance of 20,000. We would run back-to-back Windows 3.1 events that would accommodate all 20K people.
- At the satellite cities, we would run events set for 500 people morning and evening. The target will be cover an additional 80,000 people in these cities.
- The events will target IEUs who have used Windows. Overriding message for the first hour will be that Windows makes it practical and easy for you to use your PC. We will make this believable through momentum, use of scenarios of real people based on segmentation.
- The final two hours will be the Windows Technical Workshop with detailed support and satisfaction information.

### Post-launch Blitz

Following this week, we will find reseller, OEM and ISV partners who will sponsor additional launch events. We would allow them to tailor the material so that they could add their own messages. Target is to reach an additional 150,000 people through the next three months. We would modify the launch video to include segments shot on Winworld floor of neat apps, hardware and customer reaction.

We will revert back to standard WTWs for the seminars group as well.

**B. Windows Champions**

Windows Champions has been a big success. With Windows 3.1, we will refine the existing newsletter, Resource Kit and workshops. And expand the Champions program to include the deliver of Tech Notes from PSS, OEMs, ISVs and IHVs via bulletin boards, direct mail and fax.

| Activity                           | Objective  | Pre launch   | At launch   | Post Launch   | Budget                        |
|------------------------------------|--|--|---|---|-------------------------------|
| Program planning and promotion     | Develop comprehensive collection of support information services to increase user satisfaction | Finalize service offerings and develop execution plan<br><br>Implement pilot of information services | PR announcement                                   | Measure impact  | 20k                           |
| Promotional collateral development | Multiple, flexible executions of promotional piece   | Create collateral pieces<br><br>Start including in retail, OEM packaging                             |   |   | 120k                          |
| Focus on Windows Newsletter        | Promote service offerings through newsletter   | Create new edition of Focus  | Mail newsletter<br><br>Include in PR announcement | Process responses<br><br>Measure results                    | Included in . upgrade mailing |
| Windows Resource Kit               | In-depth technical support information   | Create new 3.1-specific WRK.   | Include in PR announcement                        | Fulfill orders<br><br>Measure results                       | Breakeven                     |
| Windows Technical Workshop series  | Technical overview of Windows  | Revise WTW presentation for 3.1  | Include in PR announcement                        | Ongoing administration of WTW series<br><br>Measure results | \$3mm FY92                    |
| Windows Technical Support Library  | Provide ongoing flow of technical support notes on key issues                                  | Create initial collection of tech notes  | Include in PR announcement                        | Fulfillment<br><br>Measure results                          | 20k                           |

### C. Upgrade Program

Windows 3.0 now has an installed domestic base of approximately 3 million copies. Because Windows 3.1 will eliminate many of the barriers that have prevented users from fully adopting Windows, it is critical that our upgrade program have a very broad reach.

However, Microsoft currently only has names of about 1 million users to reach directly. Therefore, it is critical that we make the Windows 3.1 upgrade program compelling, easy, and widely available. We will do this through massive direct mail, state-of-the-art reseller and corporate upgrade programs, and by assisting OEM's with their upgrade programs.

| Activity                          | Objective                                       | Pre launch   | At launch                      | Post Launch  | Budget  |
|-----------------------------------|---|--|--------------------------------|--|---|
| Direct mail program               | Reach 1.5mm users                               | Create mailing collateral<br>Gather lists<br>Setup phone and mail operations                           | Send mail                      | Send targeted follow-up mailing<br>Process orders<br>Measure results | \$1.6mm   |
| Reseller program                  | Obtain 100% distribution of upgrade package     | Sign up resellers<br>Provide materials for reseller promos<br>Build upgrade SKU                        | Conduct field promotion events | Process orders<br>Measure results                                    | Reseller promotion activities covered by reseller marketing funds |
| Corporate account program (CUA's) | Obtain involvement of XX% of corporate accounts | Train field<br>Sign up corp accounts<br>Sign up resellers<br>Setup operations for CUA's                | Conduct field promotion events | Process orders<br>Measure results                                    | Covered in reseller and corporate marketing funds                 |
| OEM program                       | 100% participation by current Windows OEM's     | Establish policy<br>Create collateral materials<br>Train OEM reps<br>Sign up OEM's<br>Setup operations | Send mail (for some OEM's)     | Process orders<br>Measure results                                    |   |

**D. Windows Partners**

The aggressive MS-DOS 5 promotion by Egghead shows that partners can be very active in supporting our products. Windows 3.1 promises to be the next big thing to drive demand in our industry. When our partners sell a unit of Windows, they have a great chance to sell applications, hardware, support, etc.

Moreover, we need these OEMs, resellers, IHVs and ISVs to support our customers. They can help us achieve great end-user satisfaction.

| Activity          | Objective   | Pre launch  | At launch  | Post Launch  | Budget |
|-------------------|---|---|--|--|--------|
| Reseller Partners | Demand. Get top five resellers to build Spring promotions around Windows<br><br>Satisfaction. Train 4,000 RSPs on selling and supporting Windows before the launch.   | RSPs attend WTW training on the product and its selling points<br><br>Planning of retail promotions.                          | Stock the Windows update and full product. Take the money.   | Resellers plan their own events in their local cities                      | TBD    |
| OEM Partners      | Demand. Get top 10 OEMs to carry certified Windows machine with a logo. Get 5 OEMs to preinstall and run Windows promos<br><br>Satisfaction. Train 1,000 of their PSS techs and carry the newsletter in pack. | Their PSS techs attend WTWs.<br><br>Certification of Windows machines<br><br>Generate tech notes based on beta test problems. | Show off machines at launch event.<br><br>Kickoff their Windows 3.1 promotions and Windows machines at Winworld. | Generate tech notes as needed based on user problems.                      |        |
| ISV Partners      | Demand. Get top 10 ISVs to give us their names for update mailings.<br><br>Satisfaction. Train 2,000 ISV PSS techs on Windows 3.1 before launch.  | Train PSS Techs at WTW 2.0s.<br><br>Generate tech notes based on beta test issues   | Show off Windows 3.1 applications at Winworld.   | Generate tech notes as new versions of software come out.                  |        |
| IHV Partners      | Satisfaction. Get drivers certified in Windows Driver library.  | Generate tech notes based on beta test issues   | Show off hardware at Winworld  | Generate tech notes as new products ship.<br><br>Update drivers as needed. |        |

**E. Key Milestones**

**Key milestones for this launch are:**

- 11/1 Kickoff launch activities with support groups. Finalize product positioning, support points, target audience analysis and product objectives.
- 11/15 First drafts of plans of support groups.
- 12/1 Exstaff final approval of launch plan and support plans.
- 1/91 Rollout to U.S. field sales force. Training of field.
- 2/91 Training begins for partners
- 3/91 Pre-launch awareness campaign begins
- 4/91 Winworld launches; Windows Month events
- 5-6/91 WTWs return to normal format; Partners WTWs begin.

**F. Budget**

Total Windows Marketing budget for FY92 is 10.4MM of which \$5.2 is allocated to the launch. This includes \$3.1MM for WTWs, \$1.6MM for updates and newsletters and \$500K for the event. See detailed budget attached.

Additional funds include Winworld event budget, reseller marketing funds and marketing dollars our partners contribute. These are TBD.

**ATTACHMENT II. PLAN SUMMARIES FOR SUPPORT GROUPS**

**Program Roles and Responsibilities**

The following events, partners and programs will make the launch of this product a success. If you need the detailed marketing plans, you can contact people below. To get them all, email Jonro.

|                     | Winmktg Owner  | Program Owner  |
|---------------------|----------------|----------------|
| Tools               | Toma           | N/A            |
| Certification       | Janelle        | Sandraj        |
| PR                  | Richt/Richab   | Lizi           |
| Tradeshows/Events   | TBD            | TBD            |
| User Groups         | Timbre         | Tonyad         |
| Advertising         | Jonro          | TBD            |
| Marketing Materials | Timbre         | Coraed         |
| Direct Mail         | Jeffl          | Coraed         |
| Workshops           | Janelle        | Caroksha       |
| Resellers           | Timbre         | TBD            |
| Corporate Accounts  | Josephk, Tycar | Richta, Billhc |
| Salesforce          | Bobf           | Celesteb       |
| OEM                 | Alexm          | TBD            |
| PSS                 | Bobf           | TBD            |
| MSU                 | TBD            | Lisac          |
| ATCs                | TBD            | Alany          |
| Manufacturing       | Timbre         | TBD            |
| Fulfillment         | TBD            | TBD            |
| MS-DOS 5            | TBD            | TBD            |
| Systems Marketing   | TBD            | TBD            |

**A. Tools**

The current satisfaction and adoption tools produced by Windows Marketing have been very successfully received by customers, with over 170K Resource Kits shipped and over 35,000 people attending a Windows Technical Workshop.

Windows 3.1 will require new product information for successful customer adoption, which will be provided by:

| Description                 | Objective   | Pre-Launch   | Launch  | Post-Launch  | Cost   |
|-----------------------------|---|--|---|--|--|
| Windows Technical Workshops | Give support professions the basic information necessary to successfully adopt and support Windows in their organizations.                            | Jan.- WTWs to move to SMSD Seminar group.<br>Jan.- New 3.1 WTW content in development. | One month of intensive WTWs around the country, including a new feature overview for 3.1. | Ongoing WTWs.  | Budget \$3.089M<br>175 WTWs X 200 attendees = 35,000 |
| Windows Resource Kit        | Provide support professionals with a source for all technical information necessary to successfully adopt and support Windows in their organizations. | Resource Kit 2.0 under development.  | Resource Kit 2.0 to ship at product launch.   | Ship a 2.1 update to the Kit within 6 months.                  | N/A<br>Revenue neutral price TBD.                    |
| Windows Diagnostic Tool     | Software tool to provide support professionals with key diagnostic info for Windows.  | Tool under development.  | To ship in the Resource Kit.  | Updating as needed.  | TBD  |
| Windows White Papers        | Deliver a series of short articles on Windows technical internals   | Prepare a series of four to salesforce, PR, etc.                                       |   | Continuing series as needed. Include Winball                   | N/A  |
| Windows Certification       | Enable support professionals to become certified Windows experts.   | Develop test content, beta test it, and revise as needed.                              | Launch the Windows certification program in March.  | Ongoing revisions as needed. Promoted via newsletter and WTWs. | N/A  |



|  |  |   |  |                              |            |
|--|--|---|--|------------------------------|------------|
| <b>Windows<br/>Technical<br/>Notes</b> | <b>More timely<br/>information based on<br/>PSS Tech Notes and<br/>ISV/OEM/IHV notes</b> | <b>Develop contents<br/>based on beta<br/>testing</b> | <b>Ready for delivery<br/>on BBS, Fax or<br/>paper</b> | <b>Ongoing<br/>revisions</b> | <b>TBD</b> |
|--|--|---|--|------------------------------|------------|

**B. Public Relations (Lizsi, Richt)**

Currently, most of the people in the trade press use Windows and like it. They are also reasonably skeptical of IBM's ability to deliver OS/2 2.0 particularly after the most recent slip and like the features that we've been pushing with Windows 3.1 to date.

However, our reach has been limited to the trade press and we want Windows to be a larger phenomena. We have the opportunity with Windows 3.1 to go into the local press and the business press. Therefore, we should push hard in business and local press:

Top line Objectives:

| Activity/Objective   | Pre launch  | At launch  | Post Launch  | Budget |
|--|---|--|--|--------|
| <p>Monthly Trade Press..</p> <p>Covers of PC Magazine, PC World and PC Computing.</p> <p>Windows 3.1 tips series in PC Magazine and PC Computing</p> | <p>Deliver betas to the press starting with Beta II.</p> <p>Provide series of white papers on Windows issues we want them to write about.</p> <p>Sponsor conference for tech weenie editors</p> | <p>April covers drop including articles on TrueType, OLE and reliability of Windows.</p> | <p>Continuing series of Windows support Q&amp;A.</p> <p>Win OS/2 2.0 vs. Windows 3.1 reviews</p> |        |
| <p>Weekly Trade Press.</p> <p>Goal is to get front cover</p> <p>Win reviews in PC Week and Infoworld</p>   | <p>Provide white paper series.</p> <p>Another tour in February.</p>   | <p>Get the April 6 covers</p> <p>Get favorable first looks.</p>                          | <p>Place articles that compare OS/2 2.0 vs. Windows 3.1.</p>                                     |        |
| <p>Business Press</p> <p>Get WSJ, New York Times and LA Times articles</p>   | <p>Repositioning messages on IBM, the company. Make OS/2 2.0 the do or die release.</p>   | <p>WSJ technology article on Windows 3.1 compared to OS/2 2.0</p>                        | <p>N/A</p>   |        |
| <p>Local Press and Columnists</p> <p>Reach top 20 metro area columnists</p>  | <p>Identify key local columnists (use EBU list)</p>   | <p>Get them to come to the launch nearest them.</p>                                      | <p>Place articles on Windows 3.1 referring them to Champs program.</p>                           |        |

**C. Tradeshows (TBD, TBD)**

Windows 3.1 is of general interest to many people. The incredible interest in WTWs shows that with nearly 50K people trained in the last six months.

However, with current WTWs, we can't teach more than 25K per quarter. We can really win against OS/2 if we combine WTWs with a demand generation for the product. Therefore, we should:

| Activity  | Pre launch  | At launch   | Post Launch                                      | Budget  |
|---|---|---|--|---|
| Windows World.<br>Get 1,000 press and influentials to see Billg.                            | Prepare launch videos and script main messages.   | Windows World keynote will be the launch of Windows 3.1.  |  | \$350K including free product and launch video production.                        |
| Top 25 metro areas in the U.S.<br>Train 100,000 Windows champions on the use of Windows 3.1 | Register key accounts and Windows Champions for April 6 event and purchase of Win 3.1 upgrade | Simulcast the launch event to 20 cities.<br><br>Rerun the launch event plus 2-hour WTWs twice daily. Do this April 6-10 | <i>Seminar team will pick up WTW after April</i> | 100K x \$55 per person=\$5.5M M.<br><br>We do get the revenues from them however. |
| International events  |   | Simulcast event to major European cities  |  |   |

**D. User Groups (Tonyad, TBD)**

User groups have traditionally been some of our biggest supporters and are a big pool of influential end-users. However, we don't typically treat them differently and Windows 3.1 launch will no doubt interest them. Therefore, we should:

| Activity  | Pre launch  | Launch month                                 | Post Launch   | Budget    |
|---|---|--|---|-----------|
| User Group Visits<br>Visit the top 20 user groups                                   | Get on their calendars.<br>Get their names on Champs lists. | Get them to attend the WTW 2.0 events.       | Visit user groups in metro areas that aren't covered in top 25. | T&E only. |
| User Group Newsletters<br>Get Windows help section in top 20 user group newsletters | Deliver to them white papers on Windows.                    | Series of white papers on using Windows 3.1. | Continue to deliver white papers on Windows                     |           |

**E. Advertising (KathrynH, v-Mattr, Rich)**

We have been running business press advertising focused on momentum this fall. However, with the Windows 3.1 launch, we will want to tie advertising closely with the launch of the product and to get customers (particularly influential end-users) to try the product. And, we the number of events that we are running, we will want to tie the advertising with these events:

| Activity/Objective  | Pre launch   | At launch  | Post Launch  | Budget                |
|---|--|--|--|-----------------------|
| <b>Business Press</b><br>Get 50% reach into IEUs. Increase awareness of Windows 3.1 to 30% of IEUs. | Continue the momentum and testimonial campaigns.<br><br>In March, switch to an anticipation campaign telling users about Windows 3.1 | Announce Windows 3.1 and provide 800# for customers to register for WTW 2.0s and get their updates | Momentum campaign would continue as a series that covers how Windows can be used by any five target end-user segments. | TBD                   |
| <b>Trade Press</b><br>Get 30% reach into IEUs. Response rate of 10,000 users from ads.              | In March, drop anticipation ads  | In April, drop ads getting customers to register for WTWs  | Go silent.   | \$350K                |
| <b>Local Press</b><br>Co-op advertising in top 10 metro areas driving response of 50,000 IEUs       | N/A  | Begin co-op ads with key reseller and OEM partners driving demand and attendance to WTWs           | Continue co-op ad campaign series.   | TBD our contribution. |

**F. Marketing Materials (Johnbarr, Tomja)**

The standard marketing materials will work for us. The primary goal will be reducing the amount of collateral to just a few pieces. We expect most customers won't need a datasheet to understand the product. Therefore, the minimum collateral will be:

| Activity  | Objective   | Pre launch   | At launch                                    | Post Launch                          | Budget  |
|---|---|--|--|--------------------------------------|---------|
| <b>Retail Packaging</b><br>This include variants for ACIS, AE, etc.                     | Ensure it pops off the shelf.   |  | Insert a "New!" stripe at the top of the box | Update stripe as review wins come in | \$25K   |
| <b>Datasheet</b>  | Prepare single page datasheet.  |  | Ready one month before launch.               |                                      | \$175K  |
| <b>Windows Driver Library packaging and cover letter.</b><br>A set of six separate SKUs |   |  | Ready for drop at the launch.                |                                      |         |
| <b>Demo Script</b>  | Train ASRs to <ul style="list-style-type: none"> <li>• impart the benefits of 3.1 to RSPs</li> <li>• train RSPs to sell to various customer types.</li> </ul> | Winmktg creates a demo script for ASRs to demo to RSPs |  |                                      | \$2,500 |
| <b>Demo Video</b>   | Tool to help ASRs learn the 3.1 demo script   | Film, dupe and distribute to the field                 |  |                                      | \$10K   |

**G. Direct Mail (Coraed, Jeff)**

Although we will reach a significant number of people through resellers and our corporate account salesforce, our mailing list remains our single most important resource for getting updates and communicating with champions.

|                                     | Objective  | Pre launch     | At launch                       | Post Launch   | Budget  |
|-------------------------------------|--|----------------|---------------------------------|---|---------|
| Update mailing/Champions newsletter | Two drops of IMM pieces each to get 100K updates | Drop in March, | Begin taking orders for updates | Second drop three months after launch of second mailing | \$1.2MM |
| Resource Kit Update mailing         | Need to decide if we need this                   |                |                                 |   |         |

**H. Seminars (Carolsha/Janelle)**

Our long-term WTW will be the key vehicle in the first month of product shipping. Because we will do many cities, it will be handles by corporate events. Both before and after, we will use the lower-cost, more efficient seminars group

|  | Objective  | Pre launch  | At launch  | Post Launch  | Budget  |
|--|--|---|--|--|---|
| WTW 1.1<br>Windows 3.0<br>training   | Train 20K users<br>in Jan-March                      | WTW 1.1<br>seminars to<br>ramp people<br>up.            |  |  | \$1.0MM   |
| WTW 2.0<br>Updated workshops<br>that is Windows 3.1<br>specific. The first set<br>also include an hour<br>of demonstration of<br>Windows 3.1 | Train in top 50<br>metro areas.<br>50K users in all. | Learn the<br>WTW 2.0 and<br>start beta test<br>training | Switch over to<br>WTW 2.0.<br><br>In April,<br>WTW<br>presenters will<br>be used for<br>Corp Events. | Return to<br>standard seminar<br>team-like events. | \$2.0MM of<br>FY92 money,<br>Additional<br>funds in FY93. |



**I. Reseller Channel Plan**

**Reseller Channel Planning**

| <b>Activity</b>                   | <b>Objective</b>   | <b>Pre-launch</b>   | <b>At launch</b>                               | <b>Post-launch</b> | <b>Budget</b>                                |
|-----------------------------------|--|---|--|--------------------|--|
| <b>RSP Training</b>               | Train RSPs on the product and how to sell it.  | Schedule ASR time at reseller outlets to conduct training sessions  |  |                    | \$25,000 for Pizza Party or other incentives |
| <b>POS promotion</b>              | Create POS materials to give 3.1 BIG in-store presence   | Work with Nancybi to create these materials   | Distribute materials to 5,000 reseller outlets |                    | \$200,000                                    |
| <b>Leverage existing programs</b> | Make sure Windows programs complement existing efforts   | Work with Nancybi to make Windows a major part of the merchandising section and training call-in quiz   |  |                    |  |
| <b>RSP Seeding</b>                | Give non-resaleable product to all RSPs who pass a quiz. This will be for their personal use, because RSPs are better able and more likely to sell what they know. | Determine qualification criteria.<br>ASRs to distribute product.  |  |                    | \$100,000 Marketing funds                    |
| <b>RSP Incentive</b>              | To give RSPs incentive to understand the product and to increase mind-share  | Create an incentive program that will include a give away (i.e. Windows wrist watch) that is earned by passing a 3.1 Quiz<br>ASRs to administer quiz and prizes |  |                    | \$100K marketing funds                       |

**J. Corporate Account Programs**

Windows today has a substantial presence in corporate accounts. However there is still high awareness and consideration of OS/2, especially in MIS organizations. Redoubling the Windows ground swell in corporate account is the most effective way of shutting out OS/2, along with providing customers with product information for making decisions and countering IBM claims. We will achieve this by:

| Description                    | Objective  | Pre-Launch  | Launch   | Post-Launch  | Cost  |
|--------------------------------|--|---|--|--|---|
| Corporate Champions            | Enroll 30,000 Named Account champions (this is 100 per Named Account). 50% will attend a field seminar or WTW. | Field training.<br>Oct.- Focus newsletter.  | Focus mailing.<br>District Launch Seminars. 2 per district with 250 people each.<br>Special Tech Workshops for Launch. | Ongoing field seminars, Focus mailings, WTWs, Resource Kits. | Field Seminars- 20 dists. x 2 sem. x 250 people x \$15/pers. = \$150K |
| Named District Program         | Develop marketing plans for Windows in each district.  | Assign Win Mktg. person to each district. Prepare local launch plan.                              | Execute launch plan with field seminars, seeding, and district-specific programs.                                      | 6 month district marketing plans and account tracking.       | N/A   |
| Seeding - Share Drive          | Cover a share of IEUs seeded by MS applications who need Windows   | Ongoing Share Drive Activity with Win 3.0 seeding.<br>Jan.- C.A. marketing beta (20 per CAM team) | Launch Seeding- 25 units X 300 Named Accounts = 7500 seed units.   | Ongoing Share Drive seeding.                                 | 40 CAM teams x 20 seeds x \$20 = \$16K                                |
| Corporate Account Product Info | Get Accounts the info they need to choose a Windows strategy.  | Ongoing white papers on product features, strategy, and competition.                              | Widest possible distribution of white papers.  | New topics as needed.  | N/A   |

K. Sales force

| Description            | Objective  | Pre-Launch  | Launch  | Post-Launch   | Cost |
|------------------------|--|---|---|---|------|
| Field Product Training | Insure that the entire field knows the product and can effectively present and demo 3.1. | SE's trained on features at NSM.<br>Ship standard demo script to field 12/1.<br>Training group to develop 3.1 training courses.<br>Train field on product and standard pitch at Jan. RKO's.   | Field presentations on 3.1 in accounts and at Launch Seminars.                    | Ongoing training for WinBall, WinLogin, new reps.   | N/A  |
| Competitive Training   | Insure the field knows key competitive info vs. OS/2 and can answer customer objections. | Ship Product Comparison to the field 12/1.<br>Train on competitive product issues at Jan. RKO   | Update field materials with latest product info vs. OS/2.                         | White Papers on key topic areas vs. OS/2 as needed. | N/A  |
| Field Launch           | Maximize field participation in the launch.  | Nov. 15-RM/DM conference calls on launch plans<br>Ongoing from Nov.- Sales force "launch countdown" communique's<br>Nov.-Feb.- 3.1 presentations to corp. accounts.<br>Jan.- RAX management of reseller inventories.<br>Feb.- RAX order taking for 3.1<br>Feb.- ASR training of RSPs. | Field Launch Seminars in each district. Corp. account and reseller presentations. | Follow up with Focus, Res. Kit.                     | N/A  |

**L. OEM**

OEMs are an important part of Windows 3.1 marketing. The most critical thing is to make sure that they have their people trained to support the OEM product and to get them to get behind preinstall and developing Windows specific machines.

| Description           | Objective   | Pre-Launch   | Launch  | Post-Launch   | Cost |
|-----------------------|---|--|---|---|------|
| Compatibility Testing | Insure that 3.1 runs on every OEM machine.                        | Run test suites.                                   | Promote compatibility via logo program.                 | Coopt ads with OEMs.  | N/A  |
| Performance           | Insure that preinstalled PCs are fully optimized for Win 3.1.     | Distribute performance tests done by t-richo.      | Promote optimized Win 3.1 PCs.                          | Encourage comparison of machines based on Windows performance.  | N/A  |
| Training              | Insure that OEMs are fully trained to support Win 3.1.            | Training in each of top 8 OEM accounts on Win 3.1. | Promote partership with OEMs for customer satisfaction. | INsure that OEMs have regular contact with PSS to stay current. | N/A  |
| Tools                 | Insure that OEMs are fully equiped with tools to support Win 3.1. | Distribute and train on Res. Kits.                 | Promote partership with OEMs for customer satisfaction. | Update materials as needed.                                     | N/A  |
| Upgrade               | Upgrade 25% of OEM Win units.                                     | Design upgrade program with each OEM.              | Roll out OEM upgrade programs. Fulfilled by OEM or MS.  | Get the customer name.  | N/A  |

M. PSS

PSS is only just now meeting the support demand on Windows. The experience of launching Windows 3.0 taught us some critical lessons regarding supporting Windows: 1) Windows is inherently harder to support than an app, especially given the complex hardware and software interactions, 2) this requires that technicians be trained extensively on Windows troubleshooting, and 3) it is critical to forecast unit sales correctly to staff adequately.

To insure that Windows 3.1 has first-class product support from day one, we will do the following:

| Description:         | Objective:   | Pre-Launch   | Launch   | Post-Launch   | Cost: |
|----------------------|--|--|--|---|-------|
| Meet Demand          | Insure staffing to handle volumes needed. Get to average 1 minute waits and <5% ATBs                     | Forecast retail, OEM, and upgrade sales correctly. Begin training adequate number of technicians.  | Fully staffed at launch.   | Provide them with weekly unit updates. Train/move techs as needed.                      | NA    |
| Train Technicians    | Insure all techs are highly skilled in Windows troubleshooting and support. Reduce call-back rate to X%. | Nov.- Biweekly tech talks with Transition Team.<br>Nov.-Jan- Win 3.1 tech training content under development, including the Windows Support Handbook.<br>Feb.- Train all techs on Win 3.1. | Fully trained.   | Ongoing biweekly tech talks on new issues as needed. Update Support Handbook regularly. | N/A   |
| Product Feedback     | Get PSS to give clear feedback on what's wrong with product. Improve tracking codes.                     | Design new tracking system with detailed, meaningful tracking codes for Program Management.  | Have system in place. Weekly reporting back to Windows Group.    | Revise as needed based on product issues that arise. Ongoing reporting.                 | NA    |
| Better communication | Improve working relationship with regular contact on many levels.  | Get every Win BU person to man the phones. Meet biweekly with PSS managers and techs. Monthly reports to management.   | 20 BU people a week to man phones for immediate feedback on 3.1. | Ongoing weekly meetings and monthly reports. Quarterly business review with Bradsi.     | NA    |

**N. MSU**

As the need for product information and training on 3.1 grows, MSU will be a valuable resource for customers and will help drive adoption of Windows. Opportunities for the Windows group to work with MSU on Windows 3.1 are:

| Description:   | Objective:   | Pre-Launch   | Launch                          | Post-Launch  | Cost: |
|--|--|--|---------------------------------|--|-------|
| Windows SE Course<br>In depth training course on supporting Windows. | Get this done and promote a formal training course | Promote current course through WTWs.<br>Develop revised content for 3.1. | Begin revised course at launch. | Revise as needed.<br>Continue to promote through WTWs. | NA    |
| Windows 3.1 video course.  | A tool for easy on-site training in accounts.      | Course under development.  | Ship course.                    | Revise as needed.<br>Continue to promote through WTWs. | NA    |

**O. ATCs**

Authorized Training Centers will also help fill the tremendous demand for information and training on Windows. We will equip them by:

| <b>Description:</b>              | <b>Objective:</b>  | <b>Pre-Launch</b> | <b>Launch</b>                                    | <b>Post-Launch</b>      | <b>Cost:</b> |
|----------------------------------|--|-------------------|--|-------------------------|--------------|
| Windows 3.1 training information | Provide ATCs with information and materials for developing their own training courses. | Material TBD      | Insure that all ATC's are ready to train on 3.1. | Ongoing promotions TBD. | NA           |

**P. International**

**Top-Line Objectives:**

| Description:         | Audience: | Objective:  | Cost: |
|----------------------|-----------|---|-------|
| Localize Champions   |           | Localize Champions support materials              | NA    |
| Windows 4.0 feedback |           | Determine country specific issues for Windows 4.0 | NA    |



**Q. Manufacturing**

| Program                | Nov-Dec Planning  | Jan-Mar Planning   | April Launch  | May-July Planning  |
|------------------------|---|--|---|--|
| Manufacturing          | Meet with Dianet, Robertu, Dianap, Scotb, Jamest re: <ul style="list-style-type: none"> <li>• Raw Materials</li> <li>• On Hand Inventory</li> <li>• New 3.1 SKUs</li> <li>• Returns/Rework</li> </ul> | By 3/1, CP's FG and RM inventory should be gone.<br><br>Need to build up massive (TBD) 3.1 Update inventory. This will involve warehousing issues. |   |  |
| COGs reduction         | <ul style="list-style-type: none"> <li>• Review BOMs</li> <li>• Evaluate Thin Manuals for update and ACIS SKUs</li> <li>• Work with DianaP regarding other cost saving measures.</li> </ul>           |  |   |  |
| Channel Management     | Meet with Sylviasz to reduce channel inventory to 0 by launch   |  | Call downs?   |  |
| Reseller Channel Promo | Work with Nancybi to plan reseller rollout <ul style="list-style-type: none"> <li>• In-Store training</li> <li>• POS promo</li> <li>• In store and outbound sales materials</li> </ul>                | <ul style="list-style-type: none"> <li>• Produce materials</li> <li>• Begin training RSPs</li> </ul>   | <ul style="list-style-type: none"> <li>• Make sure displays are being used</li> </ul> | <ul style="list-style-type: none"> <li>• Follow up/ongoing training</li> </ul> |

**R. Fulfillment**

Major goal here is to handle the demand for the update units. Also, to handle demand for Windows resource kits.

**S. Telesales**

Major goal is to make sure people get called back and to ensure that WTWs come.

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**T. Customer Service**

Get them trained to answer common Windows 3.1 questions.

### U. Developer Relations

See Cameron's plan for full details.

| Description:                        | Audience:       | Objective:  | Cost                |
|-------------------------------------|-----------------|---|---------------------|
| Register User Base Policy           | ISVs            | Revise the policy to prevent over mailing. Investigate using a third-party like PC Warehouse to provide us with a catalog   | TBD                 |
| Leverage major launches             | ISVs            | Work with ISVs to leverage key launch events including:<br>Lotus 1-2-3 for Windows Cal3Q91<br>Wordperfect for Windows Cal34Q91<br>Borland Paradox and Quattro Pro for Windows Cal 1Q92+ | TBD                 |
| Leverage "interesting" applications | ISVs and Champs | Work with "interesting" ISVs to seed champions with need products (e.g., give Champs a discount for a "fax-modem package")  | TBD                 |
| ISV Partners                        | ISVs            | Work with ISVs to get their support groups up to speed.   | NA                  |
| Key ISV Programs                    | ISVs            | See Cameron plan. Includes calling key ISVs with Microsoft Execs, conferences, etc.   | See Cameron budget. |

**V. System Marketing**

We will want to work with Billini for Winworld event coordination. And, with developer relations on the catalog.

**ATTACHMENT III. RELATIONSHIP TO OTHER PRODUCT GROUPS**

Windows is critical to many product groups and there will be many launches occurring when to we launch Windows 3.1. Here is how we will cooperate with all of them.

**A. MS-DOS 5**

How can we leverage retail activities in particular. TBD until 11/7 meeting with MS-DOS marketing. Possibilities include:

- Sharing of local co-op advertising. This is expensive and we could potentially do this in the six months after the launch.
- Include MS-DOS positioning point in Windows 3.1 materials. This would include the need for additional memory for large DOS applications and some others TBD.
- Join reseller promotions particularly if Star Wars gets implemented.



**B. Pen**

Windows for Pen Computing is Windows 3.1 specific. They will launch concurrent with Windows 3.1. Meeting set with Pradeeps week of 1/17, but preliminary ideas include:

- Demonstration of Windows 3.1 should include a module integrating pen support.
- Ensure that Windows for Pen materials include the basic positioning of Windows 3.1.
- Include Pen specific tech notes in the Windows Tech Note Library.

### **C. TrueType and Jumbo**

These discussions are still being held with Danste and SPAG. However, we will want to leverage off of both Jumbo and any font packages put together by SPAG. Preliminary ideas include:

- Reseller promotion of Windows 3.1 and Jumbo together at the launch
- If Danste does a Microsoft Fonts for Windows package, use this as a registration incentive.
- If all the Lucida fonts don't make it inside the box, fill up the Windows Resource Kit disk with them and put them on the BBS.

#### **D. Winball**

The WinBall issues is especially knotty given the anticipated launch date of June/July. TBD until more detailed discussions with Russ. Preliminary ideas are:

- Make Winball a separate SKU that includes Windows 3.1
- Also create a special update SKU for Windows 3.1 owners that makes installing over Windows 3.1 a snap.
- Don't discuss Winball at the Windows 3.1 announce, but when it does announce, have an easy update program in place.
- Prepare an update to the Resource Kit that includes Winball specific information.

**E. MS Applications**

We will want to investigate working with Word, Excel, Cirrus and whatever other applications product launch in the Spring.

- Excel will launch in March. TBD if we should do co-marketing.
- Cirrus will launch in June. Not clear what impact there will be.
- EBU. Will investigate whether we can use Productivity Pack as registration incentive.

**CC LIST**

Executive Committee

|                |       |
|----------------|-------|
| Bill Gates     | 9N/2  |
| Mike Hallman   | 9N/2  |
| Steve Balkmer  | 4/2   |
| Mike Maples    | 10N/2 |
| Frank Gaudette | 9N/2  |
| Jeremy Butler  | 9N/2  |
| Scott Oki      | 8S/1  |

System Division

|                  |     |
|------------------|-----|
| Adrian King      | 3/1 |
| Alex Nader       | 3/2 |
| Bill Miller      | 4/2 |
| Brad Chase       | 3/2 |
| Brad Silverberg  | 3/2 |
| Cameron Myhrvold | 4/2 |
| Chris Brown      | 3/1 |
| David Cole       | 4/2 |
| David Weiss      | 3/2 |
| Jeff Thiel       | 3/2 |
| Jim Allchin      | 1/1 |
| Jody Snodgrass   | 4/2 |
| John Connors     | 4/2 |

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|------------------|-------|
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| Jan Clauson      | Ridge |
| Jim Peterson     | LPA   |
| John Barr        | 9S/1  |
| Karen Abel       | 8N/1  |
| Kellee McCusker  | 8N/1  |
| Mark Seidenverg  | LPA   |
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| Mike Delman      | 9S/1  |
| Nancy Bick       | 8N/1  |
| Pat Young        | 9N/1  |
| Patty Stonesifer | LPB   |
| Dave Staehlin    | LPA   |
| Terry Bourne     | LPA   |
| Mark Seidenverg  | LPA   |
| Richard Tait     | 4/2   |
| Robin Courtright | MSU   |
| Ron Davis        | 8N/1  |
| Russ Werner      | 8N/1  |
| Terri Ammand     | LPB   |
| Tina Podlodowski | MSU   |

US Field Sales and Operations

|                |        |
|----------------|--------|
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| Mike Appe      | Boston |

|                  |           |
|------------------|-----------|
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| Ed Johnson       | Dallas    |
| Paul Burden      | DC        |
| David Jaworski   | 8S/1      |
| Glenn Young      | 8S/1      |
| Sharon Decker    | Ridge     |
| Kristic Evans    | 8S/1      |
| Debbie Russell   | 8S/1      |
| Celia Paget      | Ridge     |
| Peggy Gladner    | Ridge     |
| Ogilvy & Mather  |           |
| Matt Ross        | O&M       |
| Waggener Edstrom |           |
| Pam Edstrom      | Portland  |
| Connie Ballmer   | Bellevue  |
| Marianne Allison | Portland  |
| Claire Lematta   | Portland  |
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| Jeremy Butler    | 9N/2      |
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| Frank Clegg      | Canada    |
| Sam Furukawa     | Japan     |
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| Peter Neupert    | 9N/2      |
| Daniel Petre     | Australia |
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| Gregory Tibetis  | 9S/2      |
| OEM              |           |
| George Downing   | 10N/1     |
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| Joachim Kemper   | 10N/1     |
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