Subject: conversation with Allen Loren
Date: Thu, 30 Jan 1997 17:38:03 -0500
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Organization: Netscape Field Systems Engineering
To: mikeh, jimb
CC: fredg, lynne, wackerma, kevinf, todd

Mike and Jim:
Last night and today, assisting Lynne Smith in Dallas with a high level
meeting between SABRE (AMR) and AMEX, i had occasion to have a bit of a
conversation with Allen Loren, who Mike used to work for at Apple, and
who is now a CIO of AMEX TRS. I was attending a dinner last night before
today's meeting of presos and so on.

He indicated that he had spoken to Jim during a recent NY visit and that
he hadn't gotten enough of a chance to talk with you at that time. I had
been briefed that he can be a bit prickly asking tough questions, and
has a very good bullshit detector, so I had gone over and introduced
myself in order see just what was in store for me. We talked about apple
and NeXT, and Novell and CA and a bunch of other things when he said,
"You know your company has a difficult time in front of you." So I asked
him to characterize what he saw. The long and the short of it is his
concern that in moving from an Internet focus to Intranets, we don't
have the maturity as a company to make an individual like him, as a big
CIO, comfortable that we can discharge large solutions to his large
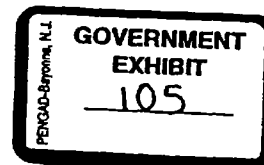problems.

He thinks we need to closely ally ourselves with one of more large
consulting firms (and he mentioned Anderson, et al) and get a real
partnership going. "You can't build a consulting organization fast
enough" and even if we did, all the effort would distract us from
Microsoft. I told him of our plans to enlist 3rd parties as well as
assemble a modest Prof Svc force, and he dismissed that with a wave.
"You need to be bought." Stymied, I thought. So, I asked him about his
deal with Microsoft.

"We went with Microsoft not because of their technology, because yours
is better, but because they could be a better distribution channel for
me. I can put my stuff on every copy of Windows95 or 97 or whatever." He
feels that the embedding of Inet stuff into OS leaves us behind and
limp. As for distribution, I pointed out 50 million customers and 120
million hits per day, but he seemed to feel the Win97 strategy was a
fait d'accompli and that "any day now, Microsoft with eat your lunch".
It brought to my mind Hitler saying he would wring England's neck like a
chicken and Churchill saying "Some Chicken, Some Neck!" (but then, I am
a partisan.) I went on about cross platform and so on...

Anyway, if either if you have a chance to speak with Loren, I feel he
has more to say and perhaps some of it might help our thinking. He wants
us to survive, he said that much, and he likes our stuff. I thought you
two should be briefed on it in case you come across him.

cheers from the trenches,
Kristofer

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