

Desktop Applications Division

3-Year Plan

DAD 3 Year Plan

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Mission Statement

To develop and market the most popular suite of
desktop productivity tools in the world

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Plaintiff's Exhibit

5632

Comes V. Microsoft

Strategic Goals

- ◆ Obtain and maintain 80% share of Windows office suite category, and 60% for individual apps
- ◆ Develop long term product differentiation
- ◆ Become a more strategic purchase to customers by better supporting business practices
- ◆ Develop annuity business
- ◆ Expand into new geographies. e.g. Far East
- ◆ Increase our development efficiency

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Medium Term Objectives

- ◆ Focus on Office as a product
- ◆ Support other DAD groups in producing individually excellent products
- ◆ Synchronize with and exploit systems releases
- ◆ Increase long-term investments in technology
- ◆ Double shared code to 40% by 1996
- ◆ Reduce cost of using cross-product technology
- ◆ Decrease documentation and localization costs by reducing number of words by 50%
- ◆ Keep support costs flat as a percent of revenue

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Competition

◆ Lotus

- Key competitor
- Strong individual products, DOS installed base
- Notes, app links to Notes ("best workgroup applications")
- Aggressive corp. acct. pricing
- Market share in small organizations
- Possible Fall 1994 release with OI 7.2.0, LotusBasic
- OS/2 app leadership

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Competition

◆ Borland

- No credible suite
- Good products and loyal customer base
- Low cost structure but low prices and lean bank account

◆ WordPerfect

- No credible suite
- Good products and loyal customer base
- High cost structure, possibly weak finances
- WordPerfect Office, Doc library

◆ Possible WordPerfect/Borland merger

◆ Claris

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Why Will We Win?

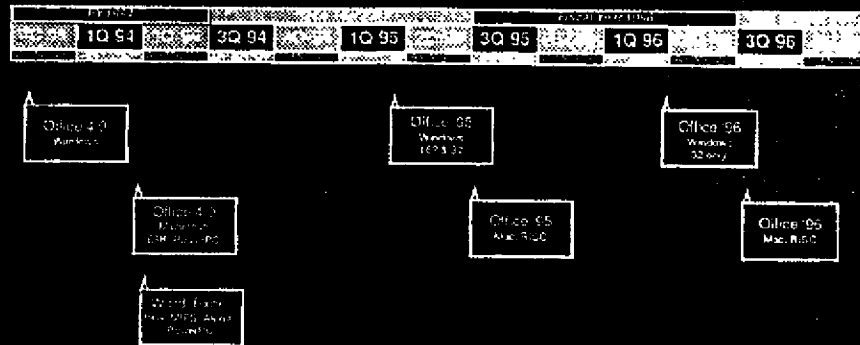
- ◆ Leverage other Microsoft products & research
 - ★ Systems
 - ATG
 - Consumer
- ◆ Lead industry direction for desktop applications
- ◆ Strong, innovative products
 - Category features
 - Usability leadership
 - Interoperability
 - VBA
- ◆ Best desktop applications for use in a workgroup
- ◆ Best platform for business solutions

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Release Plan Summary



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Release Plan Summary

- ◆ Office '95: March 1995
 - Chicago synergy
 - Workgroup features leveraging EMS and Ren
 - Leveraged category features
 - 25% of resource
- ◆ Office '96: March 1996
 - Significant category enhancements
 - Discoverability and Ease-of-Use
 - Performance
 - Programmability and Customization
 - Memphis synergy
 - 40% shared code
 - 75% of development resources

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Release Principles

- ◆ All Office components (Office, Word, Excel, PowerPoint, Access, Ren) ship simultaneously
- ◆ Extended family members (Project) ship within 60 days
- ◆ French, German, Swedish, Italian within 60 days
- ◆ Far East releases within 90 days
- ◆ All releases with 120 days
- ◆ Release on floppy and CD. No CD delta by 1995.
- ◆ All of Microsoft moves to a 12/24 strategy
- ◆ Outsource RISC releases

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Office '95

◆ Themes

- Leverage Chicago, EMS, Ren
- Meet competitive workgroup challenge
- Leveraged category features

◆ Ship Date

- March 1995

◆ Design Goals:

- 32 bit version - for Chicago and NT
- 16 bit version? - for Chicago, Win 3.1 and OS/2
- NT, RISC, Mac OS and PowerPC, top 10 International versions
- 25% of development resources (in parallel with Office '96)
- Every feature is demoable
- Increased code sharing
- 32-bit versions use Lego for optimization
- A thread or two, e.g. for display

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Office '95 Key Features

◆ Exploit Chicago

- Support highly leveraged features. Enhance where possible.
- Auto long file names
- New Chicago Visuals, including title bar, Chicago tabs
- Shell properties, eg. last printed, # of pages, locked, etc.
- Minimal plug and play event aware, e.g. resize windows on resolution change, support net connects, low power
- MDI to SDI transition work
 - o Shows MDI child windows in tray. (Need new api from Chicago to do this.)
 - o Templates to create new docs from desktop. (Installed apps appear as templates.)
 - o Factor out MDI container UI, e.g. MRU, File, Window menu commands.
 - o Improved MDI window behavior

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Office '95 Features, Cont'd.

❖ Exploit EMS/Notes/Rem

- Save/Open documents to/from EMS & Notes, add support in Open/Save/Find File
- EMS/Notes Application F/X, e.g. Excel names, Word bookmarks
- Find File supports EMS/Notes
- Better Routing
- Extended standard properties, e.g. to-do flag, project name documents for Rem & shell views
- Support CMCX from apps

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Office '95 Features, Cont'd.

❖ Cross Application Features

- Improved consistency
- New Find File 2.0 (content indexing); Word adopts it
- Merge MOM and Rem launcher. Shows appointments, unread mail & to-do list.
- AtWork support to FAX a document, dial a user
- MOS support (online registration, PSS, additional templates)
- SMORG Wizards/Templates (common business forms, etc.)
- Value Added: Bookshelf in CD Office, Symbol Manager, etc.

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Office '95 Features, Cont'd.

❖ Discoverability

- Shorter documentation (800pp for Office). Focus on top 10 tasks. Comprehensive docs only from Press. 50 percent reduction in words for print and on-line.
- IntelliSearch engine for Help with Natural Language Query. May also perform commands.
- Dialog tips for dialog controls instead of Help screens, dialog callouts. Self documenting alerts.

❖ Performance

- Word boot time, Excel recalc
- Some 32 bit assembler for Chicago, NT versions
- OLE improvements in DocFiles and In situ, 32 bit only

❖ Address major PSS issues from Office 4.0

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Office '95

❖ Technology provided

- Setup, MOM/launcher, Find File 2.0, and indexing
- Core features, IntelliSearch

❖ Technology used

- EMS, LMS, SMS, SES
- Chicago, including 32 bit OLE

❖ Issues

- No Word, PowerPoint or Access VBA
- Need to sync up with Access
- Office working set and footprint
- Small organization features?
- Do we do a Mac version?

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Ren '95

◆ **Manages Appointments, Tasks, Messages, Addresses, and Notes**

- Calendar, (Editable) Table, Card, Notes views
- Advanced email and group scheduling

◆ **Leverages EMS (also LMS) as a native data store**

- Group scheduling info stored in public folders
- Use public folders with calendar and other views (e.g. Microsoft corporate events calendar, group task lists, etc.)

◆ **Great for manipulating Office documents**

- Create and manipulate documents in useful contexts: appts, tasks, contacts, notes. Uses Ren views.
- Ren views are powerful, visual tools for managing documents

◆ **Ren launcher merged with MOM becomes manager for Office.**

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Word '95

◆ **IntelliSense 1.1**

- Background spell-checking
- Opportunistic AutoFormat and AutoCorrect enhancements

◆ **Fun formatting & DTP**

- Publisher's Border, Art and Shape Tool
- Wrap text around irregular objects
- Template preview in File New
- WYSIWYG style dropdown

◆ **Additional Wizards**

- Address list
- Form design
- Print helper

◆ **On-line viewer version**

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Excel '95

- ◆ **Content Wizards**
 - Possibly including common small business analysis, analytical charting
- ◆ **List management**
 - AutoForm
 - Auto data entry: auto-complete, in-cell dropdown list
 - Filter by common formats (ss#, ph#, etc)
- ◆ **Data access**
 - Query at your fingertips
 - Query Wizard ala Access 2.0
- ◆ **Review catch-up in presentation area**
 - Simplify charting UI
 - Gradient fills, rotated text

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PowerPoint '95

- ◆ **AutoSizzle**
 - Automatic graph builds
 - Automated animation
 - 3-D graphics
- ◆ **Workgroup Communications**
 - Collaborative presentation creation
 - Interactive meeting management and support
 - Remote conferencing support
- ◆ **IntelliSense**
 - AutoFormat, AutoCorrect, AutoClipArt
 - Auto masters, colors, and slide formatting
- ◆ **OLE Automation**

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Project '95

- ◆ **RPM integration**
 - Consolidation of multiple RPM plans into Project
 - Delegation of Project tasks into RPM plans
- ◆ **Process Library**
 - AutoPlan: reuse information from other plans
 - ... or other cool, competitive feature
- ◆ **Wizards**
 - Planning Wizard enhancement
 - Project planning content wizard (external)
- ◆ **Workgroup enhancements**
 - Ren and Schedule+ 2.0 integration
 - RPM delegation and tracking updates

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RPM '95

- ◆ **Work Management: Planning, Tracking and Reporting for the Resource Team**
 - Distribute and optimize workload for the team
 - Planning views, Work over time, Time sheet, Reports
- ◆ **Workload Driven Scheduling**
- ◆ **Workgroup Enabled**
 - Assignment, tracking, and changes managed through email
- ◆ **Quick, easy, visual status of critical information**
- ◆ **People Management**
 - Skills inventory and matching
 - Performance history, objectives tracking
- ◆ **Project integration**
 - Consolidation of multiple RPM plans into Project
 - Delegation of Project tasks into RPM plans

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Office '96

◆ Themes

- Leveraged category features
- Discoverability and Ease-of-Use
- Performance
- Programmability and Customization
- Memphis synergy
- 40% shared code

◆ Ship Date

- March, 1996

Office '96

◆ Design Goals:

- 32-bit only
- Target Memphis
- All NT platforms
- Mac (68020+ and PowerPC, Sys 7+ only)
- Office Infrastructure 1.0
 - » Single Layer; WLM
 - » Shared basic data structures (e.g. fonts, windows, memory)
 - » Shared high level features (like toolbars, intellisearch)
 - » Shared int'l code (source, access routines, tools)
- 75% of development resources (in parallel with Office '95)

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Office '96 Key Features

◆ Discoverability and Ease-of-Use

- Character/Social UI
 - » Task-oriented, Cross-app
 - » Unified User Assistance (help, wizards, cue cards, tips, IntelliSearch)
 - » Engaging, Fun, Personal
- Streamlined, Cross-App UI
 - » SDI, Task-OLE
 - » Task-centered approach (e.g. More pre-shipped solutions such as mailing labels, address list)
 - » Property Browsers / Toolbars II / central menu design
 - » Simplified Common User Model, consistent with Memphis
- Simplified Setup and Installation Mgmt
 - » On-the-fly setup
 - » Tied into system (e.g. when remove an app icon or delete an EXE file, system helps you uninstall)

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Office '96 Key Features, Cont'd.

◆ Performance

- Target perceptible improvements
 - » 20% faster
 - » 20% less disk space
 - » 20% less resources
- Sometimes Shared Code will help...
 - » Toolbars (sharing will speed 2nd app start-up almost 20%)
- Also Willing to Re-Architect and Re-Code
 - » Target common operations: e.g. typing, scrolling, etc.
 - » and operations that are too slow today: e.g. embedding
- UI changes can often make operations "seem" faster
 - » Background printing (actually slower, but shows that the user definition of fast is "when you get control back.")
 - » More animation of state changes (e.g. window changes)
 - » More direct UI (i.e. MRU lists save time)

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Office '96 Key Features, Cont'd.

◆ Programmability and Customization

- Office with VBA is a "development platform"
 - » VBA 2.0 everywhere; component controls and forms
 - » "Make EXE" ability (i.e. add-ins don't take 8 sec to boot)
 - » Cross-app customization, error-checking, bulletproofing
 - » Consistency of key classes
 - » Consistent addin architecture
- "Personal" Office (If you think Office learns more about you every time you use it, it's unlikely you'll switch)
 - » Character is your friend; you choose which character
 - » Personalized learning (personal lessons; support group learning via network or EMS)
 - » Easier voluntary customizing (e.g. shared Tools Options)
 - » More automatic personalization (e.g. More MRU's, templates and styles with no work, Auto Auto)
 - » Per-user customization (leverage Chicago user log-in)

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Office '96 Key Features, Cont'd.

◆ Leverage Microsoft Strategy

- Chicago features version 2 (e.g. Merge API, optimize for SDI, versioning with long file names, additional useful threads)
- Tight Memphis integration
 - » More UI delegation to system (e.g. shell as task organizer, find and open files directly from the shell)
 - » Doc lib uses OFS
 - » New visuals throughout (256 color palette)
- Ren 2.0 seamlessly integrates with the shell
 - » Extends shell's information management. Uses OFS.
 - » Easy Reference Look-Up ("clip data")
- Next level of EMS/OFS support
 - » auto versions; digital signatures; leverage address book
 - » MS On-Line (e.g. clip art, shared knowledge base, registration, real-time reference)
- Sync with DDT direction on data access
- Others (e.g. AIWork, WinPad)

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Office '96

◆ Technology provided

- Design & development of core features and UI
- Unified user assistance model & services (co-owned with Consumer)
- Property Browsers and Next Generation Top-Level UI
- Design of Common Document Architecture
- Design of Common User Model (co-owned with Cairo)
- Setup
- Shared components and apps infrastructure

◆ Technology used

- Platform technologies: OLE, EMS, OIS, DNA, WLM, ARWork
- Programmability: VBA 2.0, Component Controls and Forms, Common Object/Programmability models (DDT)
- Design: Memphis Shell, UTOPIA Social UI, Data Storage arch (DDT+SYS), Event/Workflow model (DDT+WCA+SYS)

Ren '96

- ◆ VBA/Improved OLE Automation Support
- ◆ Support for DNA data access instead of/in addition to MAPI
- ◆ Improved contact management features
- ◆ Time/task management wizards
- ◆ Integrated component forms with end-user customization
- ◆ Integrated digital signatures
- ◆ Tight integration with Memphis shell

Word '96

- ◆ **IntelliSense 2.0**
 - AutoFormat as you type
 - "Background everything"
 - Morphological and Synonym Find and Replace
 - Opportunistic Natural Language features
- ◆ **Real DTP**
 - Linked Frames
 - Absolute page positioning
- ◆ **Structured Text Support**
 - Hierarchical styles
 - Conditional Text
 - Enforced Document Structure at Data Entry Time
- ◆ **Rich On-Line Viewer and Authoring Environment**
- ◆ **Word as default mail editor**

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Excel '96

- ◆ **Workgroup: spreadsheet category features**
 - Multi-user books
 - Consolidation/Budgeting
 - Links/Connection Mgmt
- ◆ **Discoverability for spreadsheet features**
 - Navigation/Selection
 - Format Number
 - Formulas
- ◆ **Printing/Presentation**
 - Manipulate margins, print areas, etc. in normal view
 - Flexible grid
- ◆ **Charting/Graph: win reviews**
 - Unify XL charting and Graph
- ◆ **Query / Data Access**
 - Fully use DAO for data access
- ◆ **Exploit structure: time intelligence**

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PowerPoint '96

- ◆ **Advanced IntelliSense**
 - Presentation advisor
 - Opportunistic Natural Language features
- ◆ **Improved Workgroup support**
 - Improved collaboration support
 - Slide level versioning
- ◆ **VBA**
- ◆ **Componentized Draw (for Office)**
 - Drawings without drawing skills
 - Smart rules, predefined shapes
 - Textured lines & fills, 3D & photographic effects

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Project '96

- ◆ **Scheduling engine improvements**
 - Multiple constraint scheduling
 - Split tasks
 - Improved levelling
 - Smart recalc
- ◆ **Resource management**
 - Resource contouring
 - Better tracking and cost control
- ◆ **Enhanced and additional views**
 - Resource views
- ◆ **Multi-user data access**
- ◆ **Workflow and process modelling support**

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Things not covered in this presentation

- ◆ Organizational issues
- ◆ Detailed international plans
- ◆ PSS issues
- ◆ Plan vs last year
- ◆ Technology plans
- ◆ Accessibility

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