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To: Andrew Kwatinetz; Duane Campbell; Grant George; Richard McAniff; Kurt DelBene (Exchange); Ralf Harteneck
Cc: Andy Schulert
Subject: preliminary planning meeting

Please be careful if you need to forward this since the slides (from the meeting last week) are not out there...

Today (not tomorrow like I thought), we (jon, bob, me) got a chance to talk through the current state of planning for Office10 with billg, steveb, paulma as well as davidcol and davidv. The purpose of this meeting was to have a low key discussion around the major challenges of schedule, focus, dependencies. We had about an hour total, and things were somewhat rushed because of hard stops.

Bob started the meeting (jon was on speaker phone from home due to the flu) with a brief over view of the two waves of products we have been talking about—just in terms of timing and contents. He also went through the current status of the ATG focus areas (from the draft memo) and the idea of partnership teams.

There was a lot of discussion around the finer points of the ATG focus areas—trying to decide where specific features might fit (SameTime competition), deciding if there was really a split (KW seems document centric but datawarehouse is important), etc. Overall, I think the consensus was that this was a pretty good start but there are concerns about making sure that all the important things are really covered. Folks also wanted to know what the big constituencies (customers) would think of each of the focus areas and when we would go to them with a story.

The partnership idea was "new" to most folks and sounded interesting to them. Most of the discussion centered around trying to create more of them with more dependencies. We pushed back some trying to give examples from Office 2000 (tco, vba, IE) and talking about how you can only have two teams in the partnership and generally it takes a very senior person to run one. An example was wanting to have an XML partnership. I think this is something we will need to be very explicit about in our planning, since I worry that every problem that comes up will be the next reason to create a new partnership group. We need to do a better job explaining that these are part of the development cycle and not "crisis teams" or "taskforces". But it was definitely a positive experience to talk about these.

The product waves were well-received so I think pending the open issues we know about we can move forward knowing that there is an understanding of what we are doing. There was a lot of discussion over the disruptive nature of putting features in the office SR and we all agreed we don't want to do this. It is likely we will have the Wave I features as an add-on and the QFE and bug fixes as the actual SR. This is overall good for us and we can use darwin to help us.

We also need to reconcile terminology over SR, service pack, patch, etc. SteveB will ask kevin johnson to do this.

The key points from the Office10 slides, which everyone knew were super preliminary, were just what we needed to hear—what are the "musts", what is confusing, where are the major strategic points. Overall, I think we're ok There was a lot to absorb and we had a lot of new terms and process issues to talk about. But a good first step:

We need to align the Office10 focus areas and the ATG focus areas. I think folks like both sets, but it is confusing to have two. I think this is temporary, since we are just using these until we have a vision statement. But lots of process to absorb. The ATG ones are very LORG focused right now (especially when the partnership teams are shown) which makes it very appealing to some folks, but also doesn't cover a lot of what we want to do as crisply. The office framework appears to be missing some things that matter a lot to LORGs (business app automation). This was just because we're early in the process.

We had a big discussion around the OS service pack issue. Some were very sympathetic to this issue and definitely agreed. But as we would expect there are "some very special things" that we need to think about. The interesting this is that we might just consider these shared features that release after Office10. I think this will be super tough but in general, I think there is sympathy to what we want but a desire for there to be a couple of explicit bets. It wasn't really clear how to define redist pack for some of the new things under development as well. But the goal is out there and known now, which was the goal.

The discussion of the server triangle went much better than it did in Office. Everyone really agreed that this is worth

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addressing, and is very hard. Bill likened it to the challenges of IE v. Nav in trying to have features for Pt and webs. SteveB really wants us to hook up with MSN (no problem and in the works). Overall, the strategy of betting on Platinum is fine and continuing to take advantage of our web assets was key. There was definitely unprompted discussion over the OSE server requirements v. the FPSE server requirements and the problems that created. Bill is still down on the discussions feature :-(The ability to use Office 2000 on tripod using FPSE/FP98 was super interesting (and frustrating that you can't do this on MSN). I would say that as long as we deliver on the goal of not doing everything 3 times, using each of the servers for what they are good at, maintaining the ISP asset, and doing an awesome Pt job we'll be OK.

Notes ideas seemed to go just fine. There was a good discussion over who understands Domino Designer v. Notes client (and that they are the same) and where our tool should be. This is the "lightweight" dev tool. I think the idea of making it all hosted in VSE with Outlook being the primary host made sense. A key element of this is defining a runtime that we can host on Office or the browser. Also a talk about Navigator clients, and of course needing to do this but not being sure how.

Some specifics to think about that were raised:

- XML REVOLUTION – it is clear bill is really pushing XML, but he repeatedly offered that it was very vague. DavidV is going to write down some scenarios so we can understand the goals. This is one of those things where the partnership metaphor was used as well as the desire to have us ship "AdamB's code". It is no problem for us to do this, but we reiterated that it is pretty vague.
- Notes customers -- We should definitely have some solid Notes people close in the loop on the process (like PW on the OAC) who will seriously look at what we are doing and tell us if it is "relevant"
- Losing Notes folks – lots of fear over Office maintaining facetime (we agree). What will we do to be on top and maintain relevancy for people that won't use Exchange.
- Customer segments/constituencies -- I cut our normal segment to focus slide for time, but shouldn't have. Given SteveB's role it makes sense to do a better job really articulating these in the vision document. We should think about how to write down customer focused layperson's specs.
- COM+ -- there is a lot going on in terms of planning around COM+. Obviously there is a desire to have this ship in Office. There are specific concerns over compatibility in the tools and bob pushed on the realities of the schedule. In general, we just need to approach this with an open mind which we agreed to do.
- VS7 – we did discuss the role of VS6 v. VS7. I think there is an understanding about things, but a lot of optimism about what we can do. I tried....

There were some specific comments on things to innovate:

- Tablet PCs – bill would really like us to think about a new app around note taking. Jon and I need to figure out how to handle this.
- Banking/Enterprise Excel – steveb gave us a head to do these sorts of features. That was news to me so I need to understand the expectations of the output of a single person (40% test, 50% dev, and 20% PM perhaps?)
- Collaboration – the term was used vaguely but we should really do better advancing this (is it group authoring, categorization, personalization, etc). Our plan is currently very Outlook/Excel focused (LORG) so we just need to do better putting word and editing more front and center. Ralf will be back soon!
- Future of meetings – lots of talk about SameTime and meetings in general. We need to get bill more up to date on Office 2000's collaboration/meeting stuff. Lots of integration with Platinum's new server features.
- MSN -- definitely need to have a plan together. Lots of change over there in priorities and focus. There is a huge desire to have some great things there.
- XML -- what to do about a world of "data". We need something here, but very vague. There was a lot of discussion about navigation tools...

There is probably some more. I was talking way fast to try to get through in less time. I think this was helpful though.

I think expectations are ok, but we really didn't eliminate much. Sorry this happened a day early.

A couple of things we should get more credit for that came up:

- office update
- tripod integration

- conferencing in powerpoint
- our great "best practice" on the project coding of heads
- thinking through the dependencies up front (bill commented afterwards how far ahead we seemed to be)