

Draft 2
September 20, 1995



Current Situation

Program Description

The Microsoft Office Compatible program makes it easy for millions of users to learn and use third-party software that looks and works like their familiar Microsoft Office business productivity applications. The program also makes it easier for 3rd party vendors to sell to the millions of users who have made Microsoft Office the world's most popular office suite.

Products in the Microsoft Office Compatible program offer users many benefits. The products share the Microsoft Office family's familiar and consistent way of operating, which makes applications easier for users to learn and use. The similarities include common menus, toolbars, accelerator keys and more - such as the same way of sharing text, numbers and graphics among programs, tabbed dialog boxes, and tooltips. Through the Advanced Development Kit, available only to Office Compatible members, products can also be tightly integrated with Office by supporting the Office Binder and Document Properties for Office. The Advanced Development Kit also allows developers to create a similar Startup Screen, About Box, Status Bar, Tip of the Day, Wizards, user assistance elements, and more.

Users benefit from the ability to use these products together with Microsoft Office. For example, a diagram created with business drawing software that supports OLE 2.0 can be inserted into a Microsoft Word-based report with a simple drag-and-drop operation between applications. Or, an animation clip created with a multimedia development package can be inserted into a Microsoft PowerPoint presentation graphics program slide show or a Microsoft Excel spreadsheet just as easily. Office Compatible Products that support the Office Binder can also be inserted and viewed in the binder, just like any Office application.

The Microsoft Office Compatible program enables ISVs, corporate developers and solution providers to benefit from Microsoft's usability research as well as tap into the large base of Office users. Specifically, Microsoft will make available detailed product specifications, bit maps, sample code, and development tools and will license a logo to be used in marketing third-party applications. Office Compatible developers who purchase the Advanced Development Kit will also have access to a VB 4.0 wizard that builds Office Compatible applications. Program participants may also benefit from a range of joint marketing programs with Microsoft. To help ensure the logo has meaning to customers, products pass an independently conducted compatibility test.

Enrollment in version 2 of the Office Compatible program is free to ISVs, corporate developers and solution providers. Basic Office Compatible specifications are provided at no cost, however, logo testing, performed by VeriTest, starts at \$600 and the Advanced Development Kit is available for U.S. \$500.

Statistics

Currently, there are about 240 companies enrolled in Office Compatible 95. This is more than double the number of companies enrolled in Office Compatible v 1.0. There are 260 products enrolled in the program and over 155 of these are 32 bit. The companies represented by these numbers are almost entirely North American. The localized specs for Office Compatible will be available in French and German by September 15, and Spanish, Italian, and Dutch by September 22. Brazilian Portuguese, Norwegian, Swedish, Danish, Japanese, Chinese, and Korean will follow. As the program is rolled out internationally, we should see the numbers of companies and products enrolled in the program increase dramatically.

Competition

Lotus has a Lotus Developer Group that manages business partnerships with Lotus, certification in their products, and provides limited support to developers. They do not seem to have a logo/marketing

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program similar to Office Compatible and there does not seem to be a strong following of Lotus SmartSuite developers. We need to follow up on this to figure out their plans now that IBM is in the game.

Novell/WP is heavily marketing their PerfectFit Partner Program. It is a cross between the Office Compatible Program and the Solution Provider Program, targeting commercial developers, ISVs, VARs, consultants, and corporate developers. Since the launch of the program in October 1994, they claim to have over 1500 companies participating in one of 3 levels. (A comparable number for us would be a combination of Office Compatible participants, >240, and Solution Providers, >5,000). The 3 levels include Associate Partner, Select Partner, and Premier Partner.

The Associate Partner pay \$1,000 for their SDK, receives standard technical support, and discounts on software, but no marketing benefits. The Select Partner pays \$1,395 and must produce products or services that support WordPerfect Applications Group products. In return they receive technical benefits including notification of betas, access to betas upon request, access to e-mail alias, priority technical support, and discounted admission to conferences. They also receive marketing benefits such as listings in PerfectFit Solutions Guide, fax referrals, use of *PerfectFit with PerfectOffice* logo pending testing and approval by Novell, mailings to sales force, accounts, and user groups, pr quotes, PerfectFit tradeshow booth materials, and they are eligible to include a brochure/coupon in PerfectOffice products for an additional fee. The final level is Premier Partner. This group pays \$1,395 plus an additional unspecified amount. Acceptance into this group is determined by Novell depending on the strategic value of the company. Premier Partners are also required to use the logo on packaging, refer to WordPerfect in advertising and collateral, use PerfectFit technology, and product at least one PerfectOffice-specific marketing piece annually. The technical benefits they receive include expanded certification and support services, access to Integration Lab, Priority + developer technical support, automatic betas, and free copies of released products. Marketing opportunities for this group include joint marketing opportunities in trade shows, press tours, advertising, and collateral, ad placement using Novell's rates, access to reg base (for a fee) and sales force, co-op ads, use of various logos, speaking opportunities at PerfectOffice user conferences, lead referrals and other customer contacts.

The PerfectFit Partners SDK includes UI standards, documentation, and API access to shared code for menus, toolbars, dialog boxes, 3D look, custom controls, and PerfectScript token processing engine. It also includes file converters, OpenDoc, multimedia, MessageBox, WritingTools API's, Envoy Viewer support, and custom clipboard format access. It is important to note here that their requirements conflict with the Windows 95 requirements (and therefore with Office Compatible since Windows compatibility is a requirement of Office Compatibility). Their strategy is to distinguish themselves by not following the Windows 95 guidelines and encouraging others to support and follow their lead.

As a development platform, PerfectOffice does not offer developers a consistent, easy environment, but they are marketing it heavily and are getting vendor support for it.

Goals

The overall goal of the Office Compatible program is to entrench Office on the desktop, by building a large community of developers that create and market commercial applications and custom solutions that look and work like Office, and provide tight, seamless integration with Office. We want to create a market environment where such Office Compatible programs are in great demand, thereby increasing the functionality of and need for Office on the users desktop. Work toward this goal will ultimately lead to a customer impression of Office as a necessary platform for completing everyday work, and will lead to a higher level of Office sales and entrenchment.

Specific goals for the Office Compatible program are as follows:

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- Increase the number of worldwide Office Compatible vendors to 500 by the end of fiscal year 1996.
 - ⇒ Increase the numbers of Solution Providers and Corporate Developers.
- Market the Office Compatible concept, logo and products to Microsoft customers.
- Stay ahead of competition.

Strategy

- Growing the Office Compatible Program by marketing to developers will be communicated through the following messages:
 - ⇒ Office Compatible technical specifications allow you to design and develop products that are easier to use.
 - ⇒ The Office Compatible Program provides a mechanism for obtaining technical information and marketing opportunities from Microsoft.
 - ⇒ By creating Office Compatible applications and marketing such applications with the Office Compatible logo, software vendors will be able to easily reach the millions of users of Microsoft Office.
- Grow the Office Compatible Program through the following methods:
 - ⇒ Strong international involvement. Office Compatible will be localized into French, German, Spanish, Italian, Dutch, Brazilian Portuguese, Swedish, Norwegian, Danish, Japanese, Chinese, and Korean.
 - ⇒ Focus on recruiting key verticals and strategic partners
 - ⇒ Expand the market by considering new types of vendors, such as on-line content providers and anti-virus products.
 - ⇒ Leverage DRG, OCU, and the Solutions Developer Group to increase the numbers of developers in the program. Specifically, SP's and Corporate Developers.
 - ⇒ Educate other internal Microsoft groups to increase awareness and participation in the program
- Market the Office Compatible logo, concept, and products to customers by communicating the following messages:
 - ⇒ Office Compatible products are easy to learn and use because they look like, work like and are tightly integrated with Office.
 - ⇒ Office Compatible products offer a high level of quality and functionality.
 - ⇒ Office Compatible products help you get your job done by adding to the functionality of Office.
- Market the Office Compatible logo, concept, and products to customers through the following methods:
 - ⇒ On-line marketing
 - ⇒ Leverage resellers
 - ⇒ PR (need marketing plan from JeanneB)
 - ⇒ Leverage field

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- ⇒ Office Compatible presence at tradeshow and industry events
- ⇒ Packaging and collateral
- ⇒ Leverage SPs? Encourage SPs to include Office Compatible products in customer solutions.
- Stay ahead of the competition by communicating the following messages:
 - ⇒ Office is the leading suite and the best suite to be associated with
 - ⇒ Office provides the strongest development platform
 - ⇒ Office Compatible offers the best marketing opportunities
- Stay ahead of the competition through the following methods:
 - ⇒ Make it easier to navigate through Microsoft and obtain related development and marketing information - one stop shopping
 - ⇒ Easy access to beta, golden, and international versions for development use
 - ⇒ Determine specific and unique strengths to Office and include in Office Compatible offering
 - ⇒ Clearly convey marketing benefits of Office Compatible

Tactics

Ongoing Tactics

- Biweekly updates to DAD, WE, Headline news and International subs
- Update Office Compatible info on InfoBase
- Update Office Compatible info on MSN and WWW
- Update customer ready fax back form
- PR (need JeanneB mktg plan)

October

- Office Compatible demo
- Reseller Ad Kit
- Begin work on new Office Compatible Video
- Begin discussions on separate Office Compatible autodemo CD
- Include Office Compatible info on relevant MSN/WWW sites - developer, SP, etc.
- Roll out Office Compatible worldwide
- Get DRG on the 'evangelizing bandwagon' for Office Compatible
- Update customer-ready fax back form with '95 products
- Establish easy access for developers to obtain International versions of Office
- Set up deals w/ Cobb and IDG to advertise Office Compatible

November

- Work w/ program management to explore expanding the Office Compatible market - on-line & anti-virus
- Work w/ SP group to determine how to recruit and appeal more to SPs
- Work w/ OCU to better leverage key verticals
- Begin work on separate Office Compatible autodemo CD
- Create Office Compatible collateral
- Office Compatible participation at Comdex
- Begin work on Office Compatible Newsletter

December

- Work w/ Product Planning on Office Compatible '96 specs and features
- Distribute Office Compatible Newsletter

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- Create targeted Office Compatible demos
- Solicit feedback from Subs and Office Compatible participants on marketing and technical changes they would like to see implemented in the next version of Office Compatible
- Get Office Compatible involved in Office auditorium chats
- Highlight Office Compatible on-line area - Office Compatible month
- Begin work w/ Affinity/Stream on MSN Component Software Store

January

- Start work on Office Catalog
- Finalize Office Compatible '96 plans
- Roll out Component Software Store
- Office Compatible/Solutions Press Tour
- Begin work on Office Compatible Conference - technical & marketing sections

February

- Collect customer/vendor testimonials to use in Office Compatible conference
- Wrap up logistics for Office Compatible Conference
- Work with subs to allow them to hold similar conference abroad
- Office Catalog ships
- Begin work on Office Compatible Newsletter

March

- Distribute Office Compatible Newsletter
- Work w/ program management to develop beta style guide for Office Compatible '96
- Develop preliminary Marketing outline for Office Compatible '96 to present to Office Compatible vendors
- Office Compatible Conference
- Update Office Compatible Video

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- Create kit or pointers to whitepapers, saletools, and related development kits
- Create fast facts card for related programs and information to make navigating around Microsoft easier for 3rd parties
- Develop list of marketing opportunities that tested apps can participate in and include in datasheet to encourage enrollment
- Enroll Office Compatible vendors in beta program
- Create list server to communicate easier with Office Compatible vendors
- Update Office Compatible autodemo on 'A' release CD
- Update individual Office Compatible autodemo (2x/yr? 4x/yr?)
- MSTV
- SORG/MORG targeted promotion