

cam, this furthers the need for us to think about expanding the corp presence at these seminars.

marianne, it may be worth having a special meeting to track thru the best way to position ourselves aggressively vs. new wave without sounding like bad people. I don't feel we are doing this well right now.

> From w-maria Tue Dec 11 21:43:15 1990
To: bradsi cameronm johnfi lewisl mikemap russw viktorg
Cc: darbyw hankv msftpr peteh robg w-maria
Subject: OLE conference report

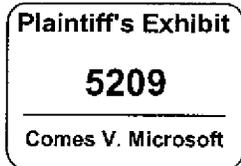
Date: Tue Dec 11 21:33:29 1990

Following are my thoughts on PR issues/implications resulting from the OLE seminar on December 10:

For the most part this seminar was a real positive for Microsoft. It was well attended and the audience was motivated and interested. There were some hard questions but the audience was engaged. One implication of both this and the amazing turnout at the multimedia seminar is that this is proof positive that virtually every ISV has completely accepted Windows as a platform and they are all very very hungry for data on how to develop better Windows applications. It is clear that Microsoft will continue to be challenged to get out information to developers fast enough to meet the demand.

Press attendance was kept limited and consisted essentially of three weekly reporters (Stuart Johnston of Infoworld, Paul Sherer of PC Week, Josh Greenbaum of CSN) and Karl Koessel of PC World. In addition, Mike Millikin of Patty Seybold's group attended. The weeklies had already filed stories based on meetings with Darryl the following week so we can expect them to write stories based on ISV reaction to the presentations. Here are some general conclusions:

- o OLE is a positive first-step but there is a sense that it is incremental and evolutionary only. The press will focus on some of the shortcomings brought up in ISV questions but since MS positioned this as a first step these should be reasonably balanced.
- o Most of the concerns centered around network navigation



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and link tracking and management.

- o I didn't hear any questions about Apple although I didn't attend the sessions in the middle part of the day. However, people reporting to Apple should note the high level of interest in this technology on the PC side.
- o Lots of NewWave questions: "I can already do this in NewWave; why should I do OLE?". Someone asked Billg if NewWave and apps that support OLE would ever be cross-linked of embedded; Bill said there is this concept of a generic encapsulator and HP should write to this. There was a snicker at this. The competitive bar moved up a notch here and if HP (or at least NewWave) is not already on the "list" of companies MS wants to crush, it will be soon.
- o One ISV asked if OLE would be supported in the SMK (Windows libraries) and this needs to be resolved so we can answer definitively. If yes, we should get back to Stuart, Paul and Josh with an FYI since they may leave it an open question in their stories.
- o The Lotus presentation was excellent and there was a good Notes demo. Note to the apps group: Lotus is claiming Notes is "the first app" to incorporate OLE although Alex Morrow acknowledged this was beta (version 2.0). I thought Morrow was witty and self-efacing. A couple of subtle issues that came up out of this:
 - Morrow placed strong emphasis on the need for vendor cooperation and "committee-ization" to ensure the protocol thrives
 - He did a good job of emphasizing that OLE will be of benefit to users. He explained that Lotus first got interested in this in response to a Notes customer request.
 - He positioned OLE as fairly early and this may be of some concern because the apps division will want to be clear that the Excel implementation is robust
 - Note to multimedia group: Ray Ozzie used voice annotation in Notes and told the group he used MS's multimedia extensions! This was great
 - Ray Ozzie was great: open, frank and reinforcing of Microsoft's messages. I think the Lotus presentation did a lot to legitimize OLE and diffuse the church/state issues
- o Speaking of church/state, all speakers were super clear that they want input from ISVs. There was a specific question from the floor saying, "Are you saying you are actively looking for input or you think you're done and are there any questions?" The answer was, we are actively looking for input. Again, given that OLE support is shipping

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in Excel 3 in one month this seems inconsistent to me.

- o Bill's talk put OLE in the context of IAYF with brief references to file-system improvements in the Win 4 timeframe and embedded BASIC. Bill said OLE will be the main theme of Windows 3.1 since the applets will support it.
- o Other things Billg said:
 - MS has sold 20K Win3 SDKS, 5 times the number projected
 - MS anticipates one million multimedia PCs by 1992.

Audio extensions will be available separately (didn't say how)

- o Mike Millikin from Seybold flew out to Bellevue just for this conference. He was disappointed that there were not corporate developers present and said his clients would be SUPER motivated to get on the bus with this. He urged MS to incorporate this into training for corps as soon as possible. Excel developers conference might be a good place to start with this.

433
From catherin Wed Dec 12 08:25:50 1990
To: bradsi
Subject: Re: rankings
Cc: catherin
Date: Wed Dec 12 08:24:53 1990

We can pull the OS/2 information also, but will need Steve's ok to release data for Paul's departments.
Thank you,
Catherine

434
From steveb Wed Dec 12 08:26:31 1990
To: davidw
Subject: Need your view (dib driver)
Cc: billg bradsi
Date: Wed Dec 12 08:26:30 1990

brad you should give the guys a foal to attack geoworks on performance in 3.1
how is their size is the meeting with them scheduled

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