

GO Corporation Confidential

Mar 5, 1994

January 9, 1991

To: Jim Cannavino
CC: Sue King
From: Jerry Kaplan
Subject: Videotaping tomorrow

Jim -

Just a note to make some suggestions on your videotaped remarks for our 1/22 announcement tomorrow, and some intelligence on Microsoft.

Whatever you have been saying to the press to date, it's working.

The Fortune reporter was very impressed with your vision about pen-based computing, your support of PenPoint, and a number of other messages you communicated. He accepts your view of a new market, and that PenPoint is "justified" to reach this new market. He believes you are serious about marketing PenPoint machines, that you are seeing real customer demand, and that you see Microsoft as focussing on a different, incremental market with Pen Windows.

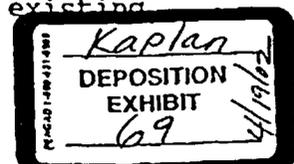
These are constructive, effective messages that make IBM and GO look good, and establish a common vision for the future.

I got a copy of the remarks that were prepared by a speechwriter for your taping tomorrow. This text does not make the points above. As a follow on to the July 18 licensing announcement, this speech would look very weak to the press, developers, and other potential partners. Unfortunately, there isn't time to work through the organization to correct this before tomorrow.

Consequently, I urge you to simply use your own words, not those prepared for you. You are great when speaking from the heart.

A strong statement of support via video from you will really help keep the ball moving. What people want to hear is:

1. Your vision for pen-based computing.
2. That you see a real market, are seeing real customer demand.
3. That the true pen-based market is distinct from the existing personal computer market, and needs a different software approach, that complements rather than competes with pen-extensions to existing systems.



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4. That you will be bringing a pen-based computer to market that runs PenPoint.

5. That you support GO in licensing PenPoint widely, and want to see a healthy market for applications software as with the personal computer.

If these points get across, the mission will be accomplished.

On other matters, momentum is building for the announcement. We are presenting this as a "Developer Summit" - a full day of announcements, briefings, hands-on experiences, demos, and technical sessions about Penpoint. The support we will show is growing daily. We now have about 40 ISVs, VARs, and System Integrators putting out supporting press releases, video or live testimonials, and product demonstrations. The first third party application - a forms-oriented application development system for "vertical" customers like State Farm - will be announced and shipped by Slate Corporation. We are expecting over 500 people in San Francisco, and as many as 1200 at a Boston Computer Society meeting the following day in Boston.

Microsoft is on the road trying to blunt our announcement. I expect a lot of press next week. Journalists tell us that they are claiming to have 6 hardware licensees signed up - including IBM. If this claim is supported by IBM, it has a real potential of undermining our announcement. Please let me know if I have a problem to deal with here.

Other than that, the technical reports of their system are very weak, and ISV interest appears low. Their weakest point appears to be their handwriting recognition - its seems that they have decided to ship the system "without" this component at this time, and patch it up later.

If we can address the "licensee count" issue, we have a good shot at winning this war with Microsoft. Enclosed is a recent article to this effect from the front page of InfoWorld.

Good luck with the taping, and thanks again for your support.

Jerry