From:	Bill Gates
Sent:	Wednesday, September 15, 1999 10:55 PM
To:	Steven VanRoekel
Cc:	Steve Ballmer; Jeff Raikes
Subject:	FW: Real Networks and Bill's Company Talk

Somehow I should mention this I guess.

-----Original Message-----
From: Will Poole
Sent: Wednesday, September 15, 1999 6:06 PM
To: Bill Gates
Cc: Jim Allchin (Exchange); Anthony Bay (Exchange)
Subject: FW: Real Networks and Bill's Company Talk

Bill, I hope you agree that it is important to raise awareness of real networks as a strategic threat at the company meeting -- the attached single slide gets the message across reasonably well.

An interesting factoid: in the recent PC Mag scorecard of portals, MSN's streaming audio and video feature (provided by SMD as WindowsMedia.com) rated as one of 3 excellent features on MSN *and* rated higher than ALL other portal's streaming media efforts.

(see "Streaming Audio and Video" under "Content")

Streaming
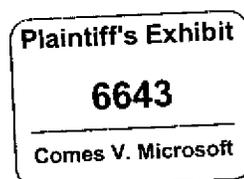Media.ppt (25 KB)

-----Original Message-----
From: David Britton
Sent: Wednesday, September 15, 1999 5:35 PM
To: Steven VanRoekel
Cc: Gary Carter; Will Poole; Gail Thomas-Flynn; Brian Hall; David Britton
Subject: Real Networks and Bill's Company Talk

Steve, I've gathered what info I can abt the Company meeting by speaking with those on the cc: line and suspect that Real Networks is not being mentioned as a competitor by any of the presenters.

Real is a very important competitor to the company; its important for the employees to recognize the threat Real represents, and the actions we have taken in forming a new division to address a major new market.

From what I understand, each of the presenters will be addressing competitive threats within their talks, w/Jeff handling IBM, Sun, Oracle, Steve handling Yahoo and AOL, and Bill addressing Linux. Bill is familar with our division and products, having demo'd them recently at the Sun Valley event, the Global Summit, and Analysts meeting. We'd like to request that Bill address Real with the single slide attached tomorrow. This could easily be placed in the context of the knowledge worker, which is a key target for our division, but clearly has broader implications as outlined in the slide.

Thanks for your help on this, specially given the timing.

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