

Patrick Moorhead: Robin, welcome to the Six Five Summit 2021, and thank you so much for speaking here on day four.

Robin Seiler: Thank you, Pat. I'm excited to be here.

Patrick Moorhead: Yeah, probably a good place to start here is to explain to everybody what you do for Microsoft, because based on our pre-show meeting, you have a lot of responsibility at the company.

Robin Seiler: It's always an interesting question to answer, what do you do? My title is COO of Windows and Devices. Really, what that means is how do you make sure that you have the right resources in the right places, so that you can get the outcome that you want across that business? It's things like financial operations. It's also things like vendor management, supply chain, packaging. It's also, what do we do over the long-term with the Surface portfolio, and how do we make sure that we have great customer input coming into that portfolio? So it's a lot of long range things, as well as day to day operations.

Patrick Moorhead: Yeah, so many of the bucks stop with you, and that's impressive. I've been following Microsoft for, gosh, I guess now over 30 years. I've aged myself a tad. But Microsoft has really turned into more of an experience company, and I'm wondering, and I think our viewers really want to know, how do you think about what goes into each product? Because there's just all these pluses and minuses on decisions that go into these.

Robin Seiler: Yeah, that's a great question. There's a few things that I would talk about in terms of product making. I think at the very beginning, in order to make great products, you need two things. You need a great set of diverse people and you need curiosity. Curiosity is one of my favorite words because it's a little bit fun, but the impact that it has is substantial. Why do I say curiosity is important? Well, you have to learn and you don't just think about where you want to go. You have to look at the past. What were the fundamentals that you learned? What was important? What resonated with the products that you built?

In many cases, we look for the emotion in that. What did you feel? What did the customer feel? How did keyboard feel when they put their hands down on it? Did they love it? How did the display feel on your eyes? How does the device feel when you hold it with the materials that you make? All of that emotional connection creates fundamentals that you should never design out. Those are the reasons that customers love your product, so you have to hold on to those. But we also know people's needs change all the time, and so we have to learn today. We do that through a bunch of different forums, customer advisory boards, user research teams, human factors, labs.

Then lastly, having the teams that are curious and dream about the future. What can AI and machine learning bring? How can we use those capabilities to make everything a little bit easier for the people that use our products? How do we

beautify your handwriting? How does the pen feel against the glass, and how do we predict that pen movement so that we can reduce latency, gaze correction on Pro X, so it feels like you're looking ... you're making eye contact? Those are some of the dreams that we've had about the future. Bringing more seamlessness into how you work, so you learn and you dream. You're curious.

Then the last piece is how do you build what you see in your mind's eye? You have to bring together that team, but most important, you have to build and tune the software and hardware together. The way that we talk about this as really putting the product in the center of the table. It's the product that matters. It's the end-to-end experience that matters, not who's on what team and what their mission is. It is a single mission to create the best end-to-end product that we can. So we bring in the Office team and we dream up what the pen can do in Excel, or what earbuds and your voice can do in Word, connecting Surface Hub to Teams room systems, and Whiteboard for group collaboration. All of these new experiences, combine software and hardware in a seamless way from the moment they are dreamt up. With the breadth and history that we have at Microsoft, and our ability to build what you need today while preparing for tomorrow, is really our passion. That's what creates the experiences.

Patrick Moorhead:

Gosh, I still must be a product person because I am literally excited and want to go work on your team. I used to be a product person before I became an analyst, but the whole curiosity, emotion, and dreams, and then making it a reality. I know this isn't all talk because I have been in ... I have walked in your gallery and it's like revered ground, right? It's like, you just know there's a sense of pride. You walk into the building and it's like we're coming into this big room, and everybody takes it so personally, and I love that, so great answer. Now, Microsoft is a technology company, and Surface is about technology in addition to experiences. So I have to ask, what technologies are you most excited about right now?

Robin Seiler:

There's a lot to be excited about. There's definitely a lot of potential that's coming, things that can make everybody's life a little bit easier. But this last year, I think, was a big year for a lot of people to just become more aware of things that maybe they weren't aware of before. So for me personally, when I look back at the last year and I think about the biggest move forward we made from working at home was about inclusivity. I'm going to bring two concepts together. When products are accessible for people of all kinds of abilities, it makes us more inclusive. So I'm going to group, when I think about technology, accessibility and inclusivity together.

You may be aware a few years ago, we launched the Xbox Adaptive Controller. Through this process, we learned that we needed to be intentional. To include people with disabilities in our ideation and through our development process. The principle was, which I love this, nothing about us without us. It was core to the product development process, and we took all of those insights through the customer success experience. We learned so much, and it pushed us to ensure that accessibility is part of every development process for every product. Now

we're not perfect and we have a long way to go, but we are committed to becoming better with every single product release.

We have evolved our packaging to be more accessible, pull tabs and BTS labels. We begin every product development process with an inclusive design sprint. We don't simply assume that we understand what people need. We bring them in, and we understand their barriers, and we get better at what we do through that connection. The intent is accessibility becomes part of our product development DNA. Now has to be everyone's responsibility at Microsoft. It's not just one group of people and it can't just be a phase. So it is cross-company responsibility, and it's not just hardware, it's software.

The thing that came about with Teams, the ability to include everybody, the ability to use the chat to talk, the ability to raise your hand, gave all sorts of people better tools to participate in meetings. There's something about it where it brought a level of inclusivity I've never seen before. I think too, and I'm just going to go a little sideways for a second, when you're really lucky, there is an intersection between what you do for work and what you do in your personal life. You really want to know that what you do matters, and these moments are little personal proof points that you're doing the right thing with your life. I had one of those moments recently.

My dad has been deaf since I was 18, and he never wanted to tell anyone he was deaf. So he taught himself to read lips, and when you try and talk on the phone with somebody who reads lips, it doesn't really work. Phones are pretty hard. So he and I, for a long time, have not talked on the phone. But as I started learning the capabilities of Teams and as they started really building more and more capabilities for people working from home, I decided to try it with my dad. We had our first family Teams call with my two sisters. We turned on subtitles. His laptop was large enough, so he could see all of us. He could read our lips and he could see subtitles, and I have not seen him smile that much in such a long time. We were connecting.

This step forward in how we communicate, how we include everyone, is what we have to hold on to. We have to build on it with the technology that we create to give everyone a voice and a way to connect. I think it's really core to where Microsoft is going as a company and frankly, where we need to go as humans.

Patrick Moorhead:

Wow. Listen, I remember when that video for the Adaptive Controller ran. I don't think there was a dry eye in the crowd. I know I was shedding a tear, and I need to watch it. Your story is invoking a lot of emotion in me and that's just awesome. Now, none of this stuff is easy in what we're doing. It's easier for me to say it because I'm not executing on product programs and I'm not managing an engineering teams or spending billions of dollars in money here, but with what you want to achieve, what is the biggest technical challenge that we face right now?

Robin Seiler:

Yeah, this is one that I spend quite a bit of time thinking about, because it isn't necessarily obvious in my opinion. I don't think it's a challenge that just Microsoft faces. I think it's a challenge that every single company is going to face in the next 12 months, and that's, how do we make hybrid work successful? If you think about the journey that we've been on, for a long, long time, we've dreamt of using collaboration tools so that we don't have to travel, to be just as effective remotely as we are in person. We've tried a bunch of stuff and we've had some really good steps forward, but it hasn't been consistent. Then we all worked from home for a year or more, and we learned new ways to collaborate. Things like raising your hands, or sending real time reactions like hearts or thumbs up.

We use these tools in every meeting every day, and we feel success because we're doing it. We're working remotely, and we have raised our inclusion levels. Everyone has a way to participate, but you also have to remember, it won't be this way when we get to hybrid. Many people have taken this moment and translated it to, oh, this is what hybrid will feel like. It won't. As businesses in many countries go back to work, some employees will choose to work remotely. That is a great choice for many people, but technology has to adapt to support them. When you build physical products, it is very hard to build them when you don't sit with the product in the center of the table and look and feel. So we have done, in our team, a set of hybrid meetings.

It's a challenge. It makes you realize that as much as we had to learn to all go remote, we will have to learn the same amount in order to go hybrid. Because we've been trained to use these tools like hand raising or thumbs up, and then you get a small group of people in a room and 20 people on the call, and nobody knows the right protocol. When you're in the room and you want to speak, do you raise your hand? Do you do a thumbs up? You can't see chat well. You can't see faces well. It will require us to reconfigure how we do group meeting rooms so that we can bring the tools that we've built that have brought so much inclusivity with us to the next stage of work. Making sure that we have the right camera and mic set up so that you can hear everyone in the room, and when you're reviewing hardware, bringing cameras up close so that everyone can see what you're looking at and holding.

So I think that we have another significant evolution to go through. We went through in person to remote. We now have to go remote to hybrid. From a Microsoft perspective, this is Teams, Office, Whiteboard, collaboration hardware like Hub or Microsoft Teams room systems. But we have to reconfigure it in a way that helps both in-person and remote people collaborate without losing the inclusivity that we have achieved over the last year.

Patrick Moorhead:

That has to be the most insightful take on hybrid I've heard yet, and I so appreciate you bring that to the table. It's easy to forget that right now, with remote, every person has the same size square or block. You have the same tools. Regardless of stature, regardless of where people are, it's all the same.

That all does get mixed back up in the snow globe when we're doing halvesies again.

Robin Seiler: That's right.

Patrick Moorhead: So I appreciate that. I am proud to say that I have every Surface that's ever been released except for one your PC devices, right? I remember when it first started. It was-

Robin Seiler: Anda few mice.

Patrick Moorhead: Yeah, no, I know, and I love mice. You know I love mice.

Robin Seiler: Oh yeah.

Patrick Moorhead: It started out as it was all consumer, right? It was with Windows 8. It was patchable, and then over what seems like almost a decade, it's been a decade, you've gone, at least from my point of view, consumer to small business. Now here you are in the Enterprise. Many of the largest companies out there rely on the Surface portfolio of products and the Microsoft services to get their work done and collaborate. How does Enterprise fit into the vision of Surface?

Robin Seiler: That's a great question. We definitely did start with a consumer focus. The way that we think about it is Surface is built for people, and we purposely use that word. We purposely don't say consumer. We don't say small business. We don't say ... All we say is Surface is built for people, because the person who uses it is the person that we want to love it. So our goal was to create products that people love and not just use, but truly love, the feel, the quality, the craftsmanship, what it does for them, the speed. That people love how our products help them get things done, or relax a little bit and surf the web or watch movies. But it was business customers that really pushed us to evolve. They said, "Our people love your products, but we as IT don't necessarily love your products."

So we started listening to this and designing much more for IT and businesses without losing what people love. We listened. How did they want to modernize? Where do they need to adapt and remove manual processes? How are they evolving their management, their deployment capabilities as they move parts of their infrastructure to the cloud? How can we work with them to enable more scenarios like mobility, versatility in the way people work, or more computing and a better experience for frontline workers, or experiences for Teams like group collaboration capabilities? Of course, like every person, IT wants security. They want the best of Windows and Microsoft from a security perspective. So we have pulled each of these capabilities into our roadmap, into our products and then across the portfolio.

We still drive for that end user love in every single detail that we build. That's just who we are, but IT professionals get special focus from us across our products, thinking about them more so that they ... we also consider their needs in addition to the people that use our products. Making sure every product is secure from the beginning of its design until the end of its life. We call it chip to cloud security. Making sure that they're manageable from setup and autopilot, to making sure that all the way down to the hardware level, IT can turn cameras on and off in secure environments. So the end goal, loved by people approved by IT. People love being the biggest part of it.

Patrick Moorhead: Now, I love that, and it's ... I always call it loved by the kids, approved by the parents. That's a really ... It's an art to make that happen because the trade-offs are immense. I think you're starting in a very good place because there's so much quality in the devices. I think what gives you an edge in any circumstances is when you get to choose your own device, and it's, they see the catalog and then make the decision. So, Robin, I can't believe we're at time already, but we are. I could literally sit here another hour. I know it'd be like sticking needles under your fingernails for you, but I've really enjoyed myself. I just want to thank you for making our day four here at the Six Five Summit better. Thank you so much.

Robin Seiler: Thank you, Pat. I love working with you, and it's always great to catch up.

Patrick Moorhead: Thanks Robin, and so this is Pat Moorhead with Moor Insights and Strategy. Have a great day four for the remainder of the Six Five Summit.