



## The Boss Loves Microsoft: Where does that leave Lotus? 2006

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**IBM**

Lotus software

## Bill Gates on IBM, Lotus Notes

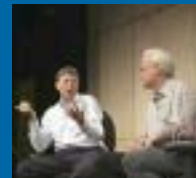
Reuters, January 5, 2006:

*"The biggest company in the computer industry by far is IBM. They have the four times the employees that I have, way more revenues than I have. **IBM has always been our biggest competitor.** The press just doesn't like to write about IBM."*



*Fortune: How much has Microsoft wanted to beat Notes?*

*Gates: There are two ways to think of Notes. One is as an e-mail product, and the other is as a deep collaboration product. Microsoft competed with Notes as e-mail. **We never matched Notes in some of the collaborative features.***



*Fortune: Gates and Ozzie Get Into the Groove, June 27, 2005*

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Lotusphere 2006

Lotus software

## Microsoft is also saying...

- **Steve Ballmer:** "We have Lotus Notes opportunities coming out the yin-yang. I've never seen [such] a customer base waiting to be plucked." (July 10, 2005)
- **Chris Capossela:** "We will be getting customers to build [new applications and services] using SharePoint rather than Lotus Notes or Workplace and keep Lotus Notes in maintenance mode." (July 8, 2005)
- **Chris Capossela:** "The thing that Lotus Notes did not do well at all was to solve inter-company problems. With Notes you could easily build applications within the company, but it was extremely hard to expand that out. We now see that people are moving away from Notes, and start using Groove instead." (October 10, 2005)
- **John Merrill:** "Almost everybody uses Exchange, they just don't know it" (November 16, 2005/channel9.msdn.com)



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## Microsoft's efforts to convert Notes customers

- **"Notes compete" project:**
  - Partner training and customer workshops
  - Per-user "bounty" for converting Notes shops
  - Updated and revised migration tools ("Red bull")
- **Tactics:**
  - Propose mail-only migration
  - Propose application migration POC
  - "Trojan Horse" integration with Notes/Domino



Source: Microsoft presentations to partners (e.g. IBM), October 2005



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## “Red Bull”

- Microsoft announced updated migration/coexistence tools for Notes/Domino
- Tools still don't magically migrate Notes applications – only analyze possible migrations, and convert those based on standard discussion/doclib templates
- Full analysis done by several business partners and customers
  - See weblogs like pmooney.net, jaffacake.net, and edbrill.com
  - Results not exactly a resounding endorsement
- Availability described as “immediate” (source: Red Herring), yet beta versions pulled from Microsoft.com 24 hours after announcement
- Gartner's Matt Cain: "What's still missing is a tool or service that can migrate the Domino application logic," Cain said. "Domino still is an awesome rapid application development tool. **There frankly is nothing (like it) on the market.**"

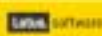


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## DominoPower: Migration to Microsoft: Look before you leap

- *“If you are considering a migration from Lotus Notes/Domino to Microsoft, I want you to think about a few things before making the leap. The development languages don't mesh, the document store is different, and the general working environments are quite different as well. **If anything, Microsoft's new application analyzer will tell you how difficult it will be to migrate from Lotus Notes/Domino to a Microsoft solution.**”*
- *“Microsoft provides no software to help businesses migrate away from their customized Notes/Domino applications, which is at the heart of what the Notes/Domino platform is all about. **To reproduce a typical Notes/Domino application's feature set on the Microsoft platform would involve a total rewrite -- a truly expensive proposition.** Customers need to fully investigate the effort involved before they sign up for this proposition.”*

<http://www.dominopower.com/issues/issue200601/00001706001.html>



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## Why does Microsoft say you should migrate from Notes?

- “Notes is dead” – 7 is last version on current architecture, IBM has not announced a version past “Hannover” (which will be re-architected and built on a WebSphere platform)
- TCO – META report from June, 2004
- Market share/momentum
- Notes architecture – “Flat file system”, no single instance store means huge waste of disk space
- Bundled licenses – Exchange and Outlook are “free”
- End users prefer Outlook

## Let's take a look at reality....

- **“Notes is dead” – 7 is last version on current architecture, IBM has not announced a version past “Hannover” (which will be re-architected and built on a WebSphere platform)**

- Not like there's a version of Exchange past “12” announced, either!
- Microsoft cites as “evidence” a Radicati Group survey of Notes customers (May, 2005)
  - The survey was conducted on Radicati.com (non-random, in fact likely biased)
  - Only 32 survey responses -- +/- 17.5% margin of error
  - More info at controlscaddy.com / “Fighting FUD” box
- “Hannover” is the next version of Lotus Notes. You've seen that in spades at Lotusphere 2006. There is no question that the Notes investment you've made continues long into the future.

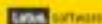
- **TCO – META report from June, 2004**

- MS now refers to this as a “Gartner” report, though Gartner would never have published a sponsored, one-sided paper of this nature
- Notes/Domino 7 has shipped since then – the paper mostly studied R5 customers anyway
- IBM response is still posted on [lotus.com/compare](http://lotus.com/compare)

## Gartner: Focus on Business Issues, Not Emotions, When Considering IBM Lotus Domino

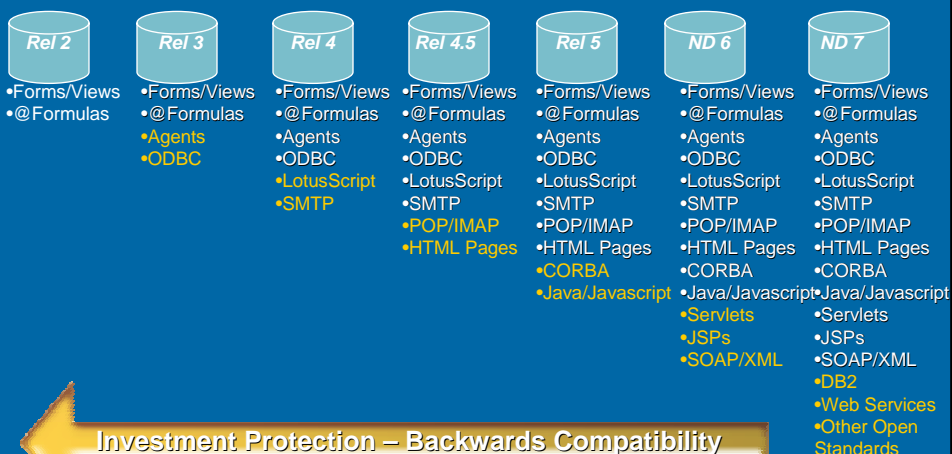
- "Many Domino-related inquiries that Gartner receives come from longtime Domino customers actively considering a migration to Microsoft products, although **few have actually made the move.**"
- "We do not believe that IBM is going to withdraw from this market. Although brands may evolve over time, we believe IBM is committed to "workplace" technologies and, through at least 2010, IBM will maintain or increase investments in its "workplace"-related technologies"
- "Organizations must move the Domino vs. Exchange/SharePoint debate from emotions and politics into sound business reasoning, with an emphasis on long-term infrastructure directions and emerging collaboration and business process needs."

November 29, 2005



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## Investment Protection



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## Let's take a look at reality....

### ▪ Market share/momentum

- OK, Gartner and IDC both say MS was #1 for 2004.
  - Congratulations, Microsoft, it only took ten years.
- Gartner says IBM has 45% market share for 2004 – only a 1% change.
  - and IBM leads in key markets like Western Europe
  - This continues to be a two-player market – there is no significant trend change.
- Microsoft tends to exaggerate their market standing
  - Have never indicated what percentage of Exchange revenue is Core CAL bundle "shelfware"
  - Bill Gates claimed 75% share in February, 2005. *"The data that Bill Gates referred to is one very specific way of looking at the data."*
  - Radicati Group numbers have not been consistent from one published report to the next—either IBM is catching back up, or ...
- 2005 analyst reports not published yet, but IBM reported:
  - Double-digit growth for Notes/Domino for five consecutive fiscal quarters, with expectations of gaining or maintaining share
  - **1319** competitive winbacks in 2005 (Move2Lotus/Tradeup)



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## IDC: The Domino Effect – July, 2005

*"After initially confusing customers about the relationship between Domino/Notes and IBM Workplace, during the past year IBM **has succeeded** at clarifying the relationship between the two, resulting in double-digit growth for each of Lotus' last three quarters."*

*"IBM's 2Q05 performance **gives credence to its contention that it is bullish about** 'gaining market share in the collaborative software ...category,' according to CEO Palmisano, and helps build a foundation for success in subsequent quarters. Further, its insistence on following a unique path that leads to a portal-oriented workplace is finally bearing fruit among its customers."*

*- "The Domino Effect: Lotus Drives IBM's Strong Software Performance in 2Q05" July 2005, by Robert Mahowald, Evan Quinn, Mark Levitt and Brian McDonough, -IDC*



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## Let's take a look at reality....

- **Notes architecture – “Flat file system”, no single instance store means huge waste of disk space**

- Exchange's single instance store stores one copy of a message – it's “fairly powerful” (MS blogger). To me, it has echoes of the past (i.e. cc:Mail)...
  - Up to 20 databases per server means message is certain to be stored more than once
  - Fewer users per server means more servers...thus more copies of the message
  - Exchange provides no management tools to assess which users to assign to which database
  - Any problem with that shared message store affects multiple users – a single point of failure, since Exchange does not cluster data
- “No [Domino] email was lost and none of our users were even aware that their primary mail server was unavailable for 30 hours. Having the cluster and individual mail stores made this almost a trivial event!” – Simon Barratt (December 6, 2005)

## Exchange reliability

- “High-availability e-mail is still too complex” – Dave Thompson, Exchange VP (January 19, 2005)
- Lucid8.com survey, 360 IT managers running Exchange – (December 13, 2005):
  - “Nearly three quarters of the respondents had suffered from an Exchange disaster. 70 percent of these firms stated that their Exchange Server was down for at least eight hours, and 45 percent said it was down for more than 24 hours per incident.”
  - “Almost half of the respondents stated the cost of lost opportunity was more than \$5,000 per incident, and 23 percent reported that they had experienced permanent data loss from server disasters.”
- “Disks are cheap - downtime isn't” – Paul Mooney (December 5, 2005)

## Let's take a look at reality....

### ▪ Bundled licenses – Exchange and Outlook are “free”

- You've heard my analogies on this (car vs. bicycle, bottled water vs. tap water, etc.)
- Have you wondered how much you are spending overall with Microsoft for those “free” licenses?
  - See BOF405: Liberate Your 2006 Budget - Best Practices in Negotiating Microsoft Enterprise Agreements [Thursday, 7 AM]
- What about those conversion costs?
  - It's 2006, and *guess who* is *still* using Lotus Notes?!
  - “Yeah, its easy to migrate a Notes application, as long as you have no data, no code, no agents, no lookups and no workflow... Hang on while I just shut down all the domino servers.” – Paul Mooney, November 2005
- And what about that product roadmap – even if it's “free”, is it delivering in the future?



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## Exchange 12 – Early 2007 deliverable

- Features falling out...
  - Active/Active clustering – gone
  - **All** previously existing APIs – maintenance mode or gone (includes WebDAV, CDO, OLEDB)
  - Plan to move to SQL Server architecture completely abandoned: *“The Exchange message store, based on the Jet database, is prone to corruptions and is difficult to manage and maintain, [Julie Farris, CEO of Scalix] said, adding, “This is a long-standing, known problem, and plans to replace the Exchange message store have been iteratively postponed.”*
- Architectural changes
  - Will run on 64-bit hardware *only*
  - Last release to support Exchange public folders (Source: Ferris)
- Catch-up “innovation”
  - All new OWA features match Domino Web Access 5.0.x feature set



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## Reaction to Exchange 12

- *"The amount of change Microsoft will be introducing not only in Exchange 12, but also the Windows server and client, and the entire Microsoft Office System suite, opens the door for Microsoft's competitors in the collaboration platforms market. Customers will have the opportunity to look at the software, hardware, and training costs associated with the new Microsoft product versions and evaluate alternatives. IBM and Oracle, among other vendors, offer not only competitive alternatives to Exchange, but also alternatives to SharePoint and Live Communications Server. These vendors could see a bump in adoption of their collaboration platforms in the 2007 to 2008 time frame."*
  - Forrester, December 7, 2005
- *"I think Microsoft is creating as many problems as it's solving with Exchange 12. If there was some capability available only in 64-bit, such as a much greater level of security, then that would be an acceptable reason for going solely with 64-bit."*
  - Directions on Microsoft's Peter Palwak, November 21, 2005
- *"The change will make the typical Exchange version migration slower and more complex."*
  - Gartner's Matt Cain / Stephen Kleynhans, November 21, 2005

## Let's take a look at reality....

### ▪ End users prefer Outlook

- Reality: **Users prefer what they're used to.**
- Business usage patterns are not the same as home use of Outlook/Outlook Express
- Focus groups, Q4 2005 – Outlook users perceive e-mail as:

Difficult to track and categorize	Undifferentiated flood	Burdensome
Demanding – 24 x 7	Never-ending / bottomless	Repetitive

- "Outlook sucks" gets more google hits than "Notes sucks"
- Outlook continues to be prone to more security issues
- ...and if you really want your Outlook, Domino supports it with DAMO

## Osterman Research, January, 2006

- "We're nearing the end of a survey\* asking end users about their email practices. As part of that survey, we're asking about users' satisfaction with their primary email client in the context of how well it meets their needs. At this point, we've found **relatively little difference** between users of Notes, Outlook and GroupWise in terms of their level of satisfaction, although a **slightly higher**, but not statistically significant, percentage of **Notes users report they are 'very satisfied'**."

\* "The survey we're conducting was not commissioned by any of our clients: we funded this study internally." – Michael Osterman



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## Competitive advantage: Domino

### *Enterprise Strength*

- Unsurpassed reliability, availability
- Scalability and performance - on typical hardware
- Consistent architecture
- Autonomic capabilities

### *Security*

- Sixteen years - no viruses
- Execution control list
- Field level access controls
- End-to-end encryption

### *Flexibility*

- Multiple server choices
- Multiple client choices (+browsers)
- Fully customizable
- Complete offline/low-bandwidth access support

### *Collaboration*

- Rapid development and deployment
- Template-driven architecture
- 1000s of partner solutions
- Enterprise integration baked in



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## Recent Notes/Domino 7 & Roadmap Press

- VARBusiness publishes an article titled "Lotus Gets New Life" that reflects on the health and growth of the Lotus collaboration business and includes positive quotes from industry analysts, partners, and Notes/Domino customer Holland Company. Henry Bestritsky from Binary Tree offers the following comparison between Notes/Domino and Microsoft Exchange:
- Henry Bestritsky (co-CEO of Binary Tree, a premier Lotus partner) believes IBM has a leg up on Microsoft in terms of delivering a smoothly integrated solution... "If I want collaboration, messaging, back-end integration and workflow from the same interface, I go with Notes. Microsoft is working on that, but you need SharePoint, InfoPath, .Net, C#, Outlook and Exchange, and all those pieces are not truly integrated right now," Bestritsky says.



## eWeek: Lotus Notes/Domino 7 review

January 16, 2006

- "With Version 7 of the Lotus Domino server and Notes client, IBM continues to provide the richest integrated collaborative environment available today."
- "For companies looking for a messaging solution, Notes and Domino is the most flexible one available. Not only does Domino run on a wide range of operating systems and server hardware, but it also provides a platform for delivering database-driven applications, e-mail and group calendaring, scheduling, and instant messaging."
- "Domino's ability to manage Notes client updates and policies makes it unique in the way the entire client/server architecture can be managed without the need for third-party tools."

## Recent Notes/Domino 7 & Roadmap Press

- **Gartner on Notes/Domino 7:**
  - "Recommendations:
  - Domino customers: Enterprises committed to Domino for the next several years should **plan on a migration to 7.x** to exploit new features and remain current.
  - Non-Domino customers: Domino 7 **should be examined** as a prelude to a full-fledged, Java-centric Workplace portal and collaboration suite, which should be considered for applicability for boundary and knowledge workers, **even in Microsoft-centric organizations.**"



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## Holland Company

- **Challenge:** A new messaging solution was required to support rapid organizational growth and provide enhanced functionality for remote users
- **Solution:** Migrate off of MS Outlook/Exchange to a flexible, scalable IBM Lotus Notes/Domino messaging and collaboration environment, with the native replication capabilities that enable mobile employees to work offline
- **Key Benefits:** Improved employee productivity; reliable remote e-mail access; anticipated lower total cost of ownership and reduced development costs



"We were spending an inordinate amount of time putting on patches, chasing viruses and fixing people's machines," ... "Someone came out and spent a few days and determined that Exchange Server 2003 running on Windows Server 2003 would provide the optimal solution for our needs."

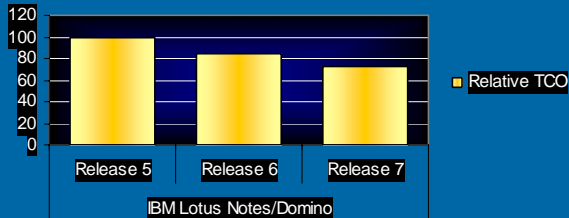
"A few weeks later I got an estimate, and it was staggering. It was big money — six figures — and at the time, we were talking about 200 total users." That's when Tieri called IBM and discovered that the IBM Lotus® Notes® and IBM Lotus Domino® 6 messaging platform was a third of the cost of the estimated upgraded Microsoft solution."

- Jim Tieri, IT director, Holland Company



## IBM Lotus Notes/Domino 7 Poised to be Significantly Less than Release 6 TCO

### Continued Focus on Reducing TCO



	Release 6	Release 7
User Productivity	✓	✓
Server Capacity	✓	✓
Upgrade Costs	✓	✓
Admin Costs	✓	✓
Support Costs	✓	✓
User Downtime	✓	✓
App Integration	✓	✓

Ferris Research study estimates reductions in key TCO areas\*

- 15% reduction in direct costs
- 15% reduction in user productivity costs
- 8.5% reduction in overall TCO
- 22% reduction in overall TCO for customers upgrading from R5



FUTURE SIGHT IBM Commissioned Study



The rest of the collaboration competition...

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## Microsoft is Touting SharePoint. . .

### ~~Windows SharePoint Services~~

- Lightweight doc management & team collaboration
- Focused at end user
- Supports small organizations
- "Free" with Windows 2003

### ~~SharePoint Portal Server 2003~~

- To aggregate on WSS team sites
- Extends the capabilities of Windows SharePoint Services

### ~~SQL Server 2005~~

- Required for all but the most basic SharePoint deployments



- Microsoft-only Environment
- No Offline Use
- Poor Admin Capabilities
- Limited Scalability
- Poor Application Integration
- Roadmap?

## "Five Things Wrong With SharePoint"

"SharePoint is one of the most underutilized assets of the Office system."

- Bill Gates, Office System Developer Conference, February 2005

### ▪ Mike Drips, *Informit.com*, "Five Things Wrong With SharePoint," July 2005

- "There are five reasons, Bill, why SharePoint is underutilized...":
  1. It's a crappy mish-mash of multiple technologies.
  2. The development team is playing the Longhorn card.
  3. There are two SharePoint products, which is confusing
  4. Support for SharePoint is lacking
  5. Microsoft has not stated a strategic direction for SharePoint

## Workplace Services Express: Choice & Flexibility

- **Single-server unified solution for team collaboration, portal & instant messaging**
  - To get the same functionality with Microsoft . . . Windows 2003, SharePoint Portal Server 2003, SQL Server 2005, Live Communications Server 2005
  - Multiple product purchases, installation and administration.
- **Supports multiple OS & DB options**
  - OS: Windows, Linux, iOS
  - Database: DB2, Cloudscape, MS SQL Server
  - Browser: IE & Firefox
  - Also works with Microsoft Office
  - Support for Open Standards (JSR168, Java)
- **Offline support**
  - Local copy replicates with server



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## WebSphere Portal: Enterprise-Level Solution with Multi-Platform Support

- **Enterprise-level portal for complete app integration on front end**
  - Unrivaled scalability
  - Ships as complete solution
  - Powerful & flexible search, full-featured doc management
  - Easy to administer with centralized administration
- **Integrates with broad IBM app dev portfolio**
  - Bowstreet, Rational, etc, facilitating portal & portlet development
- **Leverages your existing infrastructure**
  - Choice of OS: Windows, Linux, Unix, zLinux
  - Choice of DB: DB2, Informix, Cloudscape, MS SQL Server, Oracle
- **Built on & supports latest open standards**
  - JSR 168, WSRP, Struts, JSFs, JAAS (industry security standard)
- **Support for Multiple Client Devices**
- **Clear Roadmap & Backwards Compatibility**



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- **WebSphere Portal:**
  - Leaders quadrant in Gartner Magic Quadrant
  - IDC: #1 share in 2004 portal revenue
  - Gartner: #1 share in 2004 portal new license revenue
  - 4000 customers
  - Double-digit growth in customer base in 2005

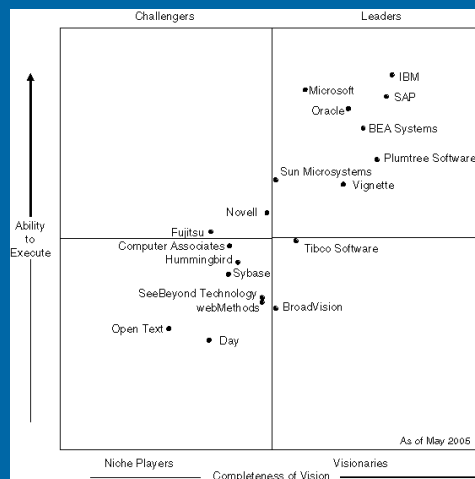
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**Magic Quadrant for Horizontal Portal Products, 2005**

May 18 2005

Gene Phiher, Ray Valdes, David Gootzit,  
Kim Underwood, Laurie Wurster

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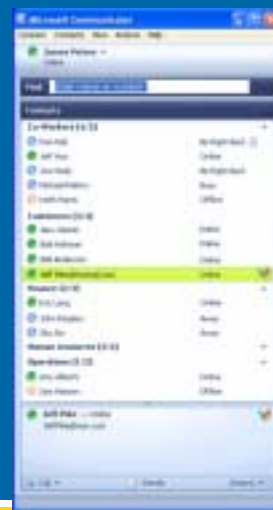
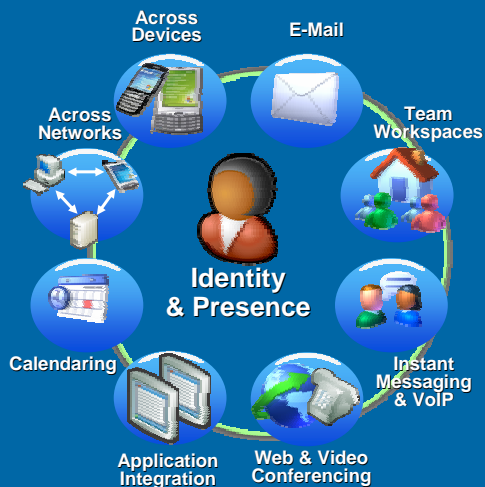


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## Microsoft's "Integrated Communications" Strategy



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## Want a Full Microsoft Solution for Real-Time Communications?



### Make sure you have:

- ✓ Office Live Communications Server 2005
- ✓ Office Communicator
- ✓ Windows XP
- ✓ Windows Server
- ✓ SQL Server
- ✓ Active Directory (with required updates)
- ✓ Office 2003 SP2
- ✓ Outlook 2003
- ✓ Exchange
- ✓ SharePoint Portal Server
- ✓ ... and a subscription to Office Live Meeting

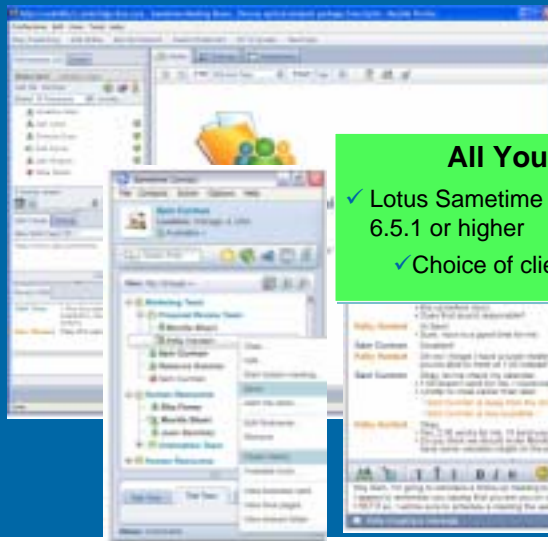


Lotusphere

Lotus Software

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## Want a Full IBM Solution for Real-Time Communications?



### All You Need Is:

- ✓ Lotus Sametime & Notes/Domino 6.5.1 or higher
- ✓ Choice of client, server, directory

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Lotus Software

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## Lotus Sametime

- #1 in on-premise Web conferencing
- Almost 16M users (in addition to Notes users)
  - 27 out of the current **Fortune Global 50** use Sametime
  - 8 of 10 of the top **banks** in the world have Sametime
  - 8 of 10 of the top **Pharma companies** in the world have Sametime
  - 3 of the 4 **most profitable companies** in the world use Sametime
  - 25 companies have implementations of over 100k seats

## Office 12: What's the Deal?

- To be released end of 2006... so they say
- “Radical shift” in UI for both Office 12 & Windows
  - Eliminates menus & taskbars, provides “tabs”
  - Vista enhancements will include improved graphics support, changes to Windows menus & Explorer interface
- Microsoft says it's revolutionary... but really just catching up:
  - Offline Sharepoint document libraries
  - RTC Toolkit – APIs to extend presence into applications
  - OpenXML
- Reason to upgrade?
  - In 3 years almost half of Office base still not on Office 2003
  - New UI will complicate migrations
  - Tight integration with Vista

## Workplace Managed Client 2.6

- **Provides integrated, roles-based front end to managed computing environment**
- **Choice & Flexibility:**
  - Linux, Windows & Mac (upcoming)
  - Leverages key standards & open source & open communities: ODF, OSGI, Java, Eclipse, J2EE, XML, SyncML,...
- **Provides integrated set of collaboration applications**
  - Workplace Document Manager, Workplace Messaging, IM & Presence, Activity Explorer, embedded browser...
  - Provides richness and power of client software – i.e. drag-n-drop
  - Supports disconnected mode: offline services, data store, & synchronization
  - Built in productivity components: Spreadsheet, Word processing, Presentation, Project Plan
- **Lowers TCO by delivering & managing applications through server-managed clients**
  - Reduces IT costs due to "no touch" server-managed delivery/deployment/update of rich client applications
  - Provision user capabilities by role, policy & need – "on demand"
  - Built in Data Management & Security
- **Extensible client platform for:**
  - Custom applications by IBM Customers & Partners & Developers
  - Integration of existing Portal, Web, Java, .Net and Notes Application



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## Summary and resources

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## Key takeaway points

- IBM Lotus continues to offer best-in-class messaging, collaboration, productivity solutions
- This week's IBM announcements further IBM's technology lead and provide additional business value, on top of what is already in-market today
- Microsoft wants to "pluck" you, and is having to spend a lot of money to convince partners and customers that there's any reason to be "plucked"
- Analysts say that there's no solid business reason to migrate away from Notes, that there's no replacement technology
- You are not alone in fighting this fight – use resources such as references, weblogs, user groups



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## Resources

- "Collaboration in an On Demand World. Why IBM collaboration solutions are superior to Microsoft"
  - 1 PM to 3 PM
  - Dolphin, Europe 5
  - Produced by IBM Software Group Competitive Project Office
- BoF – Liberate your 2006 budget – Best practices in negotiating Microsoft enterprise agreements
  - 7 AM, Thursday
  - Swan – Macau



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