>From peteh Thu Mar   7 08:16:41 1991
To: jeffr
Subject: Strategic Threat--Lotus Office...
Date: Thu Mar   7 08:16:38 1991

>From richt Wed Mar   6 13:19:46 1991
To: hankv lewisl peteh
Subject: Strategic Threat--Lotus Office...
Cc: chrisbro ruthannl
Date: Wed Mar   6 13:17:18 1991

J~h

Just had a conversation with Chrisbro that pretty much
confirms a lot of what Hankv told me Lotus was going to
do. Apparently, Chris has been working on a deal with Neilf to
get all of Intel converted and Steveb just gave an SBT pitch
where he said Notes was the greatest thing since sliced bread.

At Intel, we've been pitching the Office. Their exec staff
is using our apps. Lotus just came in and said, "well, you love
Notes and so does Msft and we can offer you the same office as
MS. They're going to offer R3.1 (with /W upgrade), Ami, Freelance
(with upgrade to /W) and Notes in one package deal. Intel says
they'll evaluate.

Conclusion:
          - Their office strategy is rolling out even now in our
          corporate accounts. For Scottsdale, it seems to me that
          we have to figure out a way to explain why switching to
          our apps is much better than upgrading to theirs.
          Unfortunately, I don't think that price is a big issue
          with accounts like Intel, so it has to be something like,
          "trust us, we know the future like OLE"--the problem is
          that I'm not sure we can deliver this in Cal92.

          - We have to make sure not to be too "even handed" with
          Notes since this is the competitive difference for many
          people (it's a new enough app and it looks to me like the
          differences between our vs. their Win apps aren't great
          enough particularly if you factor in the i.b. of 1-2-3
          and Freelance).   Is there any way we can get
          Steveb/Billg, etc. to say nice things about Notes without
          having it come back to us like this. A suggestion would
          be to say that it offers some great features, but is a
          closed system (Chrisbro's suggestion--that is, you can
          buy pieces that are great like open SQL Server,
          Toolbook--maybe Thunder whenever it ships).

Thanks,
Rich

From paulma Thu Mar   7 14:29:40 1991
To: bradsi davec fredg jimall mikemap
Subject: official 486 clone
Cc: billg joem neile steveb
Date: Thu Mar   7 14:27:23 1991
Mail-Flags: 0000

I met with Joem/Neile and agreed the following, which I propose
we follow elsewhere:

1. Neile/Joem say that they already support the Northgate 486 machine,
   which has been extensively used in the NBU as a development machine,
   and in PSS. Neile says that the experience has been good.
   Based on this, I am going to convert orders for new 486's to
   Northgates, unless there is specific need for a Compaq.

2. MIS wants to qualify a second clone vendor, and is starting an
   effort to do this. I promised to give them a person to work
   with them on the selection of the vendor (most likely this will be
   russbl).

From billg Sat Mar 9 07:45:50 1991
To: jeremybu strategy
Subject: Accounting products
Cc: susanb
Date: Sat Mar 9 07:45:48 1991
Mail-Flags: 0000

Perhaps MikeMap should copy the strategy committee on the memo
EBU did for Mikehal and I when we discussed whether they should
go ahead with a low end accounting product. I would be glad to
discuss the decision at the next strategy committee so we at
least have your input on where we take it in the future.

Part of EBUs missions is to attract small business users to
be Microsoft users - they decided a long time ago that they
needed a family of products in order to do this. WORKS is
our primary product. We are developing in house (3 developers)
a competitor to Quicken - its quite simple and inadequate for
most business uses. We are also developing a low end DTP product
that will compete with FirstPublisher, Printshop and Personal Press
but this is more for home entry users rather than business. Liekwise
the entertainment products EBU does are for home rather than business.

The accounting product we are licensing will be a subset of the
Great Plains product it appears. Great Plains will provide the
support with their personnel in North Dokota answering the line
"Microsoft". Support for accounting products is charge for and
profitable. No developers from Microsoft will work on this product.
We believe LOTUS plans to offer some kind of accounting package to
this market - but we are not sure and that is not an overwhelming
reason to do so.

Our other small business product will be the low end networking
product.

In retrospect we should discuss any new product thrusts in the
strategy committee and we didnt in this case. I'll make sure
we do that in the future. I still would like to discuss this one
to help shape how far we go with it and whether we try and do
anything with it outside the US.

I recently reraised the issue of doing a tax package but I think
we will kill that unless there is a clear acquisition opportunity
(macintax) because of the particular issues and the large number
of things EBU is already doing.