

MEMORANDUM

To: Dennis Paboojian

cc: Julie Holding - 234 Jeff Rulifson - 217 Emil Wang - 204

From: Rich Zalisk

Date: October 18, 1984

Subject: MPD Q1 FY85 MBO Review

Attached are copies of MPD's original objectives for Ql and a review of our Ql performance for your review prior to our October 19th session.

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MESSAGING PRODUCTS DIVISION **Objectives** FY85

- Growth and Profit: Contribute to the achievement of the BCG objectives for revenue growth and profitability, by providing a high level of support for PhoneMail, as well as following through with the introduction and support for both PhoneMail II and Text applications in FY85.
- Sales Plans: Meet the FY85 sales plan milestones. Become the dominant vendor in integrated voice messaging by achieving the penetration objectives defined in our sales plan. Provide a high level of field support for PhoneMail sales, with specific emphasis on supporting the trained specialists in the field organization, and providing the training so that PhoneMail is presented correctly to customers.
- Customer Satisfaction: Monitor the customer satisfaction of PhoneMail customers and provide a high level of field support to ensure that all of the Division's customers are satisfied with their installation. Meet all customer commitments.
- PhoneMail II: Meet our product development milestones in accordance with the Definition in terms of content, schedule, cost, reliability and other key product objectives; ensure a well-supported release of this product to the field.
- 5. Business Plans: Prepare an integrated business plan for the Division that will provide the direction for an integrated, prioritized product plan, consistent with our financial objectives. Be prepared for the integration of this business plan with the other SDG Divisions by November, 1984.
- 6. Text Applications: Meet our product development milestones as defined in the May 3, 1984 review in terms of content, schedule, cost, reliability and other key project objectives; ensure a well-supported release of this product to the field.
 - 7. Integration: Work to resolve systems issues that become visible as a result of the products defined and developed in the Division; he a focal point for SDG for defining and implementing the strategy for integration of voice/text messaging with CBXs and desktop devices.
 - 8. Organization: Complete the organizational structuring of the Division; fill key positions consistent with our targets. Define clear charters, objectives, and responsibilities to ensure timely implementation of our business plan.
 - People Development: Focus on people development programs that will ensure that we can fill a larger percentage of our management and individual contributor requirements internally.
 - 10. Great Place to Work: Ensure that we continue to have a GPW environment that helps us to attract, hire, motivate, and develop outstanding people to contribute to the goals of the Systems Development Group.

BUSINESS BASICS

BUSINESS

STRATEGY

PEOPLE

MPD Marketing Objectives

- <u>Sales Plan</u>: Achieve sales plan projections. Execute PhoneMail sales plan action items. In particular, develop OA specialist training modules and a PhoneMail trial program.
- <u>Sales Support:</u> Monitor and assess PhoneMail performance in the field. Where appropriate recommend and execute activities to resolve any outstanding problems. In particular, review Ql and Q2 results and recommend revisions to sales plan action items by January 15.
- 3. <u>Product Launch</u>: Develop and execute launch plans for PhoneMail Release II and text applications. In doing so, ensure consistency of product message and position, end user training, and sales support. In particular, better communicate the text applications positioning to the organization and ultimately to the field.
- 4. <u>Customer Marketing:</u> Ensure that Customer Marketing's role is understood and useful to the field. In particular, Customer Marketing should identify, evaluate, and resolve problems impacting the field's ability to sell or customer's ability to use MPD products.
- 5. <u>Marketing Leadership</u>: Have the marketplace perceive ROLM as a leader in messaging products in general and voice messaging in particular. In doing so, focus primarily on how ROLM products solve common business problems better than existing solutions. Identify and kickoff those projects that will be necessary to maintain and build PhoneMail's position in the marketplace.
- <u>Business Plan:</u> Develop an integrated messaging business plan. In particular, marketing focus should include customer migration path and fit into the sales process.
- <u>ROLMphone Messaging:</u> Get ROLMphone messaging defined and back on schedule. In particular, ensure that ROLMphone messaging's position is understood and accepted in the organization.
- <u>Integration</u>: Define a few key integrated features to be kicked-off in FY°85 that demonstrate ROLM's ability to provide useful, system solutions to common business problems. In addition, develop a road map for future integrated features.
- 9. <u>People Development:</u> Have product managers assume a leadership role on project teams. In particular, product managers should ensure that projects have clearly defined goals that are understood by the corporation and track projects on their schedules.

- <u>PhoneMail:</u> Respond in a timely, high-priority fashion to reported problems in the field and at ROLM. Monitor CBX releases for continued support of PhoneMail functionality.
- <u>PhoneMail II:</u> Meet the development milestones and meet PhoneMail Local Networking FSD in March, 1985. Start ROLM Trial of Long Distance Networking in May, 1985. Continue to improve product functionality and work with Product Support to improve product RAM.
- <u>Text Applications:</u> Meet the May 3, 1984 milestones. Specifically: Field Trial TextMail in December, 1984; Field Trial FileMail in February, 1985; Field Trial NetMail in June, 1985. Field Trial TextMail-PhoneMail integration in April, 1985.
- <u>Cost-Reduced PhoneMail</u>: Implement a phased plan for the continued cost reduction of PhoneMail. Reduce the cost 10% and reduce the footprint by July, 1985.
- <u>PhoneMail/NCS:</u> Support marketing in launching the product. Develop a mechanism to provide message-waiting indication on non-CBX systems.
- <u>TMMS</u>: Ensure successful trials; provide quick responses to reported problems in the field and at ROLM.
- <u>Business Plan:</u> Contribute technical leadership in preparing and communicating the Business Plan. Ensure that the plan will identify product areas in which ROLM can offer unique value-added market contributions.
- 8. <u>Integration:</u> Improve CBX release coordination with MPD products. Improve SECO turnaround. Develop a technical framework, consistent with the Business Plan, for the integration of voice-text messaging products and desktop devices. In particular, kickoff and define a select set of key device-application features.
- 9. <u>People Development:</u> Make people development a routine and regular process. Ensure that it clarifies job performance expectations and improves milestone achievement. Raise the effectiveness, productivity, communication skills and documentation skills of engineers without stifling creativity.
- <u>Great Place to Work:</u> Improve the development environment and provide better software and testing tools. Provide challenging and rewarding tasks. Encourage people to stretch but make sure they are successful.

MPD Product Support Objectives

- <u>Communications:</u> Facilitate increased communications with customers, field support personnel, other Product Support groups, specifically ROCO Customer Support and BCG Customer Support, in order to provide a high level of support for PhoneMail and other Messaging Products. Define and implement precedures for these and other support groups to provide ongoing feedback to Engineering about MPD products.
- <u>Customer Satisfaction</u>: Implement our strategy of coordinating customer support across vendors (ROLM and IBM) for Text Applications and TMMS, in order to ensure customer satisfaction with ROLM's products. Obtain information from the Customer Support groups which will enable us to evaluate and monitor the level of support being provided for our products.
- 3. <u>Training and Publications:</u> In order to ensure the successful introduction of Text Applications Products, PhoneMail 2.0 and TMMS, coordinate the design and development of the technical training and publications for these products so that they are concise, modular, accurate and easy to update. Review all existing PhoneMail publication and revise them for Release 2.0 changes into the PhoneMail training classes.
- 4. <u>Product Trials</u>: Develop, publish and implement phased ROLM Trial and Field Trial plans for PhoneMail 2.0, Text Application and TMMS to assure that ROLM trials provide for thorough testing of product specifications and proper integration with 8000 and 9000 software.
- <u>RAM Guidelines</u>: Work with CSD Product Support to develop RAM guidelines which state the purpose of RAM throughout the design and development of a product. Apply these guidelines as appropriate in MPD Product Support and develop strategy for ensuring RAM during integration with CBX.
- 6. Organization: Use RAM guidelines to develop an organizational charter by end of Q2 FY85. Define Product Support responsibilities to ensure accountability, smooth transition across group boundaries, and to eliminate duplication of effort. Plan for adequate staffing levels based on on-going and future project requirements, consistent with the Business Plan and Division targets.
- 7. <u>People Development:</u> Develop a comprehensive training plan for new PSE's so that they make a positive contribution within 60 days of hire. Plan career opportunities within Product Support and ROLM. Appropriately apply the model used by Engineering to develop a set of personal performance guidelines by which all Product Support group members can be evaluated.
- <u>Great Place to Work:</u> Continue to identify and hire skilled and motivated individuals who will contribute to the goals of the Division, SDG, and ROLM.

MESSAGING PRODUCTS DIVISION

08JECTIVES - FY85 01 85 Review

	Objective		Q1 Accompliahments		O1 Deficiencies	MBD	01 Rating
1.	Growth & Profit	o	250% growth over FY84.	0	30% of plan		2
		0	Pass through operating margins >20%.				
		٥	30% market share.				
		0	Responsive field support.				
2.	Sales Plans	o	Responsive field support.	0	30% of plan		D
		٥	High quality specialist training.	0	Low market visibility		
			training.	٥	Low sales activity		
з.	Customer Satisfaction	0	Customers reasonably satisfied.	0	Low visibility into customer satisfaction.		1
				0	Customers are not <u>very</u> satisfied.		
4.	PhoneMail II	٥	On schedule for PhoneMail II.	0	Low expectation of timely follow-thru to FSD.		2
				٥	Lack of control over non-MPD resources.		
5.	Business Plan	٥	Business Plan completed.	0	Plan not integrated.		4
6.	Text Applications	o	On schedule for Text.	٥	Lack of firm definition.		2
				o	Low expectation of timely fallow-thru to FSD.		
				a	Lack of control over non-MPD resources.		
7.	Integration	٥	None.	0	Unable to influence other Divisions/priorities.		0
8.	Organization	o	Objectives/responsibilities clear.	٥	Key jobs not filled.		1
				0	Charters not clear.		
9.	People Development	٥	Participated in SDG classes.	0	Little demonstrable		1
		0	Some MPD-Engineering classes.		progress.		
10.	Great Place to Work	0	Terrific people.	0	Morale slipping due to lack of resource resolu- tion and under target sales performance.		3
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	Overall MPD	٥	Substantial progress on business strategy.	o	Did not achieve financial or customer satisfaction goals.		1.6 rginally ceptable
		0		4		HU	capedora
			action items.	٥	Anticipate not achieving product introduction goals due to non-MPD resources.		

MPD Marketing Objectives

Q185 Review

- <u>Sales Plan</u>: Sales are currently 30% of target, unacceptably low. Trained 22 OÅ marketing managers. Developed training guides and vertical market guides for them. A trial program was developed and introduced, but is not yet possible to implement. A special RCC leasing plan for Phonemail was developed and introduced.
- Sales Support: OA marketing manager performance beginning to be reported. Initial data analysis, eg, proposal activity, trial activity, published. First pass promotion and MarCom activity completed. Intend to have revisions to sales plan prior to January 1.
- 3. <u>Product Launch</u>: Launch plans delayed pending product schedule reviews due to 295/Tandem impact. Phonemail II design phase checkpoint held. Rolm trial plans for Phonemail II developed, but currently being modified to account for resource reductions. 9003/Phonemail released. Streamer tape released to manufacturing. TMMS stress test and Rolm trial succesfully completed. TMMS field trial bogged down due to contract disputes.
- 4. <u>Customer Marketing</u>: Two customer testimonial videotapes made and distributed. One customer application story printed in Computerworld. Customer data base being created. Customer satisfaction survey conducted, results tabulated and presented. So far unable to develop and implement plan to achieve sales objective.
- 5. <u>Market Leadership</u>: Market has little or no awareness of Phonemail as market leader. More aggressive market position stance presented to Probe, Yankee Group, and Rothschild conference. New ad created and currently running in Business Week, Computerworld, etc. Local advertising blitz underway in Dallas local market. So far unable to develop and implement plan to increase market awareness.
- <u>Business Plan</u>: MPD Business Plan completed and partially distributed. In addition a white paper on the positioning of the text applications was published and distributed.
- <u>Rolmphone Messaging</u>: Unable to demonstrate progress towards achieving objective.
- <u>Integration</u>: Greater integration between Phonemail and PCmail identified and initial work begun. Proposal for integration with IBM host products created and presented to IBM management. Have made great progress in understanding overall integration strategy.
- <u>People Development</u>: Unable to demonstrate progress towards achieving objective.

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Q1 MBO Rating

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MPD Engineering Objectives

Q1 85 Review

- 2 1. PhoneMail: Responded adequately to all field reported problems. 2 PhoneMail II: On schedule. Local networking ROLM Trial plan 2. completed. Implementation in jeopardy due to Telecom Ops resources. Long Distance Networking moved to 1/86 due to new CBX priorities. Revised error log to improve product maintainability. Improved diagnostics. 2 3. Text Applications: Met 9/17 demo milestone. Accelerated File Mail schedule by 2 months to coincide with TextMail and project is tracking well to new schedule. Shifted primary focus from TextMail to File Mail. Based on Review, chose to extend File Mail features. Impact of redefinition and non-MPD resources yet to be determined. 1 Cost Reduced PhoneMail: Have prototype 19" cabinet; cooling and EMI 4. done. Lost mechanical resources. On hold. Objective will not be met. 2 5. Stand Alone PhoneMail: POR and configuration support completed. Marketing plan not done. 1 6. TMMS: Completed stress test and ROLM trial; successful as stand
- alone application; needed better trial coordination with PhoneMail. Marketing plan proposed but not final.
- <u>Business Plan</u>: Completed Business Plan; in addition published PC Mail White Paper.
- 8. <u>Integration</u>: Good CBX coordination on driver and test SW for AP-AP code on 9004 and 8000 SW for VCC. Nothing on SECOs. Business Plan for Voice-text integration complete. Developed technical strategy for host integration. Timely integration of messaging products apparently not a CBX priority.
- <u>People Development</u>: Started more rigorous code reviews; raised documentation standards; prepared job responsibility guides and held workshops with Group Managers; held presentation style workshops.
- 10. Great Place to Work: Improved S/l tools by bringing in ACS. Got Logic Analyzer for Diagnostics Group. Reorganized Text Applications responsibilities to use management skills better. Without more resources: pulled up File Mail schedule, started DTMF project, did RS232 patch panel project, implemented 24 hr shifts for PC Mail debug.

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MPD Product Support Objectives Q1 85 Review

- 1. <u>Communication</u>: Have not yet developed and implemented procedures to substantially improve communication with the customer and the field, although have been successful in facilitating quality communications through all support organizations in several specific instances. Have not planned or implemented specific procedures for providing ongoing feedback from the field.
- <u>Customer Satisfaction</u>: Have not yet been able to implement plans to improve PhoneMail reliability, and therefore, customer satisfaction. Too soon to implement multi-vendor (ROLM and IBM) support procedures necessary for customer satisfaction of text products. Participation in PhoneMail Customer Survey, but analysis by Product Support and future planning required.
- Training and Publications: Performing all tasks mentioned in objective on an ongoing basis. Little success in obtaining satisfactory results from Tech Pubs for TMMS.
- 4. <u>Product Trials</u>: ROLM Trial Plans developed for PhoneMail 2.0, TMMS and PC Mail, and implemented for TMMS. Stress test planned and implemented for TMMS. Field Trial Plan developed currently being implemented for TMMS. PhoneMail 2.0 regression test plan being developed. Implementation of new plans in jeopardy due to Telecom Ops resources.
- <u>RAM Guidelines</u>: Intend to rely heavily on CSD RAM guideline development effort, but we have not actively participated yet. Implementation of new guidelines not yet possible.
- 6. <u>Organization</u>: Organizational charter still required by end of Q2 FY 85. Have been successful in specific day-to-day activities in ensuring accountability, smooth transition and keeping down duplication of effort between support groups.
- 7. <u>People Development</u>: Participating on task force to develop training plan and procedures for MPD PSE's. No effort has yet been put into developing performance guidelines for PSE evaluation.
- 8. Great Place to Work: No change in last quarter.

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Q2 85 Review -- Proposal

- 3. <u>Text Applications</u>: Clear, concise, product definition well communicated both inside and outside the Division. 5/3 system in Engineering Trial. Extensions to 5/3 system unit tested. PhoneMail integration implementation underway. Documentation received praise from outside groups. Computer Services, Technical Documentation, and End User Documentation made our priorities their priorities.
- <u>THMS</u>: Engineering problems solved. Field Trial successful. Marketing plan accepted and implemented.
- 7. <u>Business Plan</u>: Revised project list. Clarified project definitions. Revised project implementation schedule.
- <u>Integration</u>: PCmail in 9004 and 8003. QSIO fixed. White paper on PhoneMail-PCmail integration published. System Administration inter-divisional plan published. Divisional networking strategy published. Desktop device strategy published.
- <u>People Development</u>: Management Guide published. Office Procedure Guide published. Performance appraisal workshop held. Code reviews formalized and used more widely. Design reviews formalized and used more widely. Laboratory Notebook practice initiated.
- Great Place to Work: S/1 Lab in order. DX problems resolved. Bi-weekly exceptional recognition started. Lunch program for improved Section communication started. Inter-Section design review program for better communication started. Celebrations for stress test completion and engineering trail completion held.

ROLM	Corporation	
MEMOR	RANDUM	
TO:	Wing Cheng Jan Janik Sameer Jayakar Gary Maxey Fran Morphy	217 217 217 217 217 217
FROM:	Jeff Rulifson	R
DATE:	October 23, 1984	

SUBJECT Q2 85 Objectives

Attached is the proposal for the accomplishments for Q2 85 that we drafted at the off site on Monday, 10/22.

Please work together to assure that a single group manager is responsible for each accomplishment. E.g., one individual may be responsible for code reviews and another individual may be responsible for design reviews.

Prepare two charts in the same format that we used last quarter. One that shows October, November, and December. (Even though October is over, keep the format the same.) And another that shows the weeks for November. Use the same format, printer, type face, spacing, etc. that was used last time.

Please have them ready for review on Monday 11/5.

COPY.



MEMORANDUM

TO Objectives Notebook

COPY:

FROM Jeff Rulifson

DATE: October 18, 1984

SUBJECT: Ideas for 2085 Objectives

Our goal should be to achieve a 4, Excellent, for the Laboratory on the next rating. To do this our performance must exceed the objective.

Not all the of the Engineering Laboratory objectives apply to the Text Applications Section. Only four have direct application: Business Plans, Text Applications, Integration, People Development, and Great Place to Work.

1. Business Plans

We could exceed the objective by keeping the plan current, revising parts such as the project list, adding to the clarity of the plan, and working to have the plan accepted by the other divisions even though there will not be a formal integration process.

Make the definitions clear. Revise the project list. Make the Floppy Demonstration reflect the extensions. Assure that marketing plans are in place and final. Put the Customer Evaluation Program on track.

2. Text Applications

Exceeding the objective will be difficult because we no longer intend to accomplish the first part -- to Field Trial TextMail in December. Under our current plans we will not meet the second part of the objective -- to Field Trail FileMail, as defined on 5/3/84, in February.

We should remove the deficiencies: lack of firm definition, low expectation of follow-through to FSD, and lack of control over non-MPD resources. Then, with the extended system, we must exceed expectations for quality, organization, follow-through, etc. If we come in one month late with the extended system and it sets an example in ROLM we should claim a rating of 4 anyway. Ideas for 2Q85 Objectives - 2 - October 18, 1984

Make the definitions clear. Prepare a presentation. Make all our documentation, including system administration, exceed ROLM standards. Have it all on the VM, in a unified format, indexed, printed, distributed, up to date, etc. Complete a successful stress test. Plan the Engineering Trials. Have the Technical Documentation ready. Have the Technical Training ready. Have the End User Documentation ready. Have the System Administration Documentation ready. Revise the ROLM Trail plans, assure other organizations are ready to implement them. Revise the ROLM-IBM support guide. Assure the Test and Integration Laboratory is well organized and fully operational.

3. Integration

Even though working with other groups is not a part of the Engineering Objective as written, R. Zalisk includes it. Thus, working with Computer Services and Writing will influence the rating here. Many of these points are covered in other objectives.

Put PhoneMail-PCmail integration of track. Develop plans with Desktop Devices. Elaborate on the Business Plan and make the integrated plan consistent. Have solid, clear communications with 8000 and 9000. Make our priorities their priorities.

3. People Development

As with the Integration objective, the Division Objective is larger than the Engineering Objective, but we will be judged on the larger objective. Thus, we must show positive progress that we have ensured that we can fill a larger percentage of our management requirements internally.

Publish Management Guide. Publish draft Writing Guide. Publish Office procedures. Do timely reviews and reports. Hold workshops: Management Guide, Writing Guide, Writing Performance Appraisals, Presentation Style. Formalize code review process. Start more rigorous design reviews. Identify potential Group Managers and, because the SDG program seems to make little progress, start our own program.

4. Great Place to Work

Development Environment improvements. Task assignment workshops or review sessions. Ideas for 2Q85 Objectives

October 18, 1984

More hopla. Regular MBO reviews to help managers be successful. Recognition of individual achievement.

Because we will receive a Laboratory rating and not individual Section ratings, and because we are a coherent team working toward Division goals, we should also help the Voice Section achieve their objectives.

We may be able to help most on the deficiencies called out in the rating: low expectation of follow-through to FSD and lack of control over non-MDP resources. Beyond those items, we can help a lot with PhoneMail III: definitions, plans, schedules, etc.

And finally, because we will receive a Division rating, I believe we should help Product Support. I suggest that each Engineering Section appoint a Group Manager to work with Product Support to help them work through a similar process and achieve a better rating next quarter. RUM Corp

Corporation

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cc: Julie Holding - 234 Jeff Rulifson - 217 Emil Wang - 204

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RZ:rt attachment



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- <u>Cost-Reduced PhoneMail:</u> Implement a phased plan for the continued cost reduction of PhoneMail. Reduce the cost 10% and reduce the footprint by July, 1985.
- <u>PhoneMail/NCS</u>: Support marketing in launching the product. Develop a mechanism to provide message-waiting indication on non-CBX systems.
- <u>TMMS</u>: Ensure successful trials; provide quick responses to reported problems in the field and at ROLM.
- <u>Business Plan:</u> Contribute technical leadership in preparing and communicating the Business Plan. Ensure that the plan will identify product areas in which ROLM can offer unique value-added market contributions.
- <u>Integration:</u> Improve CBX release coordination with MPD products. Improve SECO turnaround. Develop a technical framework, consistent with the Business Plan, for the integration of voice-text messaging products and desktop devices. In particular, kickoff and define a select set of key device-application features.
- 9. <u>People Development:</u> Make people development a routine and regular process. Ensure that it clarifies job performance expectations and improves milestone achievement. Raise the effectiveness, productivity, communication skills and documentation skills of engineers without stifling creativity.
- Great Place to Work: Improve the development environment and provide better software and testing tools. Provide challenging and rewarding tasks. Encourage people to stretch but make sure they are successful.

MPD Product Support Objectives

- 1. <u>Communications:</u> Facilitate increased communications with customers, field support personnel, other Product Support groups, specifically ROCO Customer Support and BCG Customer Support, in order to provide a high level of support for PhoneMail and other Messaging Products. Define and implement precedures for these and other support groups to provide ongoing feedback to Engineering about MPD products.
- 2. <u>Customer Satisfaction:</u> Implement our strategy of coordinating customer support across vendors (ROLM and IBM) for Text Applications and TMMS, in order to ensure customer satisfaction with ROLM's products. Obtain information from the Customer Support groups which will enable us to evaluate and monitor the level of support being provided for our products.
- 3. <u>Training and Publications</u>: In order to ensure the successful introduction of Text Applications Products, PhoneMail 2.0 and TMMS, coordinate the design and development of the technical training and publications for these products so that they are concise, modular, accurate and easy to update. Review all existing PhoneMail publication and revise them for Release 2.0 changes into the PhoneMail training classes.
- 4. <u>Product Trials:</u> Develop, publish and implement phased ROLM Trial and Field Trial plans for PhoneMail 2.0, Text Application and TMMS to assure that ROLM trials provide for thorough testing of product specifications and proper integration with 8000 and 9000 software.
- 5. <u>RAM Guidelines</u>: Work with CSD Product Support to develop RAM guidelines which state the purpose of RAM throughout the design and development of a product. Apply these guidelines as appropriate in MPD Product Support and develop strategy for ensuring RAM during integration with CBX.
- 6. Organization: Use RAM guidelines to develop an organizational charter by end of Q2 FY85. Define Product Support responsibilities to ensure accountability, smooth transition across group boundaries, and to eliminate duplication of effort. Plan for adequate staffing levels based on on-going and future project requirements, consistent with the Business Plan and Division targets.
- 7. <u>People Development:</u> Develop a comprehensive training plan for new PSE's so that they make a positive contribution within 60 days of hire. Plan career opportunities within Product Support and ROLM. Appropriately apply the model used by Engineering to develop a set of personal performance guidelines by which all Product Support group members can be evaluated.
- <u>Great Place to Work:</u> Continue to identify and hire skilled and motivated individuals who will contribute to the goals of the Division, SDG, and ROLM.

MESSAGING PRODUCTS DIVISION

OBJECTIVES - FY85

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		Objective		Q1 Accomplishments		Q1 Deficiencies	01 MBO Rating
	1.	Growth & Profit	0	A DESCRIPTION OF THE REAL PROPERTY OF	0		2
	1	ACTION A CONTRACTOR	0	Pass through operating margins >20%.			
				30% market share.			
			o	Responsive field support.			
	2.	<u>Sales Plans</u>	0	Responsive field support.	o	30% of plan	ö
			a	High quality specialist training.	0	Low market visibility	
					o	Low sales activity	
	з.	<u>Customer Satisfaction</u>	٥	Customers reasonably satisfied.	٥	Low visibility into customer satisfaction.	1
					o	Customers are not <u>very</u> satisfied.	
	4.	PhoneMail II	٥	On schedule for PhoneMail II.	0	Low expectation of timely follow-thru to FSD.	2
					٥	Lack of control over non-MPD resources.	
	5.	Business Plan	o	Business Plan completed.	0	Plan not integrated.	4
	6.	Text Applications	o	On schedule for Text.	٥	Lack of firm definition.	2
					o	Low expectation of timely follow-thru to FSD.	
					0	Lack of control over non-MPD resources.	
	7.	Integration	0	None.	٥	Unable to influence other Divisions/priorities.	D
	8.	<u>Organization</u>	o	Objectives/responsibilities clear.	٥	Key jobs not filled.	1
					٥	Charters not clear.	
	9.	Paople Development	0	Participated in SDG classes.	٥	Little demonstrable	1
			o	Some MPD-Engineering classes.		progress.	
	10.	<u>Great Place to Work</u>	o	Terrific people.	0	Morale slipping due to lack of resource resolu- tion and under target sales performance.	3
					÷÷		
		Overall MPD	٥	Substantial progress on business strategy.	0	Did not achieve financial or customer satisfaction goals,	1.6 Marginally Acceptable
				Good follow-through on MPD action itema.			vecebcapre
					0	Anticipate not achieving product introduction goals due to non-MPD resources.	

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MPD Marketing Objectives

Q185 Review

- <u>Sales Plan</u>: Sales are currently 30% of target, unacceptably low. Trained 22 0Å marketing managers. Developed training guides and vertical market guides for them. A trial program was developed and introduced, but is not yet possible to implement. A special RCC leasing plan for Phonemail was developed and introduced.
- <u>Sales Support</u>: OA marketing manager performance beginning to be reported. Initial data analysis, eg, proposal activity, trial activity, published. First pass promotion and MarCom activity completed. Intend to have revisions to sales plan prior to January 1.
- 3. <u>Product Launch</u>: Launch plans delayed pending product schedule reviews due to 295/Tandem impact. Phonemail II design phase checkpoint held. Rolm trial plans for Phonemail II developed, but currently being modified to account for resource reductions. 9003/Phonemail released. Streamer tape released to manufacturing. TMMS stress test and Rolm trial succesfully completed. TMMS field trial bogged down due to contract disputes.
- 4. <u>Customer Marketing</u>: Two customer testimonial videotapes made and distributed. One customer application story printed in Computerworld. Customer data base being created. Customer satisfaction survey conducted, results tabulated and presented. So far unable to develop and implement plan to achieve sales objective.
 - 5. <u>Market Leadership</u>: Market has little or no awareness of Phonemail as market leader. More aggressive market position stance presented to Probe, Yankee Group, and Rothschild conference. New ad created and currently running in Business Week, Computerworld, etc. Local advertising blitz underway in Dallas local market. So far unable to develop and implement plan to increase market awareness.
 - <u>Business Plan</u>: MPD Business Plan completed and partially distributed. In addition a white paper on the positioning of the text applications was published and distributed.
 - <u>Rolmphone Messaging</u>: Unable to demonstrate progress towards achieving objective.
 - <u>Integration</u>: Greater integration between Phonemail and PCmail identified and initial work begun. Proposal for integration with IBM host products created and presented to IBM management. Have made great progress in understanding overall integration strategy.
 - <u>People Development</u>: Unable to demonstrate progress towards achieving objective.

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Q1 MBO Rating

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MPD Engineering Objectives

Q1 85 Review

- 1. PhoneMail: Responded adequately to all field reported problems.
- <u>PhoneMail II</u>: On schedule. Local networking ROLM Trial plan completed. Implementation in jeopardy due to Telecom Ops resources. Long Distance Networking moved to 1/86 due to new CBX priorities. Revised error log to improve product maintainability. Improved diagnostics.
- 3. <u>Text Applications</u>: Met 9/17 demo milestone. Accelerated File Mail schedule by 2 months to coincide with TextMail and project is tracking well to new schedule. Shifted primary focus from TextMail to File Mail. Based on Review, chose to extend File Mail features. Impact of redefinition and non-MPD resources yet to be determined.
- <u>Cost Reduced PhoneMail</u>: Have prototype 19" cabinet; cooling and EMI done. Lost mechanical resources. On hold. Objective will not be met.
- <u>Stand Alone PhoneMail</u>: POR and configuration support completed. Marketing plan not done.
- <u>TMMS</u>: Completed stress test and ROLM trial; successful as stand alone application; needed better trial coordination with PhoneMail. Marketing plan proposed but not final.
- <u>Business Plan</u>: Completed Business Plan; in addition published PC Mail White Paper.
- 8. <u>Integration</u>: Good CBX coordination on driver and test SW for AP-AP code on 9004 and 8000 SW for VCC. Nothing on SECOs. Business Plan for Voice-text integration complete. Developed technical strategy for host integration. Timely integration of messaging products apparently not a CBX priority.
- <u>People Development</u>: Started more rigorous code reviews; raised documentation standards; prepared job responsibility guides and held workshops with Group Managers; held presentation style workshops.
 - 10. <u>Great Place to Work</u>: Improved S/1 tools by bringing in ACS. Got Logic Analyzer for Diagnostics Group. Reorganized Text Applications responsibilities to use management skills better. Without more resources: pulled up File Mail schedule, started DTMF project, did RS232 patch panel project, implemented 24 hr shifts for PC Mail debug.

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MPD Product Support Objectives Q1 85 Review

- 1. <u>Communication</u>: Have not yet developed and implemented procedures to substantially improve communication with the customer and the field, although have been successful in facilitating quality communications through all support organizations in several specific instances. Have not planned or implemented specific procedures for providing ongoing feedback from the field.
- <u>Customer Satisfaction</u>: Have not yet been able to implement plans to improve PhoneMail reliability, and therefore, customer satisfaction. Too soon to implement multi-vendor (ROLM and IBM) support procedures necessary for customer satisfaction of text products. Participation in PhoneMail Customer Survey, but analysis by Product Support and future planning required.
- Training and Publications: Performing all tasks mentioned in objective on an ongoing basis. Little success in obtaining satisfactory results from Tech Pubs for TMMS.
- 4. <u>Product Trials</u>: ROLM Trial Plans developed for PhoneMail 2.0, TMMS and PC Mail, and implemented for TMMS. Stress test planned and implemented for TMMS. Field Trial Plan developed currently being implemented for TMMS. PhoneMail 2.0 regression test plan being developed. Implementation of new plans in jeopardy due to Telecom Ops resources.
- <u>RAM Guidelines</u>: Intend to rely heavily on CSD RAM guideline development effort, but we have not actively participated yet. Implementation of new guidelines not yet possible.
- 6. <u>Organization</u>: Organizational charter still required by end of Q2 FY 85. Have been successful in specific day-to-day activities in ensuring accountability, smooth transition and keeping down duplication of effort between support groups.
- 7. <u>People Development</u>: Participating on task force to develop training plan and procedures for MPD PSE's. No effort has yet been put into developing performance guidelines for PSE evaluation.
- 8. Great Place to Work: No change in last quarter.

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ROLM Corporation

MEMORANDUM

TO. Objectives Notebook

COPY:

FROM: Jeff Rulifson

DATE October 18, 1984

SUBJECT. Ideas for 2085 Objectives

Our goal should be to achieve a 4, Excellent, for the Laboratory on the next rating. To do this our performance must exceed the objective.

Not all the of the Engineering Laboratory objectives apply to the Text Applications Section. Only four have direct application: Business Plans, Text Applications, Integration, People Development, and Great Place to Work.

1. Business Plans

We could exceed the objective by keeping the plan current, revising parts such as the project list, adding to the clarity of the plan, and working to have the plan accepted by the other divisions even though there will not be a formal integration process.

Make the definitions clear. Revise the project list. Make the Floppy Demonstration reflect the extensions. Assure that marketing plans are in place and final. Put the Customer Evaluation Program on track.

2. Text Applications

Exceeding the objective will be difficult because we no longer intend to accomplish the first part -- to Field Trial TextMail in December. Under our current plans we will not meet the second part of the objective -- to Field Trail FileMail, as defined on 5/3/84, in February.

We should remove the deficiencies: lack of firm definition, low expectation of follow-through to FSD, and lack of control over non-MPD resources. Then, with the extended system, we must exceed expectations for quality, organization, follow-through, etc. If we come in one month late with the extended system and it sets an example in ROLM we should claim a rating of 4 anyway. Ideas for 2Q85 Objectives - 2 -

October 18, 1984

Make the definitions clear. Prepare a presentation. Make all our documentation, including system administration, exceed ROLM standards. Have it all on the VM, in a unified format, indexed, printed, distributed, up to date, etc. Complete a successful stress test. Plan the Engineering Trials. Have the Technical Documentation ready. Have the Technical Training ready. Have the End User Documentation ready. Have the System Administration Documentation ready. Revise the ROLM Trail plans, assure other organizations are ready to implement them. Revise the ROLM-IBM support guide. Assure the Test and Integration Laboratory is well organized and fully operational.

3. Integration

Even though working with other groups is not a part of the Engineering Objective as written, R. Zalisk includes it. Thus, working with Computer Services and Writing will influence the rating here. Many of these points are covered in other objectives.

Put PhoneMail-PCmail integration of track. Develop plans with Desktop Devices. Elaborate on the Business Plan and make the integrated plan consistent. Have solid, clear communications with 8000 and 9000. Make our priorities their priorities.

3. People Development

As with the Integration objective, the Division Objective is larger than the Engineering Objective, but we will be judged on the larger objective. Thus, we must show positive progress that we have ensured that we can fill a larger percentage of our management requirements internally.

Publish Management Guide. Publish draft Writing Guide. Publish Office procedures. Do timely reviews and reports. Hold workshops: Management Guide, Writing Guide, Writing Performance Appraisals, Presentation Style. Formalize code review process. Start more rigorous design reviews. Identify potential Group Managers and, because the SDG program seems to make little progress, start our own program.

4. Great Place to Work

Development Environment improvements. Task assignment workshops or review sessions. Ideas for 2Q85 Objectives

October 18, 1984

More hopla. Regular MBO reviews to help managers be successful. Recognition of individual achievement.

Because we will receive a Laboratory rating and not individual Section ratings, and because we are a coherent team working toward Division goals, we should also help the Voice Section achieve their objectives.

We may be able to help most on the deficiencies called out in the rating: low expectation of follow-through to FSD and lack of control over non-MDP resources. Beyond those items, we can help a lot with PhoneMail III: definitions, plans, schedules, etc.

And finally, because we will receive a Division rating, I believe we should help Product Support. I suggest that each Engineering Section appoint a Group Manager to work with Product Support to help them work through a similar process and achieve a better rating next quarter.

JFR 10/15/84

Objections MPD Engineering Accomplishments

> Q185 Review July thru Sept. 1984

- 1. PhoneMail: Responded immediately to all field reported problems. Five that required action were resolved within a week.
- 2. PhoneMail II: On schedule. Local networking ROLM Trial plan completed. Implementation in jeopardy due to Telecom Ops resources. Long Distance Networking moved to 1/86 due to new CBX priorities. Revised error log to improve product maintainability. Improved diagnostics.
- 3. Text Applications: Met 9/17 demo milestones would miss 11/5 ROLM Trial milestone by less than 4 weeks? Accelerated File Mail schedule by 2 months to coincide with TextMail and project is tracking well to new schedule. Shifted primary focus from TextMail to File Mail. Based on Review, chose to extend File Mail features, definition and schedules still to be determined impact of redefinition and non-mpd resources yet to be determined.

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Q1 MBO Rachurs

lendino Caps MPD MARKETING OBJECTIVES REVIEW 10/15/84 Q185 REVIEW

1. SALES PLAN: Sales are currently "30% of target, unacceptably low. MPD marketing developed training guides and vertical marketing guides for OA marketing managers. MPD marketing trained 22 OA Managers, 90 day plans were developed, and followup has taken place. A trial program was developed and introduced. However, recent events indicate OA and accounting followup did not occur. A special RCC leasing plan for Phonemail was developed and introduced.

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2.SALES SUPPORT: OA marketing manager performance beginning to be reported. Initial data analysis, eg, proposal activity, trial activity, published. First pass promotion and marcom activity completed. Intend to propose plans prior to January 1.

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6.BUSINESS PLAN: MPD business plan completed and partially distributed. In addition a white paper on the positioning of the text applications was published and distributed.

7. ROLMPHONE MESSAGING: Discrepencies in basic messaging definition uncovered and communicated. As a result product as originally defined is on hold. Calling name display enhancement committed to customer was identified and implemented. Unoble to week on .

8. INTEGRATION: Greater integration between Phonemail and PCmail identified and initial work begun. Proposal for integration with IBM host products created and presented to IBM management.

9.PEOPLE DEVELOPMENT: One offsite held to conduct workshop on product management skills. Second offsite held to reorganize group and jointly develop action plans to sell more Phonemail.

Varie 20 M Engineering Accomplishments Suptember 84 1984 Goals Joly through

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FY85

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- Great Place to Work: Improve the development environment and provide better software and testing tools. Provide challenging and rewarding tasks. Encourage people to stretch but make sure they are successful.

PMX ter concurrent with appropriate CBX releases Architecture: Develop comprulaisive Divisin procence strategy in and a. Kickoff projects to imprement strategy by 2/85.

COMMON PROBLEMS AMONG GROUP MGRS

1. FEELING LEFT OUT OF THE DECISION MAKING PROCESS, BUT NOT DIRECTLY RELATED TO THEIR PROJECTS.

2. FEEL THAT THERE IS NEVER ENOUGH TIME TO GET THE JOB DONE. SCHEDULES ARE NOT REALISTIC, AND WHEN THEY SPEAK UP THEY ARE TOLD THAT THE AMOUNT OF TIME IS TOO LONG.

3. THE DEVELOPMENT ENVIRONMENT IS A MAJOR PROBLEM ALONG WITH DATA SWITCHING PROBLEMS. LAB MAINTENANCE FALLS INTO THIS SAME CATEGORY.

4. IT IS FELT THAT WE TAKE TOO LONG GETTING PROJECTS DONE IN OSD BECAUSE OF POOR PLANNING, CHANGES IN DIRECTION AND CREEPING ELEGANCE.

5. THE WAY MEETINGS ARE RUN, ATTENDANCE, TIMELINESS OF ATTENDEES AND AMOUNT OF MEETINGS ARE A LARGE TIME WASTER.

6. WE ANNOUNCE PRODUCTS TOO SOON AND HAVE TO RUSH TO GET THE PROJECT COMPLETE AND GO TO THE FIELD WITH UNRELIABLE PRODUCTS.

7. TOO MUCH DEPENDANCE ON CBX SOFTWARE RELEASES.

8. TOO MANY MEANINGLESS PARTIES AT ROLM AND WE CELEBRATE TOO SOON.

9 'E REALLY HAVE A MERCHANDISING DEPARTMENT AT OSD RATHER THAN HAVING A ARKETING DEPARTMENT. IT IS TOO DIFFICULT TO GET MARKET INFO FROM THEM.

LEO OHANESIAN

1/13/84
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Year's objective (July 84-July 85)
PRODUCT DBJECTIVES
SA to administer PMS I.
       FSD 3/85 (Q3 84)
SA to administer PMS II.
       Announce 7/85 (Q1 85)
SA to administer PMS III
       FSD 9/85
SA to administer Phonemail.
       FSD 22/85
Network Control Center (NGC)
ACTION PLAN
91-84
Q2-84
03-84
Q4-84
HOW TO OBJECTIVES
01-84
```

```
Integration and test---PMS I

Q2-84

Trial---PMS I

Define database for PMS II

Q3-84

Ship PMS I

Test PMS II

Define database for PMS III

Q4-84

Test and trial PMS II

Test PMS III
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ACTION PLAN

02-84 03-84 04-84

1/24/83

	cc:	D.	Barkley	607
		Μ.	Blanton	002
		J.	Carnes	608
		J.	Cockrum	617
bid alledite consists		W .	Kirsch	561
ICE SYSTEMS DIVISION		с.	Lindemer	608
		D.	Stone	002
CY83 OBJECTIVES		c.	Diggins	608
		۱.	Howard	963

1. Begin production deliveries of PhoneMail by June; sell, deliver and provide support for at least 100 systems by year end. Build sales, mfg., and support capabilities to enter CY84 at 25 systems per month.

OFFICE SYSTEMS

- 2. Launch and demo Cypress at ICA, commence and support production (600 per month) deliveries by year end.
- 3. Achieve a well-supported installed base of 550 DCF systems by year end.
- 4. Release and provide quality support for new DX products:

VLDX	RT	2/83	FCS	7/83
Async DCM on CBX		7/83	п	12/83
Async DCM on VL		8/83		1/84
X.25		6/83		12/83
Sync on VL & CBX	11	7/83	"	12/83
RMDCM (Announce)	. 11	8/83	н	12/83

- Define, jointly w/CBX Division, evolution of system architecture by May 1. 5.
- 6. Announce 3270 by April 15 and successfully sell and install on 50 CBX systems by year end.
- POR for first text mail product complete by 2/15, announce by November '83 7. and ROLM trial by August '83.
- Announce Mesquite by 11/83 and ROLM trial by 10/83. 8.
- Develop and publish updated OSD Business Plan including 5 year strategy, 9. 2 year tactics by Business Team, by April 30.
- 10. Manage expenses to within +0, -5% of targets.
- Maintain good communication throughout the Division by informative 11. Quarterly Management Meetings, frequent Division meetings on subject of wide interest, frequent department meetings, etc.
- Establish Divisional P & L. financial reporting-beginning FY84. 12.

	OLM Office JIM COCKRUM Systems
	SANTA CLARA OSD ENGINEERING OBJECTIVES
0	DEVELOP 5 YEAR PLANS FOR VOICE, TEXT, DATA COMM- UNICATIONS AND SYSTEMS BY FEBRUARY 1983, WITH PARTICULAR EMPHASIS ON PRODUCTS FOR THE NEXT 24 MONTHS.
0	COMPLETE IN CALENDAR 1983:
	PHONEMAIL I, II TEXTMAIL DX REL II, SYNCHRONOUS AND X.25 VLDX REL I, SYNCHRONOUS AND X.25 RACK MOUNT DCM (RDCM) DATA FRONT END X.25 TAPE FOR AP
0	DEVELOP PLAN TO INTEGRATE PHONEMAIL, CYPRESS, TEXTMAIL BY FEBRUARY, 1983.
0	STRESS COMMUNICATIONS AND COMMITMENT THROUGHOUT THE ORGANIZATION.
	- CONDUCT MONTHLY MEETINGS WITH GROUP AND SECTION MANAGERS.
	 Hold 2 Engineering offsite meetings during 1983 for planning, communications and manage- ment development,
	- KEEP EVALUATIONS CURRENT.
C	MANAGE ENGINEERING EXPENSES TO TARGET/FORECAST.
С	SHORTEN THE PRODUCT DEVELOPMENT CYCLE.
þ	BEAT THE HELL OUT OF AT&T AND IBM.
C	DEVELOP SYSTEM ARCHITECTURE WITH CBX DIVISION BY MAY 1, 1983.



JIM COCKRUM 1/17/83

GOAL: BE INDUSTRY LEADER IN BUSINESS COMMUNICATIONS

NETWORKS OF BUSINESS SITES

DATA COMMUNICATIONS NETWORK MANAGEMENT PHONEMAIL/TEXTMAIL INTERCONNECTION

RELIABILITY, AVAILABILITY, MAINTAINABILITY

Customer Can Maintain System Always Up Life Cycle Costing is a Competitive Advantage

INTEGRATION

ROLM SUPPLIED APPLICATIONS/EQUIPMENT CUSTOMERS EQUIPMENT

ACCESS

ANY TERMINAL TO ANY APPLICATION

ROLM	Office JIM COCKRUN Systems
<u>STRATEG'</u>	Ϋ́
0	PURCHASE HARDWARE AND SOFTWARE WHERE NECES- SARY IN ORDER TO ACHIEVE OUR BUSINESS COMMUNICATION OBJECTIVES,
Ó	BUILD ON CBX STRENGTHS.
0	Focus on ROLM added value systems Voice Messaging Systems Text Messaging Systems Data Communications
0	DEVELOP CUSTOM LSI WHERE NECESSARY TO SATISFY POWER, SPACE AND COST OBJECTIVES.
0	DEVELOP GENERAL PURPOSE TOOLS AND PROCESSES IN ORDER TO IMPROVE APPLICATIONS PRODUCTIVITY.
0	PURSUE JOINT RELATIONSHIPS WITH COMPUTER COMPANIES IN DATA COMMUNICATIONS AREAS WHERE NECESSARY TO GIVE ROLM TOTAL BUSINESS COMMUNICATION SOLUTIONS

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MEMORANDUM

To: Dennis Paboojian

cc: Julie Holding - 234 Jeff Rulifson - 217 Emil Wang - 204

From: Rich Zalisk

Date: October 18, 1984

Subject: MPD Q1 FY85 MBO Review

CAN YERE

15

Attached are copies of MPD's original objectives for Ql and a review of our Ql performance for your review prior to our October 19th session.

Call.

RZ:rt attachment

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Messaging Products Division

Objectives CY85

	ſ ^{1.}	Growth and Profit: Contribute to the BCG objectives of revenue growth and profitability by providing a high level of support for PhoneMail. Achieve the CY85 sales/revenue targets. Follow through with the introduction and support for enhancements to the product line that will have an impact in CY85. Become the dominant vendor of integrated voice/data store-and-forward products.
USINESS BASICS	2.	<u>Commitments</u> : Meet our MPD Operating Expense Targets. Meet our product development commitments in terms of content, schedule, costs, reliability and other key product objectives. Focus on team responsibility and accountability and milestone definition and achievement. Meet every milestone defined in the January 5, 1985 MPD Project Plan. Meet all customer commitments.
	3.	<u>Customer Satisfaction</u> : Monitor the customer satisfaction of PhoneMail customers and provide a high level of field support to ensure that MPD's customers are very satisfied with their installation. Ensure that installed customer feedback is appropriately channeled into the Engineering Process so that our products incorporate customer suggestions and provide lasting value. Define a strategy and plan for ensuring we have high quality, reliable, available, maintainable products.
	l4.	<u>Costs</u> : Define and implement programs that significantly improve the PhoneMail product line profitability, as well as our development and sales productivity. Implement opportunistic projects to maintain competitive price/performance leadership.
JSINESS	15.	<u>Business Planning</u> : Develop and communicate an integrated business plan for MPD that will maintain market leadership for ROLM with integrated voice/data store-and-forward messaging products, as well as provide a framework for prioritizing our product development projects.
FRATEGY	6.	ROLM Integration: Ensure that MPD's plans are achievable by working with other ROLM organizations to identify and resolve system/common services/field issues and priorities which affect resources required for MPD success. Achieve the MPD business plans, while also being an exemplary corporate citizen.
	l ₇ .	IBM Integration: Define and implement programs which leverage our association with IBM. Develop a cooperative strategy with ADS to collectively address customer requirements better than any other vendor and, as a result, dominate the integrated voice/data store-and-forward market. Leverage the IBM Sales Force to exceed CY85 PhoneMail revenue targets.
	8.	Organization: Make the division's new organization work. In particular, reduce the uncertainty/volatility in project assignments and establish Product Support as a highly important, contributing divisional function.
PEOPLE	9.	People Development: Focus on people development programs that will ensure that we can fill a larger percentage of our management and individual contributor requirements internally. Continue to recruit excellent potential individuals.
	L10.	<u>Great Place to Work</u> : Ensure that we continue to have a GPW environment that helps us attract, hire, motivate and develop outstanding people to contribute to MPD's

goals. Have more fun.

- USINE
- BASIC



CONFIDENTIAL

active pro

TMT Use Only

MEMORANDUM-----November 13, 1984

TO: TMT

FROM: Ken Oshman

SUBJ: CORPORATE OBJECTIVES FOR 1985

- 1. Improve customer support with substantive, measurable programs.
- 2. Meet revenue and margin targets.
- Improve productivity by reducing costs as a percent of revenues with emphasis on:
 - inventory control
 - receivables management
 - overhead reductions
 - reduced installation and support costs
 - improved RAM
 - reduced direct costs
- Meet development schedules with emphasis on cost reduction and reliability improvement of CBX II and European CBX.
- 5. Demonstrate significant progress towards introduction of products demonstrating ROLM/IBM integration.
- Maintain ROLM GPW environment with increased emphasis on management development.
- 7. Capitalize on synergy with the rest of IBM without negatively impacting ROLM's strengths.

Condlune



SUBJECT: Corporate Objectives for 1985

On the reverse side of this memo is a copy of the Corporate Objectives which I referenced at the offsite. Please see that these are appropriately distributed within your organization and are used as part of the objective setting process that you are involved in.

COPY:

DP:rt

Paboojian 11/26/84

SYSTEMS DEVELOPMENT GROUP

CY85 OBJECTIVES

- Growth and Profit: Contribute to the BCO objectives for revenue and growth and profitability by providing a high level of support for our existing products, as well as following through with the introduction and support for the key products that will have an impact in CY85.
- <u>Commitments</u>: Meet our product development commitments in accordance with the product definition in terms of content, schedule, costs, reliability, and other key product objectives.
- 3. <u>CBX II</u>: Plan and implement a well-supported launch of the full capability of CBX II to have the maximum positive impact on our CY85 and CY86 financial objectives. Special focus on ROLM Trial and Field Trial to ensure issues are identified and resolved quickly, both before and during the trials.
- <u>Reliability, Availability, Maintainability (RAM)</u>: Refine our strategy and plan for ensuring that we have high quality, reliable products; communicate and implement this plan with substantive, cost effective programs.
- 5. <u>Product Development Process</u>: Define and implement improvements to the product development process to ensure we make timely, effective decisions that are consistent with our overall strategy. Focus on Project Team responsibility and accountability, exception reporting, and milestone definition and achievement.
- <u>Cost</u>: Define and implement programs that significantly improve our development productivity, as well as the cost components of our products.
- 7. Business Plans: Develop and communicate affordable, integrated business plans that will provide a framework to make decisions for our product development programs; address marketing and product strategy for each Division consistent with the overall strategy; define the specific product plan with priorities for implementation that will ensure continued market leadership for ROLM in Business Communication.
- People Development: Focus on the people development programs that will ensure that we can fill a larger percentage of our management and individual contributor requirements internally.
- <u>IBM</u>: Define and implement programs across all Divisions which leverages our association with the other parts of IBM, while not negatively impacting the focus and strength of ROLM; bring products to market which demonstrate the cost effective synergy of IBM/ROLM product integration.
- Great Place to Work: Ensure that we continue to have a GPW environment that helps us to attract, hire, motivate, and develop outstanding people to contribute to the goals of the Systems Development Group.

MESSAGING PRODUCTS DIVISION

Objectives FY85

- 1. <u>Growth and Profit:</u> Contribute to the achievement of the BCG objectives for revenue growth and profitability, by providing a high level of support for PhoneMail, as well as following through with the introduction and support for both PhoneMail II and Text applications in FY85.
- 2. <u>Sales Plans:</u> Meet the FY85 sales plan milestones. Become the dominant vendor in integrated voice messaging by achieving the penetration objectives defined in our sales plan. Provide a high level of field support for PhoneMail sales, with specific emphasis on supporting the trained specialists in the field organization, and providing the training so that PhoneMail is presented correctly to customers.
- 3. <u>Customer Satisfaction</u>: Monitor the customer satisfaction of PhoneMail customers and provide a high level of field support to ensure that all of the Division's customers are satisfied with their installation. Meet all customer commitments.
- 4. <u>PhoneMail II:</u> Meet our product development milestones in accordance with the Definition in terms of content, schedule, cost, reliability and other key product objectives; ensure a well-supported release of this product to the field.
- 5. <u>Business Plans</u>: Prepare an integrated business plan for the Division that will provide the direction for an integrated, prioritized product plan, consistent with our financial objectives. Be prepared for the integration of this business plan with the other SDG Divisions by November, 1984.
- STRATEGY 6. <u>Text Applications:</u> Meet our product development milestones as defined in the May 3, 1984 review in terms of content, schedule, cost, reliability and other key project objectives; ensure a well-supported release of this product to the field.
 - 7. <u>Integration:</u> Work to resolve systems issues that become visible as a result of the products defined and developed in the Division; be a focal point for SDG for defining and implementing the strategy for integration of voice/text messaging with CBXs and desktop devices.
 - 8. <u>Organization:</u> Complete the organizational structuring of the Division; fill key positions consistent with our targets. Define clear charters, objectives, and responsibilities to ensure timely implementation of our business plan.
 - PEOPLE 9. <u>People Development</u>: Focus on people development programs that will ensure that we can fill a larger percentage of our management and individual contributor requirements internally.
 - 10. <u>Great Place to Work:</u> Ensure that we continue to have a GPW environment that helps us to attract, hire, motivate, and develop outstanding people to contribute to the goals of the Systems Development Group.

BUSINESS

BUSINESS

MPD Marketing Objectives

FY85

- <u>Sales Plan:</u> Achieve sales plan projections. Execute PhoneMail sales plan action items. In particular, develop OA specialist training modules and a PhoneMail trial program.
- Sales Support: Monitor and assess PhoneMail performance in the field. Where appropriate recommend and execute activities to resolve any outstanding problems. In particular, review Ql and Q2 results and recommend revisions to sales plan action items by January 15.
- 3. <u>Product Launch:</u> Develop and execute launch plans for PhoneMail Release II and text applications. In doing so, ensure consistency of product message and position, end user training, and sales support. In particular, better communicate the text applications positioning to the organization and ultimately to the field.
- 4. <u>Customer Marketing:</u> Ensure that Customer Marketing's role is understood and useful to the field. In particular, Customer Marketing should identify, evaluate, and resolve problems impacting the field's ability to sell or customer's ability to use MPD products.
- 5. <u>Marketing Leadership:</u> Have the marketplace perceive ROLM as a leader in messaging products in general and voice messaging in particular. In doing so, focus primarily on how ROLM products solve common business problems better than existing solutions. Identify and kickoff those projects that will be necessary to maintain and build PhoneMail's position in the marketplace.
- <u>Business Plan:</u> Develop an integrated messaging business plan. In particular, marketing focus should include customer migration path and fit into the sales process.
- <u>ROLMphone Messaging:</u> Get ROLMphone messaging defined and back on schedule. In particular, ensure that ROLMphone messaging's position is understood and accepted in the organization.
- <u>Integration</u>: Define a few key integrated features to be kicked-off in FY°85 that demonstrate ROLM's ability to provide useful, system solutions to common business problems. In addition, develop a road map for future integrated features.
- 9. <u>People Development:</u> Have product managers assume a leadership role on project teams. In particular, product managers should ensure that projects have clearly defined goals that are understood by the corporation and track projects on their schedules.

MPD Engineering Objectives

FY85

- <u>PhoneMail:</u> Respond in a timely, high-priority fashion to reported problems in the field and at ROLM. Monitor CBX releases for continued support of PhoneMail functionality.
- <u>PhoneMail II:</u> Meet the development milestones and meet PhoneMail Local Networking FSD in March, 1985. Start ROLM Trial of Long Distance Networking in May, 1985. Continue to improve product functionality and work with Product Support to improve product RAM.
- <u>Text Applications:</u> Meet the May 3, 1984 milestones. Specifically: Field Trial TextMail in December, 1984; Field Trial FileMail in February, 1985; Field Trial NetMail in June, 1985. Field Trial TextMail-PhoneMail integration in April, 1985.
- <u>Cost-Reduced PhoneMail:</u> Implement a phased plan for the continued cost reduction of PhoneMail. Reduce the cost 10% and reduce the footprint by July, 1985.
- 5. <u>PhoneMail/NCS:</u> Support marketing in launching the product. Develop a mechanism to provide message-waiting indication on non-CBX systems.
- <u>TMMS</u>: Ensure successful trials; provide quick responses to reported problems in the field and at ROLM.
- 7. <u>Business Plan:</u> Contribute technical leadership in preparing and communicating the Business Plan. Ensure that the plan will identify product areas in which ROLM can offer unique value-added market contributions.
- <u>Integration:</u> Improve CBX release coordination with MPD products. Improve SECO turnaround. Develop a technical framework, consistent with the Business Plan, for the integration of voice-text messaging products and desktop devices. In particular, kickoff and define a select set of key device-application features.
- 9. <u>People Development:</u> Make people development a routine and regular process. Ensure that it clarifies job performance expectations and improves milestone achievement. Raise the effectiveness, productivity, communication skills and documentation skills of engineers without stifling creativity.
- Great Place to Work: Improve the development environment and provide better software and testing tools. Provide challenging and rewarding tasks. Encourage people to stretch but make sure they are successful.

MPD Product Support Objectives

FY85

- <u>Communications</u>: Facilitate increased communications with customers, field support personnel, other Product Support groups, specifically ROCO Customer Support and BCG Customer Support, in order to provide a high level of support for PhoneMail and other Messaging Products. Define and implement precedures for these and other support groups to provide ongoing feedback to Engineering about MPD products.
- <u>Customer Satisfaction:</u> Implement our strategy of coordinating customer support across vendors (ROLM and IBM) for Text Applications and TMMS, in order to ensure customer satisfaction with ROLM's products. Obtain information from the Customer Support groups which will enable us to evaluate and monitor the level of support being provided for our products.
- 3. <u>Training and Publications:</u> In order to ensure the successful introduction of Text Applications Products, PhoneMail 2.0 and TMMS, coordinate the design and development of the technical training and publications for these products so that they are concise, modular, accurate and easy to update. Review all existing PhoneMail publication and revise them for Release 2.0 changes into the PhoneMail training classes.
- 4. <u>Product Trials</u>: Develop, publish and implement phased ROLM Trial and Field Trial plans for PhoneMail 2.0, Text Application and TMMS to assure that ROLM trials provide for thorough testing of product specifications and proper integration with 8000 and 9000 software.
- 5. <u>RAM Guidelines</u>: Work with CSD Product Support to develop RAM guidelines which state the purpose of RAM throughout the design and development of a product. Apply these guidelines as appropriate in MPD Product Support and develop strategy for ensuring RAM during integration with CBX.
- 6. Organization: Use RAM guidelines to develop an organizational charter by end of Q2 FY85. Define Product Support responsibilities to ensure accountability, smooth transition across group boundaries, and to eliminate duplication of effort. Plan for adequate staffing levels based on on-going and future project requirements, consistent with the Business Plan and Division targets.
- 7. <u>People Development:</u> Develop a comprehensive training plan for new PSE's so that they make a positive contribution within 60 days of hire. Plan career opportunities within Product Support and ROLM. Appropriately apply the model used by Engineering to develop a set of personal performance guidelines by which all Product Support group members can be evaluated.
- <u>Great Place to Work:</u> Continue to identify and hire skilled and motivated individuals who will contribute to the goals of the Division, SDG, and ROLM.

MESSAGING PRODUCTS DIVISION

OBJECTIVES - FY85 01 85 Review

-

	Objective		Q1 Accomplishments		Q1 Deficiencies	01 MBO Rating
1.	Growth & Profit	•	250% growth over FY84.	٥	30% of plan	2
		a	Pass through operating margins >20%.			
		٥	30% market share.			
		٥	Responsive field support.			
2.	Sales Plans	0	Responsive field support.	o	30% of plan	o
		o	High quality specialist	o	Low market visibility	
			training.	o	Low sales activity	
з.	Customer Satisfaction	o	Customers reasonably satisfied.	0	Low visibility into customer satisfaction.	1
				0	Customers are not <u>very</u> satisfied.	
	<u>PhoneMail II</u>	0	On schedule for PhoneMail II.	0	Low expectation of timely follow-thru to FSD.	2
				٥	Lack of control over non-MPD resources.	
5.	Business Plan	o	Business Plan completed.	o	Plan not integrated.	4
6,	Text Applications	o	On schedule for Text.	0	Lack of firm definition.	2
				٥	Low expectation of timely follow-thru to FSD.	
				0	Lack of control over non-MPD resources.	
7.	Integration	٥	None.	0	Unable to influence other Divisions/priorities.	O
8.	Organization	0	Objectives/responsibilities	0	Key jobs not filled.	1
			clear.	0	Charters not clear.	
9.	People Development	o	Participated in SDG classes.	0	Little demonstrable	1
		0	Some MPD-Engineering classes.		progress.	
10	. <u>Great Place to Work</u>	٥	Terrific people.	o	Morale slipping due to lack of resource resolu- tion and under target sales performance.	3
	Overall MPD	0	Substantial progress on business strategy.	0	Did not achieve financial or customer satisfaction goals.	1.6 Marginally Acceptable
		o	the state of the s			Horehean ra
			action items.	0	Anticipate not achieving product introduction goals due to non-MPD resources.	

Q185 Review

- <u>Sales Plan</u>: Sales are currently 30% of target, unacceptably low. Trained 22 OÅ marketing managers. Developed training guides and vertical market guides for them. A trial program was developed and introduced, but is not yet possible to implement. A special RCC leasing plan for Phonemail was developed and introduced.
- <u>Sales Support</u>: OA marketing manager performance beginning to be reported. Initial data analysis, eg, proposal activity, trial activity, published. First pass promotion and MarCom activity completed. Intend to have revisions to sales plan prior to January 1.
- 3. <u>Product Launch</u>: Launch plans delayed pending product schedule reviews due to 295/Tandem impact. Phonemail II design phase checkpoint held. Rolm trial plans for Phonemail II developed, but currently being modified to account for resource reductions. 9003/Phonemail released. Streamer tape released to manufacturing. TMMS stress test and Rolm trial succesfully completed. TMMS field trial bogged down due to contract disputes.
- 4. <u>Customer Marketing</u>: Two customer testimonial videotapes made and distributed. One customer application story printed in Computerworld. Customer data base being created. Customer satisfaction survey conducted, results tabulated and presented. So far unable to develop and implement plan to achieve sales objective.
- 5. <u>Market Leadership</u>: Market has little or no awareness of Phonemail as market leader. More aggressive market position stance presented to Probe, Yankee Group, and Rothschild conference. New ad created and currently running in Business Week, Computerworld, etc. Local advertising blitz underway in Dallas local market. So far unable to develop and implement plan to increase market awareness.
- <u>Business Plan</u>: MPD Business Plan completed and partially distributed. In addition a white paper on the positioning of the text applications was published and distributed.
- <u>Rolmphone Messaging</u>: Unable to demonstrate progress towards achieving objective.
- 8. <u>Integration</u>: Greater integration between Phonemail and PCmail identified and initial work begun. Proposal for integration with IBM host products created and presented to IBM management. Have made great progress in understanding overall integration strategy.
- <u>People Development</u>: Unable to demonstrate progress towards achieving objective.

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Q1 MBO Rating

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MPD Engineering Objectives

Q1 85 Review

- 1. PhoneMail: Responded adequately to all field reported problems.
- <u>PhoneMail II</u>: On schedule. Local networking ROLM Trial plan completed. Implementation in jeopardy due to Telecom Ops resources. Long Distance Networking moved to 1/86 due to new CBX priorities. Revised error log to improve product maintainability. Improved diagnostics.
- 3. <u>Text Applications</u>: Met 9/17 demo milestone. Accelerated File Mail schedule by 2 months to coincide with TextMail and project is tracking well to new schedule. Shifted primary focus from TextMail to File Mail. Based on Review, chose to extend File Mail features. Impact of redefinition and non-MPD resources yet to be determined.
- <u>Cost Reduced PhoneMail</u>: Have prototype 19" cabinet; cooling and EMI done. Lost mechanical resources. On hold. Objective will not be met.
- <u>Stand Alone PhoneMail</u>: POR and configuration support completed. Marketing plan not done.
- <u>TMMS</u>: Completed stress test and ROLM trial; successful as stand alone application; needed better trial coordination with PhoneMail. Marketing plan proposed but not final.
- <u>Business Plan</u>: Completed Business Plan; in addition published PC Mail White Paper.
- 8. <u>Integration</u>: Good CBX coordination on driver and test SW for AP-AP code on 9004 and 8000 SW for VCC. Nothing on SECOs. Business Plan for Voice-text integration complete. Developed technical strategy for host integration. Timely integration of messaging products apparently not a CBX priority.
- <u>People Development</u>: Started more rigorous code reviews; raised documentation standards; prepared job responsibility guides and held workshops with Group Managers; held presentation style workshops.
- 10. Great Place to Work: Improved S/1 tools by bringing in ACS. Got Logic Analyzer for Diagnostics Group. Reorganized Text Applications responsibilities to use management skills better. Without more resources: pulled up File Mail schedule, started DTMF project, did RS232 patch panel project, implemented 24 hr shifts for PC Mail debug.

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MPD Product Support Objectives Q1 85 Review

- <u>Communication</u>: Have not yet developed and implemented procedures to substantially improve communication with the customer and the field, although have been successful in facilitating quality communications through all support organizations in several specific instances. Have not planned or implemented specific procedures for providing ongoing feedback from the field.
- <u>Customer Satisfaction</u>: Have not yet been able to implement plans to improve PhoneMail reliability, and therefore, customer satisfaction. Too soon to implement multi-vendor (ROLM and IBM) support procedures necessary for customer satisfaction of text products. Participation in PhoneMail Customer Survey, but analysis by Product Support and future planning required.
- Training and Publications: Performing all tasks mentioned in objective on an ongoing basis. Little success in obtaining satisfactory results from Tech Pubs for TMMS.
- 4. <u>Product Trials</u>: ROLM Trial Plans developed for PhoneMail 2.0, TMMS and PC Mail, and implemented for TMMS. Stress test planned and implemented for TMMS. Field Trial Plan developed currently being implemented for TMMS. PhoneMail 2.0 regression test plan being developed. Implementation of new plans in jeopardy due to Telecom Ops resources.
- <u>RAM Guidelines</u>: Intend to rely heavily on CSD RAM guideline development effort, but we have not actively participated yet. Implementation of new guidelines not yet possible.
- 6. <u>Organization</u>: Organizational charter still required by end of Q2 FY 85. Have been successful in specific day-to-day activities in ensuring accountability, smooth transition and keeping down duplication of effort between support groups.
- 7. <u>People Development</u>: Participating on task force to develop training plan and procedures for MPD PSE's. No effort has yet been put into developing performance guidelines for PSE evaluation.
- 8. Great Place to Work: No change in last quarter.

JFR 7/9/84

TEXT APPLICATION SECTION

FY 85 Objectives

- 1. TextMail 1 Software: Final Integration in September 1984.
- 2. TextMail 1 Release: Field Trial in December 1984.
- Device-TextMail Integration: Kickoff CBX Cypress TextMail SA integration in December 1984.
- 4. File Mail 1 Release: Field Trial in February 1985.
- 5. TextMail PhoneMail Integration: Field Trial in April 1985.
- 6. NetMail 1 Release: ROLM Trial in June 1985.
- 7. <u>S/1 CDN:</u> Support as appropriate.
- People Development: Make people development a routine and regular process. Ensure that it clarifies job performance expectations and improves milestone achievement. Raise the effectiveness, productivity, communication skills and documentation skills of engineers without stifling creativity.
- Design Quality: Raise the effectiveness and productivity of engineers without stifiling creativity.
- 10. <u>Device Integration</u>: Improve CBX release coordination with MPD products. Improve SECO turnaround. Develop a technical framework consistent with the Business Plan, for the integration of voice-text messaging products and desktop devices. In particular, kickoff and define a select set of key device-application features.
- Business Plan: Contribute technical leadership to the development of the Division Business Plan.
- <u>Competition</u>: Assure that the engineering staff understands the use of their products by customers and the positioning of their products relative to competition.

Communication Systems Group FY 85 Objectives

- 1. <u>TextMail:</u> Integrate RIX-Operations, 3101 support and ALP High Speed Device Driver with TextMail in September 1984. Start Field Trial in December 1984.
- S/1 CPN: Implement TRIP on S/1 by February 15. Start CPN Engineering Trial with PM in May 1985.
- <u>NetMail:</u> Start Engineering Trial using MMEP2 in April 1985. Be ready for Field Trial in June 1985.
- Training: Implement individual written yearly growth/training plans for each MTS.
- 5. Development: Conduct monthly counselling with MTS's:
 - * Review objectives for previous month.
 - * Set objectives for next month.
 - * Discuss performance and give/receive feedback.
- <u>Presentations</u>: Have MTS's present status/progress/special interest reports at group and section meetings. Get them to talk enthusiastically about what they are doing.
- Designs: Get MTS's to participate in design. Emphasize simple designs; clear, concise, well illustrated documents; and bullet-proof code.

File Server Group FY 85 Objectives

- 1. <u>File Mail 1</u>: Give Demonstration of some File Server features. (8/27/84) Full File Server ready for Engineering Trial (10/22/84)
- File Mail 2: Definition of File Server using Phoenix. (11/5/84) Begin Field Trial of first version File Server. (2/4/85) Complete design of features for second version of File Server. (2/4/85) Complete design of File Server using Phoenix. (2/4/85) Ready for integration test of File Server using Phoenix and new features. (6/24/85)
- 3. Milestones: Strive to set realistic milestones and to meet them.
- Designs: Work with each member of the group to produce well-thought out and well-documented designs that implement the products we want to build.
- <u>Time Management</u>: Work with each member of the group to produce well-thought out and well-documented designs that implement the products we want to build.
- <u>Competition</u>: Provide opportunities for group members to become familiar with competitive products and to understand how our products are positioned.

TextMail Group FY 85 Objectives

- 1. TextMail 1 Software: Achieve Final Integration by September 1984.
- <u>TextMail 1</u>: Start TextMail Release 1 (minus PhoneMail) Field Trial by December 1984.
- Device Integration: Pass Design Phase checkpont for PMS 4, the extended integration of PhoneMail, TextMail and SA, by January 1985. Continue development of PMS 4 in order to start Engineering Trial in Q1 of FY86.
- 4. File Mail 1: Start Field Trial of PMS 2, File Mail, by February 1985.
- 5. TM-PM: Start Field Trial of Release 1 with PhoneMail by April 1985.
- 6. Net Mail 1: Start Field Trial of PMS 3, NetMail, by June 1985.
- People Development: Make employee development a continuing process by establishing clear performance expectations, setting realistic but challenging golas and getting and giving timely feedback in weekly one-on-ones.
- 8. <u>Design Quality</u>: Work with each member of the group to improve their effectiveness and creativity. This will include technical reviews of work, establishment of mentors for the more junior members, intra-group presentations of work acomplished, and group development of techniques for improving the software development cycle.
- 9 <u>Competition</u>: Encourage group members to become familiar with competitive products and how customers use both our product and our competitors' product.
- Scheduling: Use all available tools to closely track the development cycle, both to prevent schedule surprises and to improve estimating skills.

Text Applications Section FY 85 Quarterly Goals

	Alter as her man of a	01	02	03	0.4
1	TextMail 1 SW	Done			
2	TextMail 1	Plan Trials	Start Field Trial		
3	Device Integration	Eng. Proposal Drafted			
4	File Mail 1	Partial Demo	Eng. Trial	ROLM Trial	Complete Fi
		Issue ERS		Start Field Tr	ial Field Tria
5	TextMail- PhoneMail	Plan	Design	ROLM Trial	Field Trial
6	Net Mail	Complete Specifications	Cade	Integration	Eng. Trial ROLM Trial
7	S/1 CPN	Plan	Monitor	Add TRIP	PM Testing
8	Performance	Charts Updated	Step 1	Step 2	Practice
9	Productivity	Goals Set	Step 1	Step 2	Practice

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Communications Systems Group FY 85 Quarterly Goals

	01	02	03	04
High Speed ALP device drivers	Eng. Trial	Field Trial		
3101 support	Eng. Trial	Field Trial		
RIX Ops.	Eng. Trial	Field Trial		
S/1 CPN	Monitor PhoneMail	Design TRIP Start Code	Complete Code	PM Testing
NetMail/MCI1	Complete Specs	Complete Code	Test & Integration	Eng. Trisl Rolm Trial
Training	Directed	Planned	Voluntary	Self Init.
Development	50% >=good	66% >=v.g.	50% >=v.g.	66% >=v.g.
Presentations	Directed	Planned	Voluntary	Self Init.
Designs	Accepted Criticism	Valued Criticism	Self criticism	Self correcting
	device drivers 3101 support RIX Ops. S/1 CPN NetMail/MCI1 Training Development Presentations	High Speed ALP device driversEng. Trial3101 supportEng. TrialRIX Ops.Eng. TrialS/1 CPNMonitor PhoneMailNetMail/MCI1Complete SpecsTrainingDirectedDevelopment50% >=goodPresentationsDirectedDesignsAccepted	High Speed ALP device driversEng. TrialField Trial3101 supportEng. TrialField TrialRIX Ops.Eng. TrialField TrialS/1 CPNMonitor PhoneMailDesign TRIP Start CodeNetMail/MCI1Complete SpecsComplete CodeTrainingDirectedPlannedDevelopment50% >=good66% >=v.g.PresentationsDirectedPlannedDesignsAcceptedValued	High Speed ALP device driversEng. TrialField Trial3101 supportEng. TrialField TrialRIX Ops.Eng. TrialField TrialS/1 CPNMonitor PhoneMailDesign TRIP Start CodeComplete CodeNetMail/MCI1Complete SpecsComplete CodeTest & IntegrationTrainingDirectedPlannedVoluntaryDevelopment50% >=good66% >=v.g.50% >=v.g.PresentationsDirectedPlannedVoluntaryDesignsAcceptedValuedSelf criticism

File Server Group FY 85 Querterly Goels

				Q1	02		03	Q.4
Fi	la	Mail	1	Coding∕ Debugging	Engr.	Trisl	Field Trial	Done
Fi	Le	Mail	2	Begin Def.	Begin	Design	Complete Def. Complete Design	Coding/Testing
3	M	ilest	ones					
4	De	sign	8					
5		ime anage	ment					
6	Co	mpet	ition					
	-						dia terrativa de la construcción de	

TextMail Group FY 85 Quarterly Goals

		Q1	02	03	04
1	Textmail 1 Software	Done			
2	TextMail 1	Plan Trials Eng. Trial	Start Field Triel w/o PM	FSD	
3	Device Integration	Help Define	Design	Dasign Phase Chackpoint	Implement
4	File Mail 1	Aid in Testing	Support Eng. Trial	Low Lavel Support	
5	TH-PH	Plan Stert Imple,	Finish Imple. Start Eng. Trial	Start ROLM Trial	Start Field Tri
6	NetMail 1	Plan & Help in Design	Imple. Mailer & NS Mods.	Integrata FT Support	Field Trial Support
7	People Development	Set Development Goals	Execute & Monitor	Execute, Monitor & Modify	Execute & Monitor
8	Design Quality	Set Goals Monitor	Monitor	Monitor	Monitor
9	Competition	Plan	1 Out	3 Out 1 Report	6 Out 3 Reports
10	Scheduling		1		A. A

Text Applications Section FY 85 - Q1 Goals

		July	August	September
1	TextMail 1 SW	Test SA Code and Test	Complete SA Code and Test	
2	TextMail 1	Trial Plan Complete		Engineering Trial
3	Device Integration	Investigate	Proposal Drafted	Internal Review
4	File Mail 1	ERS Decisions Integration	Partial Demo PC Complete	Issue ERS S/1 Complete
5	TextMail PM	Plan	Nothing	Design
6	NetMail	Freeze Specs Local Mailer Design	Remote Mailer Design	Postman Designs
7	S/1 CPN	Plan	Monitor	Monitor
8	Parformance	Charts Out Lst Draft Plans	Charts Reviewed 2nd Draft Plans	Incremental Goals Set
9	Productivity	Draft Group Plans	Draft Section Plans	Incremental Goals Set

Communication Systems Group FY 85-01 Goals

	July	August	September
High speed ALP	Complete single line	Complete multiple lines	Engineering Trial
3101 support	Track ACS	Test ACS	Engineering Trial
RIX Operations	Complete ERS	Complete code	Engineering Trial
S/1 CPN	Monitor	Monitor	Monitor
NetHail 1	Freeze Specs Complete ERS Design L Mailer	Design R Mailer	Design Postmen
Training	Forced	Directed	Suggested
Development	Explain	Plan Actions	Act
Presentations	Directed	Directed	Suggested
Designs	Learn value of criticism	Willingly accept	Voluntarily seek
	3101 support RIX Operations S/1 CPN NetMail 1 Training Development Presentations	High speed ALPComplete single line3101 supportTrack ACSRIX OperationsComplete ERSS/1 CPNMonitorNetMail 1Freeze Specs Complete ERS Design L MailerTrainingForcedDevelopmentExplainPresentationsDirectedDesignsLearn value	High speed ALPComplete single lineComplete multiple lines3101 supportTrack ACSTest ACSRIX OperationsComplete ERSComplete codeS/1 CPNMonitorMonitorNetMail 1Freeze Specs Complete ERS Design L MailerDesign R MailerTrainingForcedDirectedDevelopmentExplainPlan ActionsPresentationsDirectedDirectedDesignsLearn valueWillingly accept

File Server Group FY 85 - Q1 Goals

	<u>FY 85 - Q1 Goals</u>					
		July	August	September		
1.	File Meil 1	Test link level; Test S/1 appl level level (create & retrieve)no filer mailer, name server; Begin PC appl level routines	Integrate w/ Filer & Filer & Name Server & Mailer Robust Link Level; Test some PC appl. Level routines;Begin higher speed modifications	Complete S1 appl. level code; Complete PC appl Integrate w/high speed drovers Integrate w/TextMa		
2	ERS	Complete draft	Modifications	Issue new		
3	File Mail 2		Understand	Understand		
4	Designs					
5	Time Management					
6	Competition					

JJJ 7/28/84

<u>TextMail Group</u> FY 85 - Q1 Goals

		July	August	September
1	TextMail 1 Software	D1.Subrs Comp. NS/SA Files Complete Mailer Design Complete UIF Data Structuring and Screen Definitions	Mailer Complete NS Complete UIF Phase 2 Code Complete	All code complete an ready for Eng. Trial
2	TextMail 1	Support Trial Plan Work		Start Engineering Trial
3	Device Integration	Help Investigate	Support Proposal	Review Proposal
4	File Mail 1		Supply D1 Aid in Testing	Aid in Testing
5	TM - PM	Plan	Finish Plan Review	Start ERS
6 1	NetMail 1	Local Mailer Design	Monitor Design	Monitor Design
7	Development	Review Charts	Set Development Goals	Review and Set Set Final Goals
8	Design Quality	Set Goals Monitor	Set Development Goals	Review and Set Set Final Goals
9	Competition			
10	Scheduling			

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Done os list of To-do Hems This cused to at weekly one-more meetings



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SYSTEMS DEVELOPMENT GROUP FY85 OBJECTIVES

- <u>Growth and Profit</u>: Contribute to the BCG objectives for revenue growth and profitability by providing a high level of support for our existing products as well as following through with the introduction and support for the key products that will have an impact in FY85.
- <u>Commitments</u>: Meet our product development commitments in accordance with the product Definition in terms of content, schedule, costs, reliability and other key product objectives.
- <u>CBX II</u>: Plan and implement a well-supported launch of CBX II to have the maximum positive impact on our FY85 and FY86 financial objectives. Special focus on ROLM Trial and Field Trial to ensure issues are identified and resolved quickly, both before and during the trials.
- 4. <u>Reliability, Availability, Maintainability (RAM)</u>: Refine our strategy and plan for ensuring that we have high quality, reliable products; communicate and implement this plan so that appropriate decisions can be made about investments and organizational charters.
- 5. Product Development Process: Define and implement improvements to the product development process to ensure we make timely, effective decisions that are consistent with the overall BCG strategy. Focus on Project Team responsibility and accountability, exception reporting, and milestone definition and achievement.
- 6. Organization: Follow through with the organizational plan to decentralize along market segments; define charters, objectives and responsibility for each Division so that we will have a framework and staffing to develop and implement aggressive business plans.
- 7. <u>Business Plans</u>: Develop and communicate business plans that will provide a framework to make decisions for our product development programs; address marketing and product strategy for each Division consistent with the BCG strategy; define the specific product plan with priorities for implementation that will ensure continued market leadership for ROLM in Business Communication.
- People Development: Focus on the people development programs that will ensure that we can fill a larger percentage of our management and individual contributor requirements internally.
- <u>Computer Plan</u>: Develop and implement a computer plan for the small, mid-range, and large systems that deals appropriately with hardware and software issues over the long term.
- Great Place to Work: Ensure that we continue to have a GPW environment that helps us to attract, hire, motivate, and develop outstanding people to contribute to the goals of the Systems Development Group.

W. Warren W. Rea W. Hausen 5/4/84

COMMUNICATION SYSTEMS DIVISION FY85 OBJECTIVES

1. 2

- <u>GROWTH AND PROFIT</u>: Contribute to the achievement of the BCG Objectives for revenue, growth, and profitability by providing a high level of support for the installed base of CBX's and prior releases of 8000 and 9000 software. In addition, follow through with the introduction and support of 8004, 8005, 9004.X, and RB295/INL/INN.
- <u>COMMITMENTS</u>: Meet our product development milestones as defined in the POR's for CBX II and Tandem. Hold committed availability dates to field to minimize confusion and rebuild confidence. Define software releases 8006 and 7, and 9005 and 6 in terms of content, schedule, and reliability.
- 3. <u>CBX II</u>: Plan and implement a well supported launch of CBX II to have maximum positive impact on FY85 and FY86 financial objectives. Special focus is needed on ROLM trials and field trials to ensure issues are identified and resolved quickly, both before and during the trials.
- 4. <u>RELIABILITY, AVAILABILITY, MAINTAINABILITY</u>: Develop the process tracking and cost tracking methods needed to be able to make informed business decisions on RAM. Goal is to provide high quality, reliable products, and our plans need to be communication throughout the division. Develop clear definition and specifications of RAM and relate to service costs and marketplace requirements.

- 5. PRODUCT DEVELOPMENT PROCESS: Define and implement improvements to this process to allow us to make timely decisions which are consistent with BCG strategy. Use checkpoint process to build Project Team capabilities and responsibilities. Develop the tools to allow us to shorten the development process.
- 6. <u>SALES PLANS</u>: Meet the FY85 sales plan milestones with specific emphasis on supporting the development of the sales tools needed to increase field productivity and the resolution of the outstanding product development issues for the Small, Mid-Range, and Large Market segments.
- 7. <u>BUSINESS PLANS</u>: Prepare an integrated Business Plan for the Small, Mid-Range, and Large Market segments in conjunction with MPD and NPD. Integration of these plans will occur in November of 1984 and May of 1985 and should allow for resource allocation decisions. The plans to market requirements and system performance expectations.
- 8. <u>ORGANIZATION</u>: Build up the organization to be able to operate as three divisions by having good people and developing strong ROLM employees. Be sure that charters are defined such that these three market-oriented divisions can work together and share common resources and capabilities.
- 9. <u>COMPUTER PLAN</u>: Develop and implement a computer plan for both the Small, Mid-Range, and Large Market segments that deal with hardware and software issues over the next three to five years. Goal is to reduce software duplication costs and remove the CPU as a constraint, thereby increasing software productivity. Coordinate these efforts with LSS activities.
- 10. <u>PHOPLE DEVELOPMENT</u>: Focus on the people development programs that will ensure that we fill a larger percentage of our management and individual contributor requirements internally. Involve division management to build up creditability of these development efforts.
- 11. <u>GREAT PLACE TO WORK</u>: Ensure that we continue to have a GPW environment that helps us to attract, lure, motivate, and develop outstanding people to contribute to the goals of the Systems Development Group. Do a better job of communicating what ROLM is, where it is going, what our products are, and how they are used by our customers.

JC:5/4/84

Network Products Division FY 85 Objectives

- Establish ROLM as a leader in the networks market through development of a long term strategy, ways to explain that strategy and the products to implement the strategy.
- Make reliability, availability and maintainablility a way of life. RAM plan included in all product definitions.
- 3. Provide sales deliverables which leverage network products to help achieve FY85 sales objectives for BCG.
- Develop plans and procedures for insuring that quality products are completed on time and introduced in a professional manner.
- 5. Complete network business plans by November 1984.
- Use business plans to communicate strategy both within and outside of the division. Use as basis for developing a non-disclosure presentation.
- Fully implement the business team strategy as a method for people development and for producing superior products.
- Establish CPN as the building block architecture for developing distributed systems.
- Drive LSS to clarify and solidify functions needed for network management centers and intersite voice/data features.
- Monthly division meetings to keep everyone aware of division activities.
- 11. Define methods for measuring division success.
- 12. Insure that the transition to the new organization is handled in a smooth and professional manner.
- Develop and keep a solid relationship with the field and with other divisions.

Organization

- Implement a new organization. Staff with talented professionals who can quickly achieve success by meeting established objectives.
- Identify major organizational issues and develop a plan that defines charter, objectives, and responsibilities by end Quarter.
- 3) Communicate organization and its objectives to field by end Quarter.
- Communicate the transition plan for all transferred SE's so people deliver on their 90-120 day "contracts".

Growth & Profit

- Develop and drive a process for identifying, bidding, and tracking "ultra-large" system proposals.
- 2) Identify individual program risks and communicate to management.
- Implement program management tools (PC based?) that will ensure effective project management and communication with appropriate groups.
- 4) Identify resources/organizational requirements for success.
- Help increase the win ratio to 30% of proposals contributing \$100 million in bookings in FY 1985. Analyze and report on bid wins and losses.
- Implement standard pricing algorithms and checklists to ensure profitable, competitive bids.

Decision Process

- Identify and drive a Major Systems prospect identification and tracking process to emphasize importance of long-range account development.
- Develop groundrules for Program Managers and track with frequent account reviews to ensure effectiveness.
- Introduce the "team" program management process where factory and field people are paired for the duration of the program.
- Identify and communicate qualification criteria for considering RFP's as candidates for Major Systems.
- Develop a "key program committee" process to determine which candidate proposals should be agressively bid. (PBR or project bid recommendation process).
- Understand MSC's major program organization, and adopt the best pieces to Major Systems.

Commitments

- 1) Meet program commitments as identified in program schedules by Program Managers.
- Implement communication packages (electronic mail?) that will facilitate better interchange and more up-to-date project and prospect information among other factory Applications Engineering organizations and the field (Region, Branch, National Accounts).

Throughput

- Plan for initial program manager workloads of 2-3 major proposals per month (\$5-10 million retail range).
- Identify tools and procedures to help increase organization's productivity. Utilize Product Divisions as consulting resources where possible.

Products

- Be the customer advocate within SDG. Provide product divisions frequent exposure to "ultra-large" customer needs to influence business/product plans.
- CBX II/295. Stand on our own two feet for both pricing and configuration. Understand when the economics will drive future products and include in proposals when agreed by CSD.
- 3) Develop an RFP bid response data base and hardware plan by 10/1/84.
- Develop "capabilities" sales aids (slides, video tape, etc.) to differentiate and sell ROLM's expertise in ultra-large systems.

People Development

- 1) "Grow our own" better so we can fill a larger percentage of our management and individual contributor needs internally.
- Provide adequate inter and intra departmental training opportunities to be prepared to handle the bulk of the projects within Major Systems.

Great Place to Work

- Ensure that the Major Systems environment is energetic, entrepreneurial, and viewed as the applications engineering "green berets".
- Provide an atmosphere to help ROLM attract, hire, motivate, and develop outstanding people to contribute to the goals of SDG and BCG.

SDG DEVELOPMENT SERVICES OBJECTIVES

OVERALL DEVELOPMENT SERVICES OBJECTIVES

- 1. <u>Commitments</u>: Meet our commitments to SDG, the Operations Group and the ROCO's in terms of schedules, quality of services and reliability.
- Support Processes: Review, define/redefine and implement/correct support processes to ensure that we deliver effective and efficient support services to our users.
- Support Plans: Develop, communicate and execute support plans that are consistent with and driven by the business plans and product development programs.
- 4. <u>People Development</u>: Establish people development programs in each organization to grow management and individual contributors.
- <u>Productivity</u>: Focus on those processes, procedures, and tools in each organization that can make SDG and the organization able to do the "right thing right" - more often and faster.

DEVELOPMENT HARDWARE SERVICES

- <u>CAD Turnaround</u>: Plan, implement and operate CAD processes and systems that permit faster electrical and mechanical design - more turns, faster turns, easier turns.
- <u>CAE Focus</u>: Improve the focus on CAE processes, tools and procedures to leverage engineering productivity in the areas of design, documentation test and post-release support.
- <u>Change Control Process</u>: Review the change control process and procedures with the goal of implementing and communicating changes to all necessary organizations faster, more accurately but in a well controlled manner.

DEVELOPMENT SOFTWARE SERVICES

- <u>Configuration</u>: Review the current configuration tools; identify areas which are error prone, require lots of support and are difficult to maintain; develop models and plans using modern SW configuration technology to make current and future configuration tools more reliable and supportable.
- <u>Software Production</u>: Review and develop a long range software production plan consistent with the business strategy. Improve the effectiveness of current Software Production tools.
- Autoquote/SE Support: Develop a plan for autoquote and SE tools support. Put together a team of people to address long term and short term AQ issues.
- Software Release: Review the software release, maintenance and control processes. Develop and communicate the objectives for a Software Release and Support system and organization.

DEVELOPMENT COMPUTER SERVICES

- Availability: Take responsibility for the total availability of systems. Take the user view of what the system can do for him/her. Plan to make all systems available 99% of the time during prime hour (8AM to 6PM Monday to Friday) and 97% during non-prime hours.
- Manage Resources: Plan and manage the total systems environment (processors, peripherals, terminals, communications, networks) and the total systems product life cycle (purchase, operations, service, disposal to optimize user productivity and shorten product development times.
- 3. <u>Tools Development</u>: Plan, develop, install and support state-of-the-art software development, software test and software maintenance/control tools. Support and maintain software productivity programs.
- 4. <u>User Support</u>: Continue to develop and maintain user support programs for documentation, help desk, training and education.

INFORMATION SERVICES

- 1. <u>MIS Systems</u>: Identify, plan, prioritize, develop (make or buy), maintain, operate and upgrade those MIS Systems that the SDG group needs to do to implement its strategic and tactical plans.
- <u>Documentation Services</u>: Identify weaknesses of the current documentatio processes (document control, components, EDB, technical library, technical writing, etc) that will impact our ability to meet plans or commitments. Define, prioritize and put new systems in plac to eliminate these weaknesses.



MESSAGING PRODUCTS DIVISION

Objectives FY85

- 1. <u>Growth and Profit:</u> Contribute to the achievement of the BCG objectives for revenue growth and profitability, by providing a high level of support for PhoneMail, as well as following through with the introduction and support for both PhoneMail II and Text applications in FY85.
- 2. <u>Sales Plans:</u> Meet the FY85 sales plan milestones. Become the dominant vendor in integrated voice messaging by achieving the penetration objectives defined in our sales plan. Provide a high level of field support for PhoneMail sales, with specific emphasis on supporting the trained specialists in the field organization, and providing the training so that PhoneMail is presented correctly to customers.
- <u>Customer Satisfaction</u>: Monitor the customer satisfaction of PhoneMail customers and provide a high level of field support to ensure that all of the Division's customers are satisfied with their installation. Meet all customer commitments.
- 4. <u>PhoneMail II:</u> Meet our product development milestones in accordance with the Definition in terms of content, schedule, cost, reliability and other key product objectives; ensure a well-supported release of this product to the field.
- 5. <u>Business Plans</u>: Prepare an integrated business plan for the Division that will provide the direction for an integrated, prioritized product plan, consistent with our financial objectives. Be prepared for the integration of this business plan with the other SDG Divisions by November, 1984.
- 5. <u>Text Applications</u>: Meet our product development milestones as defined in the May 3, 1984 review in terms of content, schedule, cost, reliability and other key project objectives; ensure a well-supported release of this product to the field.
 - 7. <u>Integration:</u> Work to resolve systems issues that become visible as a result of the products defined and developed in the Division; be a focal point for SDG for defining and implementing the strategy for integration of voice/text messaging with CBXs and desktop devices.
 - 8. <u>Organization:</u> Complete the organizational structuring of the Division; fill key positions consistent with our targets. Define clear charters, objectives, and responsibilities to ensure timely implementation of our business plan.
 - People Development: Focus on people development programs that will ensure that we can fill a larger percentage of our management and individual contributor requirements internally.
 - Great Place to Work: Ensure that we continue to have a GPW environment that helps us to attract, hire, motivate, and develop outstanding people to contribute to the goals of the Systems Development Group.

BASICS

JUSINESS

PEOPLE

MPD Marketing Objectives

FY85

- <u>Sales Plan:</u> Achieve sales plan projections. Execute PhoneMail sales plan action items. In particular, develop OA specialist training modules and a PhoneMail trial program.
- <u>Sales Support:</u> Monitor and assess PhoneMail performance in the field. Where appropriate recommend and execute activities to resolve any outstanding problems. In particular, review Ql and Q2 results and recommend revisions to sales plan action items by January 15.
- 3. <u>Product Launch:</u> Develop and execute launch plans for PhoneMail Release II and text applications. In doing so, ensure consistency of product message and position, end user training, and sales support. In particular, better communicate the text applications positioning to the organization and ultimately to the field.
- 4. <u>Customer Marketing:</u> Ensure that Customer Marketing's role is understood and useful to the field. In particular, Customer Marketing should identify, evaluate, and resolve problems impacting the field's ability to sell or customer's ability to use MPD products.
- 5. <u>Marketing Leadership:</u> Have the marketplace perceive ROLM as a leader in messaging products in general and voice messaging in particular. In doing so, focus primarily on how ROLM products solve common business problems better than existing solutions. Identify and kickoff those projects that will be necessary to maintain and build PhoneMail's position in the marketplace.
- <u>Business Plan:</u> Develop an integrated messaging business plan. In particular, marketing focus should include customer migration path and fit into the sales process.
- 7. <u>ROLMphone Messaging:</u> Get ROLMphone messaging defined and back on schedule. In particular, ensure that ROLMphone messaging's position is understood and accepted in the organization.
- <u>Integration:</u> Define a few key integrated features to be kicked-off in FY°85 that demonstrate ROLM's ability to provide useful, system solutions to common business problems. In addition, develop a road map for future integrated features.
- 9. <u>People Development:</u> Have product managers assume a leadership role on project teams. In particular, product managers should ensure that projects have clearly defined goals that are understood by the corporation and track projects on their schedules.

MPD Engineering Objectives

FY85

- <u>PhoneMail:</u> Respond in a timely, high-priority fashion to reported problems in the field and at ROLM. Monitor CBX releases for continued support of PhoneMail functionality.
- <u>PhoneMail II:</u> Meet the development milestones and meet PhoneMail Local Networking FSD in March, 1985. Start ROLM Trial of Long Distance Networking in May, 1985. Continue to improve product functionality and work with Product Support to improve product RAM.
- <u>Text Applications:</u> Meet the May 3, 1984 milestones. Specifically: Field Trial TextMail in December, 1984; Field Trial FileMail in February, 1985; Field Trial NetMail in June, 1985. Field Trial TextMail-PhoneMail integration in April, 1985.
- <u>Cost-Reduced PhoneMail:</u> Implement a phased plan for the continued cost reduction of PhoneMail. Reduce the cost 10% and reduce the footprint by July, 1985.
- 5. <u>PhoneMail/NCS:</u> Support marketing in launching the product. Develop a mechanism to provide message-waiting indication on non-CBX systems.
- <u>TMMS</u>: Ensure successful trials; provide quick responses to reported problems in the field and at ROLM.
- 7. <u>Business Plan:</u> Contribute technical leadership in preparing and communicating the Business Plan. Ensure that the plan will identify product areas in which ROLM can offer unique value-added market contributions.
- 8. <u>Integration:</u> Improve CBX release coordination with MPD products. Improve SECO turnaround. Develop a technical framework, consistent with the Business Plan, for the integration of voice-text messaging products and desktop devices. In particular, kickoff and define a select set of key device-application features.
- 9. <u>People Development:</u> Make people development a routine and regular process. Ensure that it clarifies job performance expectations and improves milestone achievement. Raise the effectiveness, productivity, communication skills and documentation skills of engineers without stifling creativity.
- <u>Great Place to Work:</u> Improve the development environment and provide better software and testing tools. Provide challenging and rewarding tasks. Encourage people to stretch but make sure they are successful.

MPD Product Support Objectives

FY85

- 1. <u>Communications</u>: Facilitate increased communications with customers, field support personnel, other Product Support groups, specifically ROCO Customer Support and BCG Customer Support, in order to provide a high level of support for PhoneMail and other Messaging Products. Define and implement precedures for these and other support groups to provide ongoing feedback to Engineering about MPD products.
- <u>Customer Satisfaction:</u> Implement our strategy of coordinating customer support across vendors (ROLM and IBM) for Text Applications and TMMS, in order to ensure customer satisfaction with ROLM's products. Obtain information from the Customer Support groups which will enable us to evaluate and monitor the level of support being provided for our products.
- 3. <u>Training and Publications:</u> In order to ensure the successful introduction of Text Applications Products, PhoneMail 2.0 and TMMS, coordinate the design and development of the technical training and publications for these products so that they are concise, modular, accurate and easy to update. Review all existing PhoneMail publication and revise them for Release 2.0 changes into the PhoneMail training classes.
- 4. <u>Product Trials:</u> Develop, publish and implement phased ROLM Trial and Field Trial plans for PhoneMail 2.0, Text Application and TMMS to assure that ROLM trials provide for thorough testing of product specifications and proper integration with 8000 and 9000 software.
- 5. <u>RAM Guidelines</u>: Work with CSD Product Support to develop RAM guidelines which state the purpose of RAM throughout the design and development of a product. Apply these guidelines as appropriate in MPD Product Support and develop strategy for ensuring RAM during integration with CBX.
- 6. <u>Organization:</u> Use RAM guidelines to develop an organizational charter by end of Q2 FY85. Define Product Support responsibilities to ensure accountability, smooth transition across group boundaries, and to eliminate duplication of effort. Plan for adequate staffing levels based on on-going and future project requirements, consistent with the Business Plan and Division targets.
- 7. <u>People Development:</u> Develop a comprehensive training plan for new PSE's so that they make a positive contribution within 60 days of hire. Plan career opportunities within Product Support and ROLM. Appropriately apply the model used by Engineering to develop a set of personal performance guidelines by which all Product Support group members can be evaluated.
- 8. <u>Great Place to Work:</u> Continue to identify and hire skilled and motivated individuals who will contribute to the goals of the Division, SDG, and ROLM.



DATE: April 27, 1984

SUBJECT: MBO Rating

As we've discussed, we'd like to increase our focus on the MBO process by conducting quarterly reviews. I believe that these sessions will be more effective in helping all of us to better define our objectives and communicate them. During these sessions, I would expect each participant to comment on the progress he has made toward achieving those objectives, indicating risks and concerns going forward. It is more important to highlight particular objectives than to cover each objective during these reviews. To put a little more structure into this process, I'd suggest each participant rate their own performance relative to the accomplishment of these objectives. So that we have a consistent scale for the group, I'd suggest the following:

- 0 <u>Unacceptable</u>: Performance is seriously deficient and major improvements are necessary in order to reach acceptable level.
- 1 <u>Marginal</u>: Progress has been made, but overall performance towards MBO attainment does not meet minimum acceptable progress. Improvement is required.
- 2 Acceptable: Minimum acceptable progress has been made; the MBO should be attained, but there are considerable risks that attainment will be achieved.
- 3 <u>Fully Effective</u>: Performance assures objective will be achieved with minimum risk.
- 4 Excellent: Performance exceeds objective.
- 5 Superior: Performance exceeds objective at a level not expected or anticipated.

Perhaps we can discuss this at one of our upcoming offsite meetings. I would expect that at the MBO Review in October the participants would come prepared to discuss their performance on their MBO's rated on this scale. It might also be helpful if individuals rated their overall performance, taking into account their judgment of the relative priority of their individual MBO's.

MESSAGING PRODUCTS DIVISION

DBJECTIVES - FY85 1085 Review

	Unjuctive		01 Accomplishments		Q1 <u>Deficiencies</u>	01 Overall Grade
14	Growth & Profit	o	250% growth over FY84.	۵	30% of plan	2
		o	Pass through operating margins >20%.			
		o	30% market share.			
		o	Responsive field support.			
	Soles Plans	o	Responsive field support.	ø	30% of plan	п
			High quality specialist training.	ø	Low market visibility	
			craining.	ø	Low males motivity	
04	Customer Satisfaction	o	Customers reasonably satisfied.	۵	Low visibility into customer satisfaction.	1
				٩	Customers are not <u>very</u> satisfied.	
τ.	PhoneMail 11	O	On schedule for PhoneMail II.	ø	Low expectation of timely follow-thru to FSD.	*2
				0	Lack of control over non-MPD resources.	
194	Business Plan	o	Business Plan completed.	ø	Plan not integrated.	4
5.	Text Applications	0	On schedule for Text.	a	Lack of firm definition.	2
				a	Low expectation of timely follow-thru to FSD.	
				0	Lack of control over non-MPD resources.	
7.	Integration	ø	None.	0	Unable to influence other Divisions/priorities,	a
94	Organization	α	Objectives/responsibilities clear.	0	Key jobs not filled.	1
				0	Charters not clear.	
۰.	People Development	o	Participated in SDG classes.	o	No MPD-initiated activity.	21
10,	Great Place to Work		Terrific people.	O	Morale slipping due to lack of resource resolu- tion and under target sales performance.	3
	Gverall MPD	٥	Substantial progress on business strategy.	o	Did not achieve financial or customer satisfaction goals.	1.6
		o	Good follow-through on MPD action items.	o	goals. Anticipate not achieving product introduction goals due to non-MPD resources.	

MESSAGING PRODUCTS DIVISION

1

OBJECTIVES - FY85 1085 Review

					100	5.2	
	Objective		Q1 Accomplishments		01 Deficiencies	01 Overall Gr	ade
1.	Growth & Profit	o	250% growth over FY84.	o	30% of plan	С	
		٥	Pass through operating margins >20%.				
		a	30% market share.				
		D	Responsive field support.				
2.	Sales Plans	o	Responsive field support.	o	30% of plan	F	
		D	High quality specialist training.	o	Low market visibility		
			craming.	0	Low sales activity		
з.	Customer Satisfaction	0	Customers reasonably satisfied.	0	Low visibility into customer satisfaction.	C	
				0	Customers are not <u>very</u> satisfied.		
4.	<u>PhoneMail II</u>	0	On schedule for PhoneMail II.	0	Low expectation of timely follow-thru to FSD.	A	
				o	Lack of control over non-MPD resources.		
5.	Business Plan	o	Business Plan completed.	٥	Plan not integrated.	B+	
6.	Text Applications	0	On schedule for Text.	o	Lack of firm definition.	в	
				o	Low expectation of timely follow-thru to FSD.		
				٥	Lack of control over non-MPD resources.		
7.	Integration	٥	None .	ø	Unable to influence other Divisions/priorities.	F	
8.	Organization	0	Dbjectives/responsibilities clear.	0	Key jobs not filled.	D	
				٥	Charters not clear.		
9.	People Development	٩	Participated in SDG classes.	٥	No MPD-initiated activity.	D	
10.	<u>Great Place to Work</u>	۵	Terrific people.	٥	Morale slipping due to lack of resource resolu- tion and under target sales performance.	C	
		-					-
	Overall MPD	o	Substantial progress on business strategy.	0	Did not achieve financial or customer satisfaction goals.	C	
		0	Good follow-through on MPD action items.	o	Anticipate not achieving product introduction goals due to non-MPD resources.		



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Engineering

2

Q1 MBO Rating

MPD Engineering Objectives

Q1 85 Review

1.	PhoneMail: Responded adequately to all field reported problems.	2
2.	<u>PhoneMail II</u> : On schedule. Local networking ROLM Trial plan completed. Implementation in jeopardy due to Telecom Ops resources. Long Distance Networking moved to 1/86 due to new CBX priorities. Revised error log to improve product maintainability. Improved diagnostics.	2
3.	<u>Text Applications</u> : Met 9/17 demo milestone. Accelerated File Mail schedule by 2 months to coincide with TextMail and project is tracking well to new schedule. Shifted primary focus from TextMail to File Mail. Based on Review, chose to extend File Mail features. Impact of redefinition and non-MPD resources yet to be determined.	2
4.	<u>Cost Reduced PhoneMail</u> : Have prototype 19" cabinet; cooling and EMI done. Lost mechanical resources. On hold. Objective will not be met.	1
5.	Stand Alone PhoneMail: POR and configuration support completed. Marketing plan not done.	2
6.	<u>TMMS</u> : Completed stress test and ROLM trial; successful as stand alone application; needed better trial coordination with PhoneMail. Marketing plan proposed but not final.	1
7.	Business Plan: Completed Business Plan; in addition published PC Mail White Paper.	4
8.	Integration: Good CBX coordination on driver and test SW for AP-AP code on 9004 and 8000 SW for VCC. Nothing on SECOs. Business Plan for Voice-text integration complete. Developed technical strategy for host integration. Timely integration of messaging products apparently not a CBX priority.	1
9.	<u>People Development</u> : Started more rigorous code reviews; raised documentation standards; prepared job responsibility guides and held workshops with Group Managers; held presentation style workshops.	2
10.	Great Place to Work: Improved S/1 tools by bringing in ACS. Got Logic Analyzer for Diagnostics Group. Reorganized Text Applications responsibilities to use management skills better. Without more resources: pulled up File Mail schedule, started DTMF project, did RS232 patch panel project, implemented 24 hr shifts for PC Mail debug.	2
		*

MPD Engineering Objectives

Q1_85_Review

- 1. PhoneMail: Responded adequately to all field reported problems.
- <u>PhoneMail II</u>: On schedule. Local networking ROLM Trial plan completed. Implementation in jeopardy due to Telecom Ops resources. Long Distance Networking moved to 1/86 due to new CBX priorities. Revised error log to improve product maintainability. Improved diagnostics.
- 3. <u>Text Applications</u>: Met 9/17 demo milestone. Accelerated File Mail schedule by 2 months to coincide with TextMail and project is tracking well to new schedule. Shifted primary focus from TextMail to File Mail. Based on Review, chose to extend File Mail features. Impact of redefinition and non-MPD resources yet to be determined.
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Julie Holding 234 COPY:

ROLI Corporation

MEMORANDUM

TO:	Wing Cheng	217
iu:	Jan Janik	217
	Sameer Jayakar	217
	Gary Maxey	217
	Fran Morphy	217

FROM: Jeff Rulifson

DATE: October 18, 1984

SUBJECT: Objective Setting Off Site

On Monday, October 22, 1984 we will meet at my home to develop objectives for the current quarter. I will leave ROLM at llam and buy sandwiches for a lunch. Plan to be at my house in Palo Alto at 12:30pm.

The first major agenda item is objectives. We will

- Review last quarter: what we said we would do, what we did, the Management by Objective rating rules, and our rating.
- 2. Develop new quarterly objectives for 2Q85, 3Q85, and 4Q85.
- 3. Write a prototype accomplishments summary for 2085.
- 4. Write monthly objectives for October, November, and December.

The second major agenda item is office procedures. By November 23, 1984 we will use a set of documented procedures to assure that our routine business is accomplished in a routine and timely way. On Monday, we will review our procedures for

1. Time Cards

Kee Vin

- 2. Performance and Salary Reviews
- 3. Project Status List
- 4. Weekly Status Reports
- 5. Monthly SDG Review Report
- 6. Department Master Calendar.

Were a grow a week, a strong

TEXT APPLICATION SECTION

Objectives FY 85

- 1. <u>TextMail 1 Software:</u> Final Integration in September 1984.
- 2. TextMail 1 Release: Field Trial in December 1984.
- <u>Device-TextMail Integration</u>: Kickoff CBX Cypress TextMail SA Integration in December 1984.
- File Mail 1 Release: Field Trial in February 1985.
- 5. TextMail PhoneMail Integration: Field Trial in April 1985.
- 6. NetMail 1 Release: ROLM Trial in June 1985.
- 7. S/1 CDN: Support as appropriate.
- People Development: Make people development a routine and regular process. Ensure that it clarifies job performance expectations and improves milestone achievement. Raise the effectiveness, productivity, communication skills and documentation skills of engineers without stifling creativity.
- Design Quality: Raise the effectiveness and productivity of engineers without stifiling creativity.
- 10. <u>Device Integration</u>: Improve CBX release coordination with MPD products. Improve SECO turnaround. Develop a technical framework consistent with the Business Plan, for the integration of volce-text messaging products and desktop devices. In particular, kickoff and define a select set of key device-application features.
- Business Plan: Contribute technical leadership to the development of the Division Business Plan.
- 12. <u>Competition</u>: Assure that the engineering staff understands the use of their products by customers and the positioning of their products relative to competition.

Py BS Objectives

- <u>TextMall:</u> Integrate RIX-Operations, 3101 support and ALP High Speed Device Driver with TextMall in September 1984. Start Field Trial in December 1984.
- S/1 CPN: Implement TRIP on S/1 by February 15. Start CPN Engineering Trial with PM in May 1985.
- <u>NetMail:</u> Start Engineering Trial using MMEP2 in April 1985. Be ready for Field Trial in June 1985.
- Training: Implement individual written yearly growth/training plans for each MTS.
- 5. Development: Conduct monthly counselling with MTS's:
 - * Review objectives for previous month.
 - * Set objectives for next month.
 - * Discuss performance and give/receive feedback.
- 6. Presentations: Have MTS's present status/progress/special interest reports at group and section meetings. Get them to talk enthusiastically about what they are doing.
- Designs: Get MTS's to participate in design. Emphasize simple designs; clear, concise, well illustrated documents; and bullet-proof code.

SM 7/24/84

File Server Group FY 85 Objectives

- File Mail 1: Give Demonstration of some File Server features. (8/27/84) Full File Server ready for Engineering Trial (10/22/84)
- File Mail 2: Definition of File Server using Phoenix. (11/5/84) Begin Field Trial of first version File Server. (2/4/85) Complete design of features for second version of File Server. (2/4/85) Complete design of File Server using Phoenix. (2/4/85) Ready for integration test of File Server using Phoenix and new features. (6/24/85)
- 3. Milestones: Strive to set realistic milestones and to meet them.
- <u>Designs</u>: Work with each member of the group to produce well-thought out and well-documented designs that implement the products we want to build.
- <u>Time Management</u>: Work with each member of the group to produce well-thought out and well-documented designs that implement the products we want to build.
- <u>Competition</u>: Provide opportunities for group members to become familiar with competitive products and to understand how our products are positioned.

TextMail Group

- 1. TextMail 1 Software: Achieve Final Integration by September 1984.
- <u>TextMail 1</u>: Start TextMail Release 1 (minus PhoneMail) Field Trial by December 1984.
- Device Integration: Pass Design Phase checkpont for PMS 4, the extended integration of PhoneMail, TextMail and SA, by January 1985. Continue development of PMS 4 in order to start Engineering Trial in Q1 of FY86.
- File Mail 1: Start Field Trial of PMS II, File Mail, by February 1985.
- 5. IM-PM: Start Field Trial of Release 1 with PhoneMail by April 1985.
- 6. Net Mail 1: Start Field Trial of PMS III, NetMail, by June 1985.
- People Development: Make employee development a continuing process by establishing clear performance expectations, setting realistic but challenging golas and getting and giving timely feedback in weekly one-on-ones.
- 8. <u>Design Quality</u>: Work with each member of the group to improve their effectiveness and creativity. This will include technical reviews of work, establishment of mentors for the more junior members, intra-group presentations of work acomplished, and group development of techniques for improving the software development cycle.
- 9 <u>Competition</u>: Encourage group members to become familiar with competitive products and how customers use both our product and our competitors' product.
- Scheduling: Use all available tools to closely track the development cycle, both to prevent schedule surprises and to improve estimating skills.

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Eng. Maps

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	rm final Text Mail Integration before ber 1984
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	s from monagers (ASBP) & Han monage - weakly anally at sized into.
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Objective	Field Trial Text mail in Thecenture 1984
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B. <u>Objective</u> Pass Dosign Phone Checkpoint for PIX- Phone Mail-5A integration (Dons 10) in Junwory 1985

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Formed Plan Technics Dlan & Details (all Groups - Rulmphane CDr, Cypress, Phone Mail, ...) Business Review - everyone agres. Grekrum, Blanton, CBX FUL monketing Get Risks and

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5/16/84
5. Assure that the min inquieering statt industries the use of their products by customers and the positioning of their products relative to competition.
To do : use consultants to get clues visit customer sites to see competition visit Rocan sides to see our purducts
Ideal Scane: Feedback finn Bac on aware ness
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OZ BII Group Monagues de sure, judée & l'Cartinue
Q3 chief programments de same, GM, JRJ continue
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Assistance list: Only de julie new, de odhers der QZ
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Communications Systems FY BR R185 Quarterly Boals

02 03 04 01 High Speed ALP device drivers Field Trial Eng. Trial 1 3101 support Eng. Trial Field Trial RIX Ops. Eng. Trial Field Trial Design TRIP Start Code S/1 CPN Monitor Complete Code 2 PH Testing Phone Nail NetMail/MCI Complete Complete Eng Trial Rolm Frial 3 Test & Integration Cole Specs Directed Planned Self Init. Training Voluntary 4 Development 50% >=good 66% >=v.g. 50% >=v.g. 86% >=v.g. 5 Presentations Directed Planned Voluntary Self Init. 6 Designs Accepted Valued Self criticism Self correcting 7



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	01	02	03	0.4
File Mail 1	Coding/ Debugging	Engr. Trial	Field Trial	Done
File Mail 2	Begin Def.	Begin Design	Complete Def. Complete Design	Coding/Testing
3 Wilestones	20			
4 Designs				
5 Time Management				-
6 Competition				

TextMail Group FY 85 Quarterly Scals

	1.00	*	FY 85 Querterly 9		
		Q1	02	03	0.4
1	Textmail 1 Software	Dana			
2	TextMail 1	Plan Trials Eng. Trial	Start Field Trial w/o PM	FSD	
3	Device Integration	Help Define	Design	Design Phase Checkpoint	Implement
4	File Hail 1	Aid in Testing	Support Eng. Triel	Low Level Support	
5	TH-PN 1	Plan Start Imple.	Finish Imple. Stert Eng. Trial	Start ROLM Trial	Start Field Tria
6	NetHail 1	Plan & Help in Design	Imple. Mailer & NS Mods.	Integrate FT Support	Field Trial Support
7	Development	Set Development	Monitor	Monitor & Modify	Monitor
8	Design Quality	Set Goals Monitor	Monitor	Monitor	Monitor
9	Competition				
10	Scheduling				

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3	111	ship	9	9	Test & integ.
4	111		-	8	

Major Milestones by Guarter for SA



Text Applications Section FY 85 - 01 Goals

		July	August	September
1	TextNail 1 SW	Test SA Code and Test	Complete SA Code and Test	
2	TextMeil 1	Trial Plan Complete		Engineering Triel
3	Device Integration	Investigate	Proposal Drafted	Internal Review
4	File Mail 1	ERS Decisions Integration	Partial Damo PC Complete	Issue ERS S/1 Complete
5	TextMail PM	Plan	Nothing	Design
6	NetMeil	Freeze Specs Local Mailer Design	Remote Mailer Design	Postman Designs
7	S/1 CPN	Plan	Monitar	Monitor
8	Performance	Charts Out Ist Draft Plans	Charts Reviewed 2nd Draft Plans	Incremental Goals Set
9	Productivity	Draft Group Plans	Draft Section Plans	Incremental Goals Set

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Communica	tion Sys	tens	FY 85	
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		July	August	September
1	High speed ALP	Complete single line	Complete multiple lines	Engineering Trial
	3101 support	Treck ACS	Test ACS	Engineering Trial
	RIX Operations	Complete ERS	Complete code	Engineering Trial
2	8/1 CPN	Monitor	Monitor	Monitor
3	NetHeil	Freeze Specs Complete ERS Design L Mailer	Design R Meiler	Design Postman
4	Training	Forced	Told Divected	Suggested
5	Development	Explain	Plan Actions	Act
6	Presentations	Forced	Toto Divected	Suggested
7	Designs	Learn value of criticism	Willingly accept	Voluntarily seek

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GH 7/24/84

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		FY 85 -	Server Group 01 Heathly Boals	
		July	August	September
1.	File Meil 1	Test link level; Test S/1 appl level level (create & retrieve)no filer mailer, name server; Begin PC appl level routines	Integrate w/ Filer & Filer & Name Server & Mailer Robust Link Level; Test some PG appl. Level routines;Begin higher speed modifications	Complete S1 appl. level code; Complete PC appl Integrate w/high speed drovers Integrate w/TextMail
2	ERS	Complete draft	Modifications	Issue new
3	File Mail 2		Understand	Understand
4	Designs			
5	Time Management			
6	Competition			

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JJJ 7/24/84

TextMail Group FY 95 - 91 Goals

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10	Scheduling			
9	Competition			
8	Design Quality	Set Goals Monitor	Set Development Goals	Review and Set Set Final Goals
7	Development	Review Charts	Set Development Goals	Review and Set Set Final Goals
6	NetMail	Local Mailer Design	Monitor Design	Monitor Design
5	TN - PN	Finish Plans		
4	File Mail 1			
3	Device Integration	Help Investigate	Support Proposal	Review Proposal
2	TextMail 1	Support Trial Plan Work		Start Engineering Trial
1	TextMail 1 Software	DIS ubrs Comp. NS/SA Files Complete Mailer Design Complete UIF Data Structuring and Screen Definitions	Mailer Complete NS Complete UIF Phase 2 Code Complete	All code complete a ready for Eng. Tria
		July	August	September

SA Milestones by Month

		TM	TH/PH	FM	NM
June	7	TAP, DBAP,	a pana bana anan anan anan anan anan ana	ay anay anay anay anay inay inay inay anay	ang ang mili nut ang tan tan nu dan tan tan tan tan tan tan tan tan tan t
	1	Data entry			
	1				
July	1	Test,	_	-	-
	1	comp. db.			
	1	Recovery			
	1				
Aug	1	Data check.	-	-	
	1				
	1				
Sept	1	trial	+	(interior)	

* Month's

7/24/84

For Group Munices for August 1. Well laid out plus Do How churts weekly, who asking exception reports - Dutes an other needs - capital, Dobs, desting Two were task assumments 2. Uwenstudes Goods Sentence Objectives, Q1-Q4 Gods, Q1 Gods Q11 worked out 3 Communicates Plans Group ander stands section understands [Instrades meetings División Understands 4. Ses big picture Explains by relating to División Goods 5. Influences Solutions All other Groups Connetted, E.g. Dhoue Noth Test & Integration, SA

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7/24/84 Ju Dugust Internal Reference Specs 6. Hove them in order! 7. On- time Evolvations Negular, weekly if necessary, reviews with some (brief) written notes. Develops Deuph 8 Knows status, weaknesses, strengths use charts ! Adequate Training 9 Know pushens Clear Responsibilities 10. Know my indusidual intributors what, when, how important, completed derivitian

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ATIONAL 12.381 50 SHEETS 5 42.389 200 SHEETS 5 3470 200 SHEETS 5

		7 4184
	For Group winayers	in July
	To he in Grood -	Very Good in Planning & Judgement
١.	bell laid out Thus	HPM charts & task assignments Dane without asking, show good use of resources Updated weekly, has to complete and cost Extra nutes to cover atter espects of progress - 1.9 cupital, Jobs, testing,
2	Understands Goods	Sentence objectives QI-QU churt July- Sept churt
3	Communicates Pluns	Team theroughly understands all of edour simple, choor chorts Communicated to section, other groups Julie's section, other groups in tompuny if they are involved
4	Sees big predure	Objectives relate to Division Goods and to product posidion
5	Influence Solutins	All other groups committed 1.g. Phone Moil, Test & Internation,

ALTONAL 42-388 200 5HEETS 5 50UARE

July objectives 1. 2. 3 4 5 6 7. Swint. TMER luter FMER TMIPM NNET CEN Jul 2-6 Potapletos pissi Pissi Pissi

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Jul 9-13	Sulve	PMOK	PM DK
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Jul 16-20

Jul 23-27





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wart monthing	Nun & How to ol	yechis es	JFC	6(3) 84
June 4-8	B Performence	9 Design	10 Integration	12 Competition
June 4-8	My Long Ruye Mus duri for 6104's Churts Reduce Review in 1001's weekly prostice	en onplas in Section Mity (struct) repose Branstam Mathuds in I mi's willows Lung - trug & som	· Weekly with · SA marrie drift · Blochen ast time · Notes typed	· Constant for PG day · Constant on · consepation light
June 11-15	Review in Iml's Corrections Commitment on long Runge Alms	Numples in Section not g Egods Refine Methods in Ionis w/ GMs		tracky visits competition are short [Date]
18-22	My stud Ruge Alus due & Gais	Patrie meetrods 7 5405 in Ian 's wildow's Section madg-nothing	SA metrift dugt	waxe PS dag visit cushwar cuntuct for GM Cust. Visit
	Commitment from GM's to de Shal rays Alones developments plans Discuss all churts in crutin Mitz 1 & y buty Marice Professioner	Hougher in Subin Holy MG curs No extrado & 5235 in Gratin Mrg. 1 et July List of medbods	Dright wig gods dave, review et muster mig	Control for GM PS Day

New Munth Weeking Dlue on Private Objectives UANIK, JAYAKAR, MANEY, MUREDING

June 4-8 stud idens flegistered viceoss

ins start items incluss do puly which

Stat items Review musel pat. Flevel. Stat Dews discuss Tecting Undertund in 1411

Jun 11-15 5oure

3 done

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June 18-22

Jour 27-29 6 done 6 done 6 done 1 done



JPR 7/7/85 Moxey week of July 9-13 1. Precent sheles from west's mitg at Group Mapis meeting in tuesday 2. Objectives in sentence form to Free my 7/12 3 QI-Q4 Chord to Fren try 7/12 4. July- Sept about to Run by 7/12 5. Outline of Review w/Rich at used unby 7/11 Remember review is july 23-27 6. Propose for web's mity ell 7. Be registered for all Rows mant courses by 7/13 Remember 1. Review which is july 23-27. you are responsible for time, Noom, invitations, presentations, ... 2 Resonand nesselywent Muss due in July 3. Design Revieward Resign Improvement Mundue in July

2004 12-381 50 SHEETS 5 SQUA

Joy aver week of July 9-13 1. Objectives in sendence form to From by 7/12 2 Q1-Q4 chord to Row by 7/12 3. July- Supt chart to Form by 7/12 4. Outline of Neview J Rich at wed my 7/11 Nowember Neview is July 16-20 5. Updated CPN APM chal to me · gain commit ment from Julie & strout 6. Prepro for Wels 11 on mtg 7. The registered for one Round magnet classes by 7/13 8

JFR 717185

Remember

1. Periew w/Rich is July 16-20, you ore responsible for time, rown, invitations, presentation, ... 2 Augural Turelopment plans due in July Resign Review & Design improvement plus due in july 3

OPR 7/7/85

Jonik week of July 9-13 Objectives in surlence firm to From my fin ι. QI-QU Churt to Even by Fin 2. 3. July - Supt churt to Run by 7/12 To complete on Hom ED Ponsi to Jeff ty 9/12 4.

- 5. Outline of Paview on wes may 7/11 Remember Review w/ Rich 7/23-27
- 6. Regolue Tony-Junie issue
- 7. Ideas in Print Gener problem by Iuns
- 8. Cumitment from Stuart & Julie on TA-PM plus - do they agree to topun churt?

- elso dues it motch Sumeen's CPN church ?

- 9. Prepro for Wel's 11 an meeting
- 10. Be registered for all Rocm mgm + doudes by 7/13

Remember

- 1. Review wil Rich July 28-27 you are responsible for drive, room, invitations, presentation, ...
- 2 Personal Teresign inprovement plan due in July. 3. Resign Parita & Tresign inprovement plan due in July.

42-381 50 SHEETS 42-382 100 SHEETS 42-382 100 SHEETS

AMERICA 12-381 10 SHERTS 5 SQUARE 12-382 100 SHERTS 5 SQUARE MARTOORAL

GM 7/5/85

Rile Server Group Objectives

PY 85

1. Verte Moil 1: Demunstrate sume features in August, Stord Engineering Trial in October, ...

Relemail 2: 2.

- 3. Time Munapment:
- 4. Designi

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7/2 JFR

Wing Week of July 2-6

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2. Tory- Jomis Prodeen

42-381 50 SHEETS 5 SQUARE 42-352 100 SHEETS 5 SQUARE 42-359 200 SHEETS 5 SQUARE MANAGE 12-359 200 SHEETS 5 SQUARE

3 Propert Naview for Rich - July 16-20 (Raview 7/11)

Invide Douge to Satin MAS.
JER 712

JER 7/2 Money July 2-6 N N 1. Presentation on Role Mail July 23-27 (Review 7/18)

JFR 712 Pararan Porto 2-0 1. Objectives in surface form 2. Precutation for Rich July 16-20 (Review 7/11) 3.

JER 6/24

Wing week of June 25-29 1. Goutt chart by project in 18 months Status Reputs due Priday 2. 3A motule - dryf - Doin that you PW Due 3. 4. Plans for RM, NM, Pul PM integration PMS 4 (Seend release of TM) 5. Tuny owned Parken

-

JER 6124 Jania useer y June 25-29 1. How-to Objections that support mine in survence form - Left from the 613 2. Close in TMIPM Nous - left from #86/3 3. Schedules Had work 8 get us to 913 - Left fun 613 4. Work with wins to be gure he has occounted in future needs. 5. Prepor for wel's meeting 6. Begin to Propose plu for project review of 1. The (20 min) + Jeres de some poursed ~ Melet (18 miles) why 23-27 In Rich - Some time in July 7 Gantit Chout by project En 18 months 9: Tultout Gury or does - Rochard + 15 shift 8. Status Reports due Presay 10. Solve rung Jow is morblan (Jow so Wilder) 11. Vole Mail caled le -redit was articli 12. Privil Same public of 10000 to an of 1

6/24 Mortey Week of June 25-29 1. Review Howard Project Moren chard for North with RM - R. RM - Rran will get you a copy 2. Work with wing to assure he accounts for any FM SA needs. 3. Regin to Plan In a 30 min review of RM In Rich. 45-20 July 25-27 4. Proposo & Wed's meeting (elimpt & Com 15) 5 Goutt chout by muyeer for 18 months 16 Status Paperts due Priday · lave los programming O Praghtine Critician

JAR 6/24 Jayakov Week of June 25-29 1. New's objectives in Entere form Both Protod Objectises R Dow to objectives The Objectives flacd support my lisd -2 Prepar for Wes's meeting 3. Gautt chart by project in good 18 months 4. Begin to New 30 min popul review of de 1. Rix ups (30 min) - 16-20 gelieve 3. CPN (5 min) for Rich - Some time in July. S. WINK with wins to be sure he - Notice Or of mand occounts on NM needs in his objectives 6. Stebus Reports The Richary 1. Cloubed in Dx Sty

ACTORNAL 42-387 300 SHEETS 5 SOUARE 42-387 200 SHEETS 5 SOUARE

6/17/84 Mokey - Rov ween June 18-22 + Busen month's objectives from Josd Status Report 2. Review PMS 2 charles - all the? ** 3. Discuss what can be some for you to objectives by Quada for 4. Regin to plus product abjectives by week for Kest of June & July. - an chord! 5. Pariew Yew's gools my owner & Quarter's gools my most - and de? Propose for web's meeting pars impring a sot - picture forming dray Communication also improving - feed book from fores quot play and for Any thing from wing - EM

6117184 Joyakow - Rov Week June 11-22 I. Review year's gods by wate ? Quadra's gods by marth En NM 7 CPN - should be ok. ×2 Begin to discuss next month's gods by week for NM SCPN, al TM Noview Lest months gools from soldy Rogerd. 3. 4. Discuss Years objectives - in sendence from .- 1 page Begin to Non yours on each grouten - sop in How to aspectives. Proprie for wed's meeting. 5. go an review Brything Brow Wing WM

AATLONAL 42-381 50 SHEETS 5 SOUARE 42-382 100 SHEETS 5 SOUARE

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42-312 100 SHEETS 5 SQUARE 42-312 100 SHEETS 5 SQUARE 42-312 100 SHEETS 5 SQUARE

Propose at seast 3 stems he was 211

618 Somean - what use discussed in our i-mail moves price but I need more detail. I would like to review old item and order 223 holow. Jeff Joyanov June 11-15 for 1-11-1 Paview you's NM molestures - by quarter X 2. Theseuss NM medestrues on June - supt - would 1/month (3.) Disens Fin molestimes for jun-cept-wint ilmuth A. Propose at least 3 stems on wed @ 11 Discuss UL, CBX & PM CAN milestones again by overther & for June-Cept. 5. 6 Review yearly objections - oction plan & time took Product - How to - Prin ate

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MATTERNAL 200 SHEETS 5 SQUARE 5 SQUARE

618 Jan- Pricauge we missed our 1-un-1 we are feeling helped. I would size to meet in monday and agents these items. Jeff Janik June 11-15 - tos 1-00-1 Y. Dúcuss TM 913 Risks 2. Discuss The milestures ressignments for Jue, July, Day, and capt 3. Discuss TM RT Plun; melestones by Quarter; melestones du jun - sept Discuss TMIPM Alm; milestones by Ovuder; milestones for jun - supt 4. Discuss year's or eaced objectives - ochim Non Etime dule Priva - How-no - Private 5. Discuss overe Test Plus (may be sure on #3 eture) 6. Registered for Roce- to-ford comm class? 7.

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22-381 50 SHEETS 3 SQUARE 42-362 100 SHEETS 3 SQUARE 42-369 200 SHEETS 5 SQUARE

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werk of June 4-8 - Product of youtiles



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Jan Num . Junik

For week of jue 11-15 shad bow to adoptive assignments! and stad personal objectives Week of June 4-8 How to objectives

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12 competition

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short doe library.

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Ween of June 4-8 Private Objudices

Junik , Joyenar . MERDIN . Cheng , movey Chiel in Purknound Orideria Paview assignments discuss allowing Review Discors Test in 1m1 thinking averstudies Statimi Regula for good to would -Discimula course! Stat monthly monstelly nuth mustly Ninkly AVIN Paview Nuriew Parlew Review

week of June 11-15

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. Chang · Review objectives . Pusual prosting goals · get SA matrix . Refine Rises. verily yen's web's prop. Jun- Aug obj's SA JM TMIPM Em NM

WEEKLY ASSIGNMENTS

For 118-618 101's

JER 613184

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cheng	Jenne	Jayakar	morey
Tm 9/3 Risks	Tm 9/3 Risks	Tm 9/3 Risks	TM 9/3 Risks
TM FT Risks	TM RT Ricks	TM FT Risks	TIM ET Risks
SA Matrix	The Plan June, July, 8 Aug		
ERS update Plun	Ers update Plun	Ers up date Plu	CRS update Plus
objectives year	Test Plu Syst-Dec	NM Plun	FM Richs
	Tw/pm plun	NM Risks	(Note XINOD & DIA/DCA)
	objectives - year	VC2CBX CPA Plus	objectives year.
		CAN for PM plus	

objection es - your

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Fran's

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Notes for From.

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2. Printe trong nut cital more - took lettra printing to get convect.

from As a proby the Spitie proon and working out our procedues, I thank use ought to prove also only See on work places are pourt o professional experiore. On the weekend I water the following Filing to be law storked on war table Enselyn in Risoring in mail troves Norelco mortine in floor Plades Storked on the Chune is old pypers in work table Dant youred behaid minde If we need more columets of book Shelve, please put everything is away.

Nh



· Objectives

- · Nootness Mail Dores Work tible
- · Vecotion Sick Lewe Doport
- · Contreas Room Sign-up

- Prvms

42.381 50 SHEETS 5 SOUAR 42.382 100 SHEETS 5 SOUAR 42.389 200 SHEETS 5 SOUAR Jeff

October 17, 1984

Office Procedure Guide Priorities

1. Time Cards

A guide for everyone, engineers and managers, on the procedure.

2. Performance and Salary Reviews

Due to Jeff and Julie two weeks (second Friday) before the close of the fiscal month. Returned to the manager by the next Monday. Reviewed with the employee by late Wednesday. Typed and signed by Friday. Due to Rich be Friday before the fiscal close.

Fran to have a reminder form that shows everyone in engineering. Updated during first week of each fiscal month and distributed to all managers.

3. Project Status List

Remind Jeff and Julie by Wednesday of week before last week of fiscal month. First pass edited copy due to Fran by late Monday of last week of fiscal month. Clean copy to Jeff and Julie by Wednesday morning. Second pass edited copy to Fran by late Wednesday. Clean copy to Rich by noon Thursday.

4. Weekly Status Report

Remind Jeff and Julie on Wednesday. Due to Rich by noon on Thursday. Usually handwritten.

5. SDG Review

Not sure about procedure yet.

6. Jeff's Calendar

If any changes, update late in afternoon.

Fran

Check in some regular way to be sure rooms are reserved.

Have technique for reminding groups about meetings: project team, group managers, section.

The following items are less important, but we should have guides for them.

7. Master Calendar

That shows holidays, vacations, important events.

8. Engineering Phone List

That has everyone's home phone number and address.

9. Travel

That has a check list for reservations and another check list for things to prepare such as itinerary and maps.

10. Expense Reports

Did we stop sending copies of everything to Rich? Who goes for petty cash?

As we continue, we are sure to find more.

O Scheduly Notetonic 1 Minutes 42-341 50 SHEETS 5 SQUARE 42-387 100 SHEETS 5 SQUARE 42-387 100 SHEETS 5 SQUARE 3 Status Reports @ Objectives

JFR 7/7/85

From week of July 9-13 1. List of employees, tilles, runiew lotes - left from 613 2. Explore Pollow-up Systems - left finn 6/11 Review Dade List for Group Munopers - left from 6/11 3 A. Revenue chosts - left from 6/3 5. QI-Q4 goods (were called focus churk) - left from 6/24 V6. Jul-Sep goods (were coeled freus clout) - left from 6/24 7. Filing - left from 6/24 US. Pice up love pupers - left from 6/24 19. Letters for Product amounts - lett from 215 ne-do objectives 10. Schedule Propert Paviews 11. 12. Biz Toon Minutes

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JFR 7/7/85

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12. Biz Toon Minutes

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JPR 7/2 Fron . Week July 2 - 6 1. List of smployees, tille, review dodes Explore Reclow-op systems 2 3 Stadus Report due dates & Review due dates to Group Mars. 4. Performance chats Recus Charles S. Surear's Parier. Small estas 6. Org Chord For Both Bugineering Retions Holding & Rulfan 7. * Make over heat -- Filing, love pipers, 8 Inad war Tert R. +7421 ---9. Stadus Report 12 10. Biz Tan Report Plu Propul Roviews Junik Juny 23-27 11 . Schedule · Movey July 23-27 I how w/ Rich self, whale group · Judera John 10-50 · chang July 16-20 12

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12. Notebuuts 13. Comen sign-app's 14. Gon worthy way 16. copy sys 85 11. Letting in Duraniuments 17. Corry Porcents 18. Dos objudoes

NOT 1. Quorter JER 6124 2. Jews 3. Jopenhiles 10. Nedera S ADDARD BSC June 25-29 Fran 1.2 1. List of suppoyees, exprisive, dille, rivers dubes left from 613 2. Byplore Pollow-up systems - Left from 6/11 3. Status Report & Review Dates Lid for Group Monophis Left form 6/11 4. Derformunce Churds - see me for formert 5. Rocus cherks - soo we for formut Hove 1-on-1 discuss 6 - Reling - Making Our weat 7. Schedule churges A. still have staff @ 9 an Fri 8. New-extra Stoff @ 9-1020 Tues C. Quartuly Paview #/12 9-12 D. Scheduls Project Paviews - Se Me EE. Rescledule My Staff & Peter Mag 8 Sureer's Raview - Typed - 1000 9. depies of Perd charts-were to be out soft week.

Fran June 18-22 1. Updale performance chart - from c13 2. List of samplayees, experience, tidle, sovier dates from 613 3. Lorge file contract - when installed? A. Raview - type from 17 5. Explore follow-up septems from 6+11 6. Status raport 2 Paview dates Jist in mars. from 6/11 7. Hove 1-m-1 - Dishout do ! 8 Indernation Minudes

6/17/84

9 Stoll minudes

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11 Berfornuce charts

Fren June 11-15 Old Hems N. Update dungible outenes 2 Update Performance Chart 3 List of employers, experience, Litle, raview dates 4. Order long Cobuset 5. Business Cords 6. Type swiew 7. Schedule 1-m-1's for Julie New items 8 Stort 1-un-1 Some how 9. Explore follow-up suptems 10. Status Report & Review Dute Remunder List draffed H. Prod teen min A. Grop Neps Min 48. D.C. Chief sug. It ACS Summary

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6/3/24 Rov From ance for Weekly Meeting - Indepotion Trom - Rulipson, Hucowa, BLOHMI SHEERINGER need speaken phul Schadul STUL'S wI Sun Low R. Tong Ponero Update tungible outcomes 0 update Performance Chort 0 · List of suppoyees & proview dates & spinience. - Copies of Slower Rupats by the April & May & Big team Minutes GII Product Term Minutes 5/29 ~ Group Mars Muttly moto 615 415 · Straggisten up Cadim mity Ruoms 6 letter fri Tupul · Rusiness couls 617 1 Product Sem minutes w Tubynotin tean Minutes o Review o Large Collinet

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Jeff July 7: 9-13 1. Rich chord 2. Field Survive Trip 3. Customen Visit 4. Sel publica

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Jeff July 2-6 1. Risk chort 2. Charts Pn 7/12 ruiew. 3. Rield Price Trip a. Custumer visit 1. Rix stord-up - who is in cloge Carps-out 20 Signature Authinity 3.

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Me. Week of June 25-29 I - Bonk stuff I RUCM 1. Pruis upron-ine- get list owe! 2 Stort & End mity's within 3. Reld Survive Imp A. Customes visid. 5. Risk durt!

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WATCHWE READ SO SHEETS SOURCE SOURCE

June 11-15 Me. I. Projul schedule up to date re-20 Prog Tem Rormat 2. Redo Biz Teun Rormot J. Biz Rlun Outline, ... The Meno in Aris 5. Droft milestore year's, auth's, worth's to Fran. - not to From yet - but close - a winday No to an Friday 6. Rede ou Prus chuts - again -- to presend objectives again

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Managorial Robaviar Analysia	1.11		1.		- 6.									1
Managerial Behavior Analysis	NEWNN	to	ALESINGETC											
PROGRESS REVIEWS 1. Review employee's progress very irequently (at least weekly) in considerable detail.	N	No	18		-							-	-	
2. Review employee's progress very frequently but in less detail.	-	1				-			1	-		-	-	
3. Review employee's progress regularly but less frequently (perhaps monthly) and more informally.	1													1
4. Generally leave employee alone other than periodic dis- cussions of progress.														
FOLLOW-UP 1. Stop in to see employee very frequently (possibly daily) to check the status of assignments.		1	1											
2. Stop in to see employee occasionally to discuss the status of priority or critical tasks.	1													
3. Ask employee an occasional question about status of projects at informal discussions you have with individual.	1													
 Leave employee pretty much alone other than to review projects during periodic progress reviews. 														-
COACHING 1. Spend extensive time with employee discussing and demonstrating critical job knowledge and skill areas (sales calls. presentations, conducting meetings, etc.).			1											
 Less time demonstrating but considerable time spent ob- serving employee's skills and abilities and providing feedback and help. 		1												and the second second
 Assist employee in the planning of presentations, meetings, etc. but little time spent in observation and coaching in job skills and knowledge. 		-												
4. Make yourself available only as employee needs you.	1			-	-		_				1	-		-
COMMUNICATING EXPECTATIONS														1
 Spell out in detail the activities employee should be involved in daily as well as discuss policies, practices, and work rules. 			1								1			-
 Describe in quite a bit of detail what you expect the completed task to look like and less time with policies and practices. 														
 Discuss your expectations in a very general way for employee's responsibilities and projects. 		1												-
 Negotiate your expectation of finished product by letting employee pretty much structure expectations. 	1													-
WORK INTERACTIONS												T		
 Initiate frequent discussions with the employee almost exclusively devoted to his or her project responsibilities. 		1	1					4						-
 Initiate frequent project related discussions but also engage in some "small talk" on non job related topics. 	,	1												
3. Devote most of your discussions to ways of helping and supporting the employee's, reinforcing your confidence in him or her and engaging in occasional friendly interaction i.e. kidding around, jokes, etc.		1												
 Meet less frequently and discuss not only employee's project responsibilities but solicit his or her ideas for implementing your own responsibilities i.e. he/she serve almost as a sounding board or confidant on your ideas. 	1									3				

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W.F.

Managerial Behavior Analysis Write names of subordinates here ->>>	HEWMAN	Not	Schreysher												
For each area of management listed below, please place a check under the employee's name opposite the alternative which comes closest to the way you manage this individual.								1	5						
ESTABLISHING OBJECTIVES 1. Define employee's job responsibilities, objectives and stan- dards of performance in detail,			1												
2. Define employee's job responsibilities, objectives and stan- dards after considering his/her viewpoint.	1	1								1					
3. Participate with employee in establishing job responsibilities and objectives.		1	1							Ū					
4. Allow employee to establish own objectives on which you concur.	1	4												1	
TASK ASSIGNMENTS 1. Spell out the stops involved as well as how the employee should accomplish a task.			1												
2. Provide guidelines on how the employee should accomplish a task.			1												
3. Discuss alternative ways to accomplish a task.	V	1	1	1											
 Serve only as a consultant to employee and negotiate support that you will provide. 	1	-													
DEADLINES 1. Establish larget dates and mile post dates for each of employee's tasks.		1	;												
2. Establish target dates after considering inputs of employee.	—	-	-	1	-		1								1
3. Participate with employee in establishing target dates.	1	1	V	1		1	-			-					
4. Allow employee to establish target dates.	V	-				1	1	-							
NATURE OF TASKS	-	-	-	-	-	-	-	-		-		-	-	-	
1. Assign employee highly structured, generally easiest tasks.			1			12.				-			_		
2. Assign employee small "pieces" of a project.			1		-										
3. Assign employee major portion of a challenging project.	V	1		1	-	-	-	-	-	-					
 Assign employee lotal project responsibility for a challenging project, 	1					1	1								
REVIEWING COMPLETED TASKS	2.00	1	-	-	-	-		-		-		-			
 Review in detail all employee's completed memos, reports and tasks to insure they meet standards before distribution or presentation of materials. 			1												
 Check most of employee's work before distribution or presentation but not in as much depth. 		1						Ū							
 Review only major task completions of employee prior to distribution or presentation. 		•													
 Serve as a consultant to employee if requested but generally do not review prior to distribution or presentation. 	1											_	-		
PRAISE — Frequency 1. Praise virtually every task well done (almost 100% of the time).	1							-							
2. Praise tasks well done, but less frequently than in #1 (approximately 75% of the time).		1				1					_				
3. Praise lasks well done, but less frequently than in #2 (approximately 50% of the time).				1											
 Praise lasks well done, but less frequently than in #3 (approximately 25% of the time). 			1			-			-		-		1	-	
RECOGNITION/PRAISE - Quality			J										•		
 Offer recognition for specific tasks well done. Not only offer recognition for specific tasks well done, but as often as possible praise the way in which the employee is approaching his/her overall job (i.e. broader and more general recognition). 	1		4												
general recognition). 3. Not only offer recognition outlined in #2, but support and credit the employee in front of others, and delegate more to him/her.	1	1			-					100					1
 Offer both specific and general recognition, and treat employ- ee more like a peer than a subordinate in most situations. 	1														

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Indicators of Job Maturity

- 1. Job relevant education/experience 8 7 6 5 4 3 2 1 High Low
- 2. Job relevant skills 8 7 6 5 4 3 2 1 High Low
- 3. Regular statistical measureable success criteria 8 7 6 5 4 3 2 1 High Low
- 4. Ability to identify and solve problems 8 7 6 5 4 3 2 1 High Low
- 5. Ability to initiate innovative ideas 8 7 5 5 4 3 2 1 High Low
- 6. Organization, planning and implementation ability 8 7 6 5 4 3 2 11 High Low
- 7. Ability to operate independently without strong dependence on others 8 7 6 5 4 3 2 1 High Low
- 8. Knowledge of when to call for help 8 7 6 5 4 3 2 1 High Low

Indicators of Psychological Maturity

- 1. Action oriented prefers involvement in many activities 8 7 6 5 4 3 2 1 High Low
- 2. Has a very high interest in the area 8 7 ...6 5 4 3 2 1 High Low.
- 3. Willingness to try new approaches risk taking 8 7 6 5 4 3 2 1 High Low
- 4. Has a long term perspective on activities 8 7 6 5 4 3 2 1 High Low
- 5. Aware of strengths and weaknesses and seeks help 8 7 6 5 4 3 2 1 High Low
- 6. Volunteers to help others 8 7 6 5 4 3 2 1 High Low

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- · Ours interviews
- · Address list

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