

## MICROSOFT MEMO

TO: Bill Gates  
FROM: Jeff Raikes  
DATE: 2/20/88  
RE: Draft Agenda for Apps Division Retreat

CC: Jon Shirley

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### Attendance

#### Management

Bill Gates  
Jon Shirley  
Scott Oki

#### Apps Staff

Susan Boeschen  
Jeff Harbers  
Peter Morse  
Jeff Raikes  
Tandy Trower

#### Apps

Development  
Dave Moore  
Charles Simonyi

#### Apps Marketing

Bob Gaskins  
Pete Higgins  
Chris Larson  
John Morey  
Mike Slade  
Charles Stevens  
Vijay Vashee

### Goals

- Educate apps division managers on the Microsoft Office vision
- Review the applications division strategy and 3 year plan
- Identify holes in our strategies and plans, and assign follow-up
- Isolate significant threats to our strategy and discuss the responses

### Prior to the Retreat

Issue memo on development resources, Jeff Harbers

Issue memo on apps strategy and 3 year plan summary, Jeff Raikes

Presentation of category strategies and 3 year plans, Apps Mktg

### Agenda for Friday, March 4

(1 hr) Apps Business Review, Jeff Raikes

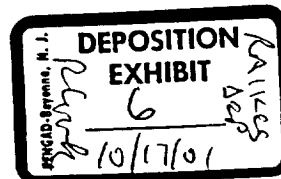
(1 hr) Summary of Strategy and 3 yr Plans (Product Grid), Jeff Raikes

(1 hr) IBM Systems Review, Bill Gates

(?) Other Systems Review, Bill Gates

### Agenda for Saturday, March 5

(1 hr) MS Systems Review, Bill Gates  
Windows, Net, OS/2



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- (1 hr) Apple Macintosh Systems Review, Mike Slade
- (1.5 hr) Vision of the Microsoft Office, Bill Gates
- (2.5 hrs) Competitive Review (or how will we win against each of these competitors)

IBM Office, Jeff Raikes

Lotus, Pete Higgins

Ashton-Tate, Chris Larson

WordPerfect, Charles Stevens

Borland, Vijay Vashee

- (3.5 hrs) Cross-Apps Design Goals

Data exchange and integration (?), Vijay Vashee (?)

Document interchange (?), Charles Stevens (?)

Language/programmability, Chris Larson (?)

Object management, Gates or Harbers (?)

User interface (?), Tandy Trower

Spreadsheet<=>DBMS, Pete Higgins

Mail and Personal Services<=>Other apps, John Morey

## **Agenda for Sunday, March 5**

### **Group Brainstorming Sessions**

1.5 hrs Break out sessions

- #1 Will we win by category strengths or by family strength?
- #2 What are the key holes in our strategies and plans, and the follow-up?
- #3 What are the key threats to our strategies and the best responses?

(other questions?)

#. Stack rank the five most important things we should be doing. What are the things we shouldn't be doing?

#. What are the causes for our capacity limitations and what are some new ideas for breaking through?

#. What are the other opportunities we should be considering and how would we pursue them?

#. How do we maximize the leverage of our core engine approach? How do we

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extend it across dev't, user ed, testing? How do we avoid producing lowest common denominator products?

#. How will we market the Microsoft Office? What are the key elements of product line mktg?

#. How do we achieve our cross-apps design goals? What process and organizational approaches do we use? What is the plan for deploying cross-apps goals in each of the categories?)

1.5 hrs Reassemble for group presentations and discussions

1 hr break (BillG and I meet to prepare for final presentation)

1.5 hrs Closing Session

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