



From: Marshall Goldberg
Sent: Saturday, March 14, 1998 12:23 PM
To: Bob Gornulkiwicz (LCA)
Cc: Tod Nielsen; Brad Chase; Morris Beton; Marc Kuperstein; Jim Allchin (Exchange); Mike Nash; Paul Maritz; Bill Gates
Subject: Lotus perceptions from the meeting today - Attorney/Client Privileged Information
Importance: High
Sensitivity: Confidential

Folks,

I had a strange feeling while at Lotus today. Both Noah (Mendelsohn) and Alex (Morrow) were "different." They seemed pre-occupied. I tried getting them to open up. At one point, I said to Alex it looked like he was getting ready to retire or perhaps move to a start-up. He muttered words to the effect that going to a start-up could be likely. Alex mentioned when Marc pointed to a moving light sign, how that was the "old" Lotus, and how things had changed since the IBM purchase. We see this as further evidence that IBM is indeed taking full control and imposing IBM Corporate culture on the remains of the old Lotus.

Alex did bring up the SDR. We didn't mention any existence of dates or Marc's roll in the SDR, but Alex realized that Lotus will not get an invitation, just like last year. I was not encouraging. Alex did not put up even a hint of a fuss about this further making me think all is not well with Alex and Lotus.

We were given eSuite literature by Noah. eSuite is clearly a development platform; not just an office suite. With the IBM PC Company putting Domino on their servers as a trojan horse, eSuite rounds out the "new" IBM platform strategy.

All runs with Java in the base Java environment with:

- Domino as the application server
- eSuite as the client application development environment
- Enterprise Java Beans running within the IBM TX series environment for ACID and queuing
- San Francisco as the core business application framework for ISVs
- Visual Age as the tool set
- Tivoli for the management framework

Lotus is now the center of IBM's platform competition with Microsoft and must not receive platform information from us any longer without a new disclosure agreement being put in place. There is just too much evidence from our wanderings and discussions at Lotus that IBM corporate people are working side-by-side with Lotus people. In that circumstance, in my view, there is no way Lotus can properly protect our IP. With Lotus' new mission, we need to be certain not to pass them features of COM+ and other new technologies for them to incorporate within their platform environment. They should not be invited to any more COM+ design previews.

Marshall

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