

**I. MS-DOS must continue as the all pervasive defacto industry DOS standard**

Over the next year the MS-DOS marketing team is dedicated to the vision of "No PC should be without it."

**II. All Customers**

**B. Continue MS-DOS 5 momentum and prevent DR-DOS from gaining it**  
Create Pull and Push to get the installed base to Upgrade and ensure customers are demanding MS-DOS 5 from their OEMs.

1. Build customer trust and knowledge of the MS-DOS name
  - Reach broad audiences with MS-DOS 5 message via enthusiast and business press
  - Use resellers and the marketing activities they generate
2. Establish MS-DOS 5 as the DOS standard
  - Careful review of press activities
  - Demonstrate industry support
3. Ensure unparalleled customer satisfaction
  - Innovative and responsive PSS
  - Transition team support for large corporate adoption
  - Build tools and materials to get customers the information they need
4. Aggressive marketing - pull and push
  - DocDay Technical seminars
  - User Groups
  - Ongoing PR
  - Promotions
  - Close partnership with resellers and aggressive marketing to them
  - At least one new and big idea

**III. PC Manufacturers**

**A. Aggressively go after existing DR-DOS accounts and keep them out of our current ones**

1. No major OEMs bundling DR-DOS
2. Secure long term MS-DOS 5 contracts (3 or more years) whenever possible
3. If possible, keep IBM from shipping DR-DOS
4. Train our OEM sales force on MS-DOS 5, DR-DOS 5 & 6
5. Learn if there are ways we can help in subsidiaries where DR-DOS is strong

**B. Consequential and Profitable increase in MS-DOS penetration on new PCs**

1. Successful development of and implementation of Thin DOS
2. Legal and PR efforts to discourage counterfeiting and grey marketing
3. Assess effectiveness of current anti-counterfeiting packaging efforts
4. Explore other anti-counterfeiting ideas - advertising etc.

**C. Establish worldwide leadership with Portable and Embedded systems**

1. Every new palmtop and pc with dos in ROM should be ROM-DOS 5
2. Establish leadership with solid state media and advanced power management.
  - Aggressive pr effort
  - Training and information for oems
  - Train our sales force on ROM-DOS 5

**D. OEM customer satisfaction**

1. Assess the support we are currently providing OEMs and recommend improvements if necessary, particularly in the area of technical support.
2. Address OEM product improvement requests

**IV. Installed Base**

**A. Migrate current PC users to MS-DOS 5**

1. Provide an easy and inexpensive solution to ensure users can upgrade larger quantities of pcs

**C. Understand customers' usage and their product satisfaction**

1. Random digit dial projectable user survey
2. Detailed PSS reporting and incorporation of product issues into future product specifications

V. Competitive Action

- A. Be prepared for IBM taking on DR DOS
- B. Instigate a detailed technical studies of DR DOS and communicate our strengths
- C. Carefully manage DR DOS among the press and influential

VI. Product

- A. Smooth delivery of MS-DOS 5.0a
- B. Help ensure an awesome MS-DOS 6 by providing data on customer needs to program management and by undertaking research to resolve key issues (Examples: features to add, interface requirements)

VII. The Business

- I. Business Strategy - try and grow MS-DOS 5 revenues and profits despite competitive pressure from IBM and DRI
  - A. Increase OEM revenue by increasing penetration - decrease the number of naked pcs worldwide
  - B. Upgrade the installed base
  - C. Help international subsidiaries build momentum and success
  - D. Keep getting COGS lower without sacrificing product quality
  - E. Minimize PSS costs while maintaining quality support
- II. Objectives
  - A. Earn more than \$450 million in worldwide revenue in FY92 (forecast \$397.6mm)
  - B. BOI of over \$300 million (forecast \$269.7mm)

VIII. Other

- A. Help other Microsoft products via a via the success of MS-DOS 5 and the MS-DOS 5 Upgrade
  - 1. Deliver registration of 50% or greater and use names effectively for other Microsoft products
  - 2. Leverage off the success of MS-DOS 5 to increase Windows penetration
    - MS-DOS 5/Windows bundle
  - 3. Leverage and build on MS-DOS 5 Upgrade distribution

## Rich Barton - Six Month Objectives

My responsibilities over the next six months (as outlined on 7/25) are as follows:

- 1) Manufacturing: Coordinate builds and forecasting of all skus with Dianet and Canyon Park. Plan and implement introduction of MS-DOS 5.00a Upgrade
- 2) DoaDays and User Group Presentations: Coordinate logistics of DoaDay setup and implementation. Serve as dosteam contact for User Group Presentations
- 3) Registration: Direct short-term revision of the registration card. Plan registration card test program for fall roll-out. Get reg rate > 50%
- 4) Marketing Data: Gather, package, and analyze Upgrade and OEM marketing data for use in management team decision-making
- 5) Education: Design MS-DOS 5 Upgrade penetration strategy for the education market. Coordinate implementation of resulting programs
- 6) Packaged Product/Piracy: Coordinate implementation of piracy minimization strategy and packaged product market analysis

Responsibilities 1-4 apply to the full six month review period. Responsibilities 5 and 6 extend from Sept 1 through December 1.

In addition to the above responsibilities, I will allocate approximately 10% of my time to learning about Microsoft, Product Management, and the technical aspects of MS-DOS 5 and the MS-DOS 5 Upgrade.

### 1) Manufacturing

**Responsibility:** Coordinate builds and forecasting of all skus with Dianet and Canyon Park. Plan and implement introduction of MS-DOS 5.00a Upgrade

**Objective:** Manufacturing coordination has several objectives:

- a) Provide supply to meet demand while minimizing inventory and raw material costs
- b) Efficiently introduce new skus or modifications to existing skus (e.g., MS-DOS 5.00a Upgrade)
- c) Minimize COGS on all skus

**Tactic:** Delivery on each objective involves monitoring of various demand, builds, and cost information (e.g., sell-through) then working with Dianet and Canyon Park to insure delivery and incorporate changes.

**Metric:** Success will be measured by:

- No backorders unless unreasonable demand (e.g., July 91)
- Maintain effective relationship with manufacturing counterparts
- Submit periodic recommendations for COGS reduction (after departure of t-Jeffal)
- Achieve smooth transition to MS-DOS Upgrade v5.00a without incurring unreasonable returns

Richard Barton  
Six Month Objectives

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## 2) DosDays and User Group Presentations

**Responsibility:** Coordinate logistics of DosDay setup and implementation. Serve as dosteam contact for User Group Presentations

**Objective:** DosDays - Introduce, drive, and support district coordination of events. Achieve 15 successful events. Minimize costs, maximize impact

User Groups - Achieve 20 successful User Group Presentations

Also, leverage position as DosDay and User Group coordinator by suggesting new high impact event ideas which support Dosmktg's marketing strategy and reflect field's event needs.

**Tactic:** DosDays - Coordinate logistics with DosDay contacts and CAXs for each district (attendance, space, a/v, marketing of event). Layout content of events by soliciting field input and working with dosmktg to develop program. Organize schedule of presenters. Incorporate feedback to improve events

User Groups - Coordinate identification of target User Groups and organization of events with Tonyad and Kiras. Make sure presenters and Q&A handlers are scheduled for events. Incorporate feedback to improve events

**Metric:** DosDays - Achieve attendance of 300-500 customers per DosDay (unless events are tailored to meet a particular district's needs. Have attendees leave event fired up about the MS-DOS 5 Upgrade (solicit feedback at end of each event in the form of questionnaire). Keep fully loaded cost per event under \$3,895 as outlined in my DosDay budget. Successfully leverage trips with a district training, corporate account visits, and/or user group presentations

User Groups - Success will be measured by general opinions from presenters

## 3) Registration

**Responsibility:** Direct short-term revision of the registration card. Plan registration card test program for fall roll-out

**Objective:** Design the "irresistible" registration card in order to:

- Maximize registration rate
- Maximize usefulness of information captured by the reg card

**Tactic:** In short term, redesign reg card to reflect conclusion of sweepstakes. In long-term, plan a reg card test in order to achieve objectives

**Metric:** Achieve a 50% reg rate

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Six Month Objectives

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#### 4) Marketing Data

- Responsibility:** Gather, package, and analyze Upgrade and OEM marketing data for use in management team decision-making
- Objective:** Provide management team with timely and useful data and analysis
- Tactic:** Set up Dos Vital Signs a la Tom Jaffe's Windows Vital Signs. On a monthly basis, collect all required data and incorporate into Dos Vital Signs. Provide value-added analysis and "data of special interest" pointers to recipients of Dos Vital Signs. Each month I'd like to incorporate a new module of data (e.g. LVA Data, Reseller Channel Data, Dealer Sell Through Data, etc...) I'll look to do smktg and winmktg for ideas here.
- Metric:** Dos Vital Signs lands on your desk during the 4th week of every month and it contains a wealth of information. Each month feedback on Dos Vital Signs is incorporated into the next issue in the form of improvements

#### 5) Education

- Responsibility:** Design MS-DOS 5 Upgrade penetration strategy for the education market. Coordinate implementation of resulting programs. This responsibility will not begin until Sept. 1.
- Objective:** Maximize penetration and profitability of MS-DOS 5 Upgrade in the Education Channel. Raise management awareness of strategic value of Education Channel
- Tactic:** Learn Education Channel issues through account calls and working closely with Dougma in September. Deliver a detailed Education Channel Penetration Strategy in October. Drive implementation and monitoring of plan. Provide management team with monthly feedback of plan progress beginning in November.
- Metric:** Part of the Education Channel Penetration Strategy (deliverable in October) will detail tracking of sales to education installed base. *Note: Currently, it appears this could be very difficult as we sell 099 and 095 (non education-specific products) to education accounts via normal dealers. This combined with a reg card that does not provide a mechanism for identification of academic buyers team up to make education sales tracking very difficult. However, I will work with Dougma to develop some kind of real or surrogate tracking system. While we could not come up with a reasonable long-term penetration rate based on available data, I would like to target achieving an education penetration rate that exceeds the penetration rate of the balance of our customer segments.*

#### 6) Packaged Product/Piracy

To be determined upon departure of T-Jeffal.

**Note:** Sergio and I would like the 3 of us to sit down at some point to talk about OEM data and piracy

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Six Month Objectives

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**Training**

In addition to the above responsibilities, I will allocate approximately 10% of my time to learning about Microsoft, Product Management, and the technical aspects of MS-DOS 5 and the MS-DOS 5 Upgrade. This will be carried out by the following training activities:

- 1/2 day spent with each of the following Microsoft areas: PSS, Customer Support, Inside Sales, Manufacturing, and Distribution
- 4 days of field sales training in Chicago
- Conducting of presentations at User Groups, DosDays, and in the field
- Attendance of one technical seminar per month
- Informal questioning of doemktg, doespman, and dostech on technical aspects of MS-DOS 5, the Upgrade, MS-DOS 6, and Windows

**Richard Barton**  
Six Month Objectives

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Randy Magliozzi  
Performance Objectives, July-December '91

Randy Magliozzi - Performance Objectives for July, 1991 - December, 1991

Business/Project Objectives:

1. Transitions to MS-DOS 5:

Objective:

Ensure a successful migration experience to MS-DOS 5 in 6 SMSD corporate accounts by providing direct support in planning and/or implementing a large-scale upgrade.

Tactic:

Identify 6 accounts during the review period that have committed to at least 1k units of the MS-DOS 5 Upgrade. My selection criteria will include:

- Windows environment
- Network environments
- Willingness to be used as a reference account to other large corporations.

Provide direct support in planning and implementing. By direct, these means close involvement with all players involved - the decision maker, evaluator, implementors and supports. Maintain an up-to-date report of any problems encountered and include a summary report in my month end report.

Metric:

Success will be measure by:

- 6 accounts have been identified
- 6 accounts have a plan in place and 50% have successfully upgraded 50% of their target PCs.

2. Transition Tool Development:

Objective:

Determine needs and develop tools to help corporate accounts successfully migrate to MS-DOS 5. If there is sufficient need, develop and ship the MS-DOS 5 Resource Kit as a follow on to the MS-DOS 5 Upgrade Evaluation Kit.

Tactic:

While some corporate account know they want MS-DOS 5 for all of their end-users, they don't know how to successfully and quickly upgrade their installed base. Based on experience gathered in Objective #1, I will develop the MS-DOS 5 Resource Kit. This will provide a cookbook approach to migrating a "site" or company to MS-DOS 5. Detailed status report on this project will be maintained on-line in the Transition Team Status report.

Metric:

Already I have two accounts transitioning to MS-DOS 5 and who have requested this type of information. Success on this objective will be measured by my ability to ship a resource kit in beta form by the end of October and the final resource kit by the end of this year.

3. MS-DOS 5 Upgrade Evangelism:

Objective:

Assist product marketing team in driving product demand/interest through product presentations and seminars to corporate accounts, user groups, OEM's and Resellers. Provide high level technical support to SMSD corporate account teams through corporate account visits, executive briefings and teleconference calls with their accounts.

Tactic:

Maintain up-to-date presentations for corporate accounts, user group, and oem technical audience. Commit only to corporate seminars that will attract a minimum of 75 influential end-users or decision makers in non-named accounts or a minimum of 25 SMSD named account representatives. Leverage all presentations or seminars with

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Rich Freedman - 6 month Objectives

**Product Support**

- Responsibility:** Manage DOS product support from the perspective of service quality and cost
- Objectives:**
- Improve product support quality
  - Reduce product support costs as a percent of revenue
  - Incorporate PSS feedback into the product development process
- Tactics:**
- Develop PSS plan to achieve above objectives
  - Work with PSS to implement
  - Work with the DOS Group to design and release MS-DOS 5.0a
- Success Measures:**
- Quality: 90% wait < 60 seconds; 90% satisfaction rate over the 8/1 - 12/31 period
  - Efficiency: PSS costs less than the target 6% of revenue
  - Successful implementation of PSS plan as defined by the plan itself
  - MS-DOS 5.0a released successfully:
    - Low publicity
    - Minimal OEM complaining
    - No channel returns
    - Decrease in call volume in targeted areas

**Product**

- Responsibility:** Define market requirements and feature set for the next version(s) of MS-DOS
- Objective:** Develop a vision for an MS-DOS that is both compelling and maximally profitable
- Tactics:**
- Work with DOS/Win product and program management, and user ed to develop
  - MS-DOS 6 product vision statement by October 15
  - MS-DOS 6 documentation plan by November 30
- This includes conducting market research as necessary, including focus groups, discussions with key corporate and reseller accounts, phone surveys, etc.
- Measure:** Two completed plans of high quality by the above dates

**Competitive Analysis**

- Responsibility:** Understand our direct competitor (DR/Novell), and our semi-competitors (memory management and utilities vendors)
- Objective:** Develop strategies to counter MS-DOS competition. Intimately understand the products, strategies and "personalities" of MS-DOS competition. Learn from competitive strengths and weakness.
- Tactics:**
1. Develop a short and long term Novell/DR marketing plan
  2. Formulate a plan to neutralize DR DOS 6 and drive in-depth analysis of it
  3. Write short-term product and strategy summaries for key "supplemental OS" products so we can understand what makes these products compelling, and what ISVs plans are for these products so we can better understand the marketing requirements for MS-DOS 6.
  4. Communicate competitive strategy (how to position and what to say about competitive products) to the Microsoft fields, OEM group, PR and other

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QEMM/Desqview - Quarterdeck  
386Max - Qualitas  
PC Tools Deluxe - Central Point  
Norton Utilities - Symantec

Success Measure: (1) completed by November 30  
(2) ready for implementation the day DR DOS 6 is announced  
(3) completed by October 31  
(4) OEM sales force trained on how to sell and possibly actual product training on DR DOS 6. SMSD field sales force kept up to date on all competitive issues.  
Proactive planning with trade and PR to be prepared for how to handle the press

**Direct Mail**

Responsibility: Manage completion of direct marketing campaign

Objectives: • Complete analysis of direct mail effort  
• Analyze effectiveness on Infocenter  
• Assess whether direct mail drove people to stores

Tactics: • Drive Roy to complete direct mail analysis  
• Implement survey to determine whether direct mail drove people to stores

Success Measure: Reports completed on all of the above by end of review period

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Randy Magliozzi  
Performance Objectives, July-December '91

local corporate account visits whenever possible. Priority will be given to visiting "strategic" accounts based on the list of accounts developed by SMSD Corporate Accounts Marketing Group (richia/valh). Support all marketing team efforts on planning and delivering our "DOS Days" district tours.

**Metric:**

Success will be measured by:

- Feedback from reps and on survey forms.
- Activities are leveraged with corporate account visits in the local SMSD district.
- Provide timely trip reports and maintain trip report log for DOSXTEAM.

**4. Firefighting:**

**Objectives:**

As necessary, support SMSD field reps in resolving technical issues that impact the sale of MS-DOS 5 to SMSD corporate accounts and support marketing team on resolving technical issues reported by press.

**Tactic:**

Monitor DOSREP and DOSXTEAM alias for potential issues; provide timely answers to the reps issues; follow up on problem resolutions. Summarize these issue in my monthly report.

**Metric:**

Success will be measure by feedback from the reps on the timeliness of the answers and satisfaction of the customer as reported by the rep.

**5. Corporate Account Watch:**

**Objectives:**

Track corporate account status on penetration of MS-DOS 5 Upgrades. Provide a monthly summary of issues impacting MS-DOS 5 penetration and known wins as reported by SMSD corporate account reps.

**Tactic:**

Use the SMSD Scoreboard (currently not being maintained by SMSD) to obtain a list of SMSD named accounts. Redesign this Excel database to include information on MS-DOS 5 Upgrade penetration in terms of opportunity and product commitment, competitive presence (IBM, other), sales cycle, and any open issues. Make this database available to the entire marketing team and include the Corporate Account Watch summary report in the team month end.

**Metric:**

Success will be measured here by the accuracy of the data timeliness and clarity of the report as reviewed by management.

**6. Technical Marketing Resources:**

**Objectives:**

Serve as technical resource on MS-DOS 5 to Windows Product Marketing Group and other groups in Microsoft in need of information and technical marketing support on MS-DOS 5. Provide ongoing technical information and indirect support to the field and corporate accounts via programs like Smartpages and Microsoft Support Coordinator Program (MSCP).

**Tactic:**

Review requests for these resources with management before committing. Assist in finding alternative resources when I cannot commit (other members of the marketing team, program management, pes). Already I have been directly involved in outlining and reviewing articles on MS-DOS 5 and Windows that will appear in an upcoming issue of Focus on Windows and outlining the Microcomputer and MS-DOS 5 objectives for the Microsoft Certification Program scheduled to rollout this fall. Serve as Smartpages and MSCP editor for the DOS Marketing Team, anticipating the needs of the field reps and corporate customers and provide information on MS-DOS that meets these needs.

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Randy Magliozzi  
Performance Objectives, July-December '91

**Metric:** Success here can be measured on the quality of the final result and feedback from the person or group involved.

**Professional Development:**

**Technical Training:**

I will continue to develop my technical expertise on the product through informal 1x1's with the developers and program managers.

I will continue to develop my technical knowledge of other areas of Microsoft's business by attending brown-bag seminars on technical topics such as Windows/NT, TrueType, etc.

**Business Training:**

I will learn more about all facets of product marketing and program management through direct interaction with our product managers and program managers. In addition, I will become involved to the level of taking ownership for understanding and resolving issues in product marketing and program management. For example: I am currently responsible for working with Testing and User Education on revising the IBM LAN products sections for MS-DOS 5.00a.

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Review Draft: 10/2/91

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To: Brad Chase  
From: Sergio A. Pineda  
Date: 16 August 1991  
Re: Six Month Objectives

My responsibilities over the next six months include:

1. Develop an OEM Marketing Plan
2. Develop an MS-DOS 5 ROM/Embedded Marketing Plan
3. Publish a competitive analysis of DRI by mid-July
4. Develop a plan for counterfeit DOS
5. Provide PC OEMs with an in-depth seminar on Advanced Power Management at the worldwide OEM briefing
6. Secure at least 3 new embedded system design wins by December 1991

**OEM Marketing Plan**

**Objective:** Maintain the momentum with MS-DOS 5 in the OEM channel to maximize penetration of MS-DOS 5, evangelize MS-DOS 5 ROM and understand future direction of OEMs.

**Tactic:** Work with OEM Marketing to ensure that the Marketing Plan addresses OEM issues effectively

**Metric:** Ensure APM specification is distributed to OEMs worldwide  
Update OEMs on MS-DOS 5 ROM  
Provide OEM Account Managers with training on how to sell against DRI  
Train OEM PSS Groups on MS-DOS 5  
Provide OEMs with Technical Notes to help support MS-DOS 5 more effectively

**MS-DOS 5 ROM Marketing Plan**

**Objective:** Evangelize MS-DOS 5 ROM version to the OEM community

**Tactic:** Develop marketing programs outlined in the Marketing Plan to achieve a broad awareness of MS-DOS 5 ROM version

**Metric:** Launch a PR campaign with the release of MS-DOS 5 ROM version: press tour and articles in key publications  
Develop a technical seminar to OEMs designing embedded systems: "What you need to know about MS-DOS to design a system effectively"  
Work with Program Management to present a Portable Issues session to Far East and European OEMs designing portable systems: palmtops, embedded, etc.

**Competition: DRI**

**Objective:** Research and publish a corporate analysis of DRI

**Tactic:** Meet with key industry analysts and customers to understand DRI's future direction

**Metric:** Deliver the report in July 1991

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**Anti-counterfeit Plan**

**Objective:** Publish a 2/3 page plan to reduce counterfeit DOS market  
**Tactic:** Work closely with OEM, PR, Legal and International to develop programs to sell MS-DOS to small OEMs and educate endusers about the risks of counterfeit DOS  
**Metric:** Introduction of Thin DOS product for OEMs  
PR coverage to educate endusers about the risk of purchasing counterfeit DOS  
Improved legal methods to keep OEMs from counterfeiting MS-DOS

**Advanced Power Management**

**Objective:** Evangelize APM to OEMs designing portable systems  
**Tactic:** Work closely with Program Management and Development to prepare material  
**Metric:** Deliver material at the OEM WW briefing on 16 September 1991  
Get key OEMs to issue statement of support in the press articles

**Embedded OEM design wins**

**Objective:** Secure at least 3 more embedded DOS design wins by December 1991  
**Tactic:** Work closely with OEM to provide whatever support is necessary from DOS Marketing  
**Metric:** Report deals closed by end of calendar year 1991

**Training**

Attend a presentation skills class in early October, educate User Groups and Corporate customers about MS-DOS 5, meet with OEMs to discuss MS-DOS issues and understand thoroughly our support for solid state media: Flash Memory and PCMCIA cards.

Attend a two day class on Effective Presentations and read a book on assertiveness.

## Russ Stockdale - Six Month Objectives

My responsibilities over the next six months include:

1. Selling to Non-Fortune 1000 - Perform marketing analysis for selling to small and medium sized businesses and implement recommendations..
2. Fall Plan - Work with SMSD to develop plan for marketing the MS-DOS 5 Upgrade to resellers during the Fall.
3. MS-DOS Marketing Research - Conduct Customer Satisfaction Research Study.
4. MS-DOS Upgrade Product Mgmt (other operational issues) - Manage all issues related to the MS-DOS Upgrade as they arise.
5. DOS/WIN OEM Bundles - Direct all aspects of DOS/WIN products, including packaging, package contents, ship schedule and inventories.
6. Corp Comm - Address any product-related issues that involve Corp Comm, including packaging and advertising.
7. Third Party Inquiries - Handle third party MS-DOS inquiries as they arise. Report back results.

In addition to these responsibilities, I plan to spend 5% of my time learning about the system division's overall marketing strategy, the technical aspects of MS-DOS 5 and the MS-DOS 5 Upgrade, and learning more Microsoft products.

### 1. Selling to Non-Fortune 1000

**Responsibility:** Perform marketing analysis for selling to small and medium sized businesses and implement recommendations.

**Objective:** Increase penetration of MS-DOS 5 Upgrade sales in small to medium sized businesses.

**Tactic:** Think through what objectives of the strategy should be, given overall objective as described above (see corporate plan as example. May also need a background section, since we understand this market less). Collect marketing info from EBU. Talk to Market Research group to get info that we already know on the market. Talk to former small business marketing people in SMSD. Review any market research Microsoft has conducted on selling to small business. Meet with Mike Negrin and/or Mike Rhamy to brainstorm strategies. Summarize recommendations with dosmktg and implement.

**Metric:** Completion of an actionable marketing strategy for small to medium sized businesses by October 11 and beginning of its implementation.

Russell A. Stockdale  
8/13/91

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## 2. Fall Plan

- Responsibility:** Work with SMSD to develop plan for marketing the MS-DOS 5 Upgrade to retail resellers during the Fall.
- Objective:** Maintain momentum and build on the Upgrade's strength in the retail channels. Build the MS-DOS brand name.
- Tactic:** Communicate objectives to SMSD and brainstorm tactics with them to accomplish objectives. Implement programs developed. Call on and/or monitor major accounts and encourage them to continue to promote the Upgrade. Review and approve all in-store materials.
- Metric:** Have 12-15 of the top 20 retail accounts involved in something specific for the Fall. e.g. DOS Days, DOS training, promotions, displays.

## 3. MS-DOS Marketing Research

- Responsibility:** Conduct Customer Satisfaction Research Study.
- Objective:** Gain a better understanding of who our customers are and what their opinions are about our product, by segment. Provide information that the DOS marketing team can use to direct its marketing efforts and the development team can use to improve the product.
- Tactic:** Conduct a Customer Satisfaction Study modeled after the Windows study. Meet with Deborah Mahon to discuss timing of study. Work with Jimm's group to design and conduct the study. Get input from doeland on study design. Develop a timely summary of the study once the analysis is complete and review with DOS team.
- Metric:** Survey should be complete by the end of this six months and ready to be implemented.

## 4. MS-DOS Upgrade Product Management / Operational Issues

- Responsibility:** Manage all issues related to the MS-DOS Upgrade as they arise. Also be thinking proactively for the business.
- Objective:** Address all operational and marketing issues related to the Upgrade in a timely manner.
- Tactic:** Manage/Monitor DoeHot staffing levels. Update revised licenses in product. Manage MS-DOS Upgrade budget. Address other issues as they arise.
- Metric:** No major outstanding issues related to the Upgrade remain unaddressed. Begin identifying opportunities to improve the business.

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8/13/91

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#### 5. DOS/WIN OEM Bundles

- Responsibility:** Direct all aspects of DOS/WIN product, including packaging, package contents, ship schedule and inventories.
- Objective:** Steer MS-DOS 5/ WIN 3.0 packaging through Corp Comm and coordinate builds with manufacturing.  
Coordinate transition to MS-DOS 5.0a if appropriate.  
Coordinate MS-DOS 5/WIN 3.1.
- Tactic:** For MS-DOS 5/WIN 3.0, expedite box through Corp Comm and coordinate builds with Canyon Park. For MS-DOS 5.0a and WIN 3.1, work closely with Corp Comm, manufacturing and OEM sales to control inventories and deliver new releases in a timely manner. Explore stop-gap plan for expediting current bundle.
- Metric:** MS-DOS 5.0/WIN 3.0 shipping by first week in October  
MS-DOS 5.0a/WIN 3.1 shipping within 4 wks of WIN 3.1 announce.  
Reasonable/Minimal levels of existing inventory when new product hits rtm date.

#### 6. Corp Comm

- Responsibility:** Address any product-related issues that involve Corp Comm, including packaging and advertising.
- Objective:** Communicate MS-DOS 5 effectively through all media.
- Tactic:** Work with transition team to package something for corporate accounts. Work on Fall Ads with CC and O&M. Do packaging for MS-DOS 5 for PS/2a.
- Metric:** Development of ads for the Fall  
Pkg of materials for corporate accounts developed and distributed.

#### 7. Third Party Issues

- Responsibility:** Handle third party MS-DOS inquiries as they arise. Report back results. Consider whether other MS-DOS product needs can be met through third party arrangements.
- Objective:** Find opportunities to improve MS-DOS' acceptance and/or image through partnering with third parties.
- Tactic:** Review third party offers as they are presented. Investigate third party teaming ideas generated internally.
- Metric:** No backlog of third party issues.

Russell A. Stockdale  
8/13/91

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**Training**

1/2 day spent with each of the following Microsoft areas: PSS, Customer Support, Inside Sales, Manufacturing & Distribution

4 days of field sales training in Denver

Conducting of presentations at DOS Days and/or User Groups

Working with Microsoft system and applications products.

Knowledge transfer from doemktg and other members of doelnd on an ongoing basis.

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8/13/91

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## Intl Win/Dos Plan

To: Rich Abel, Brad Chase, Brad Silverberg  
 From: Adam Taylor  
 Co: Win/Dos Marketing  
 Re: Systems BU's International Windows & Dos Activities Plan

### OVERVIEW:

Microsoft has become a true global corporation, with wholly owned and fully autonomous subsidiaries in 20 countries, smaller "junior" subs in 2 growing areas (Portugal & New Zealand), supplemented by sales offices in 12 countries with subsidiaries and 2 more countries without. Our expansion efforts have included developing relationships with 76 distributors to the four corners of the globe, including such far away markets as Egypt, Zimbabwe, Sierra Leone, and even Micronesia. Microsoft has also become the definitive "global competitor" by entering markets first, maintaining a high quality of localized product, and aggressively pursuing opportunity. Europe has developed into a huge profit center, with five of the top seven Windows revenue producing subsidiaries.

Top Revenue Producing Subs		% of Intl FY91 Retail Windows Revenue*
• MS-GmbH	Germany, USSR, Eastern Europe	23%
• MS-Sarl	France	20%
• MS-AB	Sweden, Denmark, Iceland, Finland, Norway	11%
• MS-Ltd	UK, Germany	11%
• MS-Inc	Canada	8%
• MS-Pty	Australia, New Zealand	6%
• MS-Spa	Italy	5%
		84%

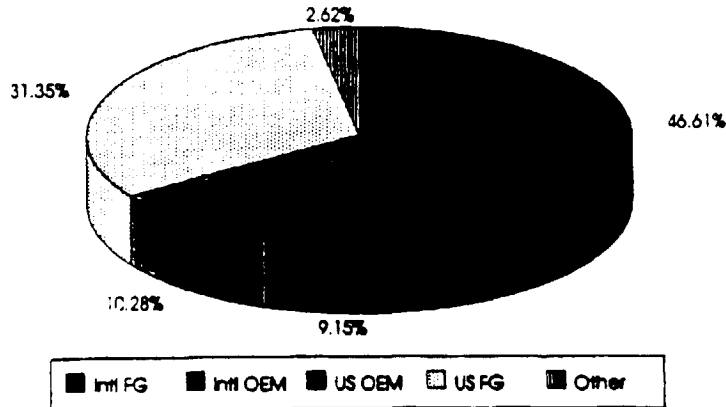
Overall, the International portion of Microsoft business has steadily increased from 32 percent in 1985 to approximately 57 percent as of FY91. Put in more tangible figures, Intl Finished Goods and Intl OEM revenue totalled nearly \$1.1 billion for FY91, with US FG and US OEM totaling \$861 million. The following chart clearly illustrates the growing International nature of Microsoft.

\*Includes Retail Win 3.0, Mouse/Win Bundle, DOS/Win Bundle and Update SKUs; no OEM sales; no SDK/DDK.

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Microsoft FY91 Revenues by Channel



As a result of this Intl growth, Microsoft has made many changes along the way to better cope with fluctuations in global markets and especially with the changing need to better understand how to produce and market products in a global marketplace. For instance, to better coordinate and administer growth in Europe, we added a European Headquarters. Furthermore, to nurture "internationalism" at the Business Unit level and to help facilitate the communication between our worldwide sites as well as understand our new global structure, we have added "International Product Managers" to nearly every BU. It is the responsibility of the IPM to do a better job of understanding our global opportunities, leverage successes between markets, and work with program management to ensure our products are developed for the International marketplace from the ground up.

One major focus of the Systems BU IPM will be to create an independent opinion of Intl issues to better facilitate the implementation of development and marketing for Systems products.

**International Plan**

During FY92, the following projects will be the focus of the System BU's International Windows & MS-Dos efforts.

- Intl Marketing (Champs)
  - Windows Technical Workshops
  - Tools (Resource & Eval Kits)
- Intl Product Development
- Foreign Market Analysis & Reporting
- Intl Consulting/Coordination
- Intl OEM Partners
- Intl Sales Reporting
- Subsidiary/Corporate Communication

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## Intl Marketing

The success of Champs 1.0 in the US clearly demonstrates the need to provide a "higher level" of support and product information in the form of programs developed from Windows Technical Workshops, Windows Resource Kits, and Windows Discovery Days Fairs.

Each of our Intl markets is unique and will require individual adaptations of the solutions used so effectively in the US. It may be better, for instance, to combine the WTW and WDD into a single event in some areas, where the technical half of the audience attends the Workshop and the inexperienced half enjoys the booths at the Discovery Days Fair. Another possibility would be to create a new implementation of the WTW whereby a wider audience can be successfully addressed through the addition of product usage information.

Intl Champs will provide the basic components of the above programs to each subsidiary on an individual basis, working closely with the product manager in bringing the subsidiary up to speed on executing these programs effectively, while managing the use of US resources in achieving our objective.

- Execute Windows Technical Workshops in appropriate Intl markets by assembling and distributing WTW Kits, coordinating subsidiary representatives training and attendance of domestic WTW, and also driving the effective use of US domestic resources in bringing sub personnel up to speed.
- Execute Windows Discovery Days Fairs, as stated above.
- Drive Internationalization and/or localization of Windows Resource Kit and MS-Dos 5 Evaluation Kit as is appropriate.

## Intl Product Development

We currently show a need to develop a mechanism in which we assimilate subsidiary feedback on future products, specifically Win 3.1, Win 4 and Dos 6, and regularly channel this feedback into program management. This would include both feedback generated by our OEM accounts as well as feedback from the retail channel (through our subsidiaries). The purpose is to maintain the Intl integrity of Windows and Dos products as the "Intl voice" at corp by working closely with our new Systems BU Intl Program Manager, Gerardz.

## Foreign Market Analysis & Reporting

By continued investigation of specific markets and issues on a case by case basis, and publishing and/or presenting results for the benefit of the business unit, I will focus on communicating critical subsidiary marketing activities. Specifically, I will start with the publication of an "Intl Windows 3.0 Overview--Launch to FY91," continue with a "European Advertising/Coop Marketing Analysis", Japan's J-Dos vs. Dos-V Market Battle, Intl DRI Updates and any other requested reports. The objective is to supplement "sales data" with a better understanding of actual market dynamics in which to better formulate opinions on the Intl scenario within the Systems BU.

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### **Intl Consulting/Coordination**

By working with subsidiaries and smaller sales offices in rolling out local MS-Dos 5 launches and appropriate Windows activities (i.e. providing key information from domestic marketing efforts, presenting at launch and other events) I will act as an Intl Consultant to these undeveloped regions.

### **Intl OEM Partners**

For the first half of FY 91 OEMs shipments represented approximately 38% of total Windows 3.0 shipments, excluding updates, and were distributed by over 50 OEM partners. Windows FY 92 forecast is for OEMs to be 60% of our total business, or 3 million units world wide. But because few OEMs preinstall and some question the value of bundling, the domestic OEM Partners Plan has been created to target key accounts and focus on preinstallation, customized set-up, developing Windows Machines and to profile the entire Windows OEM business.

Intl OEM Partners will leverage the domestic plan, targeting appropriate accounts in the FE, European, and Mexican/SA markets. I will work closely with AlexN, RaghavK, and the OEM account teams in achieving the objectives stated in the domestic OEM Partners Plan.

### **Intl Sales Reporting**

Through continued ownership of Intl Windows and Dos Spreadsheet publications, I will maintain corp's ability to understand at any given point in time, the exact unit sales and revenue status of our subsidiaries with respect to Windows and MS-Dos. Coupled with the following "market analysis" activity, I will strive to educate the BU by maintaining an effective "knowledge base" of our Intl markets.

### **Subsidiary/Corp Communication**

Through continued ownership of Intl aliases, I will keep Intl markets fully informed as to corp's marketing strategies and activities, as well as bring Intl's success stories back to corp. This is the primary mechanism for communication between corporate and the subsidiaries. Used effectively with conference calls and occasional face to face meetings, Intl alias usage has proven to be a timely and effective means of communication.

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Six Month Objectives

July 1, 1991

1. Intensify the BU's efforts at increasing Intl sales of Win & Dos, measured by:
  - driving the rollout of domestic's Windows Technical Workshops and Windows Discovery Days into appropriate Intl markets by:
    1. creating Intl WTW and Intl WDD "kits" which will be productized versions of domestic's most successful portion of the Windows Champs Program.
    2. bringing the subs up to speed on these programs by coordinating sub visits to domestic WTW and WDD events, utilizing US resources when possible (i.e. tycar flying to Canada to do WTW).
    3. driving subs to execute these events successfully.
2. Drive Intl development of future versions of Windows & Dos, measured by:
  - working with gerards to develop a mechanism in which subsidiary feedback on Win 3.1, Win 4 and Dos 6 is regularly channeled into program management.
3. Continue investigation of specific markets/issues as per requests, measured by:
  - publishing Intl Windows 3.0 Overview: Launch to FY91.
  - presenting European Windows Advertising/Coop Marketing to brands.
  - investigating & reporting on Japan's Dos-VII-Dos market battle.
  - reporting to Dos Mktg team with Intl DRI updates.
4. Act as an Intl Consultant/Resource/Troubleshooter, measured by:
  - working with our subsidiaries and smaller sales offices in rolling out localized MS-Dos 5 by providing key information from domestic marketing efforts, presenting at launch and other events (already requested by Latin America's ICON's, AIMB's Bus Dev Managers) and acting as an Intl Consultant to these undeveloped regions.
  - ensuring Intl Marketing effectively communicates the 100% Upgrade program to Intl markets.
  - coordinating domestic's Win 3.1 beta and Win 3.1 launch with EHQ and major subsidiaries.
  - driving a successful Windows Corporate rollout with tycar and the Australian sub for Telecom Aussie and documenting efforts to create an "Intl Rollout Handbook."
  - troubleshooting when problems arise with respect to Intl Win/Dos issues.
5. Continue publishing Intl Windows and Dos 5 spreadsheet, measured by:
  - monthly distribution of Intl spreadsheets, incorporating feedback to improve info.
  - providing Intl data for quarterly MS-Dos 5 report.
6. Increase technical knowledge of both products, measured by:
  - thorough study of Windows Resource Kit & MS-Dos 5 Evaluation Kit.
  - presenting at Dos Days & User Groups, running demos at Win Discovery Days and presenting first section of Windows Technical Workshops.
7. Maintain two-way communication links with subsidiaries, measured by:
  - keeping subs fully informed by regular use of Intl aliases.
  - keeping corp informed as to sub activities and programs.

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