

Erik Stevenson

From: Tandy Trower
To: Bill Gates; Brad Silverberg; Mike Maples; Paul Maritz
Cc: Darryl Rubin
Subject: extensions
Date: Wednesday, June 23, 1993 10:43AM

I have been thinking about the discussion we had about where we package "shell" extensions and I am increasingly convinced that this is a bad idea.

1. The extensions are NOT that significant. After talking with JoeB they can be summarized as adding commands to icons, adding property pages and adding views to the "explorer". Perhaps there may others we haven't defined yet, but the significance of the "extensions" seems to be overblown. I don't believe these result in any significant benefit in the marketability of Office.
2. If there IS any benefit, it just penalizes our own customers who only buy individual products from us.
3. This significantly raises the stakes of competition. It incents ISVs to directly compete with us on the "shell". You might argue that this may happen anyway, but we maintain a stronger position by ensuring that the common base is of high quality. The more we deliver only a weak shell, the more we open the opportunity for someone to displace the basic UI and operation of the system. If shells just become a commodity of a software suite, then it can no longer be considered the core of the system. Minor ISVs have to figure out which shell to integrate with. In short, this strategy potentially makes it harder to maintain a sense of standard.
4. This strategy signals a sign of weakness. This stinks of "proprietary-ness", something that we have been critical of others for embracing. We should be able to compete effectively by doing better OLE apps, thinking hard about how to evolve from GUI to OOUI apps. There is a significant transition in both the architecture and in UI to be made. (I've seen very little evidence that we are really thinking of the implications and moving forward here.) We are better focused on making this transition, like we did from character to GUI, than trying to leverage some weak extensions. If we really wanted to leverage a technological advantage we should have kept OLE 2 as a proprietary set of APIs.

It just doesn't appear to me to be a smart strategy. It seems contrived and the possible repercussions not worth the risk. In the twelve years, I have been here, I've always taken pride in the fact that we excelled by doing things better than our competition, not by withholding some functionality that we might uniquely leverage. That doesn't mean that I think we should just give away all our technology. I just don't think this particular proposal is a good one and doesn't fit our character.