Office10 Vision
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Business is going to change more in the next ten years than it has in the last fifty.
Bill Gates, "Business @ the Speed of Thought"

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The goal of this document is to provide a playbook or battle plan, but not a recipe or feature list for Office10. As we select features, design, implement, and ultimately release the product, it is critical that each of you maintains the spirit of the vision. Like a football game or a battle, there are many situations and circumstances the vision fails to foresee, but this vision serves as a guide for what is important and should help each of you to make the right decisions. Office10 will be an expression of this vision that builds on the skills, creativity, and foresight of everyone on the team.

The Office10 Vision

The soul of Office10 comes from two powerful and complementary initiatives:

- Improve the way people share information and collaborate
- Provide an exciting, customer-focused, easy-to-upgrade-to release

We will craft the soul of Office10 by focusing exclusively on six areas, each of which is necessary for us to succeed:

- Office and Exchange for corporate groupware
- Universal web documents and web sites
- Collaborative document creation
- Unlocking data with Office tools
- Nailing the fundamentals
- Everyday tasks made easier through innovation

We have a challenge in that these six focus areas not only span multiple teams, but also rely on each other for success. Full customer satisfaction depends on our ability to address the overlap in a clear and consistent manner. Issues like choice of server, choice of browser, and ability to install without updating system components are challenges addressed by the tenets in this vision process.

Customer Value Proposition

Office10 will be a leadership product because with our focus on real customer scenarios, we provide out-of-the-box solutions that exploit the technology we introduced with Office 2000. With Office 2000 we had a vision of how people will use the web in revolutionary new ways, working together in teams. With Office10, we will further deliver on that vision by eliminating the need for manually stitching it all together. **Delivering an out-of-the-box experience is a key goal for Office10.** An out-of-the box experience is one that is directly accessible after installation, obviously applicable, easily discoverable, free of baggage that would prevent it from being used directly, and also easily customizable or adaptable by power users and IT professionals.

The way our customers work is changing for the better. In the digital future, information is available to the people who need it for their jobs, but not just by trickling down through the management structure. Workers have the tools to analyze data to make decisions. Meetings are reserved for decisions rather than status. People can work together in virtual teams regardless of time and space constraints. Work is more fun because you focus more on the content and less on the tools or processes holding you back. The work we do in Office10 makes this all possible. We should not take for granted the way we use technology at Microsoft and how that is having a profound effect on our own business: email as the backbone of communications, continually updated team web sites, the web as a tool for closer contact with our customers and partners, and open access to data for everyone (MS Sales, Raid). This is the type of return on investment that excites our customers. But as cool as http://officeweb and other Microsoft sites are, our customers cannot easily build them. We must also account for varying cultures that affect the way companies want to structure their collaboration. Office10 provides the products they need to exploit new technologies for new ways of communicating and collaborating.

Changes like this take time, often requiring shifts in culture. We expect people will want to test the waters before diving in to these new ways to work or betting on new server infrastructure. That is why nailing the upgrade fundamentals is also a requirement for Office10. This release does not require new hardware. Of course, the file formats remain compatible. A significant new customer-focused advance is that we do not require companies to test all of their other software for conflicts due to required system file updates—it is hard enough just keeping a single machine running through software upgrades, imagine having to upgrade thousands! Office10 takes the traditional negatives associated with an upgrade and turn them into positives, i.e. we claim performance, deployment, and stability as demonstrable strengths. We have features to back this up, e.g. if the product crashes, data is saved and there are built-in tools to report and help resolve the situation. The end-user excitement features we add are all aimed at mainstream authoring scenarios, involving innovations like web hosting and voice and/or addressing specific customer complaints such as over-aggressive auto-behavior. We generate applause at user groups because we combine innovation with the features they use every day. We generate applause at deployment conferences because we avoid unnecessary barriers to upgrade.

Customer	Value Proposition
Knowledge Worker: End-User / Individual	Office10 addresses common issues and increases basic productivity without introducing the baggage typical of previous upgrades. At the same time, it offers the promise of exciting new ways to work, and lots of useful, usable, and desirable features for Walt Mossberg to write about in his Wall Street Journal column.
Knowledge Worker: Influential End-User	Office10 gives you the tools to make a difference–with your organization, customers, and partners. You can get new solutions (e.g. a team web site) up and running quickly, and then introduce powerful customizations as you go. Our power users and early adopters cannot wait to roll it out so they can start to improve the efficiency of their workgroup!
Knowledge Worker: Business Decision Maker, Influential, and CIO	Office10's end-to-end solutions and collaboration features demonstrate real business value through increased organization efficiency. Office together with Exchange offers a leadership platform for investment. All of this comes at a lower cost than traditionally associated with Office upgrades. Our sales force has a response to groupware development. Tom Austin has something positive to say about our strategy in his Gartner Group reports.
Administrator	Office10 is the easiest ever version of Office to deploy. New deployment features, no new system DLLs, and performance and stability work all make Office10 a smooth upgrade. The new out-of-the-box solutions generate value from existing infrastructure, or a new investment in Exchange. Our OAC members continue to tell us we have listened to their input and made their lives significantly easier.
Solution Builder	Office10 introduces powerful new tools for building collaborative solutions on top of Exchange, as well as enhancements to the tools for other forms of web solutions and collaboration. You can easily start by customizing the out-of-the-box solutions, providing customization to solve specific customer business problems. Our developers and solutions providers, and Notes VARs, are excited to use Office10!

Competition

The competitive landscape has a combination of familiar and direct threats, as well as subtle and indirect threats (the kind you usually notice when it is too late). Our major competitive concerns are:

Relevance: There is growing excitement around Notes, e-commerce, cell phones, and anything web-related that represents a new way of doing business. That excites many people much more than "yet another version of Office which already has more features than I ever could use." Our competitors in this space are our past versions of Office and anyone promising tools to solve problems that directly impact the bottom line.

Direct attack: If Office's relevance, quality and/or customer satisfaction drops, we are susceptible to numerous competitive pressures. Traditional competitors will also look to exploit new user-interfaces (e.g. speech), locale-specific features, and bets on other technology (e.g. Linux) to make inroads. Because our file formats aren't changing, it will be easier to target compatibility and offer a lower cost alternative to Office.

Back-door attack: Office is a great business and as we speak there are many companies (new and old) eyeing that opportunity and getting funded in the hopes that some bet on a new technology or business model will pay off. It could be components, hosted Office, web-service based, speech or radical new user-interface, or any other bet we are not making or cannot make.

Competitive Space	Concern	Products
Existing Office	Creating a reason to upgrade, providing a no-brainer upgrade that maintains 100% compatibility and does not require a hardware upgrade. This will be a challenge because Office 97 and 2000 have plenty of functionality, will coexist well with Office10, and took a lot of work to deploy.	Office 97 and Office 2000.
Traditional Competitors	Currently rewriting the review criteria by including speech recognition and bolting on web tools. They will look for other advantages, including compatibility and price to make inroads. The potential for tighter SmartSuite integration with Notes/Domino could cause us to look at adding tactical features to Office 2000 to remain competitive.	Lotus SmartSuite, Corel WordPerfect, StarOffice, Ichitaro, ARA Hangul.
Component Applications	The role of small component applications as specific competitors to Office is probably more credible this release than with Office 2000. While less hyped, Java has stabilized to the point that it is possible to build something that looks like a useful application. The credible threat is to incorporate component applications with a substantial groupware product. There is a continued threat that these component applications are easier to manage and have lower TCO. Some customers are even asking us if they can reduce Office usage in favor of our own web components.	eSuite, Office Web Components
Groupware Platforms	Never before has the threat been so great to Office. The value of email and collaboration for our large customers has surpassed the value of document creation (from the IT perspective). The "ROI" for Office does not compare with the ROI for groupware applications. In addition, the application model for groupware applications makes the traditional "desktop" a liability, rather than an asset as thin-client thinking predominates.	Notes / Domino Server, Groupwise
Web Services for Intranets	Web services that provide free/cheap "project spaces" all make it easy to exchange Office documents. But they all view Office integration as a necessary evil not an asset. It is not hard to imagine any one of them providing basic document creation through components as an option, possibly targeting new, non-Windows, devices.	eRoom, TeamRoom, HotOffice, Netmosphere, and many others.

Hosted Services	Many companies are offering internet services that create support for mobile users, offer free email or calendaring, or even offer more intranet project management facilities. These services also offer Office integration, but more out of necessity. The lure of free products with low switching costs is quite high.	MagicalDesk, Visto, QuickPlace, and many others

Process, Schedule, and Priorities

We conducted an extensive postmortem analysis of Office 2000 (see http://officetest/postmortem). We aim to continue the things that worked well with Office 2000 such as the shared vision process, single Raid database, and developer check-in mail. We found that doing things the same way across our teams allowed us to focus more on the specific problems of each team rather than the difficulties of cross-team communication and execution.

Process Improvements

The Office 2000 postmortem also turned up a number of areas we aim to improve on (taken directly from http://officetest/postmortem/Office%202000%20Post%20Mortem%20Summary.htm):

- Establish expectations early in M1 with all component providers through a "contract" that defines handoff, quality expectations, setup and test requirements, etc. Ensure there is a single owner on each end to monitor progress/delivery.
- Calibrate all feature investments for Office10 to the vision, understand and manage (including early cut decisions) all exceptions
- Improve checkin mail quality/content and create searchable store
- Review and commit to setup/migration plans early in Office10 and make platform support decisions early.
- Implement a complete one-stop solution for information on Office10 project (build information, schedules, cross-team contacts, bug trends, test results, specs, etc) with crisply defined format and usage/posting directions.
- Ensure user scenarios established early in M1 as part of specs and part of test plan and get additional help from usability team and customer calibration efforts (quality gate, OAC, MOSE) to help validate. Ensure scenarios articulate interactions with all related features.
- Overhaul the build process to simplify number of steps, handoffs, complexity and improve turn-around.
- Overhaul spec template to make more comprehensive, include checklist to "test" for spec completion.
- Make sure all core tools (localization, release authoring, test & dev tools, etc) are treated like products with discrete owners responsible for their delivery, deployment success in Office10 and changes/schedule for those tools communicated effectively.

With these changes we hope to improve our ability to ship on time through continuous stability and better dependency management, improve product quality by catching holes in scenarios and missing cases earlier, and improve our efficiency through better and more reliable processes and tools.

Proposed Schedule

The current schedule for Office10 is:

Milestone	Start	Duration
MM1 coding	7/12/99	12 wks
MM1 final debug	10/4/99	6
Finalize MM2 plan	11/15/99	1
MM2 coding, part 1	11/22/99	4
Holidays	12/20/99	2
MM2 coding, part 2	1/3/00	8
MM2 final debug	2/28/00	6
Code Complete	4/7/00	
Preview beta debug	4/10/00	10
Preview Beta	6/16/00	
ZBR debug	6/19/00	5
ZBR	7/21/00	
Broad beta debug	7/24/00	7
Broad Beta	9/8/00	
Final debug	9/11/00	22
RTM US/WWEXE	2/23/01	

A key to our success in Office 10 will be our ability to ship the product on our target release date. This release will be completely date driven. We will make the difficult cuts and decisions as early as necessary to ensure that we ship on time, otherwise we face coming to market too late to address the key areas and competitive threats we are targeting.

This project schedule is derived from the Office 2000 actual schedule, so we know it is realistic and achievable. Failure to hit our ship date can only come from our inability or unwillingness to estimate the work accurately and make difficult decisions early.

Over the next weeks, the Directors of Program Management, Development and Testing will deliver the guidelines for the specific changes we are making to the product development process. The release dates and goals for our worldwide products will also be determined.

Office and Exchange for Corporate Groupware

There are 28 million users of Exchange and growing, almost all of them are also running Office. Our customers (including the ones we are losing to Notes) and sales force are telling us they want us to provide a platform for collaborative solutions, and that platform should be based on Exchange and use all of Office as the "client". We are behind in this space today. If we fail to achieve success in this area, IBM/Lotus or some other competitor can gradually make Office irrelevant by moving more and more functionality into the groupware environment or subsuming Office within their "shell". Success in this area means great head-to-head comparisons against the category leader: Lotus Notes (Outlook), Lotus Domino Designer (our integrated "Designer"), Lotus Domino Server (Exchange Server), as well as browser-based access to information. We should specifically seek feedback on our plans from customers, the sales force, and analysts and influentials. We cannot match all of Notes in a single release, but we aim to be competitive by focusing on our strengths like low TCO, interface consistency, tight integration for a smoother customer experience, and supporting Notes-like application functionality combined with easier to create and customize results.

The functionality goals in this area include:

- **Storing documents in Exchange:** Integration into the Office File dialogs, makes it easy for Office users to store documents and applications in the Exchange store where they can take advantage of rich properties and views, offline with local stores, and document management functionality.
- **Out-of-the-box solutions:** Document libraries, discussions, tracking applications such as helpdesk call tracking, Outlook Today-like information "portals", and other highly demanded solutions ship as templates in the box and can be easily customized and deployed. They are rich solutions and make good use of Office features.
- **Application designer:** Office introduces a new collaborative application designer tool with easy rules-based customization UI that can be used to create new application or easily customize the solutions we ship. Rich HTML editing and ability to create solutions from Office documents. It is integrated into the Office UI (most visible in Outlook), supports scripting, allows you to target applications specifically for web/browser delivery, and scales to Visual Studio for the professional developer.
- **Solution deployment:** Central updates get replicated to clients.
- **Offline and HTML forms support:** The Exchange local store and symmetric client/server object model allow you to take documents and solutions offline, e.g. the ability to fill in and submit an expense report offline for synch up the next time you are connected. Outlook has richer options for smarter and faster replication. For customers that desire a browser-based solution for forms, there is a credible solution that works across standard HTML 3.2 browsers. Our out-of-the-box templates are designed for a browser-based experience as credible as Domino's templates.
- **Manage and view the solutions using Outlook:** Your collaboration solutions run and view great in Outlook with new support for HTML forms, improved views like column subtotals, improved security like field-level security, and richer navigation to better scale for the increased number of sites you will want to be able to reach via the Outlook Bar. Outlook will remain competitive with the Notes client in terms of user experience, especially for the power user.

Universal Web Documents and Websites

The web has revolutionized the way people share information. Web servers are spreading quickly due to their simplicity of installation and management, cross-platform support. An entire industry has been built around training, tools, and applications (like search engines). ISPs make it easy for anyone to outsource administration, and compete on their ability to add value to the experience. Customers are using web technologies to better share information within their company as well as their customers and partners. Internally we have made great use of the web for sharing specs and status, and for communicating with our customers. However, even with Office 2000, we spend a lot of time working around problems our tools were not built to solve. Our competitors are the server-side or component applications who will provide the "20% of Office that you need" along with deep ties to the web scenarios. They may run on the server and require no client setup like HotMail or QuickPlace. They may also serve as the building blocks for applications like eSuite and components, and/or they may be more integrated into the web experience like Trellix. Success in this area means Office10 enables the coolest, easiest to set up, and most productive webs for sharing and collaborating in a department or on a hosted ISP. We aim to round out the scenarios we introduced with Office 2000 based on customer feedback. The key assets we build on are the HTML file format in our authoring tools, FrontPage web site authoring and management, Office/FrontPage server extensions and MSN.

There is obvious potential for overlap with the Exchange scenarios. Our goal is that everything we do in this space should just work on an Exchange Platinum server since support for installable file system and IIS support allows it to operate like a web server as well—where necessary we will ensure that our efforts do the right thing for Exchange so that the server's

data integrity is maintained. We want to continue to provide the best support for no-frills HTTP servers that will remain popular because of installed base, ease-of-install and management, and the popularity of Apache and Unix with ISPs. Where there is a conflict, we will consciously work to design a consistent user experience. But the goal is not to spend time on unification and shared code except where there is big short-term customer benefit or less overall combined effort. Each group should target the feature set most necessary to succeed in its space.

The functionality goals in this area include:

- **Office web authoring–not just "page authoring"**: Office documents understand they are part of a web site as demonstrated by improved linking to other documents in the site, better control over navigation, support for web site meta data associated with the document, and the ability to more easily create new documents to match the site. Users can spend more time creating and posting documents with fewer barriers or time spent fixing up the site.
- **Out-of-the-box team and project web sites**: "Instant Collaboration–just add web server." Office has a simple UI to create a new team or project site from scratch or initiating from a document. The user can decide the components that make up the site: e.g. documents, team members, status, discussions, shared calendars, task lists, other structured lists, contacts, data analysis, and project management (via Project). This is the closest thing to a "new app" in Office, and like http://officeweb or http://office10/ has the potential to fundamentally change the way teams share information. When Exchange is the server, we exploit better ties to Exchange's discussions, messaging, and scheduling.
- **Out-of-the-box external web sites**: "Instant external collaboration–just add Internet connection." Via out-of-the-box ties to new MSN web services or through an ISP-hosted solution, users can simply and quickly create an external project web site on a secure Internet location. Supports setting up meetings associated with the shared space, notification, and tie-ins with other available Internet services. Collaborating and sharing information with customers and partners is now easy.
- **Easy to install and administer server extensions**: We address the main server extension adoption blockers like easy setup and administration for ISPs and IEUs, great out-of-box experience, easy site creation, roles-based security, and cross-platform server support.
- **Copy and Paste HTML Improvements**: Cut, copy and paste are frequent operations across Office and improved CF_HTML support makes it work better across applications and from browsers.
- **HTML customer Improvements**: We fix the biggest customer issues with Office 2000 HTML, which may include the ability to generate "clean" HTML, consistent browser and server targeting, MHTML for multi-doc scenarios, and other top HTML and XML requests.
- **Coolest web documents**: Power users can use Office to make state-of-the-art web pages taking advantage of advanced functionality like DHTML/IE behaviors (e.g. animation in presentations), improved web components, FrontPage bots in Office documents, the newest server extensions features (e.g. usage tracking), PhotoDraw mouse-over effects and image maps, and powerful HTML made easy in FrontPage.
- **Easier web site management**: For those users who manage web sites, FrontPage and Office Server Extensions offer the most exciting and broadly appealing customer features (along the lines of the "Everyday tasks" vision), such as cross-web find and replace (e.g. code name or staffing change), usage analysis, and simple browser-based customization.

Collaborative Document Creation

It is quite common for customers to work together on documents, yet they rarely use the features we have provided to make it easier. As more documents are stored on collaborative servers like Notes or Exchange, customers will want to use the technology to better manage the

collaboration process, including document management and workflow. The more they move collaboration into Notes, the less we will be able to help them. Strong document collaboration is a key to the start-to-finish scenarios we hope to enable.

The success of these features is fully tied to their ability to attract usage. As such, we will focus on enhancing the way people are already working (e.g. file and email), and lead users to more advanced functionality from that point where the benefit can be explained and justifies the change of usage (e.g. web server and Exchange).

The functionality goals in this area are:

- **Emailing attachments automatically initiates collaboration**: Office is more proactive about helping you in obvious collaboration scenarios and understands your role (e.g. author, reviewer) in the scenario. When you receive files authored by someone else, the collaboration features (e.g. annotate) automatically surface. When the author receives them back, other features (e.g. compare, merge) become available. Sending to multiple people allows for routing and tracking. Office users get advanced collaboration without having to learn new ways of working.
- **Unified save/send/route/post**: The strength of the Office solution relies on our ability to present the different document collaboration possibilities together so the customer can understand the difference and make the appropriate choice, quite possibly opting for the higher-end possibilities provided for by the new server technologies. You should be able to route it to multiple people with tracking, send a document as a meeting request, post it to a server and send out email notification, or post a document to a new or existing team web site. Our rich user-interface makes the advanced functionality easily discoverable, usable and desirable.
- **Richer annotations and merging**: Comments and revisions are automatically enabled as part of end-to-end solutions such as emailing or posting for review, and are merged together on receipt. There is a more clear relationship between document comments and web discussions, and the ability to expose offline comments to the server when the document is stored there.
- **Fixing mismatched formatting**: Building a document from multiple contributors is difficult today. There is the challenge of reconciling individual formatting preferences. Often you are reusing existing content (e.g. reusing slides, or putting together a summary document), so you cannot rely on templates or enforced formatting. There are also many hidden problems such as section breaks that come along with a paste and mysteriously break your headers and footers, or a formula reference that yields misleading results when pasted. Office10 furthers the concept of style checkers to catch errors and unify formatting across documents, and also provides more assistance directly at paste time (e.g. presenting alternate formatting choices based on the existing formatting in your document).
- **Simple voice and real-time**: Getting voicemail into your Inbox will teach people to expect voice as a natural extension and enhancement to basic messaging usage. WordMail allows you to reply to any message (voice or text) using voice input. All documents support basic voice annotation. NetMeeting and NetShow support for real-time sharing of documents with voice or video gets easier to use. An out-of-the-box web solution allows you to easily archive presentations for later playback.

Unlocking Your Data with Office Tools

Customers want to find the right information at the right time, so they can make more qualified and better informed decisions. There are few things as valuable to a knowledge worker than the ability to make quick, accurate decisions. Despite the amount of data stored digitally, it is hard to get to today. This is an opportunity as well as threat for Office because a customer will trade

any tool for better use of the mission critical data they need to get their job done. Office 2000 already has great tools for data authoring, analysis, reporting, and building solutions. Excel is the premier analysis tool. Access is the most popular database development tool. The Office components provide great interactive web reporting.

The functionality goals in this area include:

- **Publish and find the data you need to be successful**: It should be as easy to find a report as it is to find a Word document or HTML page. We define a standard location (i.e. "My Data" folder) and document properties for data sources, queries and reports so they are easy to locate, sort, categorize, search, and reuse by others. Links to the web allow you to access useful web queries.
- **World class corporate reporting and data analysis**: Office continues to push forward as the premier front-end for data analysis and corporate reporting systems, with improvements to Excel data analysis features, better reporting against SQL Server data using Access, and improved pivot and chart components. To make these features more usable, we move towards a simpler end-user model for data.
- **Design, share and collaborate with lists**: Our out-of-the-box solutions include the ability to create simple lists for web sites. You just type the headers and data into the list control, and the database is defined for you on the fly. This includes the ability to create lookup tables and sub-lists, and provides for structured formatting. For broad reach web solutions (e.g. Navigator support), a web page UI allows for basic list viewing and editing. The lists feature targets the everyday lists (e.g. ideas, work items, issues) that require quick and easy setup, but can benefit from sharing across a team. They can be created from scratch from the server, or generated from an existing list in Excel.
- **Powerful data solutions**: Part of the "unlocking data" mission is allowing developers the ability to easily create and customize Office solutions that rely on data (as most mission-critical corporate solutions do), whether for web or Win32-based applications. Our tools are scalable and extensible so you can move between environments, taking advantage of Access and the components for data capabilities.
- **Access to more data**: Improved tools for getting to more structured data (e.g. SAP, small business accounting data, XML data) as well as your data in Excel or Word tables, or Outlook contacts. Improved Access interface to SQL data.
- **Improved searching**: Improved interface for searching for documents or data based on properties, related to specific team web sites, and/or related to the current document.

Nailing the Fundamentals

Customer satisfaction with our product quality has been decreasing—Microsoft's overall product quality rating is weak relative to other category leaders outside our industry (typically more than 60% are very satisfied, but Microsoft has less than 35% in our FY' 99 worldwide customer satisfaction survey). Upgrades have been increasingly costly for many reasons ranging from difficult deployment, requiring new hardware, solutions breaking, and file format incompatibility. Most computer users are frustrated by instability and data loss that results, difficultly in getting support, and poor performance. New features are great, but we also need to spend more time on pure customer delight! Each time we get this wrong, we teach more and more users to delay upgrading until the service release or altogether. Our biggest competition is Office 97 and Office 2000, which are very feature rich (already more than most people think they need) and will be very compatible with Office10. Plus, customer dissatisfaction is what causes people to seek out competitors in the first place. Success in this area is taking the traditional negatives associated with an upgrade and turning them into positives, i.e. we demonstrate improvements to performance, deployment, stability, and lower TCO.

The functionality goals in this area are:

- **Even better Maintenance, Deployment and Upgrade**: Office10 has a simplified and faster setup process (focus is on just copying files), improved setup user-interface for end-users, ease of copying your current installation, and integration across our multiple CDs (or a single DVD). We continue to improve maintenance and deployment features for administrators based on top customer requests.
- **Top upgrade-blocking issues**: No new system files (see Tenets) and eliminating the need for reboots greatly reduce the cost of upgrading.
- **Performance**: No hardware upgrades required. Same or better performance than Office2000. Performance goals and process in place at the beginning of the project. Look for marketable wins in 2-3 key scenarios such as HTML to web servers and 10x scalability improvements on Windows terminal server.
- **Better crash handling**: Crashes are our number one PSS issue. Office10 introduces data loss prevention features (like AutoRecovery or exception handling) across all products. When a crash does occur, we record the details and offer to report it to Microsoft and look to see if there are available fixes or help topics on the web (as well as recording the details so we know which problems we have to find and fix in service releases). For crashes preventing access to applications or data, we offer safe mode and document recovery.
- **Registration and subscriptions:** We make registration, license verification and subscription a positive experience by giving you the benefits of direct ties to our web services on MSN and content on OfficeUpdate. We improve our anti-piracy, annuity, and trial program abilities.
- **Security**: "Making the world safer for macros" will continue to be a focus for us.
- **Top PSS Initiatives**: Keyed off the critical PSS issues for each application as well as monitoring key initiatives from the support organization.
- **Worldwide**: We finish the great international work in Office2000. Worldwide exes. Maintaining the tightest deltas possible across languages. Easier language pack deployment.
- **Satisfy the legal market**: Top customer requests / upgrade drivers like document comparison in Word.
- **Satisfy the financial market**: Top customer requests / upgrade drivers like multi-threaded recalculation in Excel.

Everyday Tasks Made Easier Through Innovation

Nothing generates customer applause better than innovative features that improve the efficiency of the work they do. Background spell check, AutoCorrect, and AutoFit in PowerPoint are examples of features with broad reaching appeal. As with Fundamentals, our largest competitors are Office 97 and Office 2000, which already have enough features for everyone. Office10 gives every user a reason to upgrade by simplifying everyday tasks in customer-focused, exciting, and innovative ways. These features cause regular customers to perk up with enthusiasm or cause them to sigh with relief ("you finally fixed that!"). This work targets the most common activities, like basic authoring. Done correctly, they should appeal to end-user focused reviewers like Walt Mossberg. Any customer should identify value with Office10 even if they are uninterested in Exchange, web features, or new ways of collaborating. These features don't require a lot of explanation because customers can readily identify the problems they solve and are able to put them to use right away without any barriers (like having to learn a new way of doing things). If it doesn't match that description, we should not do it.

This is neither a "catch all" bucket for any features nor low priority. To drive bottom-up adoption, we need to provide features any customer can fall in love with. We will have the most success in this area by choosing features that fit under a consistent set of themes, *thematic consistency,* such as Auto features done correctly, frequent tasks streamlined, and

innovative technology solving real problems.

Specific areas of investment:

- **More IntelliSense but more user control**: Office 2000 tries to identify likely actions and does them automatically, but too often to the annoyance of users. Office10 directly addresses this by more clearly exposing alternatives, including undo and turning a behavior off altogether. The alternatives are presented at the site of the guess and can be ignored (like background spelling). This new interface is used to offer help with other common tasks. For example, when you paste data from another application the format guess is often wrong. Rather than force you to Undo and then find the Paste Special command (and understand the technically worded clipboard formats), the other paste alternatives are a click away. Similarly, Office10 proactively suggests formatting already in your document without having to define styles, but does not change any formatting automatically. We use innovative methods (e.g. recognizing factoids like names and dates, understanding common Excel formula mistakes) to surface relevant options.
- **Improved Collect and Paste**: Copying and pasting is the number one cross-Office activity, and explains why users get so excited by this command. Office10 improves the presentation and control over the snippets, and incorporates the format-fixing capabilities to better support the activity of reusing content (e.g. collaboration, slide reuse).
- **Innovative enhancements to frequent commands**: Other features that improve the most frequent commands, like getting rid of ###'s and #Errors! in Excel, or counter-proposals for meeting times in Outlook. Focus is on applying intelligent heuristics or new UI to better address common problems in ways that users will immediately understand.
- **HTML UI**: Office10 includes a new, integrated HTML UI for server-delivered and/or custom interfaces, e.g. forms associated with posting documents to a managed document server, or connection to additional services or content on the web. It is also used to provide a richer user interface for common tasks that uniquely benefit from the pane interface like the next-generation mail header that unifies send with other collaboration tasks, or collect and copy which stays in place as you move between windows.
- **Speech and Handwriting**: Office10 supports more natural forms of interaction like dictation, simple voice command of the user interface, text-to-speech (e.g. reading your spreadsheet numbers to you so you can check them for proper entry), simple voice annotations (see Document Collaboration), and simple handwritten notes (recognition optional) in support of new CE or pad devices.
- **Improved Graphics and Animation**: Improved OfficeArt, PhotoDraw, and VizAct integration to allow easier creation of graphical or animated web documents that can be targeted for the web. Photo album web site wizard in FrontPage ties together all of the tasks to create common photo sites. Basic diagramming in PhotoDraw.
- **New Devices**: CE, ePad, and phone combinations as companion devices can more easily take advantage of and synch with your Office data.

Area Coordinators

The senior managers in Office will each coordinate a vision area, with implementation responsibilities spanning multiple teams. This is not a reporting relationship change or matrix management. Rather each of these area coordinators will serve as a focal point for understanding scenarios, ensuring product-wide communication, guaranteeing that we deliver a superb out-of-the-box experience for each of these vision areas.

Coordinator	Vision Area
KurtD	Office and Exchange for corporate groupware
AndySchu	Universal web documents and websites
RalfHa	Collaborative document creation
RichardM	Unlocking data with Office tools
Antoine and JeanneS	Nailing the fundamentals
AndrewK	Everyday tasks made easier through innovation
GrantG	Cross-product coordination
Kathleen	Office Premium SKU

Having these single owners in no way implies that these areas are silos or without overlap. Our full success depends on our ability to follow the tenets and nail the strategic points of interaction that span our areas.

The Area Coordinators will serve as the advocate for our knowledge worker customers throughout the development of Office10. They will spend time challenging all teams to produce great out-of-the-box experiences for each of our focus areas without regard for our organizational structure; they will look at the product through the eyes of the customer; they will bring customers into the process as needed to ensure that we are delivering a customer-ready product.

Tenets

Office10 will begin with a base set of assumptions that cross all applications and functional areas. These are requirements that should be taken seriously as each decision is made that impacts the product. These tenets are a framework so that the hundreds of contributors to Office10 can each be certain of a small set of global issues.

Customers can choose which server technology they use: We are betting long-term on Exchange as both a web server and messaging server, but recognize that not all customers will have Exchange. Departmental webs, small business webs, ISPs, and MSN remain great opportunities for us. We provide a consistent user experience on all server platforms, where Exchange is generally a superset except for platform specific customer scenarios we target.

Customers can choose their preferred browser: Office will not require users to change their browsing technology. Browser access is exciting and empowering to users for roaming scenarios, browser-based solutions, browser-based reporting, and universal viewing. Unfortunately, for each of these scenarios the current Office 2000 story is fragmented and inconsistent in terms of HTML version support, interface for targeting specific browsers, license and download requirements, migration to rich client, and in-browser user-interface. As we add new functionality to these areas in Office10, we will make our story more consistent for each scenario across product teams so that we can easily explain this work to our customers. We should have an HTML level 3 (that is we support Navigator 4.0 as a target browsing technology) goal for each scenario, often just run on the server. IE5 and 6 requirements should introduce clear new benefit, yet are not required. For all applicable scenarios, there should be a consistent single step to switch to the rich, Office client experience, preferably operating against the same copy of the data.

Office10 works with the Office 2000 level of system/redistributable components. This is a real customer need—we have to consider their point of view on this issue. We love new Windows features, but simplifying an Office upgrade is a high priority requirement for this release. A number of files (more than 1000) on Windows 2000 are marked as OS-protected and

cannot be upgraded by application installs, including Office10. Customers are also telling us they do not want upgrading Office to risk breaking other products. Software configuration testing and maintenance is too hard today, and we cannot just assume their software universe revolves around Office. We need to separate out both Office 2000-level and newer system components into separate, optional installs. It is acceptable to require the Office 2000 level for Windows earlier than Windows 2000. We do want to take advantage of new Windows features that make sense for our customers, and is it acceptable to disable new features that depend on a new redistributable component. We can make the Windows "service pack" and "option pack(s)" available on our CD for convenience. The spirit of this should be clear—the goal is not to work around this by creating new static libraries or a special side-by-side release, although that might be necessary at times. We will work closely with the Windows group on a special plan for the most difficult cases of components that we ourselves continue to deliver to Windows.

Office10 does not require you to reboot after setup. When setup is run on Windows 2000 or when upgrading an existing Office 2000 customer (on any platform), all functionality should be operational without requiring the user to log off/on or reboot the machine.

Continued file format compatibility, including Access. Office 97 (except Access) and Office 2000 will read Office10 files and only brand new features are lost (with special effort to minimize loss—e.g. opening nested tables from Word 2000 as regular tables in Word 97). This holds true for HTML and binary file formats.

Existing Office 97 and Office 2000 solutions function flawlessly. We test early with solutions as with Office 2000, and avoid product changes that introduce risk to breaking solutions.

Operating System and Hardware requirements (RAM, HDD) remain the same except possibly for optional advanced input features like speech. Office10 will target Windows 95, Windows 98, Windows NT 4.0, and Windows 2000. For non-Windows 2000 customers: if they are upgrading from Office 2000 then we will require the same service pack level as Office 2000, otherwise we will prerequisite the redistributable pack (which may come as a service pack) prior to installation. On non-Windows 2000 machines, Office10 will target 32MB or RAM as the sweet spot. On Windows 2000, Office10 will likely target 64MB, which will be determined once system requirements are formally announced. Office10 will not substantially (more than 20%) increase disk space requirements and will fully remove the previous version of Office at setup time.

Office10 is a single worldwide executable.

Customers see a consistent user-interface across applications and servers. Consistency allows customers to use more of the product without having to learn new ways of doing the same thing. The products will always have some differences, so there is often ambiguity about when to be product-specific vs. the same. Two good rules of thumb are: do not be different unless it is twice as good; do not add a feature to your product if there is no way to explain the benefits without implying another product in Office is bad.

All features must fit easily within the product vision described. For Office10 to be successful and focused it is important to follow the spirit of the vision. Office10 will not unilaterally advance a single application when it is clear that the advance is applicable across applications. Resist tweaking existing features.

Always focus on customer scenarios motivating a design before team and product boundaries. We are specifically targeting a customer-focused release with Office10, as opposed to Office 2000 which was technology focused as per the vision.

We will ship only finished features. Features will be cut totally if we are failing to meet the

scenario credibly.

Evaluate features against the current workaround. It Is not good enough to be better than the existing feature; the new feature will only get used if It is better than the workaround. For Instance, the ability to add annotations to documents is only better when you get enough benefit to make it worth not printing out and just writing on the paper (the way most comments were submitted about the vision). It takes unique benefit–not just copying the workaround (otherwise, the workaround is still easier). Ideally, the new feature exposes itself when doing the workaround.

We are not aiming for grand unifications. The difficult problems of SQL vs. Platinum, Platinum vs. Web Server, etc. are beyond the scope of this release. We aim for consistent user experience and ability to take advantage of multiple technologies In ways most appropriate.

When in doubt, do it the same way across teams. This makes our jobs easier and the product better. Similar process and tools made it easier to work together across teams In Office 2000.

We will have fun, treat each other with the utmost respect at all times and in all forms of communication, and conduct business with our traditional high standards of excellence.