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From: Steven Sinofsky
Sent: Monday, December 15, 1997 12:24 PM
To: Jon DeVaan
Subject: bobmu memo


Transition Thoughts for
BobMu...

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Office Transition

Microsoft Memo

To: Bob Muglia
From: Steven Sinofsky
Subject: Office Transition
Date: 12/16/97
cc: Jon De Vaan

What is Office9

Office9 was designed to be a technology focused release where we bring internet functionality to the mass audience of Office customers. The complete vision can be found on <http://officeweb/visions/office9.htm>. The entire plan is based on a timely release of Office due to the changing expectations of the marketplace and internet standards, so shipping on time means more than just about any feature.

There were six focus areas for Office9:

- > TCO. Reduce the total cost of ownership. We are doing very well here working well with NT.
- > HTML. Make HTML a first class file format for all Office9 applications. Reaching critical mass on this front will be a challenge.
- > Outlook and Outlook integration. We felt strongly about this but the reorganization last year and the Outlook 98 plans have caused us to fail to deliver much on this front. Once Outlook 98 ships we will see if there are any features we can squeeze in.
- > Web Collaboration and Solutions. This is the office web server work. Much of the vision for this work was subsumed by us incorporating JAWS.
- > Web Based Corporate Reporting. This is all about data access and analysis. We have the most resources committed to this.
- > Personal Productivity. We have made progress in basic use across the applications in shared and leveraged ways. This is very much our "demo" team with a limited investment.

Process

Office9 is a refinement of the DAD development process. The key items we wanted to improve for Office9 were predictability (Office 97 shipped 5 months late, basically all post code complete issues), clear focus and ownership (Office 97 was criticized internally for not having a clear vision from the start), and honesty (Office 97 was a less than honest project in terms of status).

To address each of these we had several major initiatives.

- > Development Process. See <http://officeweb/specs/schedule/devmeth9.htm> for a complete description of things we will do differently. Of particular note are the exit criteria for milestones. This has been something that has helped us a great deal in terms of predictability and honesty.
- > Vision. We have a very clear vision and every day make decisions that force this vision. See <http://officeweb/visions/office9.htm> for details. This has held up surprisingly well and was even a model for IE5.
- > More communication. Our entire process from builds to spec reviews is far more unified. This has created some tensions in terms of people feeling a lack of "autonomy" but the benefits have been very high. The alias <mailto:o9leads> symbolizes this form of contact.

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There is also the site <http://officeweb/status> that has all the PDLs and up to the week status information (bug statistics are on <http://officetest/raid>).

- Unified Specification Process. In addition to the vision, we have a single location for all specification and a great way to navigate and find them. Nothing has changed our process more than this. See <http://officeweb/specs> for details.
- Performance Lab. We have this running earlier and more general agreement on what will be done than we did in Office 97. Paul Williams in testing owns this. Recently CraigU and RichardM have been driving the process to get everyone on board earlier.
- Checkin Mail. All checkins require mail across all teams. This is part of communication, but is a degree of over-communication that is working well.
- Office Advisory Council. This is a group of 15 companies that we have involved from before we had a vision. They are on campus once a quarter and have been super helpful in terms of feedback and validation. PeggySt has driven this entire concept and it is really wonderful. This has helped a lot since this release is so technology focused. See <http://officecouncil.microsoft.com> for more information (user=offpm, passwd=sedan).

Current Status

Office9 is about to enter milestone 3 of three milestone total. The schedule and development methodology can be found on <http://officeweb/specs/schedule/devmeth9.htm>. We have a complete schedule and are reasonably on track for August. MM3 will continue through 3/30/98 which is our code complete date (all feature work done). Our goal for beta 1 is 4/13. The sequence of events progresses as expected through 8/17 which is our current RTM. Worldwide releases will follow with approximately 30 day deltas for most European countries. The work for German, Greek, and Japanese is being done in concert with the US release to gain sufficiency coverage. A key goal for this release is a single worldwide executable to cover all countries, including bidi.

Our original ship date was 7/13 so we are about 5 weeks off schedule now. After MM1 we slipped two weeks and after MM3 we slipped three weeks. Unlike Office 97 we have clear cut exit criteria for the milestone so we feel better about the progress we are making. Our bug counts are higher than we would like averaging about 15-20 bugs per developer rather than the 10 we would like. MM3 will be closely watched for this metric. The biggest problem to date has been pulling together our builds. We were hoping for two per week with an optional third, but through tremendous efforts we are averaging only one per week. There are lots of contributions to this problem, but no single cause other than general complexity has been identified. A lot of effort is going into this problem.

Some of the problem areas I worry about include:

- Performance. The applications themselves just aren't growing that much this release. We're adding the Darwin setup engine which will likely impact our most important metric of boot time. HTML load/save will be slower than binary files, but for typical documents not by much though it will add a new code path (and increase the working set). The reliance on the browser running and the commonality of having a mail client running are making our 32MB scenario very very tight.
- Disk footprint. Although not a major issue for our customers, there still is a lot of work to do here. We're picking up a huge number of components from the company from groups that do not pay attention to these issues (Visual Scripting, JAWS, IE, MAPI, etc.) all of which will add tremendously to our code size.
- Redist/Service Packs. We're punting installing system components ourselves and relying on the redistributable pack to install all the \windows\system files. This is a huge mess for corporations (but less of a mess than us installing them).
- HTML complexity/critical mass. Always a concern was if we could reach critical mass in terms of having HTML as a file format. The acid test will be word. Although we're using the

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now magically blessed XML, the files will still have lots of perceived goo in them for roundtripping which might turn people off. We are worried about the requirement for IE5 as a real viewer for Office documents. Just as critical is the complexity of multiple files imposed by targeting the web.

- > JAWS. The JAWS work is turning out to be an incredibly complex dependency and is looking quite removed from solving the scenarios that matter the most in a way that makes credible sense with customers. The requirements for an entirely new server infrastructure in order to just save web documents is extreme. We are betting on this, but it is looking more and more like the hedge of using FrontPage will make more sense for our average customer.
- > Too much strategy. Office9 is strategically leveraged to the hilt. We have dependencies in every major team with some other division at Microsoft. Nearly every yet-to-be-shipped piece of software will be required to get the full Office9 experience. In many ways we are very anti-TCO in this respect. For example, Office9 will almost certainly install IE5 as your browser. Another example is our lack of Win95 support for key TCO technologies from NT.

To give you an idea of the dependencies, here is a matrix from some recent mail:

Shared Team/App Team	Strategic Dependency	Result
TCO	NT 5.0	Most key TCO features do not work on the OS everyone has
HTML	IE 5.0	If you install Office9 you will get IE5 (at least IE4) whether you want to or not.
Web Server	JAWS, IIS4, SQL7	You get SQL no matter what. If you want to use another web server, you're not able to without settling for minimal functionality.
UI/Assistance	IE5	Converging on the user-interface will require IE 5.0
Visual Data, WebChart, WebCalc	OleDb	These components can only talk to SQL 7, perhaps 6.5 if this work gets done, and remotely Oracle. Browsing these pages requires IE 4.0.
Excel	Tensor/Plato	Key features for Excel require a whole new server infrastructure, including an update to SQL.
Access	SQL7/OleDb, Trident	Using these features requires your browser to be IE 4.0. Most every new database feature is built on SQL 7.0
Outlook	Exchange	There is a perception that Outlook only works against Exchange. Our inability to have MAPI providers for other mail systems has hampered the acceptance.
Programmability	VBA	We pick up a whole new scripting environment that may or may not be synergistic with the Visual Studio product.
PowerPoint	NetMeeting, NetShow	Customers will have to have a new server infrastructure to collaborate.
Office Art	XML, IE5	We're defining a text format for vector graphics that really depends on IE5 and XML not changing direction.

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Organization and Key People

The organization is very straightforward and maps to our customer goals for this release. It was a huge amount of work to put this organization together as we tried to move from application focused to mission/customer focus. We aligned ourselves along the Office9 focus areas.

