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Sent: Wednesday, July 29, 1998 3:38 PM
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Subject: Moving forward on the next release



Planning our next
release.doc

It is time for us to begin laying the groundwork for planning the next release of Office.

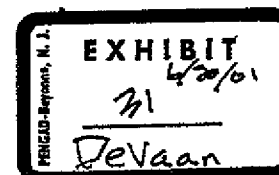
First things first--nothing matters more than us finishing Office 2000. We need to finish on schedule, and more importantly with a quality level our customers and beta sites are more than happy with. We have a lot of challenges over the next few months, but I am certain we will ship the right product when we say we will ship it. The excitement, both inside and outside Microsoft, over Office 2000 is incredible. The product has all the makings of a major success story!

The goal of this memo is to help get us started planning. We have a number of issues to think through in terms of our competitors, organization, strategic initiatives, and integrating our plans with key parts of Microsoft. Andrew will be leading the integration of our planning processes, both internally and within Microsoft, in his role in program management.

Towards the end of August we will have our first retreat which will serve to have us thinking "out of the box" on some of the challenges we face. Until then, **I ask that you not share this memo**, but rather we should use it as a tool amongst ourselves as we begin planning.

Let's ship Office 2000 and have a plan in place for the next release so we have a smooth transition.

--Steven



Plaintiff's Exhibit

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Microsoft Memo

To: andrewk; duanec; grantg; kurtg; ralfha; richardm;
 From: stevesi
 Subject: NRO—The Next Release of Office
 Date: 8/1/1998
 cc: jeffo; andyschu; gregfa; kathleen; andyh; jonde

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Introduction

This memo is about getting the ball rolling on the Next Release of Office (NRO). We have a wonderful release in the works for Office 2000 and of course our primary efforts will be to focus on finishing this work. We have a long history in DAD of making sure everyone sees their work through to completion, and a long history of allowing everyone to contribute, at the appropriate level, to the planning of future releases. Given the apparent early successes of Office 2000, we should not rush to change this element of our process.

This memo starts the process for determining the next release considering the state of our processes, customers, and product. This may seem like a lot—that is the point! Most importantly, we have much to learn in how Office 2000 is received and that will be an important element of planning the release. We also want to work together to have clear roles for each of us and our organizations, and most importantly that we have plans in place that allow for a smooth transition between releases.

For the next release, we will need to be more aware of the business framework within which Office fits. Office is obviously a key source of revenue for the company and a highly profitable business. We must continue this success and develop a plan that continues to grow Office by integrating with the major strategic initiatives and at the same time attack new opportunities to grow the business in significant ways.

Office 2000 Observations

It is too early to do a post mortem on Office 2000, but it is important to spend a few minutes and reflecting on some elements of the process that have gone well and some that we should improve upon for NRO. Of course we will do a proper post mortem and

include that feedback in the planning process.

What went well

First it is worth looking at some of the things that have gone particularly well.

Vision. From the start of this project we set out to have a shared vision and set of priorities that was well articulated and allowed for a clear decision framework. Not only did we achieve that, but also we have a process that others in the company are envious of and wish to emulate. Some days it is almost scary to look at the product and see how closely it resembles the vision, and frankly the weaknesses that are being perceived in the product are clearly represented by the vision as well (such as the lack of hundreds of little end-user features). We need to improve the rolling out of the vision, but we must not risk having the process drag out too long or be muddled. We would do well to repeat the timeline and forcefulness of the Office 2000 process.

Organization and leadership. Personally, the Office 2000 process taught me that preparing for a new project of over 700 people is as much of an organizational problem as it is a technical problem. We all spent an enormous amount of time on staffing issues throughout the first six months of 1997. The end-result was well worth it as we saw a large number of people rise to the occasion and Office has many new leaders in our organization. We had a few (single digits) people leave the team because they did not feel they found adequate roles or they were not satisfied working within the framework of the vision we created. For the next release we should strive for even less attrition especially for experienced leaders. Self-determinism, the ability to choose what team to work on and what manager to work for, was a key element of success of the organization.

Empowerment. Despite the initial concerns over a lack of space for innovation in the application teams and a general feeling at times that we over constrained the problem space for Office 2000, the organization overcame this and functions very well as an empowered group. One measure of this is the incredible rarity of escalated decisions. In fact, the only things that made it up the management chain were escalated outside of Office. We should all feel very good about this since we know from employee surveys and exit interviews that people dislike their jobs the most when they feel they cannot make a decision stick.

Shared Feature Team concept. We created the shared feature teams because of the difficulty of budgeting the integration work. We made the jobs on a shared feature team some of the most challenging at Microsoft, but they also are incredibly impactful and our customers will see the benefits of this work in terms of the consistent polish and implementation across all of the applications. The advances we made in HTML, the consistency in TCO, innovative user-interface, and the uniform introduction of server functionality and programmability all were done with less pain and more completeness than the shared features in Office 97. We learned and improved.

Fully Informed. The Office 2000 process has been extremely communicative. In each discipline major steps were taken to provide full communication across the product team, which is so critical for a team the size of ours. Starting with program management and the specification server, to the checkin aliases and email for development, and the shared testing roadmap everyone has done an amazing job keeping each other informed. Of

course we could always do better and we should look at this area carefully for feedback since a lack of information makes it hard to make the right decisions.

Focus. The focus of the team at each juncture was impressive. At the start of the project we had an incredible focus on creating a plan, feature set, and balanced schedule. The rapid pace of decision making and prioritization that took place is something we need to reproduce once again for the next release. As we turned the corner and rolled through the milestones we began to focus on the key deliverables for feature complete, automation, and closing down the details. As we neared Beta I we again focused on a new set of metrics and delivered the most robust and complete Beta I ever for Office. Now as we are marching towards shipping, all I can think of saying is "don't get in our way" and the feelings around the company are echoing that every day.

Performance. It would have been very easy for our boot/open/save performance to tank completely due to the addition of HTML, new user-interface, and the TCO features. Yet because of the broad based attention with some key leadership we have maintained near parity with Office 97 for legacy scenarios. Our customers want more in this area and we must not lose sight of that, but the team deserves a lot of credit for where we are today.

Outlook and FrontPage integration. We had two products join the Office product later than we would have liked and the integration of those teams has been excellent, though not without challenges. The need to have Outlook release with us, yet add a few marquee features, was critical and we will achieve this. We decided late, but out of necessity, to create a new SKU with FrontPage (and PhotoDraw) and the teams have delivered on this as well, which is sure to generate a significant bump in launch revenue and boost the use of FrontPage.

Specification process. The use of <http://officeweb> and the shared specification process and schedule across all of the teams was a major advance for program management. The benefits across the product team were clear as more people felt they were informed about their features and the features related to theirs. Now that we have built a suite of productivity applications designed to solve this problem, we will not have to suffer through the lack of tools for another product cycle.

Test preparedness and test automation. By integrating testing in the design process earlier than we have in the past, we achieved some concrete benefits in preparedness. In addition, the investments in automation seem to be paying off in a significant way.

Post Beta I focus. It is worth noting the incredible discipline of the team after Beta I. It would have been very easy for the project to spin out of control and not regain footing for a month or two as 200 people checked in thousands of changes. Yet the process was orderly and we were able to regain the build momentum after only a week or two. In addition, we were able to resist the temptation to go back to the feature drawing board and add a lot of new work.

What could have gone better

Of course it would not be a product cycle if there were not a few things that did not go as well as we would have liked. We will need to spend some considerable time looking at these issues during the *post mortem* process and find ways to have skilled and motivated

people help address them in a long term manner.

Build and release process. Early in the project I thought for sure we would have riots in building 17 over the build process. It is a testimony to the hard work and perseverance of some, and the patience and professionalism of all, that this did not happen and in fact we were able to settle down and make progress. Much will be said about this area of the project so I will leave it to the experts once we ship.

Dividing, rather than growing, the pie. Early in the design phase of the product there were tensions over who would own various portions of the design (HTML, user interface, etc.). This was particularly acute in the *popular* areas while there was a lack of concern over the areas that were less *popular* (release and TCO). We all knew that some areas would overlap but we had a hard time letting those challenged with working on them have some autonomy. Once we started growing the pie of features and once we became more educated about the complexity ahead of us, this became less of an issue. We should strive to learn from this experience.

Cross-division process. We had an uneven set of relationships with our cross-divisional partnerships. It is fair to say that all of our relationships went well for the first 60% of the project. The TCO team members were all given offices and made honorary members of the NT team. The SQL team loved the work that Access was doing to leverage SQL. We had a loving relationship with JAWS. And the list goes on. As we got closer to finishing and we got more focused on finishing than creating the tensions started to mount. Although very few of these relationships became wholly negative, they certainly were less than positive. I would hate for us to think this is just par for the course, though it has clearly been this way, or worse, for past releases. We do need to find ways to make working across divisions a true partnership.

Lack of customer understanding regarding standards. We started the vision for Office 2000 by saying we would support Navigator 3.0 and above, but ended the product cycle essentially requiring Internet Explorer 5.0. From a strategic point of view this is an excellent accomplishment. But from a customer point of view this is a disaster. We would not have lost any sales or reviews if we worked on down-level browsers. We need to understand how we lost sight of the very clear customer focused goals we had and what we can do to prevent us from getting too focused on the initiative—to the point that we will risk upgrades or generate negative customer sentiment. We have similar issues regarding the web server support.

Dependency management. Our *external*, that is outside of our management structure, dependencies and deliverables came in somewhat uneven as well. Obviously this is related to the strength of the relationships but it is fair to say that many of the key components delivered to us from other groups are not quite meeting our needs in terms of delivery, code size, functionality, or other metrics. For the next release, we must be more careful about stating our expectations up front. It is also worth noting, that for a few components that Office delivers to outside groups the feelings in this area might be mutual as well.

Publisher integration. We (this was mostly me) erred on the side of integrating the higher-end Premier SKU as part of setup over integrating the lower-end Small Business Edition SKU. Moving forward we must go beyond setup integration and define

functionality that legitimizes the Small Business moniker, and we must make advances in setup authoring that will give us the flexibility we need to produce SBE and other SKUs as needed.

Broad product knowledge. In some sense our focused and empowered organization worked against us in ways that should concern us long term. The Office 2000 product is incredibly broad and no one should be expected to know the whole thing or even the majority of it. Many, however, probably knew too little about the feature areas in proximity to theirs. Stating this broadly, we should work to emphasize depth as well as breadth as we build the skills across the team. This is especially true for program management where we had a number of missteps during the product cycle.

Inconsistencies. We still have inconsistencies in Office 2000 features and our development processes. We are ten times more efficient and consistent this release than we were in Office 97, but the closer we get to perfection the more the differences stand out.

What to improve anyway

There are several things we need to improve upon, despite the improvements we have made in Office 2000.

Performance. We are close to accomplishing the remarkable task of keeping the same level of performance with Office 2000 as we had with Office 97 for basic boot, open, save benchmarks. With the addition of FAT32 or Windows 98 it appears that we are even faster on boot (on some significant hardware). Our goal of not driving hardware upgrades with Office 2000 was met. On the other hand we did not make any radical improvements in performance and mostly continued down the path of delay loading and profiling. We must continue to work with Windows and truly make a huge leap in application performance, especially in boot time.

Quality. It is too early to tell how customers will perceive the quality of Office 2000. It is probably fair to say that no matter how well we do there will be some people who believe the product to be buggy and unstable. We have made incredible progress with the QFE process and our largest corporate customers who receive this support acknowledge that. Yet we still must find ways to provide a more stable product and provide better service of our existing products.

Predictability. Our scheduling process has been as tight as it ever was in the past, and we are an order of magnitude more complex. On the positive side this project cycle never felt like it was out of control or that we were not close to where we needed to be. Yet we still finishing six months beyond our original ship date. What can we do to improve this?

Simplicity. Office 2000 is still too complicated by any metric you pick. We made some innovative steps in user-interface and in ease of management, but still the product overwhelms. Some areas of the product became more complex-solutions and data access certainly. There are many ways to measure the complexity of Office, but we need to have a thorough understanding of how customers perceive complexity and make significant progress in their minds for the next release of Office.

Our Mission For This Release

Office 2000 has been an incredible product cycle and it looks to be like the product will be well received. Our work is not done by any stretch of the imagination and the opportunities to continue to define the PC experience all lie ahead of us. At the same time we continue to face threats to our core business and amazing profitability that we clearly must address. Over the next months as we plan the product, we will look at measuring ourselves by the following metrics.

Broaden the Office customer base, and increase upgrades. With Office 2000 we have definitely solidified Office's role in the corporate/LORG world. Yet we still face the challenges of convincing our customers to upgrade with a compelling product, and then these customers must deploy Office over the course of a year. At the same time, we have not made substantial progress at creating a product that can be applied to the average person working alone or on a small business. We know that more user-interface and more wizards are not necessarily the answer, but what will be? How will we ensure that Office will be the software that every PC has on it (legally!)? The early feedback from non-LORG focused people has been that Office 2000 is very corporate, and this is fair given our focus and vision. Marketing will focus on the perceptions, but we need to deliver on product realities for new customers.

Solve business problems out of the box—simply—with the Microsoft infrastructure. We are at the end of the software food chain. It is Office that makes up the end-user view of the Digital Nervous System—the information systems in a company that help a company to be more competitive and deliver better goods and services. We must create significant business value with the next release of Office. Our customers are becoming increasingly abstracted from our product offerings—the feeling customers have is that our software is a bag of bits that can do anything you can imagine so long as you have enough time, programmers, and the IQ of Bill Gates. We must apply our end-user focus and our ability to solve real problems through exhaustive customer research to significant business problems. At the same time we must continue to work with the platform teams so that we continue to evolve Windows, provide extensibility customers need and value, and produce integrated solutions that span the assets unique to Microsoft.

Two examples worth looking at for the next release of Office are *Document Management* and *Customer/Contact Management*. Both of these are areas we know that companies large (document management) and small (customer management) feel they need solved. We have tons of infrastructure and sales tools that point out how one might solve these problems, but we do not sell something that an average IEU can install and use in a finite amount of time. This is not just leveraging some infrastructure that we have in place, which we will do, but we must accomplish this without an incredible burden. Consider how difficult it is to get an Office Server Extensions server running today: install NT Server (assuming you can figure out how to get it on a corporate network), install Service Pack 3 (reboot), install NT Option Pack (reboot), install Office Server Extensions (reboot), add user names as needed (learn NT admin tools), customize the home page to represent your project/group, touch all the client machines to point to the server, etc. and that only gets you running and does not take into account managing the server over time or do not need dial up access.

Develop innovative technology that blows people away. The perception in the marketplace is that Microsoft is not an innovative company. That is even more strongly felt when the attention turns to Office. People like Walt Mossberg, David Coursey, Stewart Alsop and analysts like Gartner and Meta, feel as though we are resting on our laurels and have not done anything to advance the state of the art of productivity software. Even financial analysts think we have missed the boat on innovation and that the next wave for productivity software will be speech/dictation and that is yet another advance that Microsoft did not pioneer. On the other hand, even when we do radically innovative things people tend not to give us much credit (Answer Wizard, Assistant, adaptive interface, IntelliSense, etc.) but we should not let this sway us from being bold about how we think about our products. With Office 2000 we will likely solidify the installed base beyond our wildest dreams, so it is imperative that we think hard about the next release strategy in light of that. How will we blow people away with innovation so bold that they are willing to endure some upgrade pain?

These three concepts will guide our thinking as we begin to plan the next releases. These pose both organization and product challenges. How will we simplify the existing product so we can broaden the market, yet at the same time we want to solve complex problems for people? That is a big challenge. The focus of senior management should be on making sure we deliver on these three missions globally across the product.

The Competition

It is both rewarding and scary to look at the current competitive landscape. We can all feel some sense of vindication in the fact that the internet did not cause the immediate death of Office and that so far no one is running Java applets that do the "right 20%" of Office-yet. We can take a moment to gloat, though only a moment as we still have traditional competitors and competition at the LORG level is still there though not as directly.

A key part of the vision process will be identifying the major competitive issues and threats and establishing how Office will respond to these issues. This is an area we were weak on for Office 2000 and should improve.

We must not lose sight of the fact that our biggest competitor continues to be our existing products and the inertia they have. The cost and pain of upgrading still overwhelms any sense of benefit we seem to be able to communicate to customers. We learned that if we ever change our file formats again we can kiss the upgrade good-bye. Literally no one will ever upgrade if we change the Word and Excel file formats-I hope that fact is engrained in everyone's thinking. We must always consider the major competitor to be the Office release that is already deployed and running.

This summer, however, we are likely to see things "heat up" in the press over suite wars. We said in the vision for Office 2000 that we would not lose reviews over traditional features, and that is certainly the case. However we are missing support for speech, which both Corel and Lotus are shipping, and this has become somewhat of a checkbox item for some reviewers. Lotus and Corel, by virtue of having very minor upgrades for quite some time, are also "smaller and faster" according to many in the press and at the very least the lack of new features gives those products the feeling of being less bloated.

Recently, it would seem that Corel has disinvested itself from WordPerfect. So far Corel seems to have focused on integrating third party add-ons and content. Corel has included voice technology in the current release and that is getting a lot of attention from the press. Recently Corel introduced a low-end desktop publishing system, which could find its way into the suite.

Lotus has also disinvested itself quite a bit. Yet Lotus Millennium edition is already gathering some attention for its interoperability with Office 97 (user interface and file format), the batch HTML file conversion support, and the inclusion of IBM's voice technology. Interestingly, to date SmartSuite has not been talking about Notes interoperability (though we know they have full ODMA support).

We must continue to use and evaluate both of these products fully as though they are market share leaders—the press will do that and we cannot let any small feature catch us off guard.

Taking a step back it is worth looking at the competitors as we saw them back in the spring of 1997 when we began Office 2000. For each of these competitors we had a specific strategy in place to compete and in many cases we are in very good shape.

Network Computer (NC) and Java. This has been a fascinating evolution to watch. The NC is clearly being repositioned as a terminal replacement and our own Windows Terminal Server is garnering a lot of attention and seems to solve the customer problem in a more efficient and reliable manner. On the other hand, there are likely to be a slew of non-PC devices in the near future and some might run Java VMs, which leaves Lotus in a more comfortable position with eSuite.

Netscape Communicator HTML editing tools. Clearly the threat of people creating large documents in the Netscape HTML editor has subsided. Yet the continued and increasing role of email as the critical knowledge worker editor remains something for us to consider. The concern we had over web authoring tools becoming mainstream turned out to be an advantage to Office. FrontPage's success at winning reviews and gaining the lead market share made it easy for us to justify creating a higher end SKU for Office which our customers want and will help round out Office's role in web scenarios.

Lotus/IBM Notes and Oracle (and to some degree Sun). The strategy 18 months ago was to marginalize Office and desktop software in favor of server based computing combined with Java applets. The role of server computing has definitely increased in importance and use. We see customers clamoring for the ease of deployment and management of server software, and the value it brings. Most of us would rather hit a web site to order something from the company store than download and install a whole client application, and it does not take a big leap to see how that could apply still to productivity software. When we look at ATG as a whole, it is clear that Oracle and IBM are our major competitors and we must find ways to effectively compete with them in a way that customers will value.

Some new competitors have also entered the scene, and these pose new threats to our core business.

Lotus Notes. We did not name Notes as an explicit competitor for Office 2000 and that was probably a mistake. For the next release we must think of Notes as a major

competitor to Office. From Outlook we will need to enable the creation of "Notes-like applications" From within all of our document application we need to think through the scenarios of using them as forms within an Exchange environment. If the availability of a unified storage model comes to be, then Access could also become a programming tool for these solutions. These scenarios will need to be solved out of the box.

Year 2000. Although not a direct competitor, Year 2000 is certainly competing for mind share among our large customers and the industry as a whole. Because of our ship date we can expect many of our large customers to use 1999 as a year of keeping things stable in preparation for Year 2000. Once again this area points out the need for us to stay in touch with the real world management complexities of PCs. The EURO is closely related to Year 2000 in the minds of customers.

eSuite and other components. The desire for components, whether because they are perceived to be small and fast, less complex, or easier to manage is still very up front and center in the mind of customers. Lotus eSuite has gotten off to a couple of false starts, but the 1.0 version looks to have some compelling angle especially if Lotus can articulate a benefit to its Notes customers. One thing eSuite has done is divide the product into a set of developer components, much like our Web Components though written in Java, and an end-user shell. The end-user shell has elements of a *web UI* which has garnered some attention because it seems like it makes the software easier to use and more accessible.

Virtual office products. The area of virtual offices has garnered a lot of attention for both small businesses and large corporations. These products such as eRoom, IntraNetics, Netopia, Vista allow for group collaboration over a web site. They can be thought of as both software and a service and it is the fuzziness between the two ends of the spectrum that make these products interesting. In terms of the product, the need for teams to organize and create "places" for the work and results to live is not new, but the web makes this a more immediate need with a much clearer solution for customers. Everybody can image a home page for their project, but few can imagine how to create one or keep it up to date.

Software as a service. The virtual office products are also offered as a service. Two that have received a lot of attention are HotOffice and Visto. Today these all tend to focus on integrating Office's binary file formats and thus leave out the innovations in Office 2000. These services are clearly the value add that people are looking for-how can I share my files, how can I backup my important information, how can I have a secured customer relationship, etc. Another perspective on software as a service is the role of very targeted web sites that allow customers to create certain types of documents. For example, if you visit the Kinko's web site they have a multipage *wizard* that walks you through creating a draft of a resume that a Kinko's representative will then fully typeset for you. It is not hard to imagine an array of services like this perhaps all being offered under one umbrella at AOL for example.

Our Customers

Office 2000's customer feedback loop was better than Office 97's and was broadened to include a new constituency of corporate IT administrators. We are where we need to be in terms of integrating customers into our design and development process. We simply need

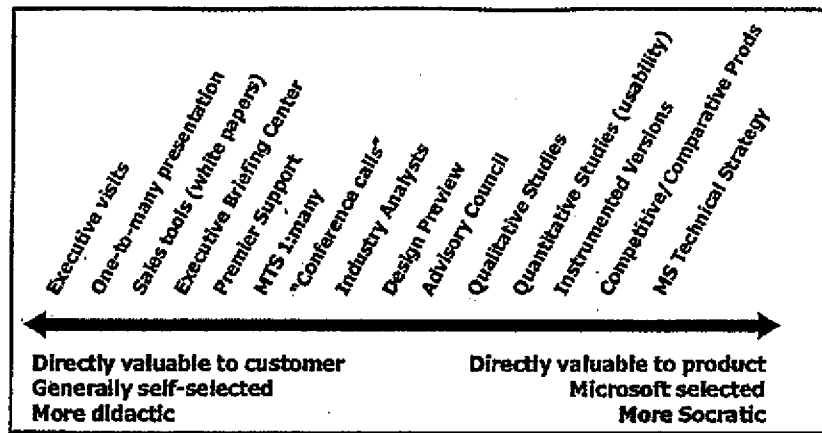
more quantity and better quality of customer information integrated into our process.

The number one challenge we face in planning the next release of Office is building on Office 2000 in a way that entirely leverages customer feedback. Office 2000 was a technology release and we must be extraordinarily careful not to follow this with another technology driven release. To do so runs the risk of alienating customers by failing to incorporate a broad range of feedback into the next release. We have few ideas of how Office 2000 will get used by our customers so we should be patient and learn from experience with Office 2000. At the extreme, a basic tenet for the next release of Office should be *do not change existing web functionality in Office 2000 without having a clear idea of how that feature is used by today's customers and how adjusting the feature meets explicit customer needs*. We must have very broad-based plans in place to learn from our early Office 2000 customers whether they are administrators, end-users at retail, or influential end-users in corporations. We will have enough early data that there is no reason to fly blind for another release.

We should also challenge ourselves to create an environment where we do a better job at learning from customers. We can explore new techniques, or at least re-educate ourselves on the best way to extract valuable and actionable information from customers. We must get more people in front of customers at quality customer visits. It is very clear that every discipline makes better decisions and choices when there is a real experience upon which to base those choices. We must also document our customer visits better and bring that information back to the teams in a more structured and regular format.

Our product planning organization has done an amazing job at gathering customer information and assisting program management and development. These efforts are uneven across the Office product and we should work hard to bring even more structure and coordination to the discipline. For the first time we will have an instrumented version across the product that will be very valuable. We have consolidated some of the redundant efforts across teams. But there is much work left to do to elevate the role of product planning and to have a coordinated set of planning activities. We should use this next release to make significant progress in this area.

Getting the right kind of customer feedback integrated into the product is always a challenge. As Microsoft has grown the bias has been towards fewer people interacting directly with customers and towards over-representing the feedback from large and vocal customers. The following picture illustrates the current paradox for getting the right kind feedback. Today we tend to over value and over-practice customer "feedback" that is actually more valuable to the customer as pre/post-sales support than it is valuable to the product team during the design phase. This is not to say we should not practice things like EBC visits, or one-to-many presentations like the Global Executive Roundtable, but we should consider them for what they are which is a self-selected and large company focused effort. The more inputs we gather from the right side of the diagram the better off we will be at understanding the true problems we are solving. One way to consider this spectrum is that the left side of the diagram is where our decisions are validated and the right side is where ideas are elucidated. Despite the pressure in the company to focus on one-off customer contact from LOGs, we must not lose sight of getting the right feedback through the right mechanisms.



We segmented the customers for Office 2000 across End-Users, Influential End-Users, Administrators, Solutions Builders, and Influentials and CIOs. Early feedback is telling us that we have nailed Administrators and IEUs. Solutions builders are doing well, but we have no data on the new solutions opportunities yet. In the Influential and CIO, we still have work to do on messaging, but the IT/Administrator message is making it to that constituency as well. So far we have not done a good job communicating the end-user benefits to people. The end-user has been defined as someone that does not care about the web at all (say if you're a reporter or writer that only uses Word 95). For the next release we should look for new ways to excite end-users beyond more wizards and more user-interface.

The Office Advisory Council has been an incredible success. From any angle you look at the role of the OAC it was well done. We had a legitimate ongoing research project that led to some significant product development decisions and validation. The members of the OAC are truly fans of Office 2000 because we solved their specific problems. So now what? Do we wish to continue the OAC for our IT customers? Should we create an OAC for a new segment, such as small business? Should the OAC include more people from other products in ATG? There are tons of opportunities here that we should investigate. How can we incorporate the sales and field efforts so they understand that the OAC is as valuable as it has been—these constituencies feel left out of this process today.

We will broaden the number of segments for the next release of Office to include a newly identified influential that has begun to surface.

- **Business Decision Maker (BDM).** The BDM is a new variant of the IEU. This is a person that has a significant budget to solve a major business problem. Today these are the people that buy Notes even though their company has a standard for email in place. The term BDM and the exact way to reach these people is still fuzzy, but we will expect to hear the term a lot so we should work on how to research their needs. I suspect this constituency will love to hear about out of the box solutions for document management or customer management.

In addition to the customer segments, we will formally acknowledge two core internal constituencies. Both Executives and the Field/Sales organizations depend heavily on the

Office product and currently feel out of the loop during the design process. We should incorporate these representatives in the design process as appropriate, keep them fully informed, and act on their input and feedback.

- o **ATG.** At each step we should be working to coordinate our plans, at least at the informative level, with the other members of ATG (tools and BackOffice). There are key product dependencies that we need to incorporate in our plans, such as Exchange and Outlook, and SQL and Access.
- o **Microsoft Executives.** Based on feedback, we did not do as good a job as people would like at including our own executives in the product planning and research process. We had more meetings and early retreats, as well as an excessively long PDL, but still the feeling was we should do more.
- o **Microsoft Customer Units and Sales.** There is a general feeling that we have not included the field and sales force in our planning. Generally speaking we bypassed the internal organization and went directly to the administrator/IT director. This has led to tensions between our organizations that we should not have. The ECU does a good job at representing the CIO level customer which we should leverage. In the end, we need the field to embrace the next release so finding ways to include them is a good exercise. Additionally, our sales methodology is focusing much more on long term agreements which means we need to communicate to the field how product vision so that a customer buying the next 3 years worth of Office has some idea of what they are paying for with these agreements.

Strategic Initiatives

We have a number of important strategic initiatives to consider for the next release of Office. These are efforts that are being driven across the entire product team and/or the Applications and Tools Group. We will make progress on all of these initiatives in one form or another, as they are part of *Microsoft 3.0*, which is the next wave of products. Implementing these will not be without a challenge as some are not well defined and others are very aggressive.

Each of these strategic initiatives involves the creation of a high-level dependency between Office and another team in the company. We should identify a leader in Office who will own the dependency by cooperating to deliver features in Office that can take advantage of this work and at the same time helping to shape the initiative by being a primary contributor.

Speech Processing. It goes without saying that we are behind in Speech. The speech team has a tough job ahead of them over the next year as they try to create both an API and an end-user functional tool. Our job will be to leverage this in unique ways. It will not be enough for us to just ship dictation or basic command and control in the next release. We must push this technology deep into the product and support new scenarios that blow customers away. As an example, we might combine the power of Answer Wizard with the speech engine along with "do it" buttons to provide a rich help experience.

Exchange Server and BackOffice Integration. ATG was formed to further integrate our desktop applications with our server applications. It will not be good enough for us to just "connect" to BackOffice. Our customers are expecting much deeper integration from Microsoft and they are expecting a bigger return on their investment in BackOffice. SQL 7 is a major release and we have begun some significant integration with the server. We need to extend this to the Microsoft Database Engine on the client moving forward. Since the start of Office 2000, Exchange Server has taken off with the most recent quarter having sales exceeding Lotus Notes and a total installed base of over 14,000,000 customers, all of whom are running Outlook and Office. The investments ATG is making in the PKM group and in creating a departmental server will only increase the number of customers with access to these BackOffice resources.

Windows NT 6, COM+, Forms+, Schemas. On the Platforms side of things there are major initiatives going on to improve the basic operating system infrastructure. Many of these are being done with the hope of creating a new applications model. Of course we will not rewrite Office for the next release, but we must also drive requirements for important functionality such as the schema definitions (Outlook), user-interface in NT6, and Forms+ (Access, Word, PowerPoint) to name a few.

Knowledge Management. As a major scenario in the Digital Nervous System, knowledge management is a key element of the ATG strategy. We must work to have out of the box solutions around this area and a well-defined approach that coordinates the investments being made by Exchange, SQL, and PKM.

SIMPLICITY. Across the board, Microsoft will need to make major advances in how we approach product design. Office has been, and will continue to be, the leaders in design for end-users. We must find a way to have an order of magnitude improvement in being simple to understand and manage. It will take several releases to make this much progress, but we need to start with the next release and set a credible direction. Many feel that our investment in speech offers an opportunity.

Areas For Brainstorming

As we begin planning the next release it is important to think about new areas for Office and how we might change directions. This is hardly a complete list but is meant to offer suggestions for brainstorming. At the first retreat in August we will begin to focus on a few of these just to get creative energies flowing.

Broaden the Office customer base, and increase upgrades

The goal for this area is to find investments that strengthen the role of Office as a broad set of horizontal tools. We also can look at features or investments that will encourage upgrades.

Upgrade blockers. What features are missing from Office 2000 that are preventing people from upgrading? What compatibility problems did we introduce (and should fix in the first Service Release)?

Unfinished business. What features in Office 2000 are just not finished yet? What can we learn from the early adopters about how they are using the product so we can finish the

job on internet and web functionality.

Total Cost of Ownership. We have made an order of magnitude improvement in TCO in Office 2000. What comes next? There are still many areas that our customers have issues with that we need to understand. Our biggest challenge will be maintaining the level of administration and manageability we have in Office 2000 since it will not be a top focus for the next release-it is easy to take an unintentional step backwards.

Small Business. We have some new functionality in the Small Business Edition for Office 2000, but this is only a start. It is probably fair to say that Microsoft has not yet reached a critical mass of understanding of our work at home customers. We know that Word plays a critical role, but what other software or features (or services!) should we be providing that will enable customers to succeed at their businesses while using Office.

Stand-alone End-Users. For the non-connected customer or the customer for which collaboration and sharing does not extend beyond basic email, what functionality is missing? What can we do to bring innovation and excitement to the process of creating a basic memo? How can we apply the ease of use/IntelliSense methods of Word more broadly across the suite? How do we excite end-users with creating more *bloatware*.

Anti-Piracy. We have some new features in Office 2000 to combat piracy. Will these be the right features and will they work?

FileMaker, ASAP. FileMaker is a good example of a category that many people need but we do not address. Is this something we should do as part of Access? Some feel this is an ideal application for web server functionality, though this might leave out the canonical CD collection application. How do we broaden the use of database functionality to more people? Similarly, Harvard Graphics ASAP garnered attention as an easy to use presentation package. Although it failed in the marketplace, the ideas are still valid and resonate with customers.

Office as a service. We must carefully consider if there are features of the product that we should offer that are just extensions of www.msn.com and how we would build those into the product. We have a big opportunity to integrate with the Microsoft portal site in this area. The Internet Explorer team consistently sees that adding new features to IE is no different than adding a new server and service to go with it. What are some services that apply broadly to document creation and collaboration?

Solve business problems out of the box-simply-with the Microsoft infrastructure

Microsoft software is the ultimate enabler. If a customer has enough time and energy, as well as access to great developers anything is possible. From a customer perspective it seems more often that anything is possible, but nothing is likely. There are two issues with our current product offerings. First, out of the box there is very little one can do to solve problems immediately. There is always a learning curve and beyond the basics of stand alone work, we have not made progress in a long time. Second, the seams between our offerings are clear and painful. Setting up a web server, connecting to an Exchange server, creating an OLAP slice are all *6.0 degree of difficulty* maneuvers. In this area, we should think about a specific, and finite, set of business problems and spend our effort on

smoothing out the integration and solving the problem with far fewer steps than we currently require.

Corporate reporting. We made major progress in Office 2000 in developing our analytical and reporting tools. These investments demonstrate amazingly well, but we know that very few people can set these up. How can we make these features more accessible and more widely used?

Next steps for HTML. Our HTML story is amazing with Office 2000, but what comes next? Do we add more structured editing and XML support to Office? How can we leverage the asset we have created?

Document Management. Document management is a key scenario customers have asked us for each and every release. We need to find a way to provide a broad base of functionality for check in, check out, versioning, history, access control, reporting, and a forms front end. At the same time we want to leverage our Exchange and SQL assets, and still be easy to use and deploy. What is the right model for building this functionality? How will we seamlessly integrate it into the document creation experience and possibly Outlook? This area will be a huge challenge.

Contact Management. Small businesses and departments need tools for managing contacts, sales people, and opportunity tracking. How can we build a higher end and collaborative level of support into Outlook, while at the same time maintaining the ease of use of Outlook. Customers are clamoring for functionality like ACT! to be part of their core Office experience.

FrontPage and Office Server Extensions. What are the next steps for the delivery of server functionality in Office. We have a long way to go to make this easier to use and more of an out of the box experience. What are the next steps for web discussions? How can we build in a richer level of support for annotations using this support? How do we integrate with the newer technologies and protocols from Microsoft?

Solutions and Components. Our Visual Tools is moving towards supporting new platform initiatives in COM+ and Forms+, which will impact our solutions implementation. What new application objects and components can we provide to support more customization of an Office environment? How can we make the Office Server Extensions part of our solutions framework? How do we continue to advance the components in Office 2000? Do we need additional components such as rich text, project management, and calendaring?

Deeper integration with web server functionality / Portal Sites. In building up Office functionality that is really a service that runs on a server, there are many opportunities to enrich the Office customer's experience. How can we integrate with the availability of third party services? What functionality would we benefit from having the portal site own and operate, such as file sharing perhaps?

Develop innovative technology that blows people away

On the one hand no one wants to change the way they work, but on the other hand if we can show people a better way we will be in an incredible position. This is the biggest, but also the most important, challenge we face. If we are complacent in the basic goal of

improving radically how people work, then it is obvious that someone else will do this for us.

NetDocs. The NetDocs team is working to define a new document model and user experience. As with any leading edge product there will be nice ideas that should make their way back to the existing products. What are the NetDocs ideas we should incorporate into the next release of Office? How can we align NetDocs and Office so we can ship them at the same time in the same box?

Speech. We must blow people away with the integration of speech and Office. It will not be enough for us to do catch-up support for dictation in Word. We need to define a unique experience that leverages the assets in Office.

Next Steps for User-Interface (NT6, Personalization, Assistance). The NT team has begun some efforts on creating a new(er) user model for applications. Obviously we will not reinvent the interface for the next release, but we will want to understand and contribute our expertise to this effort. There are some key system services that will likely become available in the areas of personalization and user-assistance. Likewise, we will want to contribute to the development of these as well.

Unified Storage: Webs v. Exchange v. SQL, ATG, along with Platforms, will be investing heavily in the area of storage unification. This will have potentially significant implications for how our applications interact with the file system, mail, and structured storage. We must contribute to this if we expect these new services to be valuable to applications.

Standard Schema. There is an effort to standardize on several schema within the operating system for some key data types, particularly as they relate to personal information. There is a huge benefit to end-users if they can reuse information across the applications and platform of their PC and Office should lead the way in defining and taking advantage of these standard data types.

Browsing + Editing = Working. With Office 2000 and Internet Explorer 5.0 collectively we take some of the first steps at incorporating the browsing experience with document creation. There are infinite possibilities for enhancing this experience. How we will move forward the paradigm of using the browser and web content/applications as key additions to the Office user's experience.

Document model v. email model. Today there is still several discontinuities in our end-user model for working with files, mail messages, attachments, and web pages. How can we unify these concepts even more than we have in Office 2000 with Office e-Mail. For example, today we have a drafts folder in email but no such, arguably useful, paradigm in the file system. This is potentially an area the Neptune/NT6 team will be attempting to advance.

Instant Messaging. Ask any AOL user about how they spend their time online and they will tell you about Instant Messaging. In the corporate space this has not been available yet, but it isn't hard to imagine this becoming an increasingly interesting paradigm for users. Being able to have very lightweight semi-synchronous communication with people is something that will be important to look at as we integrate with the portal efforts

Windows CE and non-PC devices. The Windows CE devices are interesting to

customers because of the form factors, battery life, simplicity and a host of other reasons. Today we have fairly minimal and often complex integration with Office (Outlook e-mail/scheduling and document viewers). There are opportunities to better integrate this experience as well as to consider building these applications from within the Office team.

Paperless Office. The paperless office has been a dream for as long as there has been paper and offices. With web browsing and online documents we are making progress for leading edge customers that adopt this model. How can we support cool annotations and searching that make this possible? What sorts of services, and even devices, do we need to make documents readily available as paper is today.

Radical ideas for improving performance. We ask ourselves to do something radical for performance each release, yet we end up spending, rightfully so, our efforts on maintaining parity with past releases. What can we do to make enormous progress in this area? How can we work with the platform to improve Windows and our applications?

Next Steps

In order to reduce the confusion as we begin planning, it is important for us to develop a good understanding of our release timeline and resource commitments. We have an enormous amount of opportunity, but with that comes a lot of complexity to manage. There are some things that we know we will need to be ready to accomplish soon after we release the US Office 2000:

- **Worldwide releases.** Testing and Release will be quite busy for at least two months on the worldwide and SKU releases of Office 2000. We must respect and support these efforts.
- **QFEs for Office 2000.** We will need to have our team and experts in place to address the needs of legitimate QFEs for Office 2000.
- **Service Releases for Office 2000.** As we did for Office 97, we will plan on two service releases for Office 2000 and follow the same approach since it seemed to work well. Our first service release will be from 1-6 months after we ship, depending on the immediate needs. The second release should be about six months later. If we do a very early SR-1 due to a lower than desired quality level in the initial release, it is likely we will do a third service release.
- **Continue to monitor Office 97.** We will continue to watch Office 97 quality levels and QFE traffic. We must continue to have the same level of QFE support for Office 97 that we have today, even after we ship Office 2000. To a customer in the midst of deployment of Office 97, we cannot expect them to switch gears to a new release. We must be very sensitive to answering QFE requests with "this has been fixed in Office 2000."

Over the course of planning the next release we will work to integrate our product planning efforts with those of the BackOffice and platform efforts. Paul Maritz will be leading a three-year product planning effort that will start this fall. This effort will entail a number of key initiatives with the goal being a well-integrated and credible plan that incorporates both technical and business objectives. Given the importance of Office to the technical and business goals of Microsoft, we will necessarily be key contributors to

and participants in this plan. The details of this planning process will follow shortly, but we should expect to spend some up front effort to have our planning process and milestones synchronize with the Product Group process.

The timeline for the next release has a number of options worth considering. We will arrive at a plan that makes the most efficient use of our resources, accomplishes a necessary level of integration with strategic initiatives, and provides for a manageable release plan. We will most certainly want to synchronize within a fixed time frame some Office release with the release of NT5 (and might do out of necessity). Our Exchange customers have come to expect a new release of Outlook with Exchange's Platinum release, but we know the bulk of our customers are hostile to one-off releases of just one Office application.

We will also be under pressure for a higher level of QFE support. This is where the distinction between a QFE and DCR becomes too tricky for a customer to understand. We might consider having a larger QFE team that is more lenient in specific feature requests, or we might have a separate team that is essentially building a Office 2000.1 release. We know, however, that no matter what features we add to this release we must make it easy for existing Office 2000 customers to obtain it (via a patch) and that we must carefully manage this process—nothing could be worse for us than a series of incremental releases each fixing the things we botched in prior releases (as we did with Office 4.2 a, b, c, and d.)

We learned two important lessons from Office 95/97 in terms of parallel development. First, a small release can be done if you are very hard core about the number of developers on that release. For Office 95 we had a total of about 8 developers for each of the teams that were doing a minor release (Access and PowerPoint were doing major releases). Second, a minor release takes nearly 100% of our testing, localization, and release bandwidth. We are capable of managing parallel development, but it is significantly harder and we must be very certain of the benefit we are aiming for with such a structure. We had the specific goals in Office 95/97 of (1) a traditionally competitive release that was 32 bits timed with Windows 95 and (2) a major architectural release focused on sharing.

Early in the planning the process, the management team will need to determine the basic timing and structure of releases. This is something that a lot of people will want to have input into and will involve a lot of tradeoffs and careful balancing.

The product planning process calendar is one that is mostly about building a shared set of priorities, a consistent vision, a credible set of features and timeline. Above all, the goal of the planning process is to involve a very broad set of people on the product team so that there is as global an understanding of where the vision comes from as possible. I believe if we were to have asked people in June of 1997 if the Office 2000 vision was "from above" or "from the team" the majority of people would have felt it came from above though this changed over the course of the product cycle fortunately. We must be sensitive to this challenge.

The timeline we will follow will be nearly the same as Office 2000. It is important that we do not feel as though we are more rushed this release than in the past, since we have exactly the same timing. We had a number of developers working on the Macintosh

release that helped occupy some efforts, but for the most part we are on the same schedule.

The logical driver of this process overall is Program Management. As coordinator across the Office product, Andrew will own communicating the schedule, milestones, and ensuring that we have the right participation from the whole product team and company.

We will have some new additions to our planning process in the coming weeks as we finalize some ATG-wide planning efforts. The efforts of the Design Team have led to the creation of an ATG Mission Statement and a set of shared high-level goals. ATG is looking to Office as the largest product with the most advanced planning process to lead the way at incorporating these efforts.

Timing	Event
August	<p>First Brainstorming retreat (8/17/1998) involving people from all the teams and some key partners.</p> <p>Product planning begins initial research on customer needs and industry trends. ATG three-year planning process kicks off. More details to follow.</p>
September	<p>What's Next retreats/meetings. Each of the shared teams and application teams should spend time writing down the list of <i>undones</i> and logical next steps for their area. We might not choose to implement these, but we should understand from our own perspective (without customer data) what areas we would follow up on. This will also help us later to recognize investments we are making that might not be customer feedback driven.</p> <p>Feedback from RDP and OAC should be very crisp at this point in terms of deployment concerns.</p>
October	Major wave of broad participation site visits to our RDP customers and early adopters.
November	<p>New focus areas for the product should be emerging (such as speech) and we should use this month to have retreats to determine if there is critical mass for a shared feature team.</p> <p>At this point, management has the responsibility of identifying the leaders for the organization and we must be ready to begin the necessary organizational shifts.</p>
December	<p>Ship Office 2000.</p> <p>Product team wide memo shortly after US RTM summarizing the next steps, areas people should spend time learning about, and what is up for maintaining Office-97 and Office 2000.</p>
January	<p>Team-organization is formalized and new leaders emerge (or old leaders in new areas). The teams begin to focus on their areas by specific customer research, visits, and scenario planning.</p> <p>We identify owners for major strategic initiatives and cross-division dependencies.</p>
February	Team building and team vision statements continue.

<p>March</p>	<p>Team vision statements. Teams should begin to have an idea of their marquee features and should be able to write a press release for their work.</p> <p>We should be able to validate these ideas with key constituencies, both internal and external.</p> <p>Executive checkpoint meetings on key focus areas (such as speech).</p>
<p>April</p>	<p>Shared vision statement process. We take the proposed visions and roll these up to a shared vision. This will mean that some ideas are dropped and new ones are added.</p> <p>We have a proposed feature list for all the development milestones and we have specifications for MMI features that we can schedule.</p> <p>Executive checkpoint.</p>
<p>May</p>	<p>Project coding officially begins. The number of milestones and final timing is still to be determined.</p>

In terms of the organization there are some key assumptions that we should make from the start.

- Overall headcount will be about the same across our Office organization and the allocation between disciplines will be about the same.
- The distribution of people between Excel/Access, Word/PowerPoint, Outlook, and the Shared Feature Teams will remain about the same. We might choose to assign some new hires to the application teams or to our short term needs for Office 97/Office 2000.
- The existing shared feature teams are not set in stone. We can rearrange these to meet the needs of the next product if necessary. This might mean combining two or more teams, eliminating existing teams, or creating new teams. Of course, any changes must accompany a clear distribution of the existing responsibilities and code.
- We want people to move voluntarily and laterally to new responsibilities within the organization. In particular, it would benefit the product if some of the shared team leadership moved to applications and vice versa.
- Our organization is a matrix: Some people work in application teams and some work in shared feature teams, but all are member of one of our core disciplines. There will be times when we are driving things by discipline and times when we are driving things by product focus area. We need to be flexible and realize that there is ambiguity, but in the end we ship only one product that must be consistent and represent a single shared vision.
- Within our shared teams and application teams, we should look hard at our investments in areas and reallocate resources as needed. Just as a hypothetical example, we might consider having more people work on shared graphics for the next release and fewer people work on core PowerPoint features.
- If we choose to do an incremental release late in 1999, then we must do so with a

- very small number of developers or we will most certainly fail to deliver on time.
- We demonstrated that we could do shared work across the product outside of shared feature teams (NetMeeting integration, worldwide support, etc.). We can continue down this path.
- ATG was put in place to solve key scenarios for customers by building integrated products between our "clients" and our "servers". We need to materially address this goal by some major dependencies.
- We should identify the key cross-Microsoft dependencies up front and organize around them so that a shared team/application team has only one very clear dependency. This worked extraordinarily well for us and we should continue. As a quick summary for Office 2000 we had the following dependencies: TCO owned the NT relationship, UI owned the IE5 UI relationship, Web Server owned the JAWS/FP/Rosebud relationship, VData owned the DAG relationship, Web Client owned the Trident relationship, PowerPoint owned the NetMeeting/NetShow relationship, Programmability owned the relationship with VBE and Visual Studio, etc.

Office 97 Reading

During the evolution of Office 97 a number of milestones were reached in the planning process that were well documented. It is worth looking at these and finding ways to ensure that we have similar documents as we plan the release. This is not an exhaustive list by any means and just represents a chronology of writings and thoughts that is important as we begin planning.

Title	Document Description	URL
Office 97 and Beyond	JonDe sent this note out to make sure that the team had something to think about immediately after we shipped. This document had the start of the foundation for Office 2000. OfficeWeb went live. (11/19/1996)	http://officeweb/overview/Post97.htm

Title	Document Description	URL
Office9 Shared Feature Teams	After about six weeks of leg work and a lot of meetings, we arrived at the shared feature team concept. We wanted to send this out before the holiday so people would come back in January ready to work on a team of their choice. (12/15/1996)	http://officeweb/overview/Office9-PM.htm
Program Manager Milestones	We created a schedule starting immediately after vacation that had program management busy creating the product. (1/3/1997)	http://officeweb/overview/PM-Milestones.htm
Team Overviews	In order to facilitate the <i>recruiting</i> process teams creating initial cuts of "What We're Doing". In particular note there is a vision statement for Access/Excel and for Word that closely mirrors the final visions for those teams. (1/1997)	http://officeweb/overview http://officeweb/overview/analysis.htm http://officeweb/overview/word9focus.html
Office 97 Post Mortem	It was important during this time to also look at the process for Office 97. Testing facilitated the post mortem process.	http://pdrweb/postmort/docs/Office 97 Postmortem Issue Summary.doc http://pdrweb/postmort/docs/Office 97 Post Mortem Summary.ppt

Title	Document Description	URL
Development Process	Development had a number of retreats and meetings to go over process issues. DavePa wrote a great memo outlining some of the changes and also presented it broadly. The scheduling tools were also introduced at this point.	http://officeweb/specs/schedule/devmeth9.htm
High Hopes	Each project needs at least one polarizing memo and this one did just that. It was important to take a stance so I gave it a shot. This memo sort of stated what problems we would solve and what we would not be solving. (1/1997)	http://officeweb/users/stevesi/High Hopes For Office9.html
Medium Is The Message	HTML was pretty controversial and I just wanted to include this because it was important to write things down and get people talking. (1/23/1997)	http://officeweb/users/stevesi/Medium is the Message.htm
User-Interface Overload	EricMic really pushed people to think hard about user-interface. This really got people thinking (and arguing). (1/1997)	http://officeweb/users/stevesi/UI Overload.doc

Title	Document Description	URL
Retreats	Each of the teams (apps and shared teams) held retreats during January and February. These are some of the notes as an example.	http://officeweb/users/erich/office.htm http://officeweb/visions/programmability/retreat.doc
Draft Visions	Each team (once staffing was complete) began to work on a vision statement for the team based on the overview document and these rolled up to the Vision.	http://officeweb/visions http://officeweb/visions/template.doc
Office9 Vision	We had a vision document and a two-hour presentation to roll it out after many reviews and drafts. (3/1997)	http://officeweb/visions/office9.htm http://officeweb/visions/Office9/default.htm
Executive Presentations and Milestone Checkpoints	We managed to archive all of our executive presentations and MM checkpoints. It is good to go through all of these and relive the decision processes.	http://officeweb/checkpointsts