



No Cigar

A memoir

Jim Edlin

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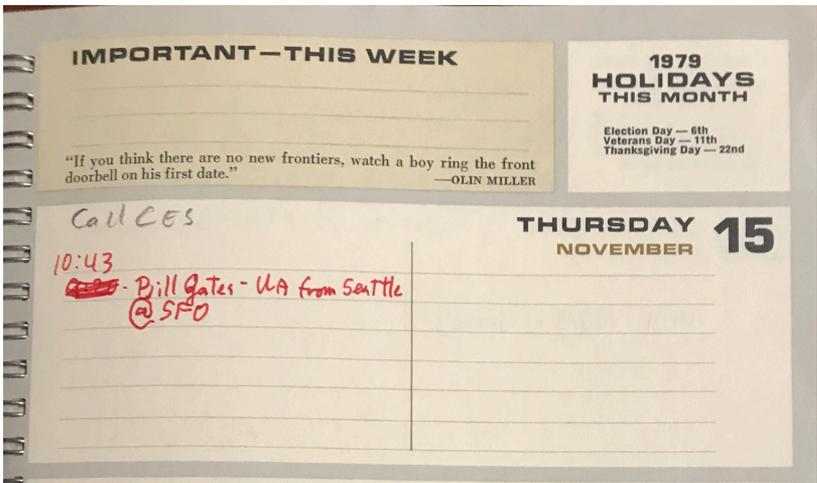
Contents

Prologue.....	1
1 - In the beginning... ..	5
2 - Florida.....	11
3 - DC and back to Florida	31
4 - Vermont	37
5 - Michigan.....	55
6 - Chicago Again.....	79
7 - Michigan Again.....	109
8 - Chicago Yet Again.....	119
9 - The Bay Area	173
10 - Bruce & James	215
11 - Between Companies	267
12 - The HyperMedia Group	281
13 - Interlude After HyperMedia.....	345
14 - Nonprofits (With Side Trips)	357
15 - StarCharm and Retirement	419
Epilogue.....	447
About the Author	451

Prologue

One November evening in 1979, my then-business partner David Bunnell and I took Microsoft's Bill Gates, who was visiting the Bay Area from Seattle, out for drinks and dinner at Borel's, an upscale view restaurant perched on a hill in San Mateo, California.

We had both short-term and longer-term goals for the occasion.



The short-term goal was to interest Bill in participating in a conference we were trying to organize—"MICRO I - The First World Planning Conference on Micros".

"Micros" were what we predicted the world would come to call the devices that evolved from microcomputers, the personal-scale computers that had begun to appear on the market in the mid-1970s. David and I had signed a contract and received an advance from the New York publisher Warner Books (the book arm of the movie studio)

to write a book titled *Micro: The Next Watershed Invention and How it Will Change Your Life*.

Our proposed conference, envisioned as a high-end affair bringing together many of the most visionary thinkers and entrepreneurs in the emerging microcomputer world, was meant to extend and leverage the *Micro* franchise we hoped to create with the book.

We figured that signing on Bill as a conference speaker early in the planning process would be a boost to our credibility as we sought to sign up other speakers and sponsors. David knew Bill from their days working in Albuquerque, New Mexico, where David was part of the MITS¹ team that launched the pioneering Altair microcomputer, and Bill's Micro-Soft (as it was then known) created critical software for the Altair.

We had planned on using the drinks portion of our evening to pitch Bill on participating in the conference.

The longer-term goal, slated for discussion over dinner, was to feel out Bill's possible interest in a bigger vision I had. For some reason, I thought I might have better success engaging Bill in this vision if I spun it out to him one-on-one. So David excused himself after the conference conversation, leaving me to try weaving my spell solo.

Underlying the vision I was peddling was the notion of "watershed inventions." By this, we meant inventions that had a major transformational effect on multiple aspects of society and how people lived their lives. The automobile was one example. We believed the devices and ecosystem we saw evolving out of early microcomputers—"micros"—would be another such watershed invention.

A corollary of the watershed invention notion, I argued, was that great businesses and fortunes would arise from a watershed invention's debut and flowering. The rise of the automobile facilitated the birth and fabulous prospering of companies like Ford, General Motors, Firestone, and Standard Oil. My pitch was that the rise of the micro would have a similar effect and that the door was open to act in

¹ Micro Instrumentation and Telemetry Systems

the dawning stages and seize an opportunity to create one such company, perhaps even the most successful one.

“Global Micro” was the working name I gave the company I envisioned. “G.M. for the Micro Age,” I’d explain. And the key asset I suggested it create and control was the user interface by which people would interact with their micros.

Wrapping up toward dinner’s end, I asked Bill if he might have any interest in joining forces to realize this vision.

Little did I know that the person I was sitting across the table from would go on, without the slightest contribution from me, to build the kind of great company and corollary great fortune that I envisioned. Or that an important factor in achieving that success would be creating (or perhaps appropriating) and controlling the PC (not “micro,” alas) user interface.

It was one of many occasions in my life where one might say, “Close. But no cigar.”

* * *

The rise of personal computers and then the internet are said to have led to “the greatest legal creation of wealth in the history of the planet².” I was around for a lot of that, but never quite brought home one of the big prizes. This is my story.

² *A History of Silicon Valley*, Arun Rao and Piero Scaruffi, Omniware, 2011

1 - In the beginning...

I –James Kenneth Edlin–was born on February 20, 1948 (my birth certificate doesn’t show the time, but I’ve been told it was shortly after midnight) to Pearl Peskind Edlin and J.³ Kenneth Edlin, in the Meyer House pavilion of Michael Reese Hospital in Chicago, Illinois.



Meyer House pavilion

I was a late child of a third (or possibly later) marriage. (And, as I found out seven decades later via Ancestry.com, perhaps a “shotgun” marriage too. Mom and Dad were married less than four months before I was born.)

Dad, born in 1898, was 50 when I was born. Mom, born in 1910, was 38 when she gave birth.

Dad was born somewhere in Grodno Gubernia, in what is now Belarus, and immigrated with his mother and two older brothers to the US at age 4, settling first in New Bedford, Mass. (His father had come

³ Joseph

to the US ahead of his family.) Mom was a native Chicagoan who grew up on the South Side and graduated from Hyde Park High School.

Dad was an entrepreneur whose business hovered somewhere around the intersection of banking, securities, and real estate development. Mom had acquired secretarial skills—she knew shorthand and was a fast typist—and had previously worked as a secretary, but didn't work after I was born. I was their only child.

The residence I was taken home to was an apartment in The Blackwood, at 52nd Street and Blackstone Avenue in Chicago's Hyde Park neighborhood.



The Blackwood

I recollect very little about the time of my infancy and toddlerhood at The Blackwood. My only fragmentary memory from that time is that my father had a bottle-green Cadillac car, in which he was driven around by a chauffeur named Alan.

* * *

Somewhere around when I was two, we moved from the South Side of Chicago to the Lakeview neighborhood on the North Side, into a

townhouse that was part of a court of them on W. Aldine Avenue. I believe my father was somehow involved in building these.



The Aldine townhouses. Our townhouse faced the court, not the street.

My memories from the Aldine townhouse are pretty fragmentary too. I recall occasional business visitors who came to see my dad. One I remember was a serious-looking accountant named Arthur Atlas, who wore a fedora typical of the period.

I also remember my mom and me arranging dining room chairs to pretend they were the seats of a car. Then we'd sit in them and pretend we were driving to eat lunch at the Pump Room, a fancy hotel restaurant.

At some point, when I was three or four, my dad's business dictated a move to Tucson, Arizona, where he was involved in building a subdivision. We flew there in a triple-tailed TWA Super Constellation and settled into a rental in the Desert Club Apartments.

Dad's subdivision was being built on land formerly part of a military base that had been deactivated.

I retain only a few memories from Tucson. One vivid one is getting into a furious argument with a neighbor kid at the Desert Club. Acting out my anger, I threw his little red wagon into the middle of the busy street in front of the property. This, of course, horrified my parents.

My other Tucson memory is of a trip to a Hungarian restaurant located somewhere in Tucson's nearby foothills. We dined there occasionally and I still remember their beef goulash as a favorite dish.

Jim Edlin



The Desert Club Apartments in Tucson



S. Edlin Ave. a street named after our family in the Tucson subdivision my Dad was involved in building.

Mostly we dined at the Hungarian place with Dad's business associate from the subdivision project, Ed Daly, and his wife Minnie. They'd generally drive us there. But on one occasion we drove there without them, and Dad was unsure of the route. When he took what I was sure was a wrong turn, I tried to convince him he'd gone off-course. But I was patiently told I couldn't possibly know the way and he was sure he was navigating correctly.

It was only after many minutes of driving into increasingly obvious wilderness that Dad finally acknowledged we'd gone astray and he backtracked to take the route I suggested. The restaurant eventually came into view on the route I had insisted was correct. Much amazement was expressed that little me had such a good sense of direction.

* * *

When the Tucson project came to an end we returned to Chicago. Continuing our journey northward in the city's neighborhoods, we moved into The Sovereign apartment hotel in Uptown.



The Sovereign

Here I acquired a child-size, pedal-driven car, which I pedaled up and down the block regularly, exchanging greetings with the doorman every time I passed the Sovereign's front door.

I was now of Kindergarten age and started that fall at George B. Swift Elementary School, which was about a 10-minute walk from The Sovereign. My teacher was Mrs. Hook, and I'm sure she was more than tired of the repeated questioning from her charges about whether she was married to Captain Hook.



Swift School, home of Mrs. Hook's Kindergarten class.

Our return to Chicago was somewhat short-lived. Before winter had fully set in, we departed The Sovereign, piling our belongings into Dad's black Cadillac Fleetwood and getting on the road to Florida.

2 - Florida

Our first destination in Florida was Daytona Beach. This was well before the advent of Interstate superhighways. So we wended our way south along a route of mostly two-lane highways, passing through a chain of small towns and staying alert for “speed traps” that the AAA cautioned us about.

Our landing place in Daytona was the Miramar Beach Motel, an oceanside motel owned by a retired Chicago cop named Norman Stabell and his wife. My father knew Stabell through their mutual friend Harry Smith, also a Chicago cop.



Miramar Beach Motel

I don't recall how long we camped at the Miramar Beach. But eventually, we found a rental house farther down the beach. It was across the street from the ocean and the super-broad, white beach that was packed firmly enough for cars to drive on.

While we were living on the east coast of Florida, Dad was working on a real estate development called Lanark, on the Gulf Coast to the south of Tallahassee. Like the earlier development in Tucson, it was being built on land from a deactivated military base, in this case Camp Gordon Johnson, where a quarter-million US troops had trained in preparation for the D-Day invasion of Europe.

Having left Swift School and Mrs. Hook behind in Chicago, I was enrolled in kindergarten in a small, private school called Mary Meder. I have few recollections of my time there except for hating the daily afternoon nap period, where we were sent to sleep on mats laid on the floor. Since I was rarely sleepy at that hour, I really resented the forced inactivity. Also, I have a strong sense memory of the taste of the slightly warmer-than-room-temperature milk we were served in little paper cartons after nap time. I really didn't care for that stuff.

* * *

After not quite a year, we moved farther down the coast to West Palm Beach.

Dad's brother, my Uncle J.V. (Jacob Vernon), and his wife, my Aunt Anita, lived in Palm Beach, where they operated a branch of the Chicago women's clothing chain Bramson, on the tony Worth Avenue shopping strip. (Anita was a sister of Leo Bramson, who founded the chain. J.V. was a psychiatrist but had retired from practice due to a heart condition that limited his activity.) So we were back in a place where we had some family.

In West Palm, we moved into the Royal Poinciana apartments in the Poinciana Park neighborhood. I have the feeling that the family finances were not in great shape during this period, since our apartment was small and a bit on the shabby side, and the kitchen doubled as my bedroom. The managers of the building were a couple named Ralph and Elvira, whom I recall as having little patience with small children, including me.

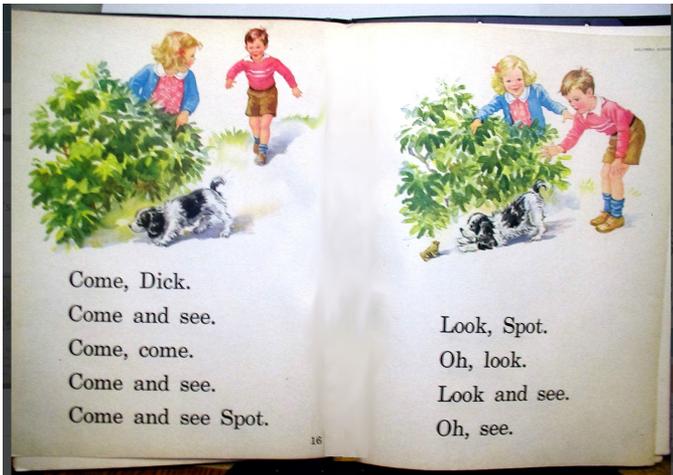
My new school was Northboro Elementary School, a short walk

from our apartment, in Mrs. Lockett's 1st grade.



Northboro Elementary in West Palm Beach, Florida

Mrs. Lockett's class was a bit of a mismatch for me, as I was already a fairly advanced reader for my age, and the class was learning beginning reading from the insipid Dick and Jane "see-and-say" books.



To keep me engaged while much of the class struggled with Dick and Jane, Mrs. Lockett appointed me a reading helper for the class. So

whenever a classmate was stuck on a word, they'd raise a hand and I would walk over to their little desk and help them figure it out. Sometimes I'd get a little over-enthusiastic, windmilling my arms on my way to perform a reading rescue, and Mrs. Lockett would have to warn me to tone it down.

After school every day, Mom would come to pick me up and we'd walk home. On the way, we'd often stop at the soda fountain in Albritton's Pharmacy, where my invariable order was "chocolate phosphate and a chocolate donut." (A combination I still love to this day.)

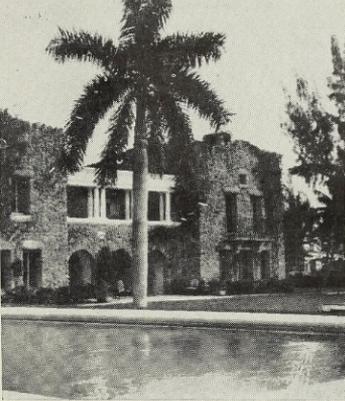
One other thing of note occurred during my time at Northboro. For the first time I can recall, I became enchanted with a girl. She was a little blonde in my class whom I thought of as "The Weegoosh." (Where'd that come from? I suspect now that I was mishearing "Annalee Gersh," filtered through a mild speech impediment, as "Anna Weegoosh." I never did learn what her actual name was.) The Weegoosh, however, seemed unaware of my existence. In an effort to be drawn more into her orbit, I befriended Clara, a girl she hung out with a lot, though someone I definitely wasn't enchanted by. Alas, this strategy gained me nothing; The Weegoosh never did notice me.



After the school year ended, we moved farther south again, this time to Miami Beach. Our first domicile there was an apartment in a court building somewhere in the vicinity of Harding Ave. and 69th St. —I don't have an exact address for this place—which we were in for only a short while.

Next, we rented the furnished bottom floor of a gracious old house at 7600 Collins Ave. (since demolished and replaced by ugly condos). The landlords were a sweet, older couple named Irv and Sadie Layton, who had once lived in the main house but since had moved up to a separate apartment on the top floor. In this house we had no TV, but in my room, there was an old Silvertone radio on which I listened to still-running radio series such as The Lone Ranger.

My new school was the private Lear School, then located in a complex of coral-rock buildings on the Biscayne Bay shore near the southern end of Miami Beach. The outcome of my parents' consultation with school Director Ida Lear and Lower School Supervisor Natalie Jordan was that I start in 3rd grade rather than 2nd. This was likely due to how far ahead I seemed to be of my 1st-grade class in West Palm.



The Lear School
NURSERY — TWELFTH GRADE . . . RESIDENT and
DAY SCHOOL
Outdoor Teaching — Afternoon Recreation — Regulation
Swimming Pool on Premises
DISTINCTIVE for its **HIGH SCHOLASTIC**
STANDARDS . . . CULTURAL HOME
ENVIRONMENT . . . CAREFUL
HEALTH SUPERVISION
IDA R. LEAR, Director
1010 West Avenue Miami Beach, Florida

An ad for Lear in Florida Teacher magazine

Come fall, a blue Lear bus began picking me up every weekday morning and delivering me home at the end of the day.

Mrs. Ethel Levine's 3rd-grade class met outdoors around a ring of tables on a rectangular concrete slab beneath an awning. Sadly, my only memories from that class, other than that Mrs. Levine was a nice

person, are occasions when I and some other boys from the class laid out crayons in the sun to soften into a substance we dubbed “ookie-mookie” and then formed into “bombs.” To what end these crudely molded bombs were then deployed, I no longer recollect.

Lear had a large, bayside swimming pool, and swimming was a regular activity in our class schedule. At this point, I had not yet learned to swim. I don’t remember whether no swimming instruction was offered or if I simply declined to partake (perhaps in embarrassment at being a non-swimmer among these Florida kids who’d been swimming forever). So I would just jump into the shallow end and splash around during swimming period.

Over time, I discovered I could semi-float with just the tips of my fingers touching the bottom of the pool to hold me up. And as time passed I realized I needed less and less time with my fingers touching to remain afloat. In this way I became a self-taught swimmer and came to love swimming—which I still do to this day. In later years at Lear I even won ribbons in intramural swim races on occasion. Kind of amazing for a “husky” and otherwise non-athletic kid.



One time at Lear our PhysEd coach walked a group of classes over to a nearby public ball field to organize a baseball game. I don’t think I had ever seen baseball played at that point. I had no notion what the rules were. Somehow I was assigned to be an outfielder. I spent my time out there trying to puzzle out why some pitches were deemed balls and others strikes. Thankfully, a ball never came near my position, which was a great relief to me because I would have had no idea what to do with it.

* * *

Somewhere toward the end of third grade, my folks bought a huge house on Rivo Alto Island, one of the islands in Biscayne Bay that are strung out along the Venetian Causeway that connects Miami Beach with Miami. It was an older home, as homes in South Florida go, and needed a fair amount of fixing up and decorating before we could move in.

I'm not sure why we didn't remain in the Collins Avenue house until the new one was ready for move-in, but we didn't. Instead we moved into two rooms in a motel, the Island House, on Belle Isle, the island just before Rivo Alto on the causeway. It was close to the new house so my mom could work with workers and the decorator who were doing the renovation. We remained in the Island House for a few months, which I liked because it had a pool.

Given the size of the Rivo Alto house, and the money obviously being put into renovation, decorating and furnishing, I guess the family finances had improved markedly from our days in West Palm. Dad had started a company called First Continental Mortgage Corporation and it seemed to be doing very well. It had a spacious office on the second floor—Dad called it the “bank floor”—of the Huntington Medical Building in downtown Miami.

This office was populated with sales and marketing people, bookkeepers and accountants, secretaries, and my Aunt Rosabelle (second wife of Dad's eldest brother, Morrie) as receptionist and switchboard operator. (Rosabelle's involvement was a source of major friction between my folks. Mom didn't get along with that branch of the family. After a while, Rosabelle was eased out and Mom took over the reception and switchboard role.)

In First Continental Mortgage, I believe Dad was a pioneer in the idea of “securitizing” mortgages, though in a very different fashion than that term signifies today. His version was to take individual home mortgages and cut them into slices that investors could purchase. For example, Joe Homebuyer would take out a \$10,000 30-year mortgage (a not-unreasonable loan size for a small house in South Florida in the 1950s) on which the payments were, say, \$42 a month. Then First

Continental would offer Susie Investor and nine other people one-tenth slices of Joe's mortgage for, say, \$1,050 each. Then, theoretically, for the next 30 years Susie and her follow investors would each have a monthly income of one-tenth of Joe's mortgage payment. If Joe paid off the mortgage early, Susie and the other investors would each get a tenth of the payoff amount.



Huntington Building, Miami

It's not clear to me from this distance exactly why Dad's approach was a better option for an investor than putting their money in a Savings-and-Loan, where return on their investment would be derived from a share of payments on hundreds or thousands of mortgages rather than just a single one, with seemingly far greater liquidity. I imagine First Continental must have offered a better interest rate than what passbook accounts at a S&L provided. And perhaps, as a way to get borrowers, they may also have undercut the rates S&Ls charged for mortgages. I imagine that S&Ls must have provided a generous pricing umbrella in the space between rates charged to borrowers and

paid to savers that allowed First Continental to offer better terms to both sides and still make money.

* * *

Fourth grade at Lear took me into Mrs. Dorothy Hadley’s classroom. Mrs. Hadley was a bit of a battleaxe, with a reputation for strictness and no tolerance for nonsense. Perhaps as a result, fourth grade is completely unmemorable for me, except that I acquired a somewhat derisive nickname—“Univac.”

UNIVAC was at that time the brand of computers possibly best known by the general public. (CBS had used one to analyze election returns from the 1956 presidential election, apparently a first for TV.) I expect I got the moniker because I generally knew and was quick to say the answer to any question the teacher posed. If a classmate didn’t know an answer they’d say, “Just ask Univac.”



A Univac installation

We also left behind the Island House and moved into the Rivo Alto house that year. Dad had convinced the older couple who sold it to provide seller financing. The mortgage was around \$17,000. (Last I checked on Zillow, the Zestimate for that house was closing in on \$6 million—though it had had significant improvements and additions.)



STUDIO PENTHOUSE—This 3 bedroom, 2 bath home, with two maid's quarters plus a studio penthouse at 101 Venetian Way, Rivo Alto Island, has been purchased by Kenneth Edlin for approximately \$21,200. Miss Mori Fremon of J. A. Cantor Associates, 1111 Lincoln Rd., handled the transaction. Abraham and Anna Beckerman were the sellers.

101 Venetian Way, Miami Beach

The house, on a triple lot that included expansive grounds, was huge. Downstairs, in addition to a foyer, living room, dining room and kitchen (plus pantry and butler's pantry) there were rooms my mom dubbed the Card Room (complete with a walk-in safe inside a closet), the Drawing Room and the Red Room, connected by a large formal hallway. Upstairs were my room, my folks' room and a guest room that doubled as Mom's study. Then there was a third-floor room, accessed by an outside stair, we called the Tower Room. Over the garage, up a flight of stairs from the kitchen, was the Maid's Quarters, a suite with living room, bedroom and bath.

Indeed, with the move we also acquired a maid, though she didn't live in. Her name was Catherine ("Cath-ern" as my mom called her.) And Mom really made her work for her \$40 a week. Every day she was expected to vacuum the carpets in all those rooms, then go back over them with a stiff-bristled push broom to "bring up the nap." And she was expected to remove all items from the refrigerator daily, wipe down the inside, and wipe down each item before returning it to the fridge.

Later, as Catherine took leaves to give birth to children, other domestic help came through the house. There was a couple, Ted and Mary, who did live in the suite above the garage. Ted was a preacher on weekends, but worked for us as a chauffeur and houseman during the week. And Mary, unlike Catherine, also cooked for us. Later, Ted and Mary split up, and Eddie, who didn't live-in, arrived to be chauffeur, butler and cook. I liked Eddie's cooking best of anyone who cooked in our house. He made a chili I couldn't get enough of, and introduced us to a dish he called "smothered steak" that I absolutely loved.

As you might guess, all these domestic help folks were African-American ("schvartz" in the Yiddish idiom of the time). And though my folks were not by any means Southerners, they did engage in some segregationist behaviors. We had a separate cabinet and drawer in the kitchen for plates, cups, glasses and silverware to be used by the "help." I didn't question this, I just accepted it as how things were. (Even years later, the attitude was so embedded in me that when I took those same items to use in an apartment of my own, I didn't feel comfortable using them myself until I had "purified" them in boiling water. I feel horrified looking back on this!)

Along with the move to Rivo Alto Island we also acquired a new car, a 1955 Cadillac Eldorado convertible in a metallic bronze color. When we had someone working as a chauffeur, this is the car they drove.

After school and on weekends I'd spend long hours camped out on a lawn chaise in the expansive back yard, marching through science fiction novels like those by Heinlein, Asimov and VanVogt, and series



1955 Cadillac Eldorado convertible

books such as *The Hardy Boys*, *Tom Swift Jr.*, *Rick Brant*, *Nancy Drew* (I didn't care that these were aimed at girls, I enjoyed the stories), and any others I could get my hands on.

Every time we visited the Burdines department store I'd race to the book department to see if there were any new arrivals. I even got into an exchange of letters with the head of the Miami Public Library, demanding to know why they wouldn't include any series books in their children's section. (They didn't consider them worthy.)

We also had subscriptions to three local newspapers - the morning *Miami Herald* and the afternoon *Miami News* and *Miami Beach Sun*. I'd generally devour these every day front-to-back, except for the sports section which I didn't care about. I'd always feel a little guilty when reading through the section of the *Herald* titled "For and About Women." I generally found the articles interesting, but it felt a little like I was intruding into a ladies' room.

We had magazine subscriptions too—*Life*, *Saturday Evening Post*, even *Playboy* for a while. "Printaholic" me would start boring into the arrivals the minute they'd land in the mailbox.

* * *

Fifth grade brought a dramatic change in teacher. Mrs. Saralee Stein was young and attractive, and I think I developed a bit of a crush on her. Six decades later I still recollect the distinctive, sharp but not-unpleasant smell of her breath as she would lean down to point some-

thing out to me on a piece of classwork on my desk, giving me an immature but vaguely sexual frisson.

It's likely that emerging sexuality that year was also behind a misbehavior that if occurring today would surely have gotten my ass instantly tossed out of school. Girls in those days generally wore skirts instead of pants to school, and with a boggling lack of self-control I started going up behind female classmates, grabbing the bottom hem of their skirts, and flipping them up to momentarily reveal their underwear. Of course this activity was met with instant horror by the school staff, not to mention major indignation from the victims. After a few such offenses I was duly warned that the next time I did this the principal would have some high school boys hold me while my own pants were dropped in front of the class. That was the end of that activity, if not the curiosity that likely underlay it.

On a related front, a neighborhood girl named Cookie and I had started riding our bikes to a construction site on the island where there was a huge pile of sand. I think it was Cookie's idea (she was a year older than me) for us to bury ourselves side-by-side up to our waists in the sandpile. Then we would burrow our hands through the sand to explore by touch the private parts of each other. Later this would escalate to sneaking into the back seat of Cookie's father's Chrysler Imperial, in their darkened garage, for similar fumbling explorations.

Naturally, I expected all of this would be private between us. But once Cookie had tired of the whole business, she spilled the beans to other neighborhood kids. Afterward, when my parents and I would happen to drive past this group of kids playing outside, they would point at our car and jeer, "Sex Maniac! Sex Maniac!" (Of course, I would tell my parents I had no idea what they were screaming about.)

Two other things emerged around this time. One was my entrepreneurial inclinations. Dad had acquired an elaborate shoe shine kit, and I had taken custody of it. My first idea was to set up in business in front of our house with it, offering shoe shines to passerby. But this was parentally discouraged; apparently this was an unseemly

One architectural idea I put on paper was a plan and elevations for a single-story house designed around a central, open courtyard. Looking at this drawing now, I find it eerily similar to the midcentury modern homes built by northern California homebuilder Joseph Eichler.

Another interest I started developing in this period was radio. I had acquired a little transistor radio with an earphone and listened to Miami stations on it all the time. This was early in the era of rock radio, but I wasn't big on the rock stations in town. I preferred stations like WINZ that had more "personality" programming, where the hosts bantered, did interviews, and took phone calls between playing cuts of "middle-of-the-road" music.

A particular radio favorite of mine was late-night talk host Larry Glick, who'd chat into the wee hours with listeners who phoned in. Long after my official bedtime, I'd lie snuggled under the covers with my earphone plugged in, listening to Glick's show and wishing I was old enough to attend the occasional "Glick-nic" picnics his station put on for listeners. I wanted to grow up to be Larry Glick one day.

Around this time, I also bestowed an extra middle name upon myself. I thought it would be fun if my initials spelled something, and I landed on the idea of inserting an "A" into my JKE initials to make them JAKE. (Of course, I completely ruled out inserting an "O" to make JOKE!) In school, we'd been reading poetry by Edwin Arlington Robinson, and I liked the sound of his name. So I stole his "Arlington" for the "A" and dubbed myself James Arlington Kenneth Edlin. In those pre-computer days, bureaucracy was less punctilious than now, so by sheer force of will I managed to get my added middle name included on both my future driver's license and passport.

Oddly, having made this addition, I never cared for or encouraged people calling me "Jake."

* * *

My last year at Lear was sixth grade⁴, this time in the classroom of Mrs. Bella Wechsler, another older lady but far kinder than fourth grade's Mrs. Hadley. In this year we were transitioned to a "departmental system" where we moved from classroom to classroom and had different teachers for some of our subjects: Mr. Harry Lauer for science, Mrs. Dorothy Lear (the founder's daughter-in-law) for social studies and Mr. Levy (who mid-year curiously changed his name to Mr. Laurent) for Spanish.

During my last couple of years at Lear, Dad had started spending increasing amounts of time out of town on business trips, leaving Mom and me to fend for ourselves. Since Mom didn't drive and I was too young to drive, this left us reliant on cabs, jitneys and Miami Beach Transit buses for any excursions we might make from the house. Mom rode the "S" bus to work at the First Continental office. It stopped outside our front gate, and the end of its line in downtown Miami was just a block from the Huntington Building.

Much of Dad's travel had to do with establishing savings and loan associations in Maryland. Regulation of state-chartered S&Ls in Maryland was apparently somewhat lax at the time, so it was not too difficult to set up an S&L there. His first creation was First Colony Savings and Loan, located in the small town of Prince Fredrick.

After a while, Dad also launched First Continental Savings and Loan, in Chevy Chase. This was in a small building of its own on a Wisconsin Avenue corner right across from the District of Columbia line. Then, in a mad December frenzy just ahead of tighter regulation on Maryland S&Ls taking effect the following year, First Continental opened six more branches in towns around the state.

These S&Ls differed from the typical ones of the day in several ways. Instead of seeking walk-in depositors from the local area, First

⁴ There's some fuzziness here. I have some artifacts suggesting I continued in seventh grade at Lear in Mrs. Zion's class. If true, what I describe later as happening in seventh grade may have actually been eighth grade. But that doesn't fit with my other recollections.

Colony sought “save-by-mail” depositors nationwide. (First Continental, especially after opening the branches, was more focused on local savers.) Second, these S&Ls didn’t focus on individual homebuyers as mortgage customers; instead they offered mortgages to large land developers and their homebuyer customers. Third, in a time when the prevailing interest rate paid by S&Ls to depositors was around 3%, they offered depositors interest rates around 6%.

How they could afford to do so is a matter of dispute. I imagine Dad would argue that his approach was just smarter and more innovative and depositor-friendly than his stodgy S&L competitors. The Savings and Loan League members, and the state regulators they complained to, argued it was all just a scam and fraud.

* * *

Though Lear was a K-12 school, the families of many of my Lear classmates chose to send their kids to public school after grade 6. This was the plan for me too. For seventh grade, I’d join a bunch of my Lear classmates at public Ida M. Fisher Junior High School.



Ida M. Fisher Junior High

The transition to Fisher did not go well for me. Somehow the change to notably larger classes, a much larger body of students, a notably noisier and more bustling campus, and a more-rigid, structured, institutional atmosphere was very difficult for me to adjust to.

A particular challenge for me was the phys-ed classes. These involved changing out of street clothes into a uniform in a large locker room, doing activities I was both ignorant about and quite incompetent at, then changing back to regular clothes following a gang-shower which coaches made sure everyone took. I hated it.

Also, having skipped a grade, I found myself in a cohort more physically mature than me. Puberty was in the air. The first junior-high birthday party I attended involved games such as “Seven Minutes of Heaven,” where a designated girl and boy would be ushered into a dark closet together for the prescribed time, while much hooting and taunting by the others occurred outside the door. Despite my prior groping adventures with Cookie, I was both clueless and uncomfortable around this, much like I was at that baseball game in elementary school where I had no idea how the game was played.

I don’t recall how many days I lasted at Fisher, but it wasn’t very many. At some point I announced to my parents that I was never going back there again. After some attempts to problem-solve, including meetings with school administrators, they decided it really wasn’t going to work for me. Returning to Lear didn’t seem like an option either—too much like admitting defeat (and all the kids I knew had switched over to Fisher).

At least as an interim solution, home schooling became the plan. To assist with this, my folks found a pastor, Mr. Edmonson, who worked part-time as a tutor. Mr. E. would come to the house a few days a week to go over assignments with me and plan the next round of assignments. Since I still had the inclinations that had previously got me dubbed “Univac” I didn’t fall behind academically. But, not having day-to-day interactions with a group of classmates, I definitely fell behind socially.

This probably played a role in the decision to have me start seeing a child therapist, First a Dr. Gilbert, with whom I developed a mutually bristly relationship and thus didn’t last long. Then a Dr. Steven Wright, who I formed a much better relationship with and who I continued seeing for a couple of years. I’m not sure whether either of those doc-

tors was a psychologist or psychiatrist, but in neither case was medication prescribed. It was all talk therapy.



One other interesting thing happened in this period. One afternoon, while accompanying Mom on a shopping trip to Burdines department store, I came across a poster advertising a contest sponsored by Creslan brand synthetic fiber. It involved submitting short essay responses to questions about Creslan. I grabbed an entry form, read the details, filled out my answers while Mom was shopping, and dropped it in the collection box. Then I promptly forgot about it.

So I was taken by surprise when a letter came from Creslan's maker, American Cyanamid company, informing me I was a winner of the contest. The prize was a trip, via private company plane, to the Creslan factory to see how the product was made.

On the appointed day, I and two other winners (both high schoolers) met up with representatives of American Cyanamid and Burdines at the airport, where we boarded the Cyanamid plane for a flight to their factory somewhere in the Florida panhandle.

I found the factory tour fascinating, learning how in some ways the process was a mechanical reimplementaion of how a spider spins its web silk. The trip back was a horror though. We flew through bad weather and, in that small plane, I was the most airsick I've ever been in my life!

3 - DC and back to Florida

Since Dad was spending more and more time in Washington D.C. and environs due to his savings-and-loan activities, he and Mom decided that we should all make a temporary move to D.C. and look for a new school situation for me there.

Along with a few staff he brought up from Florida, Dad had settled into an apartment hotel in D.C., the Woodner, on 16th St. near Rock Creek Park. When Mom and I arrived, he arranged for some additional space there for us.



The Woodner

Dad had been busy building a circle of business acquaintances and friends in D.C. including a few Congressmen and congressional staff and some prominent business people. So he asked around among them for advice on where I might attend school. The options that most appealed to him, because of their social cachet, were tony schools like Sidwell Friends and St. Albans. But he and Mom had no

luck finding a spot for me in these. Where they did find a spot was Maret School, a notch or so lower on the cachet scale.

What they may not have realized—and I certainly didn't until I got there—was Maret (at least at that time) had a focus around the French language, and a portion of instruction was conducted in French.

When I learned this on arrival on my first day I was immediately put off. I'm not sure why, but I had developed a strong antipathy toward things French, and especially the language. French pronunciation seemed artificial and pretentious to me. I somehow knew about the Académie Française and its staunch resistance to English loan words being incorporated into French, and that just infuriated me. Who the hell were they to tell people how to talk!

Thus I instantly felt like I was in the wrong place for me. Whatever else occurred during that first morning, it just kept reinforcing my feeling that I had to get out of there. So sometime before lunch I just marched myself out the front door and set off on a hour-long hike through Washington streets and Rock Creek Park back to The Woodner. (Looking at this trek now on Google Maps, I'm a bit boggled I was able to do this, but I guess my sense of direction was still working for me.)

When I got back to The Woodner, I announced with indignation that Maret was yet another school that I was never going to set foot in again.

This could have played out many different ways. Having now been a parent myself, I think if I had been on my parents' end of the situation I would have pushed a lot harder for going back to Maret and giving it some additional time, or something like that. In the event though, while I don't recall how much conflict or process preceded the decision, I never did return to Maret. Instead it was back to Florida and more home schooling. The role of Mr. Edmonson this time was taken over by Peter Weill, a graduate student at the University of Miami (and a distant relative of the composer Kurt Weill). Peter was a younger generation than gentle but stodgy Mr. E. and was a lot more

effective at engaging me in studying. He would also take me on field trip adventures, something Mr. E. never did.



In the meantime, my parents continued the search for a school alternative that would work for me as I approached high school age. Obviously, I was a “problem child” so my parents started looking at schools catering to problem children.

We made exploratory visits to such places as The Grove School, in Connecticut, which describes itself as a “therapeutic” boarding and day school and markets itself as suited for “bright but struggling adolescents.” Among its other attributes it offers “24/7 access to a clinician.” At lunch on our visit to Grove we sat at a table with at least one student who my father recognized as the offspring of someone notably wealthy and well-known. And I picked up from my parents’ conversation that the tuition amount at Grove was staggeringly high.

Apparently not as staggeringly high, though, as another place we visited—Oxford Academy, in Atlantic City, New Jersey. Its headmaster described Oxford as “an educational trouble shooter which adjusts, re-educates and educates those who have been scholastic failures at other schools.” It had the distinction of being listed in the *Guinness Book of World Records* as “the world’s most expensive school in terms of tuition.”

I don’t recall having any resonance with any of these schools. And it may also have been that their tuition amounts were just deal-breakers for Dad. But in any case we didn’t pursue them further.

One of Dad’s D.C. acquaintances was Arthur Spielberg, who was on the staff of Senator Jacob Javits of New York. Spielberg, or perhaps his wife, was friends with Francine Foley, who was then education editor of the New York Times. They referred my folks to Foley to see if she could offer a high school recommendation.

The place Foley suggested was Woodstock Country School, in the tiny hamlet of South Woodstock, Vermont.

Mom and I flew up to tour WCS. (Dad apparently was too busy for any more school tours.) It was between terms when we visited, so we didn't really get much sense of the student body or what the school was like on a typical day. But I did have an interview with headmaster David Bailey, who I felt like I connected with, at least a little bit, and we got to see the main portions of the campus. At the end of our tour, Bailey sat me down in the empty dining room to take an admission test.

I guess I did OK on the test, because a week or so later a letter from Bailey arrived in Florida advising that WCS would be pleased to accept me into its entering ninth grade class.

Now the question (at least in my view) was would I accept WCS. We were running out of options and I didn't see any showstoppers (like mandatory French). My parents were sold because the tuition was a mere fraction of what it was at those problem-child schools.

One feature of WCS that we learned about on the tour was its "work-job" program in which the students played a large role in the upkeep and operation of the school. Students swept and otherwise cleaned the campus, waited table at meals, assisted in the kitchen, washed dishes, and similar tasks.

So I drafted a letter back to David saying I would agree to attend WCS on one condition. I said I understood students were expected to assist with the chores of the school, and I was just fine with sweeping floors and the like. But under no circumstances would I be willing to wash dishes. (I was exceptionally squeamish in those days and feared I would throw up if required to interact with other people's dirty dishes.)

So the decision was made; I would be heading to Vermont that fall.

* * *

In the meantime, Dr. Wright, the therapist, seemed to have concluded that my home life was one factor causing me difficulty. So for the summer before ninth grade he proposed that I (along with another

of his patients) spend the summer with him, his wife and three children at a vacation home they were renting in Naples, across the state on the Gulf coast.

Presumably aided by what my and the other kid's family were paying for this "shrink summer camp," the Wright family acquired both a Boston Whaler ski boat and the services of an older high-school kid as informal day counselor for our band of five. (Wright's eldest son was the same age I was, and his younger son the same age as the other patient kid.) The house was right on the beach, and the boat could be launched from there. So we spent a lot of time in and on the water. I learned to water ski. And we could ride our bikes to get Popsicles and do other fun things. This turned out to be the best summer I ever spent as a child.

4 - Vermont

At the end of that Naples summer in 1961 we packed up a footlocker with a year's worth of *equipage* for boarding school and shipped it off to Vermont via Railway Express. Then Mom and I boarded a Northeast Airlines jet from Miami to Boston and connected with an aging Northeast DC-3 that puddle-jumped its way to Lebanon, New Hampshire—the nearest airport to South Woodstock, Vermont.

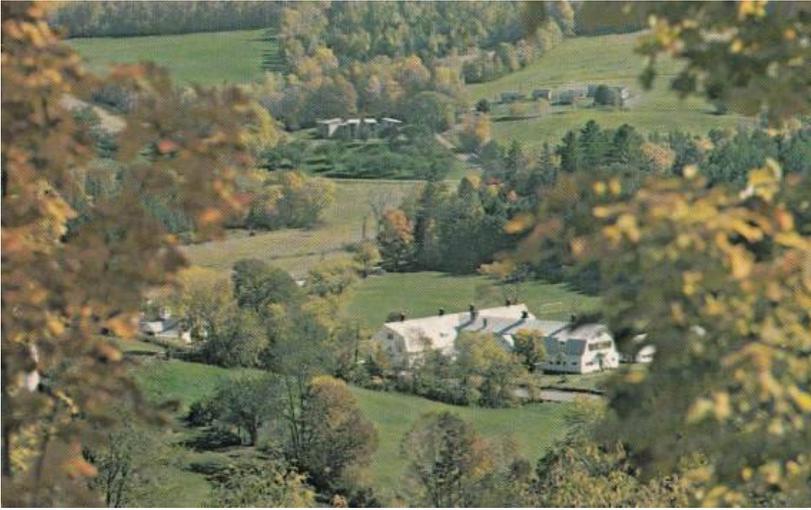
After a long taxi ride along twisty two-lane roads we arrived at the Woodstock Country School campus in South Woodstock. There we learned I was assigned to the East Hill dorm, which turned out to be a small, farmhouse-style building accessed by a rutted dirt road up an impressively steep hill. East Hill had one large room that housed five students, a smaller room housing three students, a bathroom, and a faculty apartment. I was to be in the “five-room.”

The faculty apartment was occupied by the Lecomte family—Edward, the Latin teacher, his wife Mia, and their son Douglas who was to be a sophomore student. I had never run across “Mia” as a woman's name, so I misunderstood when I was introduced to her and, since the surname sounded French, I decided what I had heard was “*mère*” and thereafter referred to her as *Mère Lecomte*.

After my belongings were put away in the dorm, we returned to the main building, where Mom said her goodbyes and headed back to the airport. I began exploring the main building, known as Upwey after the horse farm the campus had been before being converted into a school.

On a bulletin board, I noticed the posted list of “work-job” assignments and discovered my assignment for the first two-week period of school was “dish crew.”

Though David, the headmaster, (one aspect of the WCS culture was that students were on a first name basis with the faculty and staff) had



The main WCS campus building in its rural setting

never replied to my letter insisting that dishwashing be excluded from my responsibilities if I attended WCS, I had assumed lack of response signaled acceptance.

Furious at learning this was not the case, I went off in search of David to tell him "I thought we had an agreement" and he needed to fix that assignment right away. Patiently he tried to explain to me that a student committee, not faculty, assigned the jobs, and if I were relieved of dish duty some other fellow student might not be pleased to get stuck with it instead. He tried to enlighten me that by demanding special status I was putting myself at risk of rejection from my about-to-be new peer group. But I was too inexperienced to understand that, so I insisted. Perhaps to teach a lesson, he acquiesced and facilitated the change and I was reassigned to a sweeping job.

Of course, it was indeed a bad move, and I did take a lot of crap as a result.

* * *

A little background on WCS: It was a small, coeducational, primarily boarding high school with a small sprinkling of day students. There were about 100 students, with about 15 of us in ninth grade⁵ and the rest distributed across tenth through twelfth grades.

It was located on a converted horse farm in the tiny village of South Woodstock, whose population was not much larger than that of the school. The nearest larger town was Woodstock, about a 20 minute drive north on winding, two-lane state Route 106.

WCS was decidedly not in the mold of “prep schools” such as Exeter or Andover. It had been founded in the mid-1940s with a “progressive” philosophy, likely influenced by one of its two founder’s previous attendance at Black Mountain College, the experimental college in North Carolina.

A historian of WCS described it as “a place where a student could get another chance, socially, academically, emotionally.⁶” In an application to an accreditation committee, WCS described itself as, “more than just a school, we are, quite genuinely, a community, a group of children and adults sharing the intellectual, spiritual, social and physical experience necessary to community living.⁷”

After WCS had accumulated some history, it was described in a news story as “an exciting, successful, esteemed experiment in American education.⁸”

⁵ I suspect the smaller group in ninth grade was because some students would come to WCS from school systems where ninth grade was the final year of junior high, and they matriculated to WCS at the tenth grade transition point to high school.

⁶ William Boardman, *Woodstock Country School*, Yorkland Publishing, 2016, p. 24

⁷ Boardman, p. 140

⁸ Mountain Times, <https://mountaintimes.info/rise-fall-woodstock-country-school/>

So, there I was, in the middle of rural Vermont, having exiled myself from two previous schools, thrust into a milieu very different from anything in my previous experience.



Freshman year was a mostly predictable mix of courses—English, Algebra 1, Earth Science (the 9th grade course in the science curriculum). Most freshmen also took Ancient History, but in my opinionated (ignorant?) way I declared that I hated history and especially anything “ancient,” and I was allowed to omit this from my class schedule

For a foreign language I was signed up for Arabic, which I actually found pretty interesting. Our teacher was a Lebanese man, Mounir Sa’adah, a Christian rather than Muslim, who also was an ordained minister who would frequently lead the school’s Sunday afternoon Vespers services.

The text Mounir used was one actually intended to teach illiterate Arabic speakers to read, with only pictures and Arabic writing, no English. I was the only freshman in the class, which was mostly seniors and a few juniors. I guess in some ways it was an odd choice for a kid of Jewish heritage, one who had firmly refused to learn Hebrew or have a Bar Mitzvah. But it was the class I had that most engaged me, and I loved hearing Mounir’s stories of Lebanon. He promised he would organize a trip there at the end of the class for those who wanted to go. (At the time, Beirut was still thought of as “Paris of the Middle East” rather than a war-torn place to avoid.)

The remaining two classes on my freshman schedule were Drama Lighting and Art.

I had been fascinated by theatrical lighting for years. I ran the lights for many theater productions while at Lear. And when Miami Beach decided to turn its Lincoln Road shopping street into a mall, engaging famed theater lighting designer Abe Feder to do the lighting for the mall, I paid obsessive attention to everything Feder had installed as the mall was constructed.

I'd been figuring that the arrangements for theater productions at WCS would be similar to what I'd experienced at Lear; that I'd just climb up to the lighting loft, figure things out, and run the lights. I was a bit shocked to discover that in fact this was going to be a formal class rather than figure-it-out-for-myself. Teacher Larry Roberts actually instructed a small group of us in technical details about lighting instruments and color gels and how to wire and set lights for scenes. And the teachers who taught Drama gave us direction on lighting set-ups to support the scenes they were directing. I bridled a bit at discovering I wasn't just getting to do my own thing, but on the whole was thrilled to be getting a taste of how theater lighting professionals worked.

My art class was led by Lowell Naeve in an "art loft" that ran above one whole wing of the main building. The class included students from all four grades. Lowell structured the class it very imaginatively, with each term revolving around a theme project.

For example, the fall-term project was woodblock prints. Every student was issued a wood block of a standardized size, and provided access to a collection of wood carving tools. We were each asked to come up with a visual idea. We'd then sketch our image in mirror-reverse onto a block and proceed to carve the sketch into the block.

As the term progressed, we worked on inking our carved blocks then printing them onto sheets of paper big enough for prints from eight students. We'd print one such page for each student in the class.

These large pages were then folded into folios for binding into books. To conclude the project we learned how to float colored paints on top of a gelatin-like solution and stir them around to make marble-like patterns; we then laid paper on the floating paint to capture the pattern. Once this "marbleized" paper dried, we glued it onto cardboard to make book covers. The very last step was binding a set of the block-printed folios and the front and back covers into a book with the full set of the class's prints. I still have my copy.



WCS ran on quarters, each ten weeks long, with the last week reserved for final exams. Then there was a three week break before the next quarter. My first 9th grade quarter seemed to drag on forever. But as I became accustomed to the rhythm, the quarters seemed to zip by with increasing speed. I didn't really have the social skills to be part of the cool crowd, but I did develop a modest collection of friendships.

Most weekday afternoons after lunch we were expected to spend a couple of hours in outdoor activities, even on the coldest days of winter. As a total sports klutz and ignoramus, the seasonal soccer / hockey / baseball team options were non-starters for me. So I took a lot of solitary walks on the dirt roads of the nearby countryside. In my sophomore year, I acquired ice skates and in winter term skated in the rink set up outside the main building, trying to stay out of the way of the hockey players. Skating had the advantage of opportunities to duck into the building for a quick warm-up.

One opportunity I failed to take advantage of, which I later regretted, was learning to ski. On the school property there were two hills with rope tows, and there were shared taxis most winter afternoons to take students to nearby ski areas Suicide Six and Mt. Tom. But, shrinking violet that I was, completely lacking in confidence concerning any physical activity, I was far too timid to take the plunge and give skiing a try. Many times I have kicked myself over that.

A city kid since birth, I felt very isolated in hyper-rural Vermont. *Time* magazine, which I subscribed to, became a key connection to what I thought of as the "real world." When each issue would arrive in my mailbox I would devour it cover to cover. Literally. I would even read all the names in the masthead, keeping track of staff changes as they occurred. I'd read all of the "*Time* Listings" section the magazine included back then, listing current plays, movies and the like. I'd pore over the "Milestones" section reporting births, marriages, deaths and such. I enjoyed the *Time*-style punny and snarky writing that was the object of scorn from stuffier literary types. In a way, I felt like my weekly dose of *Time* helped keep me sane in Nowheresville, Vermont.

The other publication I subscribed to, because it was offered to students for daily delivery, was the *New York Times*. As I've noted earlier I had been an almost obsessive newspaper reader, devouring three papers daily in Miami. And, man, did I hate the *Times*, but it was the only choice available. Faculty members and the more-pompous students worshipped the *Times*, but not me. I felt its nickname, "the Gray Lady," was more than well deserved. I couldn't abide its lack of graphic design and visual interest. And the crowning blow was that the *Times* did not carry comics. To this day the comic pages are my favorite part of a newspaper, and I bitterly resented the *Times* for being too haughty to provide any. The only visual relief I found in the *Times* was the ads, which I often read meticulously. They were reminders of things out in the "real world" I missed in my Vermont experience.



The summer after my freshman year at WCS coincided with the 1962 World's Fair in Seattle, also known as the Century 21 Exposition. I very much wanted to go, but either my folks lacked interest in it or there was too much going on in their lives.

So they talked my cousin Gene Edlin, 18 years older than me and recently minted as an attorney following a stint in the Air Force, into being my companion on the trip, with them footing the costs.

I flew into Chicago, where Gene lived and where we joined up, then we flew on to Seattle together.

I absolutely loved pretty much everything about the World's Fair! We rode the monorail. We went to the top of the Space Needle. I probably challenged Gene's endurance, dragging him from pavilion to pavilion to see each new country's offerings.

While I was (and remain) a picky eater, Gene got me to sample cuisines that were new to me at several of the restaurants offering signature national dishes. One that remains cemented in my memory was an Asian cuisine, possibly Korean, where they poured a rich, beefy, umami-laden (though I didn't know the word at the time) broth

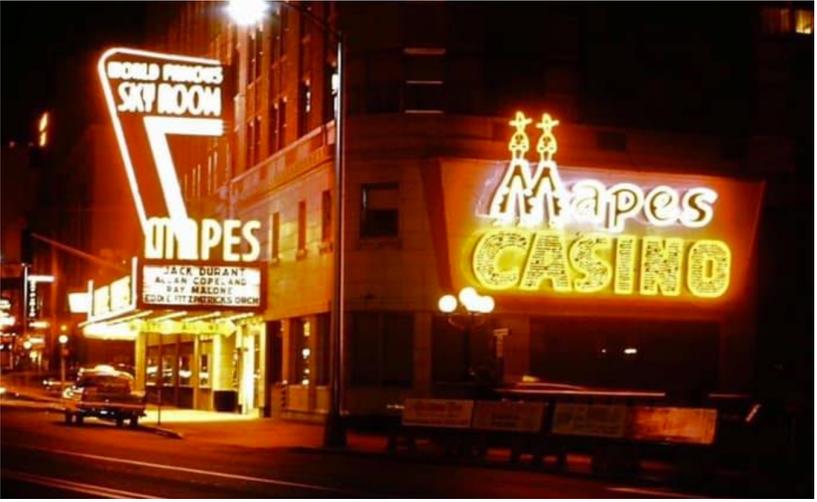
from a kettle onto cups of rice at tableside. I have wanted ever since to enjoy that keenly remembered flavor again, but sadly have never re-encountered it.



After we thoroughly explored the World's Fair, our return journey was by way of Reno.

This side-trip was part of the deal that had lured Gene into being my trip companion. He had come up with a system he thought would give him a winning edge at roulette and he wanted to try out at a casino. So we checked into the now-demolished Mapes Hotel, and I hung out in the room watching TV while he went down to try his luck with the spinning wheel. My recollection is his system didn't work.

We parted ways in Reno. Gene flew back to Chicago and I flew from there to Los Angeles for a visit with with the branches of Mom's family that lived in the L.A. area.



The Mapes Hotel in Reno - my first introduction to casinos

* * *

For sophomore year at WCS, I don't recall what classes I took other than English and geometry. Two of the other standard classes for sophomores were European history and biology. But, again disdaining history, I chose not to take the European history class. And due to squeamishness—I couldn't imagine myself dissecting a frog, for example—I also passed on the bio course. A second year of Arabic wasn't offered, so I didn't take a language either. I'm puzzled now at how it was possible for me to miss so much curriculum.

I was, however, participating more in the life of the school. I volunteered or applied for admittance to some of the committees that organized various aspects of school life, such as Saturday night entertainments and the assignment of "work jobs."

Junior year didn't go well for me so far as classes were concerned. At some point I found myself unmotivated to attend or participate in most of my classes. I think I managed to stick with English, and physics, which I found interesting. I'd started studying German for a foreign language, and I kept up with that. I also took a mechanical

drawing class, which I hoped would be supportive of my passion for architecture. But I couldn't get myself to show up for either Algebra II or American history. Instead, I would hunker into the library, where I methodically worked my way through the fiction section.

Possibly this was a manifestation of depression. This was the year that Dad was on trial in Baltimore alongside two U.S. congressmen who he was accused of bribing to do favors for him and his savings and loan businesses. In retrospect it feels like a miracle that I didn't get kicked out that year. But the school figured out ways for things to work. My algebra teacher found a "programmed instruction" course for Algebra II that I could do on my own, sitting in the library. And the school got a referral for me to a psychiatrist in Hanover, New Hampshire, where Dartmouth is located. So once a week I took 50-minute taxi rides to and from Hanover to talk through my issues with E. Haskell Schell, MD. I don't recall it helping, but maybe it did.

The final piece of spit and baling wire accommodation was for me to take American History in summer school before senior year, since it was a required course for graduation. So in the summer of 1964 I drove every weekday from our house in Miami Beach to the Pine Crest School in Fort Lauderdale to reel in that American History credit. It is due to Mrs. Repke, who taught that class, that I know anything about the Smoot-Hawley Tariff and the like.

There were a few other developments during junior year. I disliked the Sunday afternoon compulsory Vespers services that were held for us in South Woodstock's lone church. I have never been much for religion of any flavor (hence my absolute refusal to study Hebrew or have a Bar Mitzvah) and I was highly offended at being required to participate in the bland, non-denominational Protestant services we were offered as dusk descended every Sunday.

I would stand silently with sealed lips when Christian hymns were being sung. And at some point I decided to signal my protest at my required presence by sitting up in the small balcony loft of the church, which had been designated off limits. After the first time I did this I was given a verbal reprimand and told not to do it again. Of course,

defiant and oppositional schmuck that I was, the next Sunday found me right back up there. And this time there were to be consequences, in the form of a suspension. So off I flew to Florida to serve out my sentence. On my return to school I didn't press the issue further, beyond passing out diatribe handbills, denouncing the compulsory religion, to students as they entered the church on future Sundays.

Another aspect of my inclinations which surfaced that year involved the "work jobs" students were assigned to. I was on the committee that oversaw the program. One group of jobs was janitorial duties for the campus. A student might be assigned the daily upkeep of two classrooms—meaning sweeping, dusting, straightening—for a two-week assignment period. Another might get similar duties for the "common room" or for a couple of hallways. Doing these jobs was often complicated by the challenges of people occupying or moving through the spaces during the cleaning.

I floated a proposal to change in how these jobs were done, suggesting my alternative would provide both better efficiency and better results. I dubbed it the "flying squad." This group of five would take responsibility for all the major public areas except the dining room. The group would eat its lunch early alongside the dish crew, ahead of the official start of the meal. Then, while everyone else was at lunch, the flying squad would turn to its tasks. Each member had a specified role. One person would move furniture to minimize obstacles. The next person would scatter sweeping compound, followed by a person with a push broom. A fourth would follow the sweeper with a mop and bucket, and the fifth would complete the process by wielding a long-handled squeegee to dry the floor. Finally the furniture mover would put things back to normal while the rest of the squad straightened, emptied trash and put away cleaning supplies.

The committee agreed to give it a try and it seemed to work out pretty well. I took one of the five slots on the squad. One afternoon as we were doing our pass through the common room, one of the squad members looked at me and asked with some incredulousness, "How did you know how to *do* all this?" I responded that I didn't really

know, it just sort of came to me. But that was one of the first manifestations of my lifelong almost-compulsion, upon observing things I thought subject to improvement, to devise systems and approaches to optimize them.

Much later I read a novel by Ursula LeGuin which spoke of humankind's encounter with an alien race of furry beings in which the fur color was a signifier of a being's particular skill set. The white-furred ones, for example, were diplomats. When the brown-furred aliens, apparently something like engineers, were invited to stay overnight on a human space ship, when the humans woke up the next morning they discovered that, among other changes, their coffee maker had been refashioned overnight by the "browns" in a way that produced notably better coffee. And their toothbrushes had been reworked to be far more effective in cleaning their teeth. I recognized myself in that bit of narrative. It dawned on me I was a Brown.

* * *

Another notable occurrence junior year was taking the National Merit Scholarship Qualifying Test. It was a multiple-choice test, not unlike the Scholastic Aptitude Test, a type of test I was pretty good at taking. When the results came back a while later, I learned I had qualified as a National Merit semi-finalist.

Somewhat after the arrival of that news, a letter arrived for me from Michigan State University. It offered congratulations on my Merit Scholar achievement and invited me to attend MSU for college. Enclosed was a reply postcard with a place to check "Yes, I would like to attend" and sign my name. Upon return of that postcard, I would be admitted. No application to complete. No further tests to take. It would be a done deal.

I knew nothing of Michigan State, and hardly anything about the state of Michigan either. I didn't imagine I would really want to attend there. But since it didn't even require a stamp to return the postpaid

card, in a what-the-hell moment I checked the box, signed my name, and mailed the card.

My actual thinking about college was in a different direction. Since it was pretty obvious that I wasn't loving school at that point, I wasn't sure I even wanted to go on to college. With my obsession with radio unabated, my dream was to go work at a radio station as soon as I graduated.

To the extent I was thinking about college at all, my interests were quite focused. Dad was keen on my going to Harvard, where my cousin Gene had attended. Of course I didn't know much more about Harvard than I did about Michigan State, only that it was a prestigious place and that it was in Boston. The possibility I was more excited about, if I *had* to attend college, was Antioch, the small, progressive, liberal arts college in Yellow Springs, Ohio.

The big appeal of Antioch to me was their Cooperative Education program, which meant that one-third or more of a student's course of study was "field-based experiential learning"—meaning working in the "real world." Since I was chafing to leave behind the classroom for the "real world" (hey, what did I know about the rigors of the real world at that point?) Antioch seemed like a possible way to have some of what I thought I wanted, while at the same time satisfying the parental expectation that I go on to college. Also, the relative small size and strong progressive vibe of Antioch seemed like a natural follow-on to the Woodstock Country School experience.

I didn't get much college advising, and probably wasn't very receptive to receiving any, from WCS's official college adviser, Curt Hinckley. I think I probably alienated him with a know-it-all attitude. All I recall getting was a curt (yep!) note from him observing that I ranked third in my class by grade average, but 23rd by "honor points" due to my uncompleted classes etc. The note suggested I consider engineering programs (where'd that come from?) at a bunch of places I'd pretty much never heard of, such as Lehigh. Since I was being a know-it-all, I never investigated any of these recommendations.

An article about WCS, from well before my attendance there, included the claim that Harvard had told WCS it would accept any applicant from there that the school recommended. I don't know if that was ever true, let alone still true by the time I applied. But I'm pretty sure it would have been irrelevant in my case, because if WCS folk made any recommendation about me at all to Harvard it was along the lines of "*steer clear of this one.*" So, despite having journeyed down to Boston one Fall weekend with a couple of other Harvard-applying classmates to interview there in person, in the end what I got from Harvard was a thin envelope.

Alas, what I got from Antioch was also a thin envelope. (That one was a bigger disappointment than the one from Harvard.) So, since I hadn't applied anywhere else, if I was going to go to college it looked like it was going to be Michigan State.



One afternoon in Hanover after a session with Dr. Schell, I found myself with extra time before the taxi would pick me up for the return trip to school. So I wandered into a bookshop. While browsing, I stumbled across the new novel by Robert Heinlein, *Stranger in a Strange Land*. I was already a Heinlein fan, having read most if not all of his previous books, so I snapped this new one up. It sucked me right in. I was very taken with the worldview portrayed in *Stranger* and felt like I could draw lessons from it.

Around this same time I was elected president of the student council. I was ambitious and always interested in having a leadership role. But I think my election was viewed by some, perhaps many, as a bit of a joke. I had a reputation as something of a bomb-thrower and resister of authority, as exemplified by my Vespers protest, and I think a fair chunk of the votes I got were from folks who thought it would be fun to see what kind of trouble I might cause if given the role.

When the time for the first meeting of our new council arrived, I walked into the classroom where the meeting was being held and

found David, the headmaster, sitting at the table. I was surprised and a bit flummoxed. I thought, but didn't quite say, "how can we conspire against you when you are right here in the room?" Nevertheless, my discomfiture must have been evident, as David never attended any more council meetings during my tenure, appointing another teacher to sit in as our faculty adviser instead.

With Heinlein's book fresh in my mind, in which there was a passage describing how the protagonist "man from Mars" and his collaborators kept a pot filled with money by the exit from their quarters, which people could take from as needed when leaving, and replenish on their return, I made a proposal. What about having a pot of money in a convenient spot in the common room for students to use in a manner similar to Heinlein's characters? In essence, it would be a kind of revolving loan fund of coins.

I don't remember how much debate there was on this proposal, but eventually it was passed, funding it with \$10 from the budget available for student council activities. In due course a wooden bowl was found, filled with the \$10 in the form of nickels, dimes quarters and some pennies for added bulk, and placed on a central table in the common room. An announcement was made explaining the plan, telling people the money was there to take from as they might need it, with the expectation that they would return what they took later when they could.

As you might guess, in short order the bowl was emptied of coins. Even the pennies. And not a single cent was ever replenished. The bowl sat there empty for a while as a silent remonstrance to idealistic thinking, until I quietly spirited it away one evening. I was so disillusioned!

Other than the business with the bowl of cash, any expectations of bomb-throwing notwithstanding, I don't recall that anything notable or controversial came out of my student council presidency.

* * *

Senior year at WCS passed relatively uneventfully for me. I was back to going to classes and turning in my work; my days of marching through the library's fiction shelves had come to an end. I'd grown accustomed to the ten-week rhythm of quarters and those last three seemed to zip by. I had grown relatively comfortable in the WCS milieu. Though I was never part of the "cool" clique I did have close friends and avoided having the "untouchable" status bestowed on some unfortunate classmates.

As a belated attempt at reparation for my original sin of having ducked out on a dish crew assignment when I first arrived at WCS, I volunteered for dish crew for several consecutive two-week assignment periods. My squeamishness had moderated and I felt capable of coping with other people's dirty dishes. There was a pleasant camaraderie among my fellow dish crew folks, many who stayed with the assignment as long as I did. I felt a satisfying sense of accomplishment at doing the work well. (As with the "flying squad" process, I think I got us to make a few process improvements to make the work go faster.) In all, it was kind of an enjoyable experience, and I felt like an idiot for having made such a fuss over it four years earlier.

My last little bit of rebellion at WCS was after spring quarter final exams of senior year. In the few days allotted for packing up and cleaning up before the graduation ceremony. I stopped shaving and allowed my beard to start growing out, although facial hair on students was officially *verboden*. It was my one final "you're-not-the-boss-of-me" protest.

However it quickly became clear that in this particular case the school administration was, in fact, the boss of me. I was bluntly informed that unless I shaved I would not graduate. Since my folks had made the schlep to Vermont for the ceremony, and to cart me and my belongings home, my scrawny, nascent beard did not seem to be the thing to take a stand on. So, clean-shaven, I joined the rest of my classmates in the hillside outdoor amphitheater above the main campus to ceremonially conclude my four-year Woodstock Country School journey.

The school tradition was for graduates to each select a book meaningful to them, into the inside front cover of which the diploma would be pasted. My chosen book was the *Rubáiyát of Omar Khayyám*.

Though I made many poor and inadvisable choices in the course of my WCS experience, and failed by a wide margin to take advantage of all the growth opportunities it offered, I still credit my time there as a crucial developmental experience for me. I believe the experience shaped the person I became in many ways—entirely for the better. I often credit WCS, and by implication its faculty, staff and my fellow students, as being a kind of “third parent” to me.

Without the alchemy WCS worked on me, I fear I would have found myself a far less functional and more obnoxious person. It was a narrow escape.

5 - Michigan

It was quite the transition—from my graduating class of 31 seniors in a tiny school in a rural village—to an entering class of around 10,000 freshmen on a sprawling campus (it had its own bus system) adjacent to a mid-size state capital.

I first visited the Michigan State campus in East Lansing over a long weekend during the summer of 1965 for freshman orientation. I flew over from Chicago, where I'd been staying with an older cousin. I was assigned to a dorm room for the weekend with a fellow named Mark Estrin, from the Chicago suburb of Wilmette. We guessed that the assignment was just because his name followed mine in an alphabetical list of attendees. But Mark and I found each other simpatico and became fast friends. When his dad came on Sunday afternoon to pick him up and drive back to Chicago, they invited me to join them on the ride. So I cancelled my plane ticket and rode with them.

When the fall quarter began, I arrived to find myself assigned to Wilson Hall, a huge and relatively modern dorm complex that was part of a group of three such structures. Wilson had suites of two two-bed rooms sharing a bathroom.



Wilson Hall dorm at Michigan State

Mark Estrin, who had been my orientation-weekend roommate, also ended up assigned to Wilson Hall, though on a different floor. He became my best friend at MSU. We'd often eat together in the cafeteria

I noticed that whatever the day's food offering was, Mark would often drench it in ketchup, and I'd think to myself, "that guy really loves his ketchup." Only much later did I learn that it wasn't love of ketchup, but dislike of the cafeteria fare, that was the reason for Mark's generous slathering of the condiment.

My official Wilson roommate was Edmund Nowak Jr., from Saginaw. The first thing I noticed about him was his huge electric guitar (which, it turned out, he couldn't really play). But we were soon informed that dorm space was oversubscribed and that a third person would be joining us in our room, at least until an official space elsewhere opened up. Anticipating such occurrences, the Wilson rooms were equipped with couches that opened up into beds to accommodate extra roommates (though there were only two desks). The third person turned out to be Richard Wisniewski, a soft-spoken guy with a near-shaved head and thick, wire-rim glasses. In the few months Rich was our roommate I can't recall speaking half-a-dozen words to him.

Ed, on the other hand, had plenty to say. He was the son of a tool-and-die maker for General Motors. Associating with him was a bit of a new experience for me; I hadn't had much occasion to associate with people from working class families in my life thus far. It was interesting to me to hear what the world looked like from his life and experience.

I should mention that Ed, and everyone else I encountered at MSU that first year, knew me as "Jan" rather than Jim, which is how I would introduce myself.

Where'd that come from? Around age thirteen, I'd tried my hand at inventing a series and writing a book emulating the *Hardy Boys*-type books I was so addicted to. I'd named my hero character "Jan Arlington." ("Janus King Arlington" in full.) It was an obvious alter-ego, a persona I wished I could be. So when I arrived at this place where I knew nobody and nobody knew me, I thought it would be a good op-

portunity to re-invent myself. Thus I became “Jan.” (It’s an androgynous name. While Jan is a common women’s name, there were examples, like the game show host Jan Murray, to reassure me the name also worked for men. In retrospect, perhaps the choice foreshadowed a time later in my twenties when I wondered whether I actually should have been born a woman. More on that later.)

The major I elected was Radio and Television, in the College of Communication Arts. I didn’t care about television, only radio, but this seemed as close as I could get to my dream of working for a radio station.

As one of the Merit Scholar folks MSU was collecting, (the reason for that check-the-postcard admission offer), I was given a lot of leeway in selecting my courses. So I signed up right away for some practical radio production courses that normally would be taken by students in later years. (As one more step in that direction, I also signed myself up for a weekly volunteer DJ shift at one of the “carrier current” radio stations each group of dorms had, which broadcast by sending a signal through the buildings’ electrical wiring.)

MSU had a “core curriculum” all freshmen and sophomores were expected to take, in service of providing a liberal education. It included four year-long courses: American Thought and Language, Natural Science, Social Science, and Humanities. It turned out that students could waive out of these courses by successfully taking their final exams and demonstrating familiarity with the material the course covered. If one scored high enough on the exam, one could even get credit for the course, earning the grade scored on the exam.

Since I wasn’t that inspired by the subject matter of all these core courses (remember, I’m the guy who ducked out of as many high school courses as I could) the waiver option looked pretty good to me. The tests were all machine-scored multiple-choice tests, similar to the Merit Scholar test I’d cruised through. I found that, with general knowledge I already had, I could read through a core class textbook a day or two before the test, sit the exam, and generally earn a waiver. More often than not, I’d score well enough to get credit for the course.

These credits from passing the core course exams were mainly how I managed to graduate from MSU in three years rather than four.

* * *

Being freed from the core courses obligation, I treated the manifold course offerings of this large university like a giant buffet. Given leeway by my academic advisor, I signed up for any class that looked interesting to me. Over the course of my three MSU years, I took courses in music composition, geography, speech, parliamentary procedure, economics, computer programming, accounting, and a whole lot of psychology, among other topics, along with the required courses for my major.

Why music composition? Just because I was interested. I was very out of place, having a tin ear and no sense of rhythm. I can't, for example, tell that middle C and the C one octave higher are the same note. But the note and chord patterns and relationships made a kind of sense to me mathematically, so the work I turned in was patterns, progressions of notes and chords, that seemed interesting or clever to me, even though I couldn't imagine at all how it would sound until the instructor would play it on the classroom piano. And, perhaps giving me the benefit of the doubt as an obvious fish-out-of-water, she found my compositions credible enough that I earned a decent grade in the course.

The introductory sequence of economics courses I took were taught by a hammy performer of a professor named Mandelstamm (or, as he referred to himself, "*Mandelslecht*"—conflating his name with the German and Yiddish word for "bad"). Having drawn As in his courses, Mandelslecht even reached out to me to consider switching my major to econ.

The psych courses I took covered the gamut from experimental, rats-and-mice psychology to more Freudian stuff. But what I really ate up were the "existential psychology" courses taught by a European professor named Marian Kinget, who was rumored to have once been

a lover of Carl Rogers. (No “kon-zhay” for her though, she was, by gosh, an American now and would be referred to only as Prof. “King-it”.) I signed up for every course she taught.

As a side-benefit, Kinget’s courses brought me into regular contact with another of her acolytes, who became something of a girlfriend. (Enough that when she decided to drop out of MSU and move to Chicago, I seriously debated dropping out myself to go with her. In the end though, since I only had one quarter left before graduation, practicality won out and I stayed behind. By the time I got to Chicago after graduating, she was pregnant by an older, married lover. Turns out I probably made the right choice.)

The computer science courses I took were very old-school. The computer, a giant Control Data mainframe, was in the basement of an old building that had been repurposed as a computer center. It was accessible only to members of the computer priesthood, not to mere mortals like me.

The “IDE” I used (“integrated development environment”—the category of sophisticated programming software now relied on by many coders) was a wide pad of paper marked with a crossword-puzzle-like grid of 24 rows by 80 columns. On this pad I would write statements in the FORTRAN IV programming language to implement the logic I worked out by drawing flow charts on paper using a plastic stencil with cutouts for the various shapes—rectangles, diamonds, cylinders, etc.—comprising the flowchart grammar. Once I had a program written out on pages of the 80-column pad, I would take it to a room filled with large, noisy keypunch machines, where I would sit at an available keypunch and key each statement onto a cardboard card in which punched holes across a field of 80 columns would represent each character in the statement. The end product was a deck of punched cards containing my program. Depending on how many cards made up a program, they could either be wrapped with a rubber band or packed into a card-sized box.

When I had a deck of cards punched with my program, I would walk it over to the computer center and hand it into a clerk at a win-

dow, who would issue me a job number in return. Then I'd leave to go about my other business, phoning a job status line every so often and listen hopefully to its frequently updated recording announcing the highest completed job number.

When I'd finally hear a high enough job number on the recording, I'd hike back to the computer center to retrieve my deck, along with any printouts or plots that had been generated when running it. All too often the printout would be a brief report that my program had run into an error, either from a stupid typo I made in the course of keypunching, a grammatical error I made in a FORTRAN statement, or a logic error like sending the computer into an infinite loop until some monitoring software noticed and shut down the job. So the cycle for discovering and correcting errors could be hours long per iteration, if not spilling over to the following day. Pretty brutal compared to modern tools that can flag an error the instant you type it, often auto-apply ing a correction.

After MSU, I went for almost a decade without having further involvement with computers. But the grounding I got in those college classes would come in handy in later years even though the technology changed dramatically.

* * *

The transition from WCS to MSU introduced me to a lot of things I'd been unfamiliar with. College football, for one. I cared little for sports (still true) and knew hardly anything about football. When I started reading the daily *State News* MSU newspaper, it was filled with stories about the football season and football coach "Duffy" Daugherty and athletic director "Biggie" Munn, with whom everybody seemed to be on a first-name basis. I would see the stories and wonder, "who *are* these people?" Nevertheless I did queue up to get tickets to see some of the home football games at Spartan Stadium. I attended, but didn't really understand what I was seeing out on the field. It so happened, though, that my freshman year at MSU was one where the football

team had some star players and was having a great year. So good, in fact, that it went undefeated and won the football championship in its Big 10 conference. As a result, the Spartans got to represent the Big 10 in the annual Rose Bowl game on New Year's Day in Pasadena, where they would play that year's champions of the then-Pac 8 conference, the UCLA Bruins.

Even though I was no football fan, that seemed like a special enough occurrence that I decided to make the pilgrimage to L.A. to attend the Rose Bowl game. I had multiple relatives in the L.A. area, so I could get a place to stay. Also, a girl from WCS that I'd had a crush on had gone on to UCLA, so I thought maybe I'd have a chance to see her. (Silly me! It was Christmas break, and she wasn't the type to come back to school early for a football game, so that idea went nowhere.)

The MSU student union had a ride board where people making car trips would post notices offering rides to people who wanted to go to the same destination, and might kick in with gas money and driving. So I went looking to see if anyone was offering rides out West around the holiday break. I didn't find a ride to LA, but found one headed to San Francisco and figured I could do the last short leg by air.

So at the appointed time I rendezvoused with my ride and two other riders who had signed on. They were all upperclassmen or grad students. We piled into the car, an older Chevy, and made our way to the interstate. Once we got onto I-80 south of Chicago, it would be a straight shot west to San Francisco. We drove straight through, stopping only for fuel, food and bathroom breaks, with the four of us trading off driving shifts every few hours. Those not driving could nap. It was my first long distance trip across the country and I was enthralled by the changing scenery when I wasn't bored by the long stretches of empty country. The two memorable stops were at the Little America truck stop, a brightly lit outpost of civilization unexpectedly popping up out of the nothingness in western Wyoming, and in Reno, where my fellow travelers took the only break in our trip to check out a titty bar. Being only 17, I had to wait out in the chilly car and shiver while they went inside to feast their eyes and wet their whistles.

After that diversion it was a quick last leg into San Francisco, where I was dropped off at the airport. I hopped onto a short shuttle flight and was met at LAX by my Uncle Bill, husband to Mom's eldest sister. Until the day of the Rose Parade and Bowl, I hung out visiting with my Aunt Serene, Uncle Bill, and other L.A. area relatives. One day, some of my L.A. cousins took me to Disneyland. And one weekday afternoon I borrowed Uncle Bill's T-bird (I was thrilled to get to drive it) and drove to the local office of the Federal Communications Commission in downtown L.A. to take the qualifying examination for a Third Class Radiotelephone Operator Permit with Broadcast Endorsement—a credential required at the time for many jobs at radio stations.

The Rose Bowl game itself was a bit of an anticlimax. In my brief college football experience I'd yet to see the Spartans lose. But despite their hitherto undefeated season, having beaten UCLA in the season's first game, and being ranked #1 nationally, MSU failed to close the deal that day. The Spartans were down by 14-6 until the final minute of the game. A last-second touchdown closed it to 14-12, but a failed 2-point conversion, their second of the game, sealed the loss.

Soon I was winging my way back to the midwest on my first journey aboard "The Proud Bird with the Golden Tail," as Continental Airlines referred to its planes in those days, intrigued to peer at the then-novel tiny, black-and-white TV screen mounted between the seats in front of of mine. A few weeks afterward, my third-class-with-broadcast-endorsement "ticket" from the FCC arrived in the mail, clearing the way for me to seek employment in radio.

* * *

The summer between freshman and sophomore years at MSU I spent mostly back in Florida. I wanted to get a summer job but opportunities were mostly nonexistent. An exception was a heavy advertiser of summer opportunities for college students, an outfit called The Richards Company. So I showed up at one of their advertised application sessions.

It turned out they were doing door-to-door sales of encyclopedias. There was no salary; compensation was sales commission only. To start you had to attend a multi-day unpaid training program.

In the training we learned their pitch. As their story told it, we weren't "selling" their American People's Encyclopedia. We were "giving it away" as part of an advertising program. However, for a family to become eligible for this "gift" we asked them they had to sign up for several years worth of paid annual updates. In reality, the cost of the updates was enough to also pay for the encyclopedia and provide a generous sales commission to the representative "placing" the books, plus commissions "up the line" to the layers of sales management folks who directed our efforts.

All of these sales management folks were classic "big swinging dick" sales types right out of a David Mamet play. They would give us hapless students grandiose pep talks about how much money we could make once we got good at our pitch.

Once we were through training, we'd report into the office each day. Each first-level manager would pick half a dozen or so reps to go out with him (they were all guys) that day. This team leader would pile us in a van and drive us out to some suburban neighborhood. One by one the leader would drop each of us at a street corner, assign us how much of that and neighboring blocks to work, and tell us the time and place where he'd pick us up again.

Dressed in a suit and tie under the sweltering south Florida summer sun, I would work my way from door to door trying to get admitted to give my pitch. Mostly I was turned away. But every once in a while I was offered grudging admittance to a living room. I'd open my case of sales materials—a sample volume and a collection of four-color broadsheets I'd unfold on the floor—and begin running through the rap we'd been trained and rehearsed to give.

In several sweaty days of doing this, I never "placed" a single set of volumes. (Not too many of my fellow reps did either.) One evening I turned away from a door where I'd been refused entry and found a patrol car from the Hollywood, Florida police department at the curb.

Two uniformed officers beckoned me over. Apparently someone in a house I'd approached had called in a complaint to the cops. It turned out Hollywood had an ordinance against door to door sales without a local license (which ,of course, we didn't have).

I was driven to the police station, processed and booked, relieved of my belt and eyeglasses, and placed in a holding cell. In our training we'd been told if something like this ever happened we were to just hang tight and our team leader would eventually come and get us. Too embarrassed to call home, I did as instructed. Three very long hours later, to my great relief, my team leader finally did show up and get me out. I don't recall that there was any follow-up—a trial or a fine or anything—after that. But that night was the end of my involvement with The Richards Company.⁹



As I was preparing to head back to East Lansing, an interesting offer came my way. It so happened that Harry Smith, Dad's Chicago police lieutenant friend, was also friends with the owner of the midwest distributorship for Toyota.

In those days, Toyota was barely known. It wasn't the powerhouse brand it has since become, and it sold its cars through regional distributorships. Apparently, a daughter of the midwest distributor's owner had borrowed a demo car and driven it from Chicago down to Florida with a boyfriend. While in Florida, the couple broke up. The daughter decided she'd rather fly home than drive back by herself. This left the demo car stranded in the Miami area.

When Smith heard this story, he had an idea. He knew I was in Miami but would soon be going back to school in Michigan. So he asked the distributor guy if he'd be interested in having someone drive the car back to Chicago. He was. Smith then asked me if I wanted to drive the car north, stop in Michigan to unload my stuff, then drive it to

⁹ The whole Richards Co. scam is spelled out in excruciating detail in a Federal Trade Commission cease-and-desist order at <https://bit.ly/ftc-richards>

Chicago. They'd then fly me back to Lansing.

With our family finances being tight due to Dad's ongoing troubles with the federal government, this opportunity to avoid the cost of a plane flight sounded good to me. So I signed up and arrangements were made for me to pick up the car where it had been left. Which is how I found myself, toward the end of August, 1967, loading my stuff into a nearly new white '67 Toyota Corona and embarking on a road trip.



1967 Toyota Corona

I'd never seen a Toyota before and wasn't sure what to expect. But once I started driving it I was quite impressed. I liked this little car.

After I got to East Lansing, I had a few days with the car before it was expected in Chicago. In this period I began browsing the bulletin boards at the student union where part-time jobs were listed. There I found a posting from WKAR, the university radio station, seeking a weekend transmitter engineer. I had one of the qualifications, that 3rd class FCC license with broadcast endorsement that I'd got the previous winter in L.A.. The other qualification, because the transmitter was located in an undeveloped area well outside of town, was use of a car.

So I called Harry Smith and asked him to find out how badly the distributor people wanted their car back, and if they would be open to

making me a deal to buy it instead. Simultaneously, I applied for the transmitter job.

Smith got back to me to say they'd be happy to sell me the car and give me a good price. And, even better, it would be titled as a new car. He even offered to co-sign a car loan for me if I got the transmitter job. Shortly thereafter, I got the offer for the job. Thus I became both employed and a car owner.

* * *

In my second year at MSU I was assigned to Akers Hall, another mega-dorm, but in a complex far on the opposite side of campus from the previous year's Wilson.



Akers Hall

I hadn't put in a housing request at the end of freshman year. I would have wanted to room with Mark Estrin, but after a year at MSU he decided to move back home and transfer to the new Chicago campus of the University of Illinois. And Ed Nowak, last year's roommate, dropped out of MSU altogether and went to work at the Oldsmobile plant in Lansing. So I threw myself on the mercy of the housing gods and became the fifth roommate in a suite designed for four. My four roommates were all freshmen.

The large dorms at MSU were subdivided into "houses"—generally two to each floor, one on each side of a central elevator lobby. Being a "seasoned" sophomore in a house full of freshmen, I decided to try leveraging my veteran status by running for president of my new Ak-

ers house. I guess I sold myself effectively (or nobody else wanted the job) because I won the office and thus became a member of the dorm council. I don't recall accomplishing a single thing in this role.

With the new job at the WKAR transmitter I worked two shifts each weekend, Saturdays from 4 in the afternoon until midnight, then resuming again at 8 on Sunday morning until 4 that afternoon. Between the two shifts I drove home and slept. No Saturday social life for me.

WKAR's studios were on campus, in the upper reaches of the Auditorium building. But the transmitter for WKAR-FM was located in an undeveloped area about a 15-minute drive from campus, reached via an unmarked dirt driveway leading off from a side road. WKAR's AM transmitter was in an unattended location several miles away and was controlled remotely from a console in the FM transmitter building.

This building was like a small ranch house, except the main room was filled with three huge, man-height equipment cabinets and a control console. The only furniture other than an office chair was a bench seat that had been removed from an old Buick station wagon. There was a small room that had been set up with a single bed, and a minuscule kitchen, but these were the domain of a grad student who was allowed to live in the building rent-free in return for being a kind of unofficial security guard. Just outside was a 1,000-foot-plus "stick" (steel truss tower, stabilized by guy wires) with the FM antenna atop.

My role while on duty was to look at a series of meters on the console every half hour and record the values of my readings into a paper log book. If any of the readings were outside a narrow range of expected values, then I was to pick up the phone and call one of the real station engineers, who had first-class licenses, to sort out the situation. I'd do this for the FM transmitter, then again by remote control for the AM transmitter. The AM station, however, was obliged to stop transmitting at sunset, so when that moment arrived I'd use the remote control to take it off the air. The next morning I'd power both transmitters back up again as my first act after coming in the door.

Between half-hourly meter readings, barring some very rare event, I had minimal obligations. This became my primary study and home-

work time. However, being alone in this isolated building, I have to admit there were times when I just sacked out under my parka on the old Buick seat for an hour or two, then retroactively filled in plausible meter readings in the logbook.

* * *

Midway through the second year's fall term, it became clear I could no longer count on my folks for tuition and living expenses. Dad's legal cases and appeals, growing out of the savings-and-loans and his interactions with congressmen, had ground to an unwelcome conclusion in the federal courts. He was about to become a guest of the U.S. government. The house on Rivo Alto Island had been foreclosed on after months of missed payments (forfeiting quite a bit of potential value given the absurdly low mortgage balance owing on such a grand place, but nobody had time to deal with it during the ongoing trials in Maryland). Mom had to move into a room in a third-tier Miami Beach hotel. She also had to shake the mothballs off her secretarial skills and sign up for temp work to support herself.

Facing having to drop out, I threw myself on the mercy of the MSU financial aid office. Perhaps because I was one of the Merit semifinalists they had collected (though I never got any actual scholarship from that program) they turned out to be phenomenally helpful. Treating me as an emancipated minor, they pulled together a package of financial aid that allowed me to continue as before. The one wrinkle was the Toyota; students on financial aid were not allowed to have cars. This was finessed with an exception granted due to having a job related to my field of study that required a car and paid me more than enough to offset the costs of the car.

* * *

At one point, during a visit with Mark Estrin at his family home in the northern Chicago suburbs, I had an opportunity to see the Northwestern University campus in Evanston. I was very taken with it, and

the idea of being in the Chicago area rather than the relative nowhere of East Lansing was very appealing. So I got hold of a Northwestern catalog and looked into the possibility of transferring there.

It looked pretty good to me, so I did put in a transfer application. Sometime later, I was pleased to get an acceptance letter. But my financial circumstances had changed by the time I got it, and I hadn't included a request for financial aid in my transfer application. Northwestern, as a private university, was substantially more costly than MSU, and I was only able to stay at MSU due to the aid package they'd given me (including my transmitter job). So my dream of making the move from East Lansing to Evanston died on the vine.

By that time, though, I was racking up enough course credits that it began to look possible for me to graduate in three rather than four years. So that became my new goal.



As part of my 3-year plan, I'd figured on staying in East Lansing for the summer between my second and third MSU years, taking some classes during the summer quarter. But somehow I dropped the ball on arranging for my financial aid package to cover that summer quarter. So I found myself having signed on to a shared apartment lease for the summer months but with only the weekend job for income, which wasn't going to be enough.

Scrambling to generate some additional income, I signed up with a couple of temp services. The first assignment I got through this was to help with some household moving. I was sent on the job with a relatively small and scrawny African-American kid. When we arrived at the job location, it turned out the task was to move an upright piano. Well, I was no paragon of physical strength or fitness, and the other guy was even less so. Together, we bravely made an effort to wrangle the heavy piano, but it was quickly apparent that the task was beyond us. So the guy who hired us, who probably should have just sent us back and requested some more-muscular folks, decided he didn't

want to wait and would pitch in to help us. With three of us throwing our barely-adequate backs into it, we ever-so-slowly wriggled the stupid piano into the desired new spot. I did get paid for the job, but I just bet that the temp service got an earful from that customer.

My second assignment from the temp people was to drive a box truck for a company whose regular driver had called in sick. They needed a delivery driven to a customer in a town about an hour's drive from Lansing. I was eligible for this job because I had a chauffeur's licence. There was no particular reason for me to have this except that I liked acquiring qualifications and, in Florida where I was licensed, the chauffeur qualification (allowing driving for commercial purposes) required only taking an additional set of multiple-choice questions beyond those for an ordinary driver's license. So I went for it. No actual road test in a truck was involved. (This may not have been true for other license classes such as those allowing driving of a semi truck, but the lowest class was good for driving a box truck.)

On my temp application I had noted having a commercial driving license, which is why I got the call for this job. I arrived at the client's warehouse, was given the delivery instructions and route, and was shown to the truck. This sizable truck had two separate fuel tanks and I was shown how to switch over between them. I thought the instructions were simple and that I understood them. Events would prove I was wrong.

So I climbed up into the truck and set off on my route. I had never driven a truck of any size before, let alone one this big. But my attitude was, "I can do this!" Even though I was nervous as heck, proceeding out of the city very gingerly, compulsively checking my side mirrors repeatedly.

Well, about a half hour into the trip, out on a two lane road far from civilization, the engine started coughing and then died. I rolled off onto the shoulder and stopped. I wondered if the problem was that I needed to switch over to the alternate fuel tank, so I changed the control over and tried restarting the truck. No joy! After 5 minutes or so of grinding the starter, retrying both fuel tanks, with no satisfying

catch of the engine, I gave up. This was long before the era of cell phones. So I locked the truck and began hoofing it down the two-lane road in search of someplace with a phone. This turned out to be a farmhouse about a mile down the road.

A call to the company that sent me on the mission brought no advice on anything else I could try. They told me they'd send a tow truck and to go back and wait for it. Back to the truck I hiked.

Eventually a huge tow truck arrived, hooked up my truck, and I rode with the driver to the nearest town big enough to have a dealer for that truck brand. People there rolled the truck into their shop, began investigating what the issue might be, and after a short while told me there was no problem with the truck except that one of its fuel tanks was empty. I told them I'd tried switching over to the other tank with no results. They then demonstrated to me that if the tank selector was flipped to the alternate tank, the truck started right up. What they did that was different from what I had tried multiple times back by the side of the road, I couldn't tell. But of course I felt like a giant idiot! Apparently the quick lesson about switching fuel tanks I was given before starting hadn't quite landed.

Back in business, I finished the trip, arriving at the destination almost three hours after I was supposed to. Once the customer unloaded the truck (thankfully that wasn't part of my job) I pulled back out and made the return trip uneventfully, though fearing what kind of greeting I would get at the end of the awkward trip.

As it turned out, the folks at the client company had little to say at all. They just wanted me to finish up my paperwork and hustle me on out of there (and, I suspected, never see me again).

For this job, too, I got paid, including for the extra hours my incompetence had caused, with nary a critical word from the temp agency. But it was the last time I tried driving a truck that size, much less for pay.

One of the big employers in Lansing was the Oldsmobile plant, so one day I went to their employment office to apply. I wasn't at all keen on going to work in the giant, noisy, scary factory, but I did need

work. Nevertheless I was a bit relieved when they told me they had nothing to offer me.

* * *

Seeing how well temping was working out for me so far, I was scouring the want ads for a regular job I could get for the rest of the summer. There I found that WITL, a 2nd-tier Lansing radio station that played “middle-of-the-road” music (the two top stations both were rock stations), was looking for someone to write radio commercials for their advertisers.

As it happened, I had recently completed a class in radio and TV commercial writing. I wasn’t all that interested in that side of the business, but it was a required course for my major. The first assignment for the class was a TV commercial for a set of kitchen implements—spatula, carving fork, big spoon and the like. I procrastinated a lot on the assignment then quickly dashed something off just as it was due. I was expecting it to be received by the professor with as little enthusiasm as I had put into doing it. To my great surprise, it came back with a big red A and effusive, complimentary comments. And that’s the way it went for the rest of the class. Apparently I had a talent I’d been unaware of.

So, attaching some samples from the writing portfolio I’d developed in the class, I sent off an application letter to WITL, and that got me in the door for an interview. They cautioned me that they weren’t just looking for a summer hire, and I told them I could continue working part-time once classes started up again for me. Next thing I knew, I had a desk and typewriter in the advertising sales department of WITL. Their offices were on the top floor of the Michigan National Tower, the tallest building in downtown Lansing, atop which their FM transmitting antenna was mounted. My officemates were a handful of sales folk who spent their days out on the streets of Lansing and environs, pitching current and prospective advertisers.



Michigan National Tower, Lansing

Most local radio advertisers in a middle-size market like Lansing don't have ad agencies or on-staff advertising folks. So whenever one of the sales folks would come into the office after closing a sale, they'd come by my desk to say they needed something written for whoever had just bought a schedule of spots. Thus I settled down to a summer of banging out 30- and 60-second "spots" for local car dealers, bakeries, clothing stores and the like. On the weekends I still pulled my two transmitter engineer shifts for WKAR.

Each workday morning at WITL would start with a meeting of the sales team, including me, in the sales manager's office. He'd review with each salesperson the results of their previous day's calls, and which of their current accounts they planned to call on that day.

Then, having assembled a list of businesses who were advertising in the local newspaper or on other stations but not with us, he'd assign these new prospects around to the sales reps.

Sometimes a rep would ask me to write commercials on "spec" for a business they were going to go pitch. If these were well received, they'd come back to the office, pat me on the back, and say something like, "Hey, those spots you wrote helped me sell a 60-spot schedule" to whoever they'd just pitched.

After a while I started thinking, "I'm sitting here making \$1.40 an hour writing spots, and these guys are using them to close sales, earning them way better commissions than what I'm making."

So I approached the sales manager and asked him if I could try my hand at sales. He was reluctant, not wanting to take time away from my copywriting. But I persisted and he finally gave in and handed me a couple of probably-not-very-promising prospects to call on.

This got me to start wearing my only suit and a tie to work, so I could go out and make sales calls when the copywriting demands were slow. Doing cold sales calls was quite a reach for me, major introvert that I am. But I made myself do them. And, probably more because of the spec commercials I wrote than due to my innate sales skills, I started making some sales. This earned me a little expense account for gas and I started getting some extra cash flow from commissions.

A while into my tenure at WITL, I flipped on the station on my car radio as I was driving into work. Instead of the expected elevator music, I was shocked to hear the twangiest of country music. Had I tuned the wrong station, I wondered? Nope, my radio was bang on WITL's 1010 frequency. Was someone playing a joke? Also nope. It turned out that station management, without telling any staff in advance, had decided to change the station's format to "Countryopolitan." In the middle of the previous night they took all the elevator-y records out of the music library and wheeled in a whole new library of country tunes, and replaced all the station jingles with new ones announcing our new Countryopolitan flavor.

Thus, out went my sales pitch to advertisers about how WITL had a more mature audience with money to spend, and in came a new pitch about how fast the country music audience was growing and how they, too, were folks with money to spend. It made for some interesting conversations with advertisers I'd brought in with my former story. An unexpected side effect though was that I gained an appreciation for country music, which I'd previously never listened to much.

* * *

As MSU's fall quarter approached, as much as possible I chose classes that met on Tuesday / Thursday schedules. I'd have a class schedule on those days that often ran from 9 in the morning until 10 at night. That left Monday, Wednesday and Friday mostly open to sell and copywrite for WITL.

Also I finally moved into a regular apartment. In those days, MSU students under the age of 21 were supposed to live only in "supervised housing" (i.e. someplace where responsible adults were around to discourage drinking and sex). I was still only 19, but had accumulated enough credits to be a senior on paper, so this transgression slipped by without notice.

140 Cedar St. was a tiny, two-room apartment with a dinky efficiency kitchen in one corner of the living room. Ours was the far-left unit on the slightly-below-grade first floor.



140 Cedar St., East Lansing MI

My roommate was Michael Wise, another senior who also worked at WKAR. Among other duties, he was the Saturday night announcer/DJ for the last show of the day. So for the last several hours of most Saturday nights, Mike and I were the complete on-duty staff of WKAR—he in the studio and me out at the transmitter shack.

Mike had a serious girlfriend, Joan, and they had worked things so she and a roommate were living in the unit right next door to ours. Cleverly, Joan had found a roommate, Nan, who generally didn't stay around campus on weekends. Once done with Friday classes, Nan left to spend the weekend at her family's home in a nearby town. This enabled Mike to move next door with Joan from Friday evening until Nan's return on Sunday night. Mike and I also had kind of a dinner co-op with Joan and Nan. All four of us would kick in to a weekly food fund, then Joan and Nan would shop and prepare dinner for the four of us on weeknights. (Yeah, it was a pretty sexist arrangement, but that wasn't so obvious to us at the time. However I did learn a fair amount about cooking and recipes from observing Joan.)

Joan had paused her college studies that year. Instead she took a job on campus as secretary to a psychology professor. This entitled her to a faculty/staff sticker that allowed on-campus parking. Since Joan didn't have a car, she conspired with me to do a little flim-flam with paperwork, getting the sticker for my car instead. This sticker, which allowed me to park in lots close to buildings where I had classes, was a big help in making my aggressive class schedule work.

* * *

The Vietnam war, and associated draft, was in full swing during my MSU years, though I had a student deferment from the draft. That was one drawback of graduating a year early, and an incentive to consider graduate school. I decided to apply for law school. I didn't really imagine myself as a practicing attorney; my entrepreneurial urges were already making themselves felt and I envisioned starting a business of some kind eventually. But I figured having a legal education would

give me a leg up in any business activity I might pursue. (In retrospect, going for an MBA might have been a better fit for my goals, but somehow that option never really occurred to me then.)

Mike, my roommate, also was aiming for law school. So we went through the application process in parallel. The Law School Admission Test—LSAT—was another one of those multiple-choice, fill-in-the-bubble tests that I seemed to have a facility for, and once again I pulled a very high score. I applied to law schools at Harvard, Northwestern, University of Chicago, Berkeley, and UCLA. For the second time, Harvard gave me a pass. However I ran the table on my other applications. I now realize that had I chosen to attend Berkeley my life might have turned out very differently—getting me to the Bay Area ten years sooner than things turned out. But I had family and friends in Chicago, it was the city of my birth, and I liked the idea of a big, bustling city. So I chose the University of Chicago. Mike, who applied to Yale but not Harvard, got in there.



Oddly, I don't recall if my folks journeyed to East Lansing for my MSU commencement ceremony. My recollection of the shambles the family finances were in at that point suggests that such a trip wouldn't have been affordable. But I do have some vague memories of things like picking them up at the airport. I haven't run across any definitive evidence like a photo of me in my cap and gown with them. I know they would have filled up with pride if they'd been able to be present for the occasion, but 52 years later I just don't remember for sure whether or not they were in Spartan Stadium to see me—and thousands of others—graduate. I hope they were.

The end of my three years in East Lansing at MSU was punctuated by Joan and Mike's wedding. Then they were off to New Haven. And I packed up the Toyota and headed to Chicago.

6 - Chicago Again

Once I made the choice of University of Chicago for Law School, I let my Chicago friend Mark Estrin know I'd be heading to town. He'd been living with his family in suburban Wilmette but was ready to be out of the family house. We decided we'd get a Chicago apartment together while he did his senior year at U of I Chicago.

Since I was more keen about living an adult city life than being in an academic enclave, we didn't look in either the U of C's Hyde Park neighborhood or the Near West Side neighborhood around Mark's U of I campus. Instead we found a place on the mid-north side, a long block from Lincoln Park and Lake Michigan.



*4038 N. Clarendon Ave., Chicago
Our apartment entrance was down that side alley*

It was a one-bedroom in an older six-unit building owned by an entrepreneurial young landlord who did his own updating work on the units. Ours was the ground floor unit in the rear section of the building, accessed from an entrance down a long private alley that also led to an area with parking spots. The landlord had attempted to make it hip with such renovation touches as a rough-sawn pine wall surrounding the living room fireplace, lit dramatically by hanging downlight made from sections of rain gutter drain pipe spray-painted black.

When my family's Miami Beach house was lost to foreclosure, Mom had put a lot of its furniture and other contents into storage. We arranged to have some of the furniture shipped up from Florida to furnish Mark's and my new place—overstuffed chairs, some occasional tables and foo-foo lamps, and a white carpet that had once graced the Miami Beach house's "drawing room", a love seat and leather-topped card table from the "card room," and the desk, twin beds and bureau that had been in my old bedroom. It was weird, cognitively dissonant furniture for a couple of college students, but we had lighting, and places to sit and sleep, for a shipping cost that was less than we probably would have spent at thrift shops. As a bonus, my folks storage costs were reduced.

The alley leading to our entrance door was opposite a T-intersection with a street named Bittersweet. Inspired a little bit by *Lord of the Rings*, I christened our new place with the unofficial address One Bittersweet End.



I'd arrived in Chicago with a few months before the start of my first law school semester, which is when the financial aid I'd been granted would kick in. So I needed to bring in some income for the months before school started. Cruising the want ads, I saw that Montgomery Ward was looking for advertising copywriters. Leveraging my newly-minted degree from MSU's College of Communication Arts, I sent in

an application. Shamelessly, I didn't tell them I was looking only for a few months of summer work. I let them believe I was a first-job-out-of-college applicant.

Wards hired two kinds of copywriters, one for their catalog and the other for ads run by their retail stores. The job I interviewed for was the latter kind. They hired me to be a writer of ads for “cold appliances”—which included not only refrigerators, freezers, air conditioners and the like, but also fans, vacuum cleaners and similar.

The Wards offices were in a huge building bordering the North Branch of the Chicago River. It had once been their catalog warehouse. So many people worked on each of its huge floors that starting times for different groups were staggered to spread out the flow of people using the elevators. My starting time was 8:10-8:20am.



Montgomery Ward office building, Chicago

My desk was in a grouping within an open area larger than a football field. Next to me sat the “hot appliance” copywriter, coincidentally a fellow MSU graduate but a year ahead of me.

Ward's newspaper advertising used what they called a "unit space" system. For each item a store might want to advertise, ad blocks were prepared in a set of specified sizes that a local advertising manager could assemble like Lego blocks to fill up a purchased ad space with the items they wanted to promote. A typical item might have blocks prepared in 5-unit, 10-unit and 20-unit sizes. A block would have a headline, a few lines of details about the item, a picture, and a "\$00.00" placeholder where the store could insert its advertised price.

I quickly learned that my copywriting job was closer to doing crossword puzzles than anything creative. Each size of block had a maximum character length for the headline and a maximum number of lines and line length for the copy. My job as a copywriter was to get the essential details about the item into the allowed space. We submitted our copy on forms that had vertical rules five typewriter characters apart, so it was visually apparent that no line exceeded the allotted length.

The manager I was assigned to was either a control freak or didn't have much faith in my abilities. So he didn't give me very much work to do. Thus I sat there, out in the open, getting very bored, but not wanting to signal my lack of busyness by reading a newspaper or book. After a while, I took to hanging my suit jacket (it was a workplace where men wore suits) over the back of my desk chair, suggesting I'd just stepped away to the rest room or something, and leaving the building for a few hours to play. I'm not sure if this was ever noticed by anyone, but I never heard a complaint.

Ward's was my introduction to corporate life, at least as it was lived in the Sixties in the midwest. The hierarchy was visibly expressed in individual workspaces. My manager, who sat in a doorless cubicle, had two visitor chairs across from his desk, but they had no arms. His boss had a door, and arms on his visitor chairs. The boss's boss was allotted a desk tray with a water pitcher and two small glasses. I never got to see the accommodations provided to higher levels.

My swan song at Wards was an ad for their top-of-the-line vacuum cleaner model, the *Vibra-Beat*. Its tag line was, “it beats, it sweeps, it suction-cleans.” However that full phrase didn’t fit into the allotted character count for the block I was writing. So I shortened it to, “it beats, it sweeps, it sucks.” No editorial review caught this infelicity before it went out to the field.

With law school due to start in a couple more weeks I turned in my resignation. When I took the job, I imagined I would feel bad when it came time to do this, since I had hired on under somewhat false pretenses. But the fairly stultifying nature of the job, and the fact that I rarely had any actual work to do, let me vent with full authenticity at my exit interview. I don’t mean to sound ungrateful. They hired me at a time when I needed the job and income. But it was quite clear that Ward’s was not the career path for me.

* * *

My study at the University of Chicago Law School began with a fancy everybody-get-acquainted banquet in the school’s gorgeous, Eero Saarnein-designed building. (Architecture aficionado that I am, I loved that I got to go to school in that building.) It was the first indication that my U of C experience was going to be significantly different from my prior educational experiences.



University of Chicago - Laird Bell Law Quadrangle

I settled in to a typical first-year law student's diet of classes, including Torts (cases where someone inflicts damage on someone else), Civil Procedure, and the like. It being the University of Chicago, the professors tended to be famous icons in academic legal circles, and often an author of the textbook used in the class.

It took a while for me to realize it, but I was not very well prepared for this experience. Unfortunately, the film *The Paper Chase*, which might have given me a preview of what I was signing up for, didn't come out until five years after I arrived on the doorstep of the Laird Bell Law Quadrangle. Beyond being poorly prepared, I also made some self-sabotaging decisions.

You may recall that I hadn't wanted to live in an academic enclave, and so chose an apartment that, when traffic was heavy, was an hour's drive or more from the Law School. I was basically a commuter. Fortunately, I was usually able to park in the Law School's lot, so at least parking wasn't an issue. But my original vision was that I'd arrive in time for my first class and leave when my last obligation in the building was finished. I hadn't expected that success, at least in this law school, would require a far more engaged approach, devoting myself to legal study for the better part of my waking hours.

Introvert that I am, I didn't forge any rapid connections with fellow law students. So I didn't hear about, much less join, any of the study groups that *The Paper Chase* portrays as such a critical element in law school success. And my years at a highly flexible high school and a not very selective university hadn't prepared me for the intense environment at a top-ranked and very selective institution. Further, the heavily used Socratic method—involving probing questions on each day's material from professors in each class—did not play well with my typical habit of leaving reading until shortly before a scheduled exam. You really had to keep up every single day, a discipline I hadn't developed.

Also, I came in with some expectations about law school that turned out not to jibe with the reality, at least at U of C. One of the introductory courses for the new law class, "Elements of the Law," had as its text *The Bramble Bush* by the late and revered U of C law

professor Karl N. Llewellyn. The class was taught by his widow, Soia Mentschikoff. At one point, feeling frustrated at how my classes were going, I complained to Prof. Mentschikoff that I didn't feel like my classes were teaching me the law. She responded forcefully, "We're not here to teach you the law, we're here to teach you to think like a lawyer." In my head, but not to her, I responded, "I'm here because I already think like a lawyer, I want you to teach me the law."

* * *

In addition to things not going swimmingly with law school, I was feeling larger issues of dissatisfaction with my life at that point. So I decided to avail myself of the services of the University's Counseling Center. This felt particularly fitting since the founder of the Center had been Carl Rogers, whose "client centered" approach I was such a fan of and who had been the mentor of Prof. Kinget, the professor at MSU that I was so taken with.

I described the issue that was bugging me as (lack of) "Control Of my Environment," or, given my predilection to acronymize everything, "COE." So it was an odd coincidence that the therapist I was assigned to work with had the last name Coe.

The Counseling Center had me participating weekly in a group session with five other folks, along with individual visits with Mr. Coe. I'm not sure I ever felt a whole lot more in control of my environment as a result of these sessions. But they, along with crashing and burning in my first semester final exams—an experience I'd never had before—convinced me that I needed to at least take a break from law school. So far, that break has lasted more than 52 years, though when I met with the Dean of Students to discuss my intentions, he assured me I was welcome to try a restart if I later wanted to.

In later years, when asked about my aborted study of law, I tell people that the University of Chicago wanted to prepare me to be a Supreme Court justice, while my goal for law school (other than avoiding the draft) was to learn how to fix traffic tickets.



At the start of 1969 I found myself out of law school and thus also parted from the financial aid I had been relying on to pay my living expenses. I needed to find a job. I also needed to figure out what to do when the Selective Service System came calling, because my student deferment had just gone *poof*.

I started the job search by reaching out to Chicago radio stations, hoping to find some combination of time sales and commercial writing and production, like what I'd done in Lansing. I did score some interviews, but no takers. My track record at a station in a smaller market wasn't sufficiently impressive for stations in the country's number three media market.

With that option scratched off my list of possibilities, I moved on to cruising the want ads. I did get a few interviews at noteworthy companies like Container Corporation of America, known for their outstanding visual design. Again, no offers though, but someone gave me a referral to McKinsey, the management consultants. So I actually once interviewed at McKinsey, and though I was intrigued—their work resonated with my problem solving inclinations—I evidently didn't have the "right stuff" for them.

As possibilities for more-professional types of employment fell by the wayside and my cash position worsened, I began looking at whatever possibilities might help bring in some income. A big, steady advertiser in the help wanted pages was the phone company, Illinois Bell, looking for phone installers, linemen and the like. I didn't see myself climbing phone poles, but I figured I could install phones. I already did that kind of thing unofficially with our own phones.

So I took myself down to the Illinois Bell headquarters in Chicago's downtown Loop, walked into the cavernous first floor employment office, joined the horde filling out applications, and handed mine in. What happened next was a surprise. A guy came out to the waiting area from the back, called my name, handed me my application back, and told me I didn't want this employment office, which was for what

were, in phone company parlance, “craft” jobs. He said I wanted “college employment.” They were up on the twenty-somethingth floor, and he’d called up to them and made arrangements for me to speak to someone there.

I was then ushered into an elevator. When the doors opened upstairs, I was met by Hal D’Orazio, a friendly, cheerful fellow who took me into a meeting room. Hal asked for a resume rather than the application form. Fortunately I had one with me.

After perusing the resume, Hal told me I might want to talk to people in their public relations department about job possibilities. Again, a phone call was made. Then Hal escorted me up a few more floors to meet some PR folks.

These people were also exceptionally friendly and welcoming. They informed me about a position in their “creative services” group they thought might be a fit for me. To continue the interview, they took me out to lunch at the fancy dining room of a hotel down the street. (I later understood this was a perk for them, they got to enjoy an upscale lunch and bill it to the company. A lower ranking person in the group would pick up the check, then his boss, also a part of the lunch group, would OK the expense voucher.)

Lunch went well. Very convivial. There was only one thing, they told me, that might prevent them from offering me a position. My beard. Illinois Bell was a suit-and-tie, no facial or long hair kind of workplace. There was one beard exception they said, the curator of the company art collection, but “everybody knew him.” Would I be willing to shave and get a haircut to come and work with them?

Well, I was about as enthusiastic about shaving my beard for Illinois Bell as I had been about shaving it for my high school graduation. But these were likable people who were offering a position that promised far more interesting work than installing phones. And I’d made the same concession for WITL when I’d hit the street to sell radio spots.

So: Money. Benefits. I never for one minute imagined I’d end up working for the phone company. But sign me up. I guess.



The Creative Services group of Illinois Bell's public relations department was a dozen or so people. It was a mixed bag of recent grads like me and mid-career or late-career folks who often had a past history in some aspect of journalism. We were essentially "hired gun" writers available to jump onto whatever projects the company came up with that required wordsmithing. We had a section of cubicles on the top, 30th, floor of the newer section of the headquarters complex, surrounded by other groups such as press relations, employee relations, and our neighbors and frequent close collaborators, the art and design group.



*Illinois Bell headquarters
225 W. Randolph St. in Chicago's Loop*

The PR department, under the aegis of four assistant vice presidents, occupied the whole top floor of the newer tower in the complex. The richly-paneled and carpeted executive floor was two floors down from ours. The HQ complex was in the northwest corner of the Loop. It included of the modern tower we were in along with a pair of older buildings it had been grafted onto.

My first assignment in my new group was to support employee education around the company's planned filing with its regulators to request a rate increase. Illinois Bell's rates had remained stable for several years. The proposed increase was expected to be somewhat controversial. So the company wanted every employee to be well informed about the company's rationale and justifications for higher rates.

The hope was that employees could become a corps of persuasive advocates for the company line when customers, friends and family raised the subject. My task was to come up with a training script, visual materials, and handouts. These would be used by local managers to guide a series of small group meetings where the company's story would be brought to its thousands of employees.

Since this topic seemed to be pretty core to the company's business, and since whatever I came up with was going to be seen companywide, I was feeling impressed that I, as the "new guy," was given this seemingly weighty responsibility,

The approach I proposed was well received when I pitched it to my bosses and the internal clients. It was a giant envelope filled with a deck of big cardboard cards. One side of each card was essentially a slide, with a key point or two in large type, often with accompanying visual. The other side of the card was speaker notes and supporting material to be used by the meeting presenter. Today, this would be a PowerPoint deck.

Feedback from the field about this package was, as I recall, pretty favorable, giving me some immediate credibility as a good hire.

My next assignment was quite far afield from the first one. Illinois Bell had an extensive set of employee communication media. One was

Telenews, a tabloid newspaper of company-related content circulated to all employees every two weeks. I was asked to write what might be termed a “service feature” talking about the state constitutional convention, “ConCon,” that Illinois was about to have. This had nothing (so far as I understood) directly to do with the phone business, but came under the heading of the company being a good corporate citizen.

For the project, I was even assigned a colleague from the group to work with me as a research associate, a recent arrival named Dick who had supplanted me as the “new guy,”.

The tome I cranked out with Dick’s intrepid assistance was so chock full of facts, explanations, and discussions that it ended up being split across two issues of *Telenews*—a double-page spread in each issue. Considering I’d really had no training in print journalism, I was kind of bogged that I’d done it once I got to see it in print.

Those first two assignments suggest the flavor of work that came my way in my first year at Illinois Bell.

A few notable non-work things happened during that year. Mark Estrin, my roommate, graduated from UIC at the start of summer. He promptly packed up his VW bug with his possessions and a girlfriend and set off on a journey to the West Coast, leaving my on my own in the apartment. Fortunately, now that I was salaried, I could eke out the full rent on my own. However there was a hope that I would be moving on from One Bittersweet End sometime soon.

I had a great aunt and uncle who lived in one of the Marina City towers along the Chicago River. When I visited them, the building stimulated my enthusiasm for architecture. I decided I’d like to live there too. There was a lengthy waiting list for Marina City apartments, but I put in an application.

Also, I traded in the Toyota for a new, blue American Motors Javelin, which I christened, oddly, “The Blue Abalone.”

Then, over Christmas vacation, with time away from the office, I decided to grow back my goatee.



1968 AMC Javelin, "The Blue Abalone"

When I returned to the office in the new year, sporting my carefully-trimmed facial hair, my bosses called me on it. They reminded me I'd agreed to go clean-shaven. In response, I reminded them what they'd told me at the time about the company art curator, who had a beard. They'd explained that he was accepted with a beard because "people knew him."

I suggested that people at Illinois Bell now knew me too, so I hoped that they would accept my beard as well. To my surprise, my bosses grudgingly bought this. Subsequently I did get my share of teasing about the goatee, but it never rose to the level of an issue.

* * *

Having arrived in Chicago in the summer of 1968, not long before that summer's notorious Democratic convention there, I had an interest in political involvement. I was in downtown Chicago the night of the infamous "police riot" in Grant Park. However I didn't get into the park because entry had already been sealed off by the cops, which probably spared me from a cracked head. I was across Michigan Avenue from the park during the festivities, where I did get a whiff of the tear gas that was drifting across from the park.

As I acclimated to Chicago I began to get more involved in local politics, particularly in (largely doomed) efforts to break the hold of the

Daley Machine on the city. I joined and started working with the Independent Precinct Organization (IPO), a group trying to elect anti-Daley candidates to local and state office. Unfortunately it was only effective—in a modest way—in a small handful of the city’s 50 aldermanic wards along the North Side lakefront where I lived. (We were dubbed “lakefront liberals.”) I would do precinct canvassing, knocking on doors and ringing doorbells, in support of IPO’s endorsed local aldermanic and state assembly candidates. I even threw a meet-and-greet event at One Bittersweet End for a candidate I supported.

Later I would get back to presidential politics.



Having lost my student deferment from the military draft when I dropped out of law school, I became at risk of being dragooned into the Army. This was about the time when a draft lottery was instituted, and unfortunately I didn’t draw a favorable number.

It seemed pretty obvious to me that I wouldn’t do well as a soldier. Also, I’d become strongly opposed to our military misadventure in Vietnam. I definitely didn’t want to get caught up in it.

At least one friend of mine sought to avoid the draft by being declared a conscientious objector. But that option didn’t feel right to me. It began to look like my only hope of not ending up in army green was to flunk the pre-induction physical. At that time, the American Friends Service Committee had a program assisting people who were seeking medical disqualification from the draft. In exploring possibilities with an AFSC counselor, it looked like my most likely option was not meeting army standards for eyesight. My nearsightedness wasn’t bad enough to disqualify me, but one could be disqualified for “strabismus” (or, in plain English, being cross-eyed).

AFSC referred me to an eye doctor, who concluded I had this just badly enough to be an army reject and gave me a letter affirming this that I could bring along when called for an army physical exam.

My mental health counselor at the University of Chicago Counseling Center, who I'd continued working with even after leaving the law school, also gave me a letter to present at the physical. It stated that, psychologically, I would be a poor candidate for military service. (True, that!)

In due course I got the notice to show up for a pre-induction physical. With great trepidation, I arrived at the induction center with my two letters in hand, joining the herd of bodies being processed through that day. It was as much a taste of military life as I ever want to have. As I arrived at the exam stations for eye and mental health I presented my letters, which were noted by the examiners without any visible reaction whether they were accepting them. The examiner that I assumed was a shrink asked me a lot of probing questions.

In the end, to my immense relief, I learned that I had failed the physical and would be assigned the draft status 4F - meaning not eligible to be drafted. Whew!



Toward the end of my first year at Illinois Bell, I was called into a meeting with my manager to discuss possible next steps in my career there. Apparently, for hires that were recent college graduates, it was policy to move them around frequently to different roles in the company. I was asked if there was a role I was particularly interested in. I don't remember what I answered, but I do remember my answer to the question about what role I would be least interested in. That would be the position responsible for a pair of employee communication media—a two- to four-page company news bulletin circulated to management employees each workday, and a dial-in phone line where callers could hear a two- to three-minute report of company news, updated twice daily.

Well, surprise! Shortly I found myself promoted from “Public Relations Assistant” to “Information Supervisor” and assigned to the job I specifically had said I didn't want.

This was as close as I came in my working life to a daily journalism role. I had three daily deadlines. By 10 each morning I had to write and then record the early report for the dial-in line, *The Communicator*. Then, shortly after the close of the stock market in New York, I would write and record an afternoon update for *The Communicator*, including the closing stock price for AT&T, the corporate parent of Illinois Bell. Finally, by 5:30 each afternoon, I had to have a camera-ready master for the daily management bulletin. A messenger from the printer would collect the copy, they'd print copies overnight, and deliver them in time for distribution with the next morning's company mail. Its official title was *Information Bulletin*, but due to the yellow paper stock it was printed on it was known as the Yellow Bulletin.

You'd think that at least the *Communicator* part of the job would appeal to the part of me that loved radio. And it kind of did. I got to use my announcer voice. What I hadn't wanted was the never-ending rat race of those three daily deadlines. They were an abrupt change from the more contemplative pace of the Creative Service group.

On my first day in the new job, after being shown the mechanics of recording and publishing a *Communicator* report, I voiced my maiden effort, signing off with, "this is James Arlington Edlin, for The Communicator." I suspect this sign-off was in emulation of the newscaster John Cameron Swayze. If I was going to be doing something radio-like, I wanted to lean into the role.

Within minutes of this going live I was summoned into my boss's office. It seems the CEO had heard my first effort and hated the sign-off. Because *The Communicator* had an all-employee audience, along with some outside callers who had an interest in Illinois Bell news, the company wanted a friendly, relatable voice rather than an authoritative one. I was instructed to re-record immediately without the pretentious close. "But it's my name," I protested, proffering my driver's license as evidence. No matter, said the boss; the CEO has spoken. I knew the sign-off they wanted was regular-guy "Jim Edlin." But, stubborn jerk that I was, I just dropped the Arlington and announced my-

self thereafter as “James Edlin.” This apparently was enough and I heard no more about it.

There was a fair amount of overlap in the content that went into the two media, though the dial-in had a company-wide audience and the print was management only. In a company the size of Illinois Bell, there actually were enough items to fill up a daily print bulletin and two audio reports. Items included new product offerings, updates in business practices, personnel changes, and the like. They’d come to me by phone, inter-office mail, and the occasional in-person visit, and it was up to me to organize and write it all into a coherent whole.

For the print bulletin, I would type up each item on a sheet of its own, then pencil-sketch a rough layout of how the stories would be organized and where any photos or illustrations would go. Then, shortly after recording the afternoon *Communicator*, I’d hand these off to a secretary and she would type everything up into camera-ready form, attaching the visuals to be added in by the printer.

I hadn’t thought I’d like the daily production pace, but after a while I settled into it and was cruising right along.



Somewhere in this period I got the call from Marina City Management that I’d arrived at the top of the waiting list for a 1-bedroom apartment. They offered me two choices. One was on the 49th floor of the West Tower, with a north-facing view. The other, on the 46th floor with a south-facing view, was what had been their model apartment for public tours, which they were going to discontinue. The wrinkle was that they were going to refresh the model apartments before renting them out, and there would be a wait of six months or more before I could move in.

I asked if I could take the available unit now, but move to the refreshed model when it was ready. They weren’t keen on this idea but grudgingly agreed. So it was settled, I was moving to Marina City, from where I could walk six blocks to work.

The Marina City rent was higher than what I'd been paying for One Bittersweet End, and would be higher still if I needed to rent a parking place. Since I could walk to work and was close to numerous transit lines, I figured I didn't need the car and not having its costs would help me swing the higher rent. I was going to sell it, but it turned out my cousins Sue and Gene Edlin, who had been carpooling to work with me, were interested in taking over the car for a while. Rather than selling, I just let them reimburse me for the payments and insurance and they garaged it at their building, where I could borrow it occasionally if need arose.

I decided that most of the furniture I had in the Clarendon apartment was not going to come with me to Marina City. The upholstered furniture had pretty much been ripped to shreds during the brief period that Mark and I had adopted a cat. I had wanted to name the cat Ragnar, after a pirate character in *Atlas Shrugged*. Mark rolled his eyes but went along with it. Rags was a sweetheart, but his claws were death on furniture, and it turned out he was almost death on me. I was waking up in the middle of the night gasping for breath. When I consulted my doctor about it, after ruling out a bunch of possible causes, he asked, "You don't happen to have any animals, do you?" "Only this little cat," I responded. It turned out I had a severe cat allergy. Ragnar was quickly passed along to friends of friends who had a farm in the exurbs. But the furniture already bore scars of having been mistaken for cat toys.

Meanwhile, I spent my lunch hours and after-work time browsing through furniture departments in the Loop looking for the rare modern furniture items I both liked and could afford.

My budget was limited. I did keep the two twin beds brought up from Florida, but pushed them together and bought a foam strip to bridge the gap between them, making a faux king-size bed. I bought two, high-gloss enameled parsons-style tables to be end tables on either side of it.

Then I had a piece of thick plywood cut to size as a headboard behind the bed. Somehow I managed to obtain from the table manufac-

turer a quart of the end tables' enamel. I sanded the plywood as smooth as I could get it, primed it, and painted it to match the end tables. Wanting to create a dramatic look for the headboard without spending much, I came up with a swag of chunky silver metal chains. They hung from a point near the ceiling, centered over the bed, and draped down to anchor points at intervals across the top of the headboard. I meant it as a punky, modernist riff on a traditional swag.

Naïve me! I completely missed the BDSM vibe conveyed by all those chains. Decades later, my wife, hearing of this decor treatment, clued me in. I face-palm to imagine how this decor might have sabotaged the possibilities on those all-too-rare occasions when I managed to entice a woman into my bedroom.



My chain swag headboard

For the living room, I acquired some particle board bookshelves (“hylla hög”) and an entertainment console from a Scandinavian design store, smoothed the edges with filler, sanded the bejesus out of them and painted them in glossy white enamel. Fortunately I could do all that dusty sanding outside on my spacious balcony. Having economized on these, I was able to find some good buys on the rest of the furniture and lighting for the living room. I was feeling very happy

with my bachelor pad in the sky. Settled in, I told the management company to forget about a move to the former model apartment when it was ready.

I absolutely loved living in Marina City. A brief elevator ride down from my apartment—Marina City’s elevators were said to be among the fastest in the world when originally installed—I had a small but adequate grocery/deli, multiple restaurants and a bar, drugstore, dry cleaner, bank, movie theaters, and a health club with a pool. Not to mention an ice rink in the winter. And in addition to being able to walk to work I was also a short walk from Marshall Field’s and other downtown stores.

* * *

One day, I noticed in the newspaper that an organization called the Chicago School of Architecture Foundation (it’s now called Chicago Architecture Center) was offering a free multi-week course in Chicago architecture. Given my interest in architecture, this obviously grabbed me and I attended the introductory meeting.

At the meeting, it turned out that it was a recruiting event for volunteer guides to lead architecture walking tours offered by the Foundation, and that the class was offered only to those who signed up for at least a one year volunteer commitment. I figured, sure why not, and submitted an application for the volunteer class. I guess I didn’t have quite the right stuff they were looking for in a volunteer, because they didn’t accept me. But shortly afterward they contacted me to say they were starting a second training class, for volunteer guides to give tours of the building where the Foundation was based, Glessner House, and would I be interested in joining that class.

Glessner House, designed by 19th Century architect Henry Hobson Richardson in his signature style known as Richardsonian Romanesque, was built in the late 1880s for a wealthy farm machinery manufacturer. It was located in Chicago’s near South Side Prairie Avenue neighborhood, which had once been a fashionable area for the

gracious homes of the wealthy. Saving and restoring the house, which like its neighborhood had gone into drastic decline, was the original mission for which the foundation had been created. It was a rare surviving example of Richardson's work.



Glessner House

I wasn't as keen on doing tours of the House as I would have been about leading the walking tours, but it was a lovely and interesting building, and it was a foot in the door to working with the Foundation, so I signed up.

Together with a group of a couple dozen folks, I started attending the half-day "house docent" classes (I think it was ten or twelve Saturdays) to learn about the house, its contents and its story in preparation for leading public tours of this "historic house-museum." Upon passing a final check tour and graduating the class, I signed up for a half-day every weekend to lead tours of the house.

CSAF and its people became a significant factor in my social life—and my dating pool. After a year as a House Docent, I was accepted into the training class for walking tour Docents.



When another year passed at Illinois Bell, it was time again for that annual conversation about what my next step in the organization would be.

In my two years there, given my natural inquisitiveness, I had learned a fair amount about the telephone business, including a lot not directly pertinent to my particular job. I'd also gotten to know people in other departments, folks that I found smart and impressive. I'd even had the opportunity to go to a planning meeting with my peers in similar roles at other AT&T operating companies, held at the "mother ship" headquarters, the legendary 195 Broadway in Manhattan. I was kind of turning into a "company guy." Think what you will about plodding, rapacious utility companies, but I had grown to really like a lot of the people I worked with, and had developed positive feelings about the organization. Also, I had the sense that I was liked by my work colleagues and that the work I did was appreciated.

So, when asked what my interests were for a next career step, I threw my public relations department managers a bit of a curve. I told them I'd like to grow by taking some sort of operating role in a "line" division relating to the company's primary business instead of in the "staff" area where I'd been working. Of course there was also that question about what role I would least be interested in. I responded that I wouldn't be keen to work in the corner of the department concerned with charitable contributions.

Had I not learned anything from my previous year's experience? In short order I was moved out of my *Communicator / Bulletin* role and assigned a supporting position to the division manager who was responsible for the company's charitable contributions.

The PR department occupied the entire 30th floor of the newer tower in the headquarters complex, and each quadrant of the floor was the domain of an Assistant Vice President responsible for a certain segment of the activities under the PR department. Geographically, my first role was in the northeast quadrant of the floor and my sec-

ond in the northwest. Now my new desk was in the southwest quadrant, in the domain of yet another AVP. The move didn't meet what I'd been thinking about my goals at Illinois Bell. But I could see how it made sense from management's view of my career development, exposing me to another area and group of people in the department that hired me in. Since I acknowledged I'd been wrong about how my last move was going to work out, I figured I might be wrong about this one too and I should just give it a whirl.

Well, it turned out that this time things didn't work out so well. First off, I concluded that my new boss was an asshole. In a bit of *deja vu* toward my days as cold appliance writer at Wards, he also didn't give me much to do. And like at Wards, and unlike my two previous Bell roles where I worked in high-walled cubicles, this position was at an open desk in the middle of the floor. No cover if I wanted to read a book while waiting for an assignment.

What's more, there was dissonance between the ostensible and actual work of our group. As a regulated utility, Illinois Bell was very eager to portray itself as a corporate good citizen and committed partner to the communities it served. So it dedicated a not-small portion of its revenues to charitable contributions for good causes in its service area. The ostensible mission of our group was to identify the most worthy recipients of our charitable largesse and then direct contributions to them. Also, as a regulated utility, it was incumbent on us to have rigorous backup documentation showing why we chose the recipients we did any why we may have rejected others.

Those backup files were the responsibility of my position.

The reality was that our group didn't do much deciding of who got contributions. It was various executives that did the deciding, often based on their social connections and the like. Then it was our job to rustle up satisfactory supporting documentation for a gift and put it in the files. In a way, this activity was a variation on the theme of creative writing.

Between my request for more of an operating role not having been honored, and my growing reluctance to drag my ass into work for a

job I increasingly disliked, after a few months I decided to request re-assignment. If I was told no, I intended to give my notice.

Do you see this one coming? “Sorry,” said management about re-assignment. “No can do.”

Regretful that my Illinois Bell experience was coming to an end in such an unhappy way, I was about to be unemployed.



One thing I did after giving up my car when moving to Marina City was acquire a bicycle. Often I would ride the bike when going someplace inconvenient to walk to. And I would ride it recreationally along the lakefront. One day I saw a news story about the opening of a lengthy bike path in southern Wisconsin, the Wisconsin Bikeway, built on an abandoned railroad right-of-way. I decided it would be fun to check out.

I convinced a date to join me on a weekend ride up there. We found it a pleasant experience, with one exception; we hadn't adequately prepared for the chilly temperatures we encountered when overnight camping between our outbound ride and the return.

The Bikeway ride also tickled my entrepreneurial instincts. I noticed there wasn't a bike rental offering at either end of the path. Also, I figured some riders might appreciate doing a one-way ride and getting a lift back to the start. I sensed offering those services could be a business opportunity. Since my Illinois Bell departure was looming, maybe that was something I could pursue.

I talked the idea over with Ron Freund, my onetime WCS roommate. Ron had recently moved to the Chicago area and we'd renewed our friendship. Ron also was intrigued by the idea, and said he'd be interested in working on it with me. One other factor added to the allure of the idea. According to media reports, the country was having a “bike boom.”

So I started looking for places near the ends of the path that we could lease for bike rental outposts, and Ron started looking for bikes

we could buy. I did find some well-located properties at prices that seemed reasonable. But Ron struck out on finding us bikes. That was the downside of being in a bike boom—everyone was sold out.

Ron and I got to know John Hutzel, the owner of a weekend bike rental storefront called Ride-On that we found in Chicago's Lakeview neighborhood. We picked John's brain relentlessly about the bike rental business. In the end, however, we had to give up on the Bikeway rental idea, at least for that year. No bikes—especially none that were well suited to use as rentals—could be found in quantity at a price that made the economics pencil out.

Then a weird thing happened. Ron went to visit a friend in Canada. While there, he went with the friend on an errand to a Canadian Tire store, which, despite the name, deals in a much broader variety of merchandise than just tires. While there, he noticed they had a lot of bicycles available for sale. Apparently the bike boom was not happening so much in Canada. Also, they were priced such that, taking into account the exchange rate of Canadian and American dollars, they might be affordable for our purposes.

He called me to ask if he should buy out that store's supply and ship it down to Chicago. I told him I thought it was already too far into the summer to try reviving the Bikeway rental idea. But we tossed around the possibility that there might be an arbitrage opportunity just getting the bikes down to Chicago and reselling them for a profit. Y'know, bike boom and all.

So I called John from Ride-On and ran a proposition by him: Could we sell these bikes out of your storefront? In exchange, we would operate his rental business on weekdays (for him it was a side gig he only opened on weekends) at no cost to him.

John may have thought we were a bit crazy, but he went for it. So Ron bought 50 bikes from that Canadian Tire store, negotiating a discount for the bulk buy, and tossed it to me to arrange for shipping. I got a rapid, if not especially desired, education into the complexities of international shipping, customs brokers, less-than-truckload freight, and similar stuff I'd never before thought about.

A while later I got a call that our truckload of bikes would be arriving at Ride-On that afternoon. I got there to meet the truck and got my last, killer bit of education about how shipping of that type works. The truck driver informed me that his job was to get the truck with the load to the destination. Unloading wasn't part of his job. Well, Ron was still in Canada. John was at his day job. That left me to deal with it. So I got to heft 50 heavy cartons, each containing an unassembled bike, off the truck, then muscle them into the Ride-On storefront. It about killed me.

The next job was to assemble at least some of the bikes. Fortunately, my inner geek gave me some facility at doing that. The bikes, by the way, turned out to be a screwy hybrid. They were called Supercycle, and they combined three-speed gearing with a ten-speed-style frame and handlebars. People looking for a ten-speed tended to look down their noses at them. People looking for a three-speed got nervous that a Supercycle was a little too racy for them. We might never have had a hope of reselling those bikes if there hadn't been a bike shortage on,.

When Ron got back, we put up some "Bike Sale" promotion signs in the Ride-On front window, bought some ads in publications like the alt-weekly Chicago *Reader*, and suddenly had a bicycle business. We started working storekeeper's hours at Ride-On. We'd rent out John's bikes whenever a rental customer came in. And we'd pitch any Supercycle prospect who showed up, trying to convince them that these unique bikes offered "the best of both worlds." It was BS of course. Actually it was more like the *worst* of both worlds. But we needed to sell the things, so we stuck to our story.

Since Ride-On had begun looking like a full service bike shop rather than just a weekend rental place, people started coming in asking about repairs to their bikes. I'd never had any training as a bike mechanic, but I'm good at figuring out mechanical stuff and I picked up a how-to book for stuff I couldn't figure out. So we started taking in repair jobs. We opened an account with a wholesale bike parts place to get any repair parts we needed. We also got accessories from them

that we could sell with the Supercycles—baskets, carriers, horns, bells, and the like. These added much-needed profit to our sales.

By the end of the summer we'd sold 48 of the 50 bikes we had bought. Ron decided to keep one of the last two for himself. It was time for Ron to go back to grad school and for me to figure out what was next. So we bowed out of Ride-On, leaving John, the owner, to return it to its weekend rental origins.

* * *

Running a bike shop was never meant to be more than a fun summer lark for me, a change of pace after the corporate life. So during that summer I was also working on what I should do next.

As a bit of a lark I signed up to take the test to work for the United States Foreign Service. As usual for me with this type of test, I scored well. Thus I was invited to take the next step in the application process. This involved such things as getting reference letters and passing a security clearance.

It sounded like the working in the Foreign Service could be a fun adventure and an opportunity to see more of the world. If there had been a Democratic administration at the time, I might have pursued it further. But I got a lot of pushback from friends along the lines of, "Do you really want to work for the Nixon administration?" Upon further thought, my answer was "no", so I abandoned the process.

You may remember that I'd had a passion for architecture since elementary school days. But I'd never actually considered pursuing architecture because I can't draw for beans and I thought ability to draw was a prerequisite for being an architect. But somehow the idea had recently filtered into my head that this wasn't necessarily true. So I decided to look into going to architecture school.

At that time, architecture study was structured different from other professions like law and medicine. Instead of post-bachelors graduate programs, the bulk of academic training for architects was offered as five- or six-year programs starting right out of high school and leading

to a BArch (Bachelor of Architecture) degree. For someone like me who already had a bachelors degree, these looked like a lot of unwelcome repetition and waste of time. I wanted to find a program that would factor in my existing degree and jump right into the professional training.

The program I found that seemed to offer the shortest path to a professional architecture degree for someone in my situation was a Master of Architecture degree at the University of Michigan. This is the program I decided to apply to.

However my plan was not to apply right away, but to move to Michigan, find a job there for a full year while not attending any state school, and thus become eligible for in-state tuition when applying for the following year. I had friends in Ann Arbor, had visited there on many occasions, and thought it was somewhere I'd be okay living for four years—though I'd miss Chicago and my Marina City life.

During my years at Illinois Bell I'd continued the subscription to *Broadcasting* magazine that I'd first signed up for as an MSU freshman. Even though I wasn't working in radio, I still was interested in it and enjoyed reading about what was happening in the field. I'd also casually peruse the classified ads toward the back of each issue.

Once the University of Michigan program seemed like an option for me, I started looking at *Broadcasting* ads for job openings in southeast Michigan. In one issue I came across one by a station in the smallish town of Howell. WHMI was looking for someone who would both write and produce commercials and also host a daily afternoon call-in program. Howell was a half-hour drive from Ann Arbor.

I knew I could sell myself for their first requirement based on my prior experience at WITL. But the only on-air experience I'd had was DJ-ing at a dorm carrier-current station. Nevertheless, having raptly listened to and loved Larry Glick's phone-in show in Miami for years, which helped lead me into getting a degree in and working in broadcasting, I hoped I could blarney my way into convincing them I could do the call-in show too. It was a very-small-market station and every-

body's got to start somewhere. Maybe I could become the Larry Glick of Howell, Michigan.

So I sent off an application letter along with a tape of some of my commercials from WITL. And, yay, that got me an invitation to come for an interview. I took a couple of days off from Ride-On, made the five-hour drive to Howell, screwed my courage to ye olde sticking-place, and went in to sell myself as someone who could do the thing I'd had a yen to do since I first started listening to Larry Glick.

My interviewers were the station owner/manager and the person who was leaving the job I was applying for. I don't remember a single detail of that interview except that I jabbered and blabbed like a man possessed. But I guess I passed. They offered me the gig for \$125 a week—less than half what I'd been getting from Illinois Bell. I demurred, telling them that was going to be a little tight for me, and got them up to \$140. We settled on the beginning of September as a start date.

7 - Michigan Again

My first order of business before heading to Michigan was to acquire a car. I was going to need one for my Ann Arbor-to-Howell commute as well as for the move. With the small salary of my new radio job, and pretty modest savings, a new car purchase was out of the question. Before buying my AMC Javelin “Blue Abalone,” the other model I seriously considered was the Sport Coupe version of the Fiat 124. I loved it’s zippiness and handling. (The only thing that pushed my choice over to the Javelin was thinking an American car would be more reliable.) This time around I decided to look for a used 124 Coupe with a price I could afford, and I found one.



1968 Fiat 124 Sport Coupe—mine was forest green

My second order of business was subleasing my Marina City place. Subleasing it as a furnished unit meant I wouldn’t have to deal with moving or storing my furniture. Also, that kept open the option of returning to the apartment eventually. A classified ad I ran in the *Tribune* found me a lawyer from Buffalo, NY. He had some ongoing busi-

ness in Chicago and wanted a furnished *pied-a-terre* in town. In my sublease, I reserved the back of the bedroom closet to stash all the personal stuff I didn't want to bring to Michigan.

With the car and sublease done, I loaded up the Fiat, including the last of the Supercycles, and headed to Ann Arbor.

On arrival, I put up a notice card in the University of Michigan student union advertising the Supercycle. Fairly quickly, this last one was sold. (When Ron and I summed up all our income, expenses and hours put in on our bike venture, it turned out we made less than minimum wage for our efforts.)

While figuring out a place to live, I bunked with my friend Keith, a former WCS roommate now in Ann Arbor. An ex-girlfriend of Keith's, Marla, told me about an apartment for rent in the building where she lived. This small studio in a subdivided house was a huge comedown from my Marina City digs. But it would do and fit into my tight budget.



613 Hill St., Ann Arbor, MI

The house was a bit south of the University of Michigan campus, near a major street that gave me good access to the freeway I'd take to Howell. It was also about a block away from what I believe was the original Domino's Pizza location. It had been carved up into four units. The ground floor was occupied by Marla and two other women, who I also became friends with and ended up hanging out with a lot.

Most days, the drive from the house to the WHMI studios in Howell was about a half-hour, at least the way I drove it in the Fiat. (Only once did I get popped for speeding though.)

WHMI's studio and offices back then were near the center of what passed for Howell's downtown, on the second floor of an older building that had a paint store on the first floor. Later, on the air, I used to tease that I was broadcasting "from high atop Shippy's paint store." It was the only radio station in Livingston County, a mostly rural county about an hour to the west of Detroit. It was owned by Frank Bignell, a crusty radio veteran who in his younger days had been a radio personality in Milwaukee, with his wife Ann.



*WHMI's building - 201-1/2 W. Grand River Av.,
Howell— the paint store is now a wine shop*

WHMI was a 500 watt AM “daytimer” (allowed to broadcast only between sunup and sundown, since at night its signal might interfere with another, more-preferred station on its frequency). As the only station based in Livingston County, it had a strong local orientation. Most of its broadcast day was DJs presenting pop music programming. It ran ABC radio network news on the hour, followed by a brief local newscast. The main non-music program on the station was The Livingston County Afternoon Club, which ran from 1pm until 3pm on weekdays. That was my baby.

The station only had one on-air studio, though there was a second studio for producing recorded content to be aired later. The main studio was a small space with barely room for two people, a control board, two turntables, some tape cartridge players, a microphone, and one telephone that could be patched into the outgoing audio feed. I’d step into the studio while the DJ who preceded me was doing the 1pm news. At the end of the newscast he’d play a commercial and while it was running he’d step out and I’d move into the announcer’s seat.

The Afternoon Club was a call-in show, but I could have in-studio guests too. Before each day’s show I’d peruse newspapers and other sources to build up a file of subjects I could talk about and invite listeners to comment on. After the show I’d work on lining up guests for future shows.

Some guests were semi-regulars. At least once each quarter I’d have a town physician in to talk about health topics. There was also a wonderful astronomy professor from U of M that I’d invite up once a quarter to talk about things to look for in that season’s night sky. I’d occasionally bag a state legislator or town or county official. Sometimes I’d get guests who were only available by phone, in which case it wasn’t possible to get them into dialogue with listeners because only one phone line came into the studio.

I also had regulars among the listeners who called in. One regular caller was a fellow who was later outed as the Grand Dragon of the Michigan Ku Klux Klan. I found him kind of scary because he was a

calm, friendly sounding fellow who didn't come on at all like a raving, angry man. He'd start out whatever comment he called to make with some point as unassailable as one plus one equals two. Then he would build from there, and each step he'd make in his argument would subtly slide farther and farther away from what I believed was objective reality. He was a canny debater too. If I'd interject to challenge some assertion he made, he'd often have a ready response to counter me. Of course I always had the option to cut him off. But the need to fill my daily two hours of airtime often stayed my finger as it was poised above the cutoff button.

Another regular caller was a dear, older lady who always wanted to take me to task for some liberal political opinion or other that I'd expressed. This woman, in apparently failing health, eventually sent me her personal Bible at the station, saying that she couldn't think of anyone who needed it more.

The general run of my callers were about who you would expect—people listening to the radio on a weekday afternoon who had time to phone in and gab.

At the halfway point of the show I'd cut away to the network for news, then read my one local newscast of the day. Summoning my most authoritative newscaster-y voice for the copy that the news director would often rush into the studio seconds before airtime was reminiscent of my days at the *Communicator*. However, since I was "Jim" on the Afternoon Club, using "James Arlington Edlin" as my newscast signoff would have seemed silly.

When 3pm rolled around, I'd cut to the network news and then hand off to the afternoon DJ, leaving the next newscast to them.

The other part of my duties at WHMI was writing and producing commercials for the station's local advertisers. I'd bang out scripts on coarse, yellow paper. A few were meant to be read live by whoever was currently on the air when the spot was scheduled. For the rest of the commercials, I'd enlist one or more station colleagues into voicing parts, recording them in the production studio and adding in music and sound effects as needed. The analog techniques I used then were

Stone Age compared to digital audio production one can do now on a computer. I'd record a commercial on 1/4" reel to reel tape. When editing was needed I'd use a grease pencil to mark an edit point on the tape, then use a razor blade, an editing block to align pieces of tape for a splice, and splicing tape to reunite them. When a spot was finished I'd dub it onto a cartridge for announcers to play in the studio.

An example of the "spots" I cranked out was one for a local used car dealer. "Diogenes is the name..." my character introduced himself. "...*Joe* Diogenes. You've probably heard of my famous ancestor, who devoted his life to searching for an honest man. Well, I'm still in the family business, but we're more specialized now. I search for an honest used car dealer. And I think I've found one in [whatever the dealer's name was]." And so on. I'd probably knock out a dozen or more of these spots a week.

Being a small station, WHMI didn't have a huge staff. Besides me, there were three weekday DJs, a part-time news director, two part-time engineers, a woman who did sales, a utility person who handled reception, billing, and whatever else needed to be done, plus the couple who owned the station, the husband serving as general manager and the wife as sales manager. There was weekend staff too, but I rarely got to interact with them. If you ever saw the 1970s sitcom *WKRP in Cincinnati* you probably got an idea what life at the station was like, except we were a bit more small-town. It felt kind of like a family, including the inevitable dysfunctions of course, and I enjoyed being a part of it.

I rarely spent much time in Howell other than working at the station. But occasionally I would take a walk off the main drag and wonder what it would be like to live in one of the pleasant looking houses on the lushly tree-lined streets.

* * *

Back in Ann Arbor I finished and submitted my application for U of M's architecture program. There was one wrinkle: I was lacking one

calculus course that was a prerequisite for the post-bachelors program I was applying to. Since I was applying for the following year, it seemed like there was plenty of time for me to take that course somewhere, like at a community college. But the catch was that, as a new arrival in the state, in order to qualify for in-state tuition at U of M the following year, I needed a full year of not attending any school in Michigan.

Somehow it never occurred to me to try getting the class at a community college around Toledo, Ohio, which was less than an hour's drive from Ann Arbor. And I never explored whether a correspondence class might have served the purpose. Looking back from 50 years later, I feel I was insufficiently resourceful or determined. Instead I tried to beat the system by pleading for an exception.

My first such plea, to the admissions office, fell on deaf ears. I'd had successes in the past with being persistent and argumentative in trying to get things I wanted, so I kept pushing. Next I tried a personal appeal to the Dean. When turned down, I redoubled my plea to him with additional rationales for why I deserved an exception. Still no joy. Finally, my Hail Mary was a plea to the University's Board of Trustees. I wish I still had a copy of my communications with them, because I now can't imagine what persuasive argument I could make to Trustees to get them involved in my puny little admissions issue. Anyhow, they were more gracious than I deserved in telling me to get lost.

All this back-and-forth had taken nearly a year, so it was the summer following my arrival in Ann Arbor when it was finally, unequivocally clear that I would not be able to start the architecture program that fall. Since it was only possible to start that program in Fall term, my option if I wanted to pursue it was to wait another year and pick up that calculus course in the meantime. Always in a hurry, I didn't have the heart to do that.

In the meantime, I'd scratched my itch to do a radio call-in show. It had started to feel a bit like a piecework job, where I was expected to fill two hours every afternoon with *something* and I cared less and less about it being scintillating or informative as long as there was no dead

air. Perhaps I'd got disengaged due to the general run of callers I had in Livingston County, perhaps big-city callers would have helped keep my head in the game. I'd made up audition tapes with highlights from my Afternoon Club shows and sent them out to Detroit stations, but got no nibbles. So, blocked from doing the thing I'd come to Michigan to do, I was feeling it was time to go back to Chicago.

* * *

My year in Ann Arbor, while it didn't get me onto the architecture career path I'd hoped for, was kind of a fun break. It was almost like being in college again, since most of the Ann Arbor folks I hung out with were U of M students. Marla, who lived downstairs, was part of an informal friend group that thought of itself, using Kurt Vonnegut's word, as a *granfaloon*. I didn't entirely get absorbed into the *granfaloon*, but was one of several hangers-on in its outer circle.

Among other things, I got to go to my first Grateful Dead concert in Ann Arbor.

With my friend Keith, the fellow WCS alum who was now in nursing school in Ann Arbor (A² as the locals called it) I did a lot of car rallying in the Fiat on weekends. Rallying, at least at the amateur level, is different from racing. It's done mostly on public roads, though lightly travelled ones, and it involves driving according to precise, if sometimes deliberately obfuscated, instructions.

A rally (sometimes "rallye") team consists of a driver and a navigator. It's on the navigator to solve any puzzles in the rally instructions, sussing out turns and distances for each leg to be driven while keeping the team on the specified schedule for each leg. Points are deducted for arriving at a course checkpoint too soon as well as too late.

Some of the rallies we went on were in Canada, largely on agricultural back roads in desolate country with little signs of human life. Mostly Keith did the driving and I navigated. Since we were doing this a little ahead of general availability of handheld electronic calculators, some teams used a mechanical calculator called a Curta to solve navi-

gation problems. It looked a little like a pepper mill, with a hand-crank to make it calculate. These were pricey, but Keith's dad happened to have one and lent it to us for rallies.

On one occasion we bought a Texas Instruments electronic handheld calculator for a few hundred dollars from a department store with a generous return policy, used it for a rally, then returned it the following Monday. After that, using the Curta felt like being back in the Stone Age.



We fantasized about going on some more ambitious rallies in rugged parts of northern Michigan, ones that attracted pro and semi-pro teams. But the reality was that neither we or the Fiat were adequately equipped for these more demanding events, so it never happened. We did have our fun bombing around the back roads in the vicinity of A² though.

The other automotive diversion Keith and I did together was making pilgrimages to the road race course at Watkins Glen, NY for the annual U.S. Formula One Grand Prix race. Neither of us cared for the several-hundred-times-around-an-oval NASCAR style of car racing. But, both of us being somewhat adventurous drivers, we could imagine the fun of racing on a road-style course with numerous and varied curves and grades. I subscribed to *Autoweek* magazine and assiduously followed the news of the F1 circuit as it traveled from country to country on multiple continents. The U.S. race was toward the end of the season, so when we got to Watkins Glen we were all up on the statuses of the drivers and car makers. It was the only time I've ever been a sports fan on that level,

* * *

Around the middle of my Ann Arbor / Howell year, a small investment I'd made paid off with a \$5,000 windfall. This turned out to be timely, since the Fiat I'd bought back in Chicago turned out to be poor-

ly sealed against water. In the course of a Michigan winter and spring it became necessary to bail it like a boat. With water sloshing around my feet as I made my commute to Howell and back, I began telling my radio listeners I was driving “Mid-Michigan’s only mobile flood.” I loved driving that car model but was tired of the worsening stench of moldy, wet carpet. So I decided to put some of the windfall toward a brand new version of my Fiat.

So in the late summer of 1971 I gave my notice to WHMI and my Hill St. landlord, packed up the new red Fiat, and retraced my steps back to Chicago.

8 - Chicago Yet Again

Conveniently, my subtenant in Marina City was finished with whatever business had made him need a Chicago apartment, so the way was clear for me to move back into what many Chicagoans called “the corncobs.” Now all I had to do was figure out how to pay the rent.

Toward the end of my Illinois Bell days, the advertising agency business had sort of come onto my radar screen. I’d done a little exploring about making a move from corporate PR into the ad world. But I found that ad agencies didn’t consider my corporate or radio experience much of a qualification for an agency job. I was told all I was eligible for was entry-level positions that would involve a substantial salary cut from what I was making at Illinois Bell. That didn’t seem like a good move back then, but now I was back in town making a fresh start and thought I’d take another whack at it.

I put together a portfolio with the best of my work from that commercial writing class at Michigan State, my radio commercials, and a handful of example TV spots and print ads I ginned up just for the portfolio.

Then I went to the Chicago main library, got the Standard Directory of Advertising Agencies (known universally in the business as the Red Book) from the reference department, and started making a list of agencies to approach, with contact information for each. I made up an analog paper version of a Customer Relationship Management system, with a 3x5 card for each agency, noting its address, contact information, and the names of people to approach. This made up a deck of about three dozen prospects.

I updated my resume and got copies made. Then I sent one with a cover letter to each contact in my deck. At the larger agencies there were several people I mailed.

A few days after the mass mailing I started a round of phone calls to each contact. “Did you have a chance to look at my resume? Could we schedule an interview?” For each call, I wrote a line on that agency’s card, noting time, date, result, and when to recontact. After the first round of calls, the deck got sorted into calendar order by date of next contact. Each morning I’d work my way through the cards at the top of the deck for that day’s calls.

I wasn’t making a lot of headway. Ad agencies didn’t seem keen about cold calls from beginners with no agency experience and no “book” or “reel” of actual client work to show. The smaller agencies in my prospect group tended to be fully staffed and not hiring unless someone left or they added a new client. I closely followed the trade publications like *Advertising Age*, and George Lazarus’s advertising business column in the *Chicago Tribune* for agency news that might trigger a reason for a follow-up call.

But I was persistent, trying to stay just below the threshold of being annoying. Whenever I got a “no” I’d ask when would be a good time to check back and see if things had changed.

Eventually I started getting some interviews. They weren’t leading to jobs, but I got a lot of good input from experienced creative people about the samples in my portfolio, and each time I would make revisions and sharpen them up. I was also starting to get more of a feel for the business from things interviewers told me, and a sense of the differing cultures and flavors among agencies.

Some of the larger Chicago ad agencies directed all their applicants to one person in charge of prospective hires, to protect the rest of their staff from being bothered by a flood of applicants. Leo Burnett Co. was one of these. Weekly I would call their person, Linda Culley-Foster, to ask, “Anything yet?” She was always cheerful but noncommittal, neither encouraging or discouraging—an unbudging stonewall I couldn’t get past.

Until, one day after my umpteenth call, I did.

I practically fell off my chair when she told me they'd like to have me come in for an interview.

Leo Burnett, the largest agency in Chicago, was known for the down-to-earth, friendly style of its advertising. Not for them was the boundary-pushing creative stylings of the day's advertising "hot shops." Burnett was the home of the Marlboro Man, Tony the Tiger for Kelloggs, the Green Giant, the Keebler Elves, United's Friendly Skies. The man I was called in to interview with was a creative director named Rudy Perz, whose claim to fame was creating Poppin' Fresh, the Pillsbury doughboy.

My meeting with Rudy and subsequent followups with people from his group felt like they went well. And after what seemed like an endless round of calls, visits, mailings, I finally got an offer to work for an ad agency.

Burnett wasn't actually the agency of my dreams. I'd hoped to catch on with one of the smaller agencies whose creative work was drawing more oohs and ahhs from the critics. But it was the one offer I had, and prospects for another weren't encouraging. Since my biggest liability in my explorations with other agencies was my lack of agency experience, it seemed like a no-brainer to say "yes" and get some experience with a major agency. If it turned out I didn't love it, I'd still be in a better position to move somewhere else. After accepting, I sent out a postcard mailer to all the contacts in my card deck—"The Edlin has landed"—to let them know I was off the market for now.



So now I was a copywriter in one of the creative groups under Rudy Perz. Our group's primary client account was the Union Oil Company of California, generally known as Union 76. Including me, the group had three copywriters, a copy supervisor, and two art directors, managed by an associate creative director. The other copywriters, one of

the art directors, and the copy supervisor were more or less contemporaries of mine, fairly young. The other art director was a mid-career Burnett veteran. I learned a ton working with him.

Burnett's offices were on several floors in the Prudential Building, one of the first post-World War II office buildings in Chicago. It was a convenient walk from Marina City, a tad closer than my old Illinois Bell office. I was assigned a cubicle with no door.



Leo Burnett's offices occupied several floors in The Prudential Building. I was on 12, then 13

Burnett had some very specific cultural practices meant to carry forward the legacy of company founder Leo Burnett. Every reception area had a bowl of apples on its desk for visitors and employees to take. This started in reaction to naysayers who told Leo, when he was starting the agency, that he would soon be “selling apples in the street” because the agency would fail. He responded that instead he’d

be giving apples away, and for decades the apple bowls were mute re-assertion of that claim.

Leo had also liked to sketch out ideas using fat, soft black pencils of the type sometimes used in elementary schools. In homage to Leo's practice, boxes of these fatties remained readily available for present day Burnettters to deploy in their daily creative efforts.



Another Burnett practice was that all proposed creative work had to be vetted by a Creative Review Committee of senior executives before being recommended to clients. This “CRC” was a notoriously tough audience and creative teams were often nervous about getting their brainchildren past this vigilant gatekeeper.

Television commercials our group made for Union Oil—this was a time when gasoline companies competed for customers—were 30-second micro-dramas featuring a middle-aged couple named George and Marge. George was a bit of a narcissistic know-it-all, played by actor Dick Yarmey, brother of *Get Smart* star Don Adams. Marge was a patient, gracious soul unruffled by George's antics. They would arrive at a Union 76 gas station with some sort of automotive predicament either caused by George or that George mistakenly believed he knew how to fix. Marge would encourage George to seek help from the Union 76 folks. And they would indeed resolve the predicament, thus demonstrating “the Spirit of 76.” With George and Marge showing relief at their *contretemps* being resolved, a musical closing would suggest to viewers, “maybe it's time you put a man with *spirit* on your side—the Spirit of 76.”

I'd get opportunities to submit scripts for commercials the client requested. But I never got one accepted for refining and presenting to the client. I think I didn't have the right sitcom sensibility to write effectively in this genre.

As the new guy in this group, what I mostly got to work on was the piddly stuff no one else really wanted to deal with. Union 76 was, at the time, the “official fuel of NASCAR,” so there was a need for stock-car themed print ads to go in race programs and other publications aimed at NASCAR fans. And Union 76 ran radio spots on country music stations to encourage truckers to use the Union 76 network of truck stops. So I’d end up writing radio spots to be recorded by sexy-sounding woman voice actors who would invite drivers of 18-wheelers to roll in for a fill-up, a cup of hot Joe, and maybe a chance to meet Miss Union 76 Truckstop USA.

Union 76 was the bread and butter for our group, but we’d have occasional chances to work on things for other clients. One time we were called into a conference room where the table was full of boxes of cereal, including several flavors of Cap’n Crunch. The boxes were all examples of a category of cold cereals known in the industry as “high fat”—which was what allowed them to remain crunchy even after being doused with milk. Kelloggs, Burnett’s client, didn’t have an entry in this category yet and was thus losing business to competitors such as General Mills. Our assignment was to come up with product concepts, and associated branding, that Kelloggs could introduce to become a player in the high fat category.

One outcome of this exercise is that I was introduced to the Peanut Butter Crunch flavor of Cap’n Crunch. And I loved it. I’ve been buying it ever since, though I eat it as dessert rather than for breakfast.

Of the concepts I tossed out for this project, my favorite was a cereal shaped like little mini-waffles, with a buttery maple syrup flavor. I called them Wafflers. For branding, I proposed a magician spokesperson named Wellington Wafflepoof. He had a wand with a little spoon bowl at its end. In a commercial, a child would pour her- or himself a bowl and add milk, then Wellington would touch the bowl with the spoon end of his wand and the cereal would magically vanish, accompanied by the jingle, “Pour a bowl of Wafflers, and make them *disappear*.”

Like most of my creations at Burnett, this never made it as far as the client. Several decades later, Kellogg's would come out with a product called Wafblers. But it wasn't a cereal. It was a line extension of their Eggo frozen waffles brand.



After a year at Burnett, I wasn't feeling really seen or encouraged. With some agency experience under my belt, even without any TV commercials to put on a reel yet (though I did have paper storyboards of ones I'd written that hadn't been accepted), I thought it was time to see what opportunities might be out there for me at other agencies, especially since I was still making thousands less than my last Illinois Bell salary. So I did another mass mailing to the folks from my card deck from the previous year.

* * *

Since I had my full-time job at Leo Burnett I didn't have time to do the intensive follow-up I had done in my previous round of explorations. And I don't recall how much interest I got from that second round. But one nibble I got led to my moving on from Burnett.

The agency I moved to was Campbell-Mithun, headquartered in Minneapolis but with a substantial Chicago office. It was in a building just a couple of blocks away from Burnett. And I'd finally be getting paid more than I'd made at Illinois Bell.

I made my farewells to Leo Burnett, getting the sense that they were surprised by this development. Burnett was (still is) a great agency. In some ways I regret not having stayed there longer. As usual for me, I was in too big a hurry. The opportunity to flourish just wasn't happening fast enough for me there.

Unlike the giant Burnett, C-M's Chicago office had only two creative groups. Mine was headed up by Jordie Krimstein, and it was a larger

group than the one I'd been in at Burnett. The biggest C-M client in Chicago was the Kroger supermarket chain, headquartered in Cincinnati. That was the account I'd be devoting most of my effort to.



One Illinois Center, Chicago - Campbell-Mithun offices

In retrospect, I was probably lacking in my due diligence in investigating what kind of work I'd be doing at C-M. Kroger, it turned out, was not the kind of client where I'd have a lot of opportunity to win awards for cool, breakthrough work.

Kroger was a retail client, with a footprint in many states. A lot of their advertising was what's known as "item-and-price," where they'd want to tell shoppers in a certain city that they had, say, ground beef on sale this week for 39 cents a pound. Kroger's local ad managers prepared and placed their weekly print advertising of this type. But C-M was responsible for doing Kroger's local radio advertising of their weekly specials. It was a bit of a *deja vu* for me.

Most of these Kroger item-and-price ads were written to be delivered live by announcers at local stations. Neither the agency or Kroger aimed for a lot of creativity in these spots. So our team cranked out dozens of radio spot scripts a week to be sent out to local stations in places like Bossier City, Louisiana. A typical spot might include mention of three items on sale, plus a bit of copy about store amenities like delis or bakeries, and perhaps a topical theme relating to an upcoming holiday or event.

At first, I'd just sit at my typewriter and bat these out one after another from data sheets provided by the account executives for the various geographical divisions. It didn't take long to realize that a lot of the content was largely repetitive from city to city and week to week. So I began identifying nuggets of content that could be isolated into modules and then typed out separately, leaving blanks for the variable details such as prices and dates.

The agency had a "mount room" where staffers pasted ad layouts and TV storyboards onto presentation boards for showing to clients and the like. Mostly this mounting was done with rubber cement, which the agency bought by the gallon. But there was also a machine that dispensed thin ribbons of something called "tacky wax" onto a piece of paper. The advantage of tacky wax was that things stuck to it could easily be peeled off and repositioned multiple times. I coated an 8-1/2" by 11" piece of paper with tacky wax, then took a blank radio script form, cut out the middle area where the text of a commercial would be typed, and stuck this onto the tacky wax, leaving the wax exposed in the middle area.

I could then take a set of my reusable content modules, stick them in sequence on the exposed wax area, make a photocopy of this assembled page, and fill in the blanks on the copy with a pen, along with any minor edits, to make a finished script. These somewhat hacked together scripts would then go to the traffic department to be typed up neatly and sent out to the appropriate radio stations.

In a way, it was an adaptive recycling of the "unit space" approach to assembling print ads that I learned at Montgomery Ward.

I didn't go out of my way to flaunt this approach to management or the account executives that represented the agency to the Kroger people, fearing that they might perceive it as providing less value for the money they were paying, depriving them of getting the full attention of a creative copywriter on every commercial.

Around this time, office word processors were beginning to be a thing. It occurred to me that my method could graduate to a higher technology than tacky wax. I even took it on myself to get salespeople from Wang, one of the leading word processor companies at the time, to come into the agency and pitch their wares. However this was a leap too far for the agency management back then. They were just fine with the time-honored approach of a cadre of women in the traffic department pounding away at their Selectric typewriters, however repetitively.

Still, my tacky-wax script writing on the down-low became the seed of another project both the agency and Kroger turned out to love.

At the time, Kroger was pursuing a major effort to upgrade and expand their stores, evolving from their earlier, mid-century supermarkets of about 30,000 square feet to stores—they called them “super-stores”—of double or more that size with deli departments, fresh bakeries, wine departments where legal, and enlarged product selection in all departments. They wanted to advertise their beautiful new stores, but the challenge was that the message would need to be tweaked for each different geographical area, depending on what local laws allowed and what competitive markets were doing.

For general brand advertising, Kroger TV commercials featured a presenter, actor Fred Holliday, speaking for the store. For the Superstore campaign, I adapted my radio module system to TV. Starting from a list of all the possible store features they might want to promote in a commercial, an art director and I came up with modules where Fred would show and tell about each one. For many features, we'd create modules of different lengths—5 seconds, 7-1/2 seconds, and 15 seconds—so divisional advertising managers would have op-

tions of how much emphasis they wanted to put on a certain feature. We also made a selection of opening and closing modules.

To present the modular video side to the Kroger folks, I had a special, slotted presentation board made up. So instead of showing a traditional pasted-up storyboard of a proposed commercial, I could pull individual modules from a library and drop them in a sequence of slots to assemble an example commercial.

The recent general availability of computerized videotape editing was a key factor in what made this proposal possible. While TV commercials were traditionally shot on film (and many still are), videotape was becoming more accepted when the visual qualities of film weren't critical to a concept.

Well, the Kroger team loved our proposal and gave us the go-ahead to move forward with it. We were given five days use of a shiny new Kroger superstore in a Cleveland suburb, from its late-night store closing to its early-morning opening the next day. Our agency team was joined by a Hollywood production team including high-powered cinematographer Allen Daviau, and presenter Fred Holliday, and we all adopted a nocturnal lifestyle. For five nights we marched from department to department shooting our library of short modules. Then it was off to Los Angeles to edit them into the final library.

Ultimately, the output of the project was a spiral-bound catalog of photoboards (pages with representative stills captured from the video, with the accompanying audio written out below each) showing the available modules, which were sent out to each Kroger divisional advertising manager. They were also sent a tape of example commercials assembled from the modules. The video masters of the modules were stored with a computer video editing company in Chicago.

With this infrastructure in place, an ad manager could tell his C-M account executive something like, "I want a 30-second commercial starting with opening #1C, then module #3B, then #7A, then #12B, and close #15A." With these marching orders, I or another person on the team would go to the editing house, give the recipe to an editor, wait while they programed this sequence into their computer and generat-

ed copies of a finished commercial onto distribution tapes, then arranged for the tapes and run orders to be sent to the TV stations that would be airing them.

The finished product and process was a big hit with our Kroger client, and the agency presented me with its “Origin of the Species” award for coming up with it. (They didn’t know its origins went all the way back to my two unsatisfying months at Montgomery Ward!)

The next year, Kroger wanted to advertise the quality and selection of its meats in what they termed a “meat excellence” campaign. And we applied the same approach, though in a less elaborate form, to TV commercials for that campaign.

* * *

In addition to Kroger’s broad theme campaigns like superstore and meat excellence, in many markets they ran weekly TV spots with messaging that they were the low-price food store to shop at. In several markets these were a campaign built around the Kroger Price Patrol. In each such market, the Price Patrol was a group of four or five local housewives Kroger would recruit to go out to competing supermarkets with a long list of typical items—like a can of Campbell’s chicken noodle soup or a box of Kelloggs corn flakes—and add up how much it would cost to buy those items at each of the competitor stores, then compare that total to Kroger’s cost that week for the same items. Meat and produce items were never on the list, because you couldn’t guarantee that, say, one store’s ground beef was of identical quality to that sold by another store.

Predictably, the ladies of the Price Patrol, week after week, would find that Kroger’s total price for the list of items was lower than the totals at other stores they checked. There wasn’t a lot of copywriting to do on these spots once the basic concept was established. But there was a weekly production session to be done in each market, where the Patrol ladies would troop into a studio at a local TV station and

deliver on-camera testimony that, yes, once again, when they checked prices at Kroger and competing stores, Kroger's prices were lower.

As a copywriter, it wasn't normally my responsibility to oversee the production of these local weekly spots. The agency had producers who handled most of this duty. But there were a lot of spots produced every week in a lot of markets, so sometimes I and others on C-M's Kroger team were pressed into service to jump on a plane and represent the agency at a weekly taping. I recall one day when I had to catch an early morning flight from O'Hare to St. Louis to oversee a morning Price Patrol shoot there, then back out to the airport for a puddle-jumper flight to Jefferson City for an early afternoon shoot, then one more puddle jumper to Kansas City for a late afternoon session there.

The best part of that day was that I didn't need to finish the day by flying back to Chicago. So I got to treat myself to a barbecue dinner at Arthur Bryants, a joint I'd read raves about in Calvin Trillin's book *American Fried* and whose brisket "burnt ends" I still think about. On the way out of town the next day I stopped for a burger and Frosty at Winsteads, another Kansas City place Trillin raved about. I found Winsteads less celestial than Bryants though. When I later had occasion to visit a Wendy's, it was totally clear to me that Wendy's was a 100% clone (rip-off?) of Winsteads.

* * *

Another variation on Kroger's TV ads involved videotaping interviews with Kroger shoppers, for example asking them did they agree with the Price Patrol's findings that Kroger was "the low price leader"? I would fly out to the cities where these interviews were conducted. We'd hire a professional interviewer to do the actual speaking with shoppers, which we'd recruit from a store's aisles. We'd give the interviewer a general line of questioning to follow. However, I'd be out in the video production truck, watching each interview as it took place. I had a microphone where I could speak to the interviewer via an ear-

phone. As each interview progressed, I'd be listening for statements and phrases I thought could be edited into effective commercials. If I wanted the interviewer to probe further on a subject, or perhaps get a sentiment restated in a more commercial-friendly way (like asking, "Could you get her to say that again without so many 'um's and 'ah's?") I could request that via the interviewer's earphone.

I would also be making contemporaneous notes on each interview as it occurred, jotting down quotes that I thought would work well in a commercial, and generally giving myself future guidance for when we got to the editing room and started trying to extract nuggets of a shopper's story that we could assemble into a persuasive TV spot.

One of these interview projects occurred in Jackson, Mississippi. It was the only time I've ever been in Mississippi, and I was a little nervous the whole time I was there, having had my attitudes toward the deep South, and Mississippi in particular, shaped during the civil rights battles of the 1960s. I emitted a sigh of relief when my plane back to Chicago finally lifted off the runway from the Jackson airport.

Usually these interview shoots would run two or three days. On our first day of that Jackson shoot, our interviewees included one woman who was a commercial-makers dream come true. Not only did she express favorable sentiments in short, pithy and effusive phrases that would require minimal editing, but she had an engaging manner and looked great on camera. With her interview "in the can" I was immediately sure we would get at least one great spot out of the trip.

It was not to be. The next day, when we were back in the store continuing to do interviews, this woman returned to the store with obvious bruises on her face. She rushed up to our interviewing team and in a teary voice pleaded with them to discard her interview and not make it into a commercial, even though she had already signed a release. Her husband, she told them, was angry that she had given the interview.

Our interviewer and the other women on our crew, attuned to issues of domestic violence, instantly got what the situation was, reassured the shopper that of course we would do as she was asking, and

inquired if there was anything else they could do to help her. But all she wanted was the reassurance that her interview would never be used.

Back in the truck, seeing and hearing this all via the video channel, and naive as could be about battered women at that point in my young life, I began having visions of my imagined prize commercial sprouting wings and flapping away. I didn't grok the gravity of the woman's situation, so I asked over the wire if there was any way they might convince her to change her mind again. I was firmly told to shut up.



Back in Chicago after my year in Michigan, I picked up where I left off as a volunteer tour guide for the Architecture Foundation. My new assignment was leading architectural walking tours around the downtown Loop on Saturday mornings. Starting from Chicago's main Public Library, over the course of two hours I'd lead a tour group along a wandering path through the Loop, pointing out architecturally significant buildings from several eras.

I also became more deeply involved in the organization's activities, joining its Docent Council. As the 1976 U.S. Bicentennial approached, the organization got funding to open a downtown center—the Archi-Center—where it could expand its tour offerings and interpretive activities, and I played a modest role in bringing it to life. One year, I got involved in the design, writing and printing of CASF's annual tour brochure, with a little unofficial help from my Campbell-Mithun colleagues. I also learned and started giving new tours as each year brought an expanding tour repertory.

The final tour I learned and began giving was a four-hour bus tour which covered notable architecture across a broad swath of the city from the Hyde Park neighborhood to Frank Lloyd Wright buildings in the near west side suburb, Oak Park. I gave this a couple of Saturdays a month for as long as I remained in Chicago, and loved doing it.

My return to Chicago also coincided with the 1972 presidential election, when Richard Nixon was running for a second term. So I got involved in politics again, hoping to contribute to his defeat and to selection of a progressive, anti-war candidate. I canvassed this time for George McGovern, lugging around copies of *The McGovern Encyclopedia*, a multi-page tome spelling out McGovern's views and positions on a whole range of issues. This gave me ammunition to respond to any questions people might ask about where he stood. It was also something to hand out to anyone who seemed interested in going deeper.

In Illinois, at least at that time, my recollection is that there was a two-tier process for selecting delegates to the Democratic National Convention. The public voted for Delegate Electors, then the Delegate Electors voted for actual Delegates to the convention. I'm fuzzy about details of the process, but I know I ran for Delegate Elector in my district because I still have some of my campaign materials. Of course, being a political nobody, I didn't come anywhere close to winning.



There were a few other things I started doing outside of my advertising work.

One was writing classroom film scripts for Coronet Films. This was a division of the company that also published *Esquire* magazine. It had a fat catalog of 16mm films that schools could rent to show as part of their curriculum. I don't recall exactly how I got hooked up with them; I think I must have seen a classified ad recruiting scriptwriters. Coronet's office was in a building halfway along my walk from home to work, so it was easy for me to pop in for meetings with Tom, their guy in charge of scripts.

Tom would hand me a requirements document that had been prepared by the subject matter expert they had hired for a given film. This would lay out all the specific teaching points that the film was supposed to cover, along with details about the grade level the film was supposed to target, and any technical constraints on the film. I

would then go away and prepare a “treatment” document outlining the approach I proposed to take with a script.

Once a treatment was accepted, it was then my job to crank out a filmable script, with dialog for actors and a voice-over announcer, and scene and action descriptions. Once I handed in a script and it got accepted, I was out of the equation. Mostly I never saw the films I wrote scripts for. They tended to be about fairly forgettable topics like *Our Friend the Comma* (not an actual title, but suggestive of the sort of topics I wrote on—the actual topics were so forgettable I don’t recall most of them).

One film I actually do remember was *The Changing World of Work*, whose premise was that the landscape of jobs people can train for and get is always evolving, so it’s wise to keep an eye on the future when making career plans. The primary reason I remember this one is because it included the only song whose lyrics I wrote that actually got set to music, performed, and included in a film. It started out, “I want to be a buggy whip maker, just like my father ‘afore me” and faded out at the end with, “spaceship mechanic, that’s what I want to be.”

Coronet paid me \$250 for the first script I did for them. By the last one I wrote I was up to \$400 a script. Each one took me about a month of night and weekend scribbling. Writing them wasn’t by any means a stepping stone to a career in Hollywood, but it was a nice bit of extra money and it gave me a chance to flex some creative muscles that the 30-second TV spot format didn’t exercise.



Another outside-of-work thing I got into was studying astrology. I’m not sure what triggered my interest, but somewhere I learned about a course being offered on how to cast horoscopes. This was in the era when “what’s your sign” was a common trope in the mating dance, and I thought knowing something about astrology might be a useful aid for meeting women. So I signed up for the course.

The course was held on weeknights in space borrowed from an interior decorating company that had a full-floor showroom in one of the older buildings on Michigan Avenue facing Grant Park. The building had those old-style elevators, with accordion-grate doors, that were contained inside an ironwork cage and controlled by uniformed operators who asked “floor, please?” Going in at night, with most of the building empty, it felt like being in a *film noir*.

The instructor was a small, crone-like older woman whose weird appearance was compounded by having webbed fingers. She definitely looked the part to be teaching a mystical art. But she clearly knew her astrology.

The course material, surprisingly, incorporated a lot of math. One thing we learned early on was that the astrology seen in newspapers, a quick paragraph suggesting what might be going on if you were a Gemini or a Sagittarius, was grossly oversimplified from the perspective of a serious astrologer. Those newspaper Zodiac signs, we learned, were “Sun signs” and the sun was only one player in a complicated equation involving other planets and heavenly bodies, their positions and their relationships. Investigating the effect of those interrelationships for a particular place and time, and thus a person who might be present there and then, began with a process known as “casting a chart.”

This process started with using the given time and place, such as the moment when and location where a person was born, as an index into a weighty volume known as an ephemeris. The values found there guided the plotting of the various heavenly bodies onto a chart of the heavens as seen from that time and place. Once plotted, these findings served as indexes into yet weightier volumes that suggested interpretations derived from that constellation of facts. That’s how you boil the data down to a forecast of whether now is a good time to embark on a romance or business venture, or the other sorts of questions some look to astrology for guidance on. (These days, a computer can do all that stuff in a matter of seconds.)

Of course, rationalist me never for a minute bought into the premise that “the stars” actually influence our lives. It was all just cultural tourism from my point of view. The farthest I was willing to go—and it was a big stretch—was that there *might* be some sort of correlation between what the heavens indicated and what actually happened in real life. And every time I spouted this rationalization, I quietly acknowledged to myself that it was really just bushwah.

Nevertheless, I got good enough at the calculating and consulting-the-books process that, after I completed the course, I signed up to teach a chart-casting course of my own at an institution that was another product of the times, the Evanston Free University. With the ulterior motive of meeting women, of course.



A third non-work project was an expression of my entrepreneurial side. I got fascinated by the idea of a combination restaurant/movie-theater/bar because it was something I would have patronized if it existed. The idea was that people could have a meal, then walk to an adjacent theatre room to enjoy a movie, then walk to a bar area with live music to finish the evening with a nightcap. It would be a one-stop evening, eliminating the hassle of moving between establishments. And because the restaurant and theater would be cooperating parts of one business, where wait staff would know when the movie was starting, service could be smoothly coordinated to finish your meal in good time for the movie.

To educate myself a bit on the film exhibition business I got a subscription to *Boxoffice* magazine. Then I wrote up a survey asking people if they would patronize such an offering, along with questions about various preferences if folks said they were interested. I had copies of the survey run off, then I took them with a clipboard to locations that I guessed might have a good concentration of potential patrons—Oak Street Beach, the Rush St. entertainment district, and so forth—and started buttonholing people to take my survey.

The outcome of my little bit of market research was discouraging. It didn't seem that enough of the world wanted to beat a path to that particular door. I knew *I* would've been a patron, but it didn't look like tons of other people felt the same way. So I dropped the idea and didn't pursue it further. Since then, I have seen other people execute generally the same concept. For example, an AMC theater complex near where I live includes both a restaurant and a bar. They seem to do OK, and I've done the one-stop evening thing there myself. But I guess I didn't miss a big opportunity on this one.

A fourth project, also entrepreneurial, was inspired by the oil crisis of the early 1970s. As fuel prices zoomed into the stratosphere, and availability cratered, I came up with the idea of The Energy Store. This would be a catalog, and later possibly a chain of stores, aggregating products that helped people save energy.

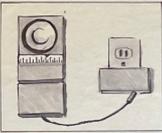
Chicago was the location of the annual Hardware Show, held at the cavernous McCormick Place. I started my research there, looking for products to resell that fit the concept. I was looking for things from the mundane, like foam tape to seal leaky doors and windows, and clear plastic sheets that could be applied to windows as sort of a half-assed double glazing, to the imaginative, like solar power products and things that could improve a car's fuel economy.

I found some interested prospects at the Hardware Show, including a couple who scheduled follow-up meetings with me. But in the end, I never took this farther than the initial concept, preliminary research, and some mockup ads.

I didn't know how to take the next steps to move The Energy Store forward. I had no money to invest in it. I didn't have enough confidence in my ability to realize it to quit my day job. Nor did I understand how to pursue it as a side gig.

Several decades later I still believe the Energy Store concept had potential. But I don't consider this a true "No Cigar" story because the "close but" part isn't true in this case. I never got close at all.

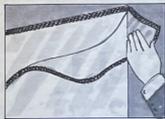
12 Pay-For-Theirselfes Ways to Stay Warmer This Winter For Less.



Wake-Up Warm
dials heat down to 55° at night, lets you wake up to a cozy house.
\$0.00



Wint-R-Fan
boosts efficiency of hot water or propane radiators up to 10%.
\$0.00



Wint-R-Window Kit
Easy-open, easy-seal storm window. Installs in minutes with Velcro.
enough for 10 average win. dows \$0.00
enough for 25 average win. dows \$0.00

HeatSaver for Garages

Lets you cut off heat to garage -- still have a warm engine, quick-starting car in the morning.
\$0.00
Deluxe kit includes fast heat blower with 3000-watt motor. Installs in 10 minutes. You're ready to leave.
\$50.00



Books With Lots of Helpful Hints



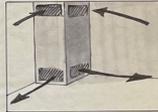
Wint-R-Stripping Kit

Seals off heat loss from ground doors quickly, easily.
\$0.00



2 Kits to improve gas furnace efficiency.

Retrofit:
automatic ignition kit eliminates pilot light & cuts gas waste. \$20.00
Automatic Flue Damper:
stops heat loss when furnace is not burning. \$0.00, both for \$100.00



The Heat Column
Springs heat collected at the ceiling down to where you can appreciate it.
\$0.00



Pyramid Fuel Saver
U.S. gov't tests show this is a poor heater. Can help you get up to 50% more heat from every drop of fuel.
\$0.00.00

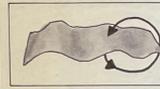
Texas Fire Frame

Triples usable heat from your fireplace -- makes it a real contributor to home heating.
\$0.00.00

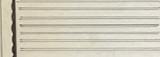


The Unelectric Blanket

Uses no energy to keep you warm & comfortable when house is at 55°.
\$0.00



Free Hot Water Saver!



The Energy Store Guarantee:

Order Here 1 800 871 8711



Mocked up newspaper ad for The Energy Store

Another non-work activity from this period was collaborating with three friends to write a script for a porno movie.

Where this idea came from I can't recall, but porn films had entered into the zeitgeist. *Deep Throat* premiered in 1972 and others with buzz followed. It seemed like a happening area. The four of us, including one woman, decided writing a porn film might be a lark. We started with research; we went to some grimy, sticky theaters to get a sense of the state of the art. This turned out to be an awkward experience, and not erotic in the slightest.

The concept we settled on for our film was *Pornotone News*. We'd parody the old-time *Movietone News* newsreels, using the same kind of portentous voice-over narration. The wrinkle was that every faux "news story" would quickly devolve into some form of sexual activity. For example, we'd have a story about a roll-an-egg-with-your-nose contest held on a beach. Things would go awry when one contestant veered off course and rolled their egg, and nose, into the crotch of a bathing beauty lying on the sand. Frolics would ensue.

Our script had been kind of fun to write. I guess our collaboration was a kind of ad-hoc "writers' room." But the fundamental mistake we made was that no one had any interest in mixing humor and porn. So *Pornotone News* got stuffed into a drawer, never to re-emerge.

There was one other (non-porn) film script I tried my hand at writing, this time on my own. I took a week's vacation from Campbell-Mithun and isolated myself with my Olivetti Lettera 22 portable typewriter in a lakeside cabin in rural Wisconsin. There I cranked out pages of an opus I titled *Air Rights*. The protagonist was a con man. (Possibly a bit of inspiration from my dad there.) His long con was to travel from town to town buying up exclusive franchise rights for a utility to supply breathable air to the town. He portrayed this as a form of environmental activism against air pollution, claiming that the symbolic purchase of the "air rights" was to dramatize how necessary it was to take steps to reduce air pollution. In fact, however, our anti-hero had no faith in people's ability to stem the increasing fouling of the air. His bet was that eventually pollution would become so bad

that a utility to deliver breathable air to homes and public places would actually be needed, thus making the franchises he'd bought for token amounts incredibly valuable. (In some ways, this prefigured the plot of the play *Urinetown*.)

Over the course of a week I actually churned out a credibly thick stack of script pages on cheap yellow paper. It was the longest thing I ever wrote, until this memoir. But as my writing week came to an end I couldn't figure out a satisfactory end for my script. An ending with my chortling protagonist gleefully rubbing his hands at newfound riches built on human frailty didn't feel very satisfying. But the other possibility, that his insincere evangelism for clean air measures would actually turn out effective and make his franchise purchases worthless, felt saccharine and insufficiently dramatic. I couldn't land the plane. Thus *Air Rights* ended up in the drawer next to *Pornotone News*.

* * *

Though Kroger occupied a lot of my work time at Campbell-Mithun, I did have an opportunity to work on other things.

For example, we had the restaurant division of General Mills as a client. Among other properties, they had acquired the classic old Chicago restaurant Henrici's, then repurposed the name for a small chain of steak-and-lobster restaurants. It was upscale dining, but not truly fine dining, which they acknowledged. So the theme line we came up with for Henrici's Steak and Lobster was "For a *very* good evening." Admittedly not a "great" evening, but a very good one.

To make some radio commercials on this theme, I went out to Henrici's locations on a few evenings with an audio recording engineer, and did at-the-table interviews with diners. I'd ask if we could take a few moments away from their meal to talk. (I believe they got comped with a dessert for speaking to us.) Afterward I'd get transcripts of these interviews, pick out positive stories and comments, then go into a studio and edit the keepers into radio spots.

The glamour side of the ad business is doing highly memorable TV commercials that win awards for creativity. But with Henrici's I did work far, far away from that glamour side. Besides radio and print ads, I had assignments that got me way down into the small stuff, like promotional "table tents" to go in the middle of tables and tout special cocktails, entrees or desserts.

Another C-M client was the franchise fried chicken chain Chicken Unlimited. We didn't have an icon like KFC's Colonel to hang their advertising on, so the ads we did for them were more retail-oriented—yet another variation on the "item-and-price" theme. Their ultimate item-and-price promotion was "Unlimited chicken at Chicken Unlimited"—an all-you-can-eat deal for in-restaurant customers.

I was also periodically involved in developing creative work for new business pitches, such as for the Lee Wards hobby materials chain and the Chicago area Oldsmobile dealers.

The one account I longed to work on at C-M, but never got to, was Universal Oil Products—UOP. The attraction of UOP for me was that they sponsored a Formula 1 race team and car—the UOP Shadow. I'd hoped, if I got to work on UOP, that I might get to attend a race or two as a team insider. I wanted a view of F1 racing I never got to see as a shallow-pocketed attendee buying the cheapest race tickets.

When I worked on Union 76 at Burnett, I might have gotten insider access to NASCAR races, since Union 76 was the "Official Fuel of NASCAR." But I never had any interest in NASCAR racing, I was even a bit dismissive of it. So I never even pursued the possibility.

Another C-M account I didn't work on was the American Egg Board. But I did get a small benefit from them. The Egg Board had a Chief Omletologist, Howard Helmer, whose job was to go around the country giving omelet-making classes to groups and organizations, presumably encouraging more use of eggs. One day Helmer came to C-M to give his omelet class, which I attended. Thus I'm now a trained "omletologist." And I can still whip up a mean omelet on demand.



A few years into my Campbell-Mithun career, the agency decided to sponsor me attending the Institute of Advanced Advertising Studies. This is a joint program of the American Association of Advertising Agencies (the “4As”) and a few well-known universities. In Chicago, the university partner was Northwestern and its Medill School. IAAS is a one-year program for working professionals that covers some of the same ground as Medill’s Masters in Advertising degree, but you get a certificate instead.

My year’s IAAS cohort was 40 folks, each sponsored by their Chicago-area ad agency employer. We met evenings at Northwestern’s downtown Graduate School of Business campus. Our cohort was divided into teams of four that incorporated a diversity of advertising roles. My team included two account people and a media person, plus me from the creative side. We were all encouraged to delve into areas that weren’t our regular work specialties. The other agencies represented on my team were Needham, Harper & Steers, Leo Burnett, and one that I don’t recall.

The course-long project for each team was to place itself in the role of a brand manager at General Mills’ cold cereal division. In that role, our assignment was launching a new cereal product. This would be a sweetened cereal with the distinctive attribute that its sweetening was half from cane sugar and half from a then-just-coming-to-market sweetener, aspartame, branded as “Equa.” (We now know it as “Equal” but that branding hadn’t yet emerged.)

The context for this product was that commodity sugar prices had for some reason risen dramatically in that period. As a result, standard sweetened cereals, such as Frosted Flakes, had either escalated notably in price, impacting their sales, or fallen significantly in profitability, or some combination of the two. We were told these conditions might create a market opportunity for the proposed new cereal.

Our charter was, at the end of the course, to present a launch plan for the new product to General Mills management (represented by the course faculty). We would have full ability to adjust all the various

levers that could contribute to making the product a success, including:

- product attributes, such as name, flavors, vitamin enrichment, cereal shape, box sizes and the like
- business attributes, such as wholesale and suggested retail prices, coupon offers, promotional allowances to retailers, etc.
- marketing plan, such as media selection, schedule and spending, creative approach, and public relations

The course classes would teach us about making these sorts of decisions and about their interrelationships.

In the end, our launch plan would have to make a business case that the required investment to launch the new product had a reasonable probability of creating a line of business that met the company's goals for profitability and return on investment.

I was fortunate to be teamed with three people who were smart, capable, knowledgeable and willing to work hard.

The result we came up with at the end of our months of work was a cereal we called *Ibbles* - because it was “delect-ibble, sense-ibble, and afford-ibble.” We claimed: 1 - Kids would love the taste as much as regular sugared cereals. 2 - It was sensible because kids got half as much sugar, with the rest of the sweetening coming from a natural sweetener derived from asparagus. And 3 - halving the sugar also made it possible to sell for a lower price.

In an age well before the advent of electronic spreadsheets, we hand-crunched a carload of numbers to propose a media plan with recommended gross rating points (GRPs) of TV ad coverage, along with newspaper ads.

The one skill missing on our team was visual design. So we begged and pleaded with some of our agency colleagues having those skills to help us mock up the *Ibbles* box and our ad creative.

Our final presentation was well received. I felt we were in the running for the winning team. But my stupid sense of humor blew it.

One suggestion in our proposal was to offer seasonal specialty cereal releases, like orange and black *Horr-ibbles* for Halloween season.

That was fine, but I couldn't stop myself from taking it one awkward step farther. I pitched that we could also do cereal versions for "specialty markets." The example I showed for this was a cereal box featuring a scantily dressed woman standing in the pool of light from a streetside, nighttime lamppost. She was holding a bowl of cereal and spooning some toward her mouth. The name on the box was *Whore-ibbles*." I hadn't realized how strait-laced the course faculty was until I saw the intense disapproval on their faces at the reveal of this concept. I was going for a laugh, but instead I sank our prospects.

Despite this final *faux-pas* however (and in some ways because of it), the IAAS program proved immensely educational for me. I have applied lessons I learned in it throughout the rest of my working life.



Perhaps helped along by my IAAS experience, as I got deeper into my ad agency career I started feeling a bit confined in a pure creative/copywriter role. I didn't like having account executives as intermediaries selling my proposed ideas to clients. I also wanted a role in strategy decisions that became the foundations for creative approaches. Reflecting a theme that keeps recurring in my work life, I wanted to cross traditional boundaries in the ad business and have a foot in multiple roles. Also, while I felt very appreciated at C-M and really enjoyed the colleagues I worked with, I was starting to crave having clients that offered juicier creative opportunities.

I wrote up a description of what my ideal advertising role would be, and started reaching out to other Chicago agencies to see if there was any interest in creating such a role for me. Most, of course, just waved me off, telling me they didn't do business that way. But after plugging away at these explorations for some months, I finally got a nibble from a senior executive at a sizable and respected agency. After rounds of interviews, they made me an offer. It was a great offer—a position structured exactly as I'd imagined it, and with a healthy bump in pay. I

was ready to jump at it, until one final bit of information popped into the equation: My primary client would be a cigarette company..

I've never been a smoker, and have always hated cigarettes. I hated the smell. I hated the mess. My mom was a smoker. As she lay dying in the hospital of lung disease, I asked her if there was anything I could get for her. She responded, "a cigarette."

As an ad guy, I always felt I couldn't effectively sell something unless I really believed in the product or service. Obviously, cigarettes didn't meet this criterion for me.

What a dilemma! The dream ad job I'd envisioned, at an agency I respected, paying well. But in the service of a client and product I not only detested but knew I couldn't effectively achieve results for. Of course I asked if there was any chance of taking the job without having that client, but they told me no, that's where they needed me.

So I asked for 24 hours to consider the offer. Really there shouldn't have been any debate. But I couldn't just pass up the only offer I'd gotten for the role I thought would be perfect for me.

I agonized. I talked to friends who told me, "Of course you can't do it." By the next morning I faced reality, called them up, and gave my regrets.



When it became clear that I wasn't going to find a Chicago ad agency that would bring me on in the sort of role I wanted, I started thinking about just starting an agency myself.

My first step along this path was to do a lot of reading. It seems that people who start ad agencies often write about that experience. I guess the people who start ad agencies tend to be more verbal than people who start other kinds of companies. You don't see a lot of books about, say, how somebody started their coal company. So I started a book collection.

Some of the books, like those by David Ogilvy, Jerry Della Femina, and Mary Wells Lawrence, were popularly published volumes. Others,

like Leo Burnett's, were privately published for circulation within the agency and perhaps to clients. When I learned of these, I'd make persistent efforts to get a copy. By the time I was done, I had gathered around two dozen such books. I pored through these looking for guidance and clues that would help me join the ranks of these founders.

Some examples I came across in this reading were less helpful than others. J. Walter Thompson, for example, married the daughter of his eponymous agency's first client. Being single, I was open to this possibility should the opportunity present itself. But a more intriguing model I saw for growing a successful agency was to get as a client an infant company with growth potential in an infant industry with growth potential. If both the company and the industry lived up to their potential, the agency could ride a double growth curve right along with them.

The infant industry that immediately suggested itself to me was the then-nascent personal computer industry.

I had taken computer programming classes back at Michigan State, but afterward the closest I came to computers in the subsequent decade was regular walks past the Sperry Univac offices (yep! Univac again) that were on the ground floor of the office building portion of Marina City. Behind its large plate glass windows I would see the consoles with their flashing lights, and the man-high cabinets of whirling data tape drives.

My cousin Gene, a lawyer, had a close friend in the computer time-sharing business. This was when most businesses access to computing power was via renting time on large computers such as those I would see behind the window of the Univac offices, accessing them via terminals over phone lines.

Gene's friend had convinced him to install a terminal in his law office and use it for document processing and the like. This was not as modern and zippy as the Wang word processors I'd tried to convince Campbell-Mithun to get, but it required a lot less upfront investment.

So Gene was pretty much running his law practice on that time sharing terminal.

As I contemplated starting my ad agency I thought I would emulate Gene's model. Rather than having a secretary, I'd have a computer terminal, which I could use not only for word processing ad copy, but also for accounting and other aspects of running the business.

I happened to mention this line of thinking to a friend, and he responded by asking why I would want a time sharing terminal when I could just buy a small computer for my office. Well, this was news to me, but I began to investigate.

My inquires led me one morning to the storefront of a company called the itty bitty machine company ("i.b.m. in small letters," they explained) in the suburb of Evanston. There, surrounded by boxes with flashing lights, tubs of cables, and other electronic paraphernalia, I told a representative I was going to be starting an advertising agency and I wanted something on which I could do word processing, accounting and other useful things.

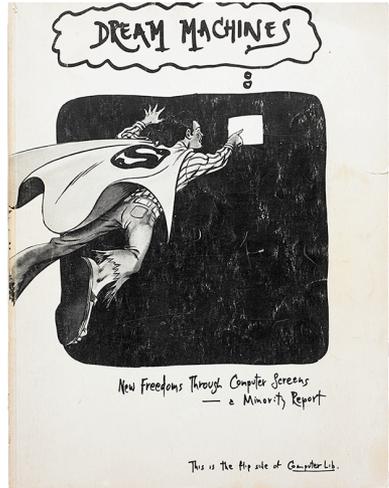
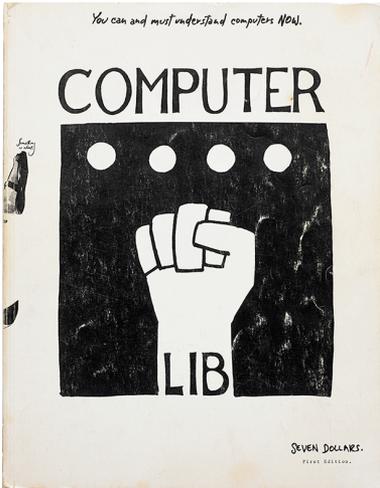
The representative nodded sagely and responded by asking how many bytes of RAM I'd like in my CPU, what baud rate terminal I wanted, and similar unparseable esoterica. Clearly we were speaking different languages.

As a result I didn't leave itty bitty machine company with a computer system. What I did leave with was an armful of magazines and books from racks at the back of the store. I got issues of *Byte*, *Kilobaud*, *Personal Computing*, *Creative Computing*, and a few other titles. I also got a copy of an oversize paperback volume by Ted Nelson. It had two covers. On one side it was called *Computer Lib* and on the other side it was titled *Dream Machines*.

I have had "printaholic" tendencies since childhood, but I really binged on this haul of reading matter. A lot of the content of the magazines was stuff I didn't really understand at the time, but I devoured it nonetheless, articles and ads alike. Both sides of Nelson's book were a revelation. The *Computer Lib* side was practical info coming from a perspective of "you can and must understand computers now." The

flip side, *Dream Machines*, was a vision extrapolating from present-day bleeding edge computer science work to forecast what exciting things people might do with computers in the very near future.

The hook was sunk.



Computer Lib and its flip side, Dream Machines

* * *

I gave Campbell-Mithun my notice effective the last day of 1976, thus staying eligible for one last annual profit-sharing bonus. I told everyone I was leaving to start an agency of my own. My boss, creative director Jordie Krimstein, was even gracious enough to recommend a possible new client to me, a lumber wholesale firm whose owners he knew.

Come January I started looking for office space. I ended up just down the street from Campbell-Mithun's office, in an older building at 307 N. Michigan Ave.

I rented a room in a suite of offices where the master tenant was Schroeppel's Secretarial Service. Today we might think of this as a co-working space, but back then it was just an office suite that Norma

Schroepel had rented for her secretarial business, then sublet individual offices to subtenants. The occupant on one side of me was an executive recruiter who'd left a firm to set up his own practice. On the other side were a couple of accountants. And there were a handful of other occupants as well.



307 N. Michigan Ave.

The reception area was also Norma's workspace, and featured a wall full of a few dozen wall phones, each a line for one of her answering service clients.

The office included a desk and a couple of chairs, and I inherited a couple of used horizontal file cabinets from my lawyer cousin Gene. Gene also contributed a somewhat antique electric typewriter.

Inspired by the example of Leo Burnett Company (no abbreviated "Co.") I named my agency Jim Edlin Company. Believing that the tradi-

tional ad agency's singular focus on print and broadcast advertising was too narrow, constraining an agency from exploring the full range of communication tools that might help a client meet its business objectives, I chose "Marketing Communications" rather than "Advertising" as the description of my business. (This sounds ordinary in the early 2020s, but was a bit of a rebellious act in 1977.)

With name and premises settled, I hired my art director friend Steve Cloutier to design me a logo, business cards, stationery and the like. Then, with the aid of some Presstype and a nearby quick printer, I ginned up a bunch of the forms typically used by an ad agency, insertion orders, meeting reports, TV and radio script templates.

The other variation from the norm I planned for my agency was the business model. From time immemorial, ad agencies were compensated primarily from a 15% commission paid by the media an agency purchased on a client's behalf. In other words, if an agency bought \$10,000 worth of TV time from a station to run a client's commercial, per the station's rate card, the station would bill the agency for \$10,000 less \$1,500 "agency discount" or \$8,500. But the agency would then bill the client for the full \$10,000, and pocket the \$1,500 difference as compensation for its work in selecting and purchasing the time and creating and producing the commercial to run in it.

That model never made business sense to me. I felt it positioned an agency as a sales representative of the media businesses that it purchased time and space from, rather than an agent of the client it was working for. I felt it potentially misaligned the agency's interest and the client's interest, since the agency was incentivized to sell the client as much media as possible, regardless of whether those purchases actually served the client's business interest. Also, the agency's payment was divorced from the amount of effort the agency might put into the client's advertising. The agency got the same 15% commission on TV time whether it had two people spend an afternoon coming up with a TV commercial and another afternoon producing it, or had three teams of people iterating on multiple ideas over a week, then spent another week on location producing the final commercials.

In the interest of aligning client and agency interests, I proposed charging clients a combination of “time and materials” for whatever tasks agency staff worked on for the client, plus a negotiated additional compensation linked to how effectively the agency’s work helped the client achieve its business goals. I called this our “IncentiFee.” We’d bill media to the client at the agency’s cost without adding any commission.

Now came the hunt for clients.

While reading through the shelf I’d collected of ad agency stories, I’d made note of who each agency’s first client had been and how that relationship had worked out. Gathering the success stories from that data, I made a table of the now-well-known agencies and their equally-well-known first clients. Around this data, I crafted an ad inviting an adventurous company to join this list of “famous first clients” by becoming the first client of Jim Edlin Company.

It was a long-copy ad, something I’ve always believed in. It went into detail about why we (yeah, actually just me) sailed under the banner of “marketing communications” rather than traditional “advertising,” and also pitched our non-traditional compensation model.

My plan was to run the ad in the business section of the *Chicago Tribune*, on the page having George Lazarus’s popular daily column about the ad business. These were the days when newspapers were still money-printing machines that charged serious bucks for each column-inch of space. That was the downside of my long-copy ad. In retrospect, I’d have been better off going with a smaller ad I could have run multiple times, because I only had funds to run my long-copy ad once.

In the end, that ad didn’t bring me a first client. What it did bring me was a lot of calls from people who wanted to sell me stuff, plus a handful of well-wishers. My actual first client was Ted C. Bloch Company, the lumber commodities company referred by my former C-M boss. To seal the deal, Ted and his wife—it was a family company—presented me a tie clip with a spinnable buzz saw blade.

JIM EDLIN OFFERS A GUTSY ADVERTISER A CHANCE TO JOIN THIS LIST OF FAMOUS FIRST CLIENTS.

With all the fine advertising agencies there are to choose from, it takes a gutsy client to put his business in the hands of a brand new shop.

But as with other business decisions that require courage to make, there is the potential for very rewarding results.

Each of the famous clients in the list at right made the decision to try out the new guy. The results are as familiar to you as the names of both the clients and the then-fledgling agencies that collaborated in their success. (And notice how many of those agencies are still serving their first clients!)

This insight comes to you from Jim Edlin Company—a brand new agency that, as you might suspect, is now seeking its first clients.

We're not your standard-model agency

We aren't trying to kid anybody about having a whole lot in common with those big, successful agencies on our list. (We should be so lucky.)

Our point is just to remind you that being among a new agency's first clients can work out pretty well.

If anything, we hope you'll appreciate us for some of the ways we differ from the standard-model agency.

Marketing Communications

A clue to one of our uncommon approaches is our choice of "marketing communications" instead of "advertising" to describe our business.

There are all kinds of communication tools and crafts that can help you meet your marketing goals—advertising, p. r., point-of-sale, employee or dealer information, et cetera ad infinitum. We think helping you find the most effective combination is one of an agency's most important jobs. And we believe the best advice for that comes from someone who offers you the full spectrum of communications resources—as we do.

"Who do you want to do what?"

Another thing we believe in very much is super-precise definition of your marketing and communication goals.

Cost and time pressures often make it tempting to wing it on this part of the job. But we think helping you define your goals is as important a part of our work as helping you meet them. So our discipline demands that work on every assignment begin by seeking a precise answer to our Prime Question: "Who do you want to do what?"

ADVERTISING AGENCY

Ted Bates & Co.
Leo Burnett Co.
Benton & Bowles, Inc.
Dancer, Fitzgerald, Sample, Inc.
Doyle Dane Bernbach Inc.
William Esty Co.
Marsteller, Inc.
Ogilvy & Mather, Inc.
Scali, McCabe & Sloves, Inc.
Tatham-Laird & Kudner
Wells, Rich, Greene, Inc.

FIRST CLIENT

Colgate Dental Cream
Green Giant Co.
General Foods
Gold Medal Flour
Ohrbach's
R. J. Reynolds Industries
Clark Equipment Co.
Sun Oil Co.
Volvo
Bendix
Benson & Hedges 100s

YEARS SERVED

'41—present
'35—present
'29—present
'23—present
'49—present
'32—present
'51—present
'49—'53
'67—present
'46—'52
'66—present

Names of agencies and clients used are present-day names. In some cases, the original relationship was between predecessor firms, with different names.

This means figuring out who are the most promising people you can communicate with.

It means deciding what behavior—trial, repeat purchase, a store visit, calling a salesman—you want from those people.

And it means learning what knowledge, beliefs, emotions and inspirations are most likely to bring about that behavior.

If that ends up costing more or taking longer than you're accustomed to, we say, "so be it." We're convinced the better-focused communication that result will prove more cost-effective in the end.

The "Incenti-Fee"™

Our concern with cost-effectiveness also extends to the cost of our services.

We see our role in your business partly as professional consultants and partly as just plain salespeople.

We think our proper concern is not how much time and space we can sell you, but how much business we can bring you. And we believe the way we are paid should reflect all that.

So instead of collecting media commissions we charge straightforward consulting fees for our basic pay.

Then, for each assignment, we propose to negotiate bonus pay—we call it an "Incenti-Fee"—tied to how well your goals are met.

For the salesmanship part of our job, what could be more appropriate!

You don't have to hire anybody to give us

Jim Edlin Company is a resource you can take advantage of even if you're thoroughly satisfied with your present marketing communications arrangements.

While we would love to handle all your communication chores, we are also happy to serve in a consulting

role when you want to enrich your mix of ideas from other sources or have a fresh eye take a look at a thorny problem. So feel free to use us as the proverbial "second string to your bow."

Our big risk-free offer

We lack many impressive things our competitors have to attract your business.

So we are substituting what we hope you will find a very impressive get acquainted offer.

We will do a complete work-up on whatever you consider your most pressing communication need—at no risk to you.

If you like what you see when we present it, and want to retain us for more of the same, we will ask you to pay our agreed-on fee for the work we have done.

But you may also choose to discard our efforts, or give them to anyone including another agency for further work, and pay us nothing. In that case we ask only that you reimburse approved expenses we have made on your behalf.

This offer is subject to withdrawal at any time. So we invite you to get in on it while we're still new and hungry enough to make the offer.

We are going to work very hard to add some courageous person's company to that list of Famous First Clients. Why not give us a call before this ad gets out of your hands, and explore with us whether that somebody should be you.

JIM EDLIN COMPANY
MARKETING COMMUNICATIONS
307 NORTH MICHIGAN
CHICAGO, ILLINOIS 60601
312-726-3646

My next client-stalking strategy was inspired when I saw ads for the First West Coast Computer Faire. I'd seen in these ads in some of the personal computing magazines I purchased at the itty bitty machine co. The Faire was scheduled for that March in San Francisco. I had pegged the personal computer industry as fitting perfectly my rubric of "infant companies in an infant industry" that, as clients, could offer a fledgling "mar-com" agency high potential for fast growth. I figured the Faire was an opportunity to identify and get acquainted with a whole lot of such potential clients all in one place.

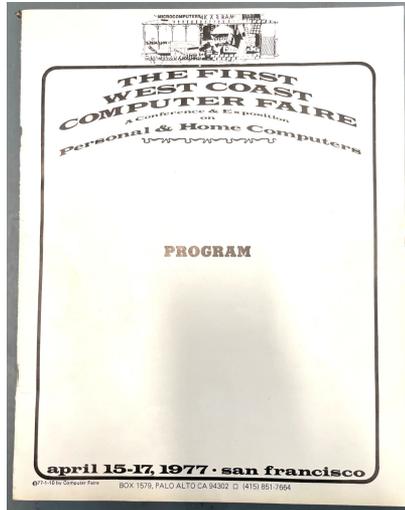
I began planning a March trip to San Francisco. In addition to attending all three days of the Faire, I planned to spend several days after the Faire visiting companies in the area that seemed interesting as prospects.

I also layered one other hopeful quest onto the trip. The Bay Area was home to the headquarters of Safeway, one of the few retail grocery companies of similar scale to Kroger. I knew my one man agency had no hope of pitching to be the principal agency for Safeway, but I thought—with my years of Kroger experience—I might be able to interest them in hiring my agency for boutique projects supplementary to their primary agency relationship. So cadging a meeting with Safeway was another agenda item for my S.F. trip.

* * *

Come April 1977, I arrived in San Francisco the night before the start of the Faire. I set up camp in a Holiday Inn just down the block from the Civic Auditorium, where the Faire was being held. The next morning, I came out of the hotel to find multi-block-long lines of people queued up to buy tickets and get into the Faire. It promised to be a long wait to get into the hall. So instead I made my way to the North Beach neighborhood, home to numerous Italian coffee houses and bakeries. There I had a leisurely coffee and pastry, hoping the line would get down to a more manageable size by the time I got back.

On my return, I did gain quick entrance, and found myself in what was, to me, something of a wonderland. I now know San Francisco's Civic Auditorium to be a quite modest space for an exposition. But at the time I wondered if I'd be able to see everything in the main hall and the two smaller side halls in the three days of the event. The description "a pig in shit" could easily have been applied to me.



Though I was very much a newbie in this world, I'd been working on educating myself. So all the buzzwords like RAM and ROM and FLOPS and such weren't quite as intimidating to me as when they'd first been thrown at me by the folks from the itty bitty machine company. It instantly felt like home. I made my way from one exhibitor booth to the next, soaking in the demos with increasing excitement.

Among the products that had their public debut at the First West Coast Computer Faire were the Apple][personal computer, which hooked up to a separate display, and the Commodore PET (explained as "Personal Electronic Transactor"), a cute all-in-one personal computer package that had the display built right in, plus a cassette tape deck for reading programs and data in and writing them out.

I'd gotten a ticket that allowed access to all the conference sessions as well as the exhibits. So I ping-ponged back and forth from panels and presentations to the exhibit halls, just being a complete sponge. Half the time I wasn't too sure what the heck a presenter was talking about, or what the heck an exhibitor was selling, but I was packing it away in the back of my head to sort out later. Whenever a speaker or exhibitor pinged my "possible-client" radar I'd hand out my business card and promo material and try to schedule a post-Faire meeting.

The Faire included an evening banquet featuring speeches from emerging personal computer industry luminaries, such as author and publisher Adam Osborne. I was an outsider getting my first exposure to this milieu, but my immediate reaction was, "I want in! I want to be a part of this."

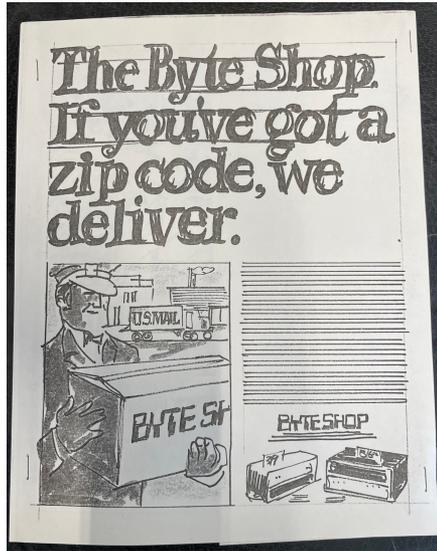
In my wanderings through Silicon Valley after the Faire, the most productive connection I made was with Paul Terrell, the founder of the Byte Shop—one of the pioneer computer retail stores. Paul is legendary for, among other things, giving Apple Computer founders Steve Jobs and Steve Wozniak a purchase order for the first fifty units of their proposed Apple I computer. They were then able to use the purchase order to get credit with parts suppliers to acquire the parts they needed to build the units.

Paul was interested in my prior experience with retail and franchise clients, and decided my little agency could be a good resource for the Byte Shop expansion he had in mind. When I flew back to Chicago I had added Byte Shop to Jim Edlin Company's client roster, for a project exploring their expansion to mail-order.

I also visited a bunch of other companies that were or would become significant in the emerging personal computer scene. I talked my way into a meeting at Apple, but only with a fairly low-level person, and nothing came of it. But I was beginning to get a sense of companies in the industry beyond what I could glean from the pages of personal computer magazines.

One hope I had for the Bay Area trip didn't pan out. The Safeway folks had no interest in a relationship with a supplementary agency. I

hadn't actually been keen to do more work in the retail grocery world, but I felt I had useful knowledge and capabilities in that world that I would happily have put to work to help get my business off the ground. So I was disappointed to scratch Safeway off my list of possibilities.



Ad concept for Byte Shop mail order

* * *

The rest of that spring and the first part of summer were uneventful for Jim Edlin Company. That changed when the summer edition of the Consumer Electronics Show came to the giant McCormick Place convention hall in midsummer. (CES now happens in Las Vegas in January, but in those days the big event was in Chicago in summertime.)

I'd made a practice of attending whatever big trade shows in Chicago I could get into. I figured they were good places to troll for prospective clients. So when CES opened that year, I was there.

I'd spent a footsore day prowling the aisles of CES seeking client leads. As I was on my way out, I cast a reluctant glance toward the

cluster of little tables near the exit that were a ghetto for media exhibitors. Amid them I spotted a table for *Personal Computing* magazine. This popped me out of my end-of-day fog, since I remained particularly eager to get clients in the then-nascent personal computer industry.

The table was manned by David Bunnell, *Personal Computing's* founder and then-publisher. He was at CES by himself, prospecting for advertisers and also promoting an event—the First Midwest Personal Computing Show—that the magazine was sponsoring in Chicago the following October.

Personal Computing Comes to

A major exhibition on computers for home, personal, business and school use will be held in Chicago on October 27, 28 and 29, 1977.

Sponsored by Personal Computing magazine, this show will bring 100's of exhibitors of consumer computer products. It will be held at the world's largest Holiday Inn on the Kennedy Expressway near O'Hare International Airport.

Dozens of seminars are planned to teach computing concepts to the general public. There will be banquets, workshops, a computer school—100's of doorprizes including a personal computer as the grandprize.

This show is the first major personal computing event to be held in the Midwest! Plan on attending now. For free \$1 discount tickets and more information write: Personal Computing Show/401 Louisiana SE/Suite G/Albuquerque, NM 87108.

18 Personal Computer 401 Louisiana SE, Suite G, Albuquerque, NM 87108

Ad for the First Midwest Personal Computer Show (by the magazine, not me)

Since it was nearly closing time for the day, with most folks in the hall now focused on their planned evening activities, David was sitting alone at his table and looking bored. He greeted me with a look of relief when I walked over and introduced myself.

I was excited at the idea of a personal computer show coming to Chicago and I eagerly pumped David for all the details. Then I explained to David that I was probably the only “ad guy” in Chicago who knew anything about an event like the one he was putting on, since I’d attended the First West Coast Computer Faire the previous spring.

Trying to leverage that experience to boost my credibility, along with the fact that my company was already doing work for the Byte Shop stores, I told David that I would love the opportunity for my agency to do the local advertising and marketing for his event. In good ad-man fashion, I then invited David to pack it in for the day and join me for a drink.

Several scotches later, David bought in to my pitch and agreed to hire my agency for the job.

So, co-ordinating with David’s team at *Personal Computing* back in Albuquerque, I began promoting the hell out of the event.

Because I saw the project as an opportunity to showcase my agency to other potential personal computer clients, I put way more effort into the project than David’s modest budget actually justified.

With ace commercial producer Bobby Levin, I made what may have been the very first TV commercial to advertise personal computers.¹⁰



A frame from our TV spot for MWPCS

¹⁰ View the spot on YouTube at <http://bit.ly/pctvad>

In preparation for shooting the spot, I begged and borrowed from their manufacturers or local resellers a handful of personal computers to be the stars of the commercial. In response, one afternoon a big carton arrived at the office from the Tandy Radio Shack people. Inside was one of their TRS-80 computers. Though I was already fascinated by personal computers, I hadn't really had any hands-on time with one. So I seized on this opportunity to try the TRS-80 out. I unpacked it, set it up on my desk, and switched it on.

I started by typing in the most minimal of computer programs, using the TRS-80's built-in BASIC ("Beginners All-purpose Symbolic Instruction Code") programming language.

```
10 PRINT "Hello, World"  
END
```

When I ran the program, the words "Hello, World" appeared on the screen. Miracle! What a different world this was from back in college when I penciled lines of code on a gridded pad, transcribed them onto cardboard cards with a keypunch machine, handed in the deck of cards through a window, and waited hours or longer for my output (or failure messages) to come back.

I'd been sucked in. I sat in my office for the remainder of the day and well into the evening, tapping at the keyboard of the TRS-80, trying things out and seeing what I could make it do. The Schroepel office emptied out. Night fell and the office darkened. The only light was that coming off the TRS-80 screen. And I couldn't tear myself away.

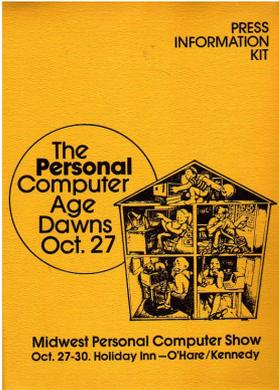
Bobby got famous voice-over artist Ken Nordine to do the soundtrack for the TV spot, with a cameo line—"Some of us can even talk"—spoken by one of the computers.

In addition to the TV commercial, I also produced and ran radio spots, newspaper ads, and even ads both inside and outside CTA busses.

But, true to the "marketing communications" banner I was flying to distinguish my company from traditional ad agencies, our work in-

volved a lot more than creating and running ads. We also did intensive press promotion.

David and I were both very pleased at how successful this was in getting coverage in both local broadcast and print media.



MWPCS press kit



Chicago Daily News front page story that ran on the Show's opening day

As one more way to create interest, I even had a “preview show” exhibit built. Disassembled, this just fit into my Fiat. For each of the four weekends before the show, I schlepped the exhibit to one of four Chicago-area shopping malls that had agreed to host it, lugged it in, and set it up. I invited representatives of local personal computer stores to help me staff it in each location.

Finally—*really* stretching the boundaries of “marcom”—I even arranged for a bus shuttle to run continuously between the nearest station of Chicago’s “El” and the hotel hosting the show.



The MWPCS “preview show” booth at a Chicago-area shopping mall

The outcome of our collective efforts was a happy success. This was true despite the Chicago event accidentally being scheduled for the same dates as a competing event in New York, which created a dilemma for potential exhibitors.

On the opening morning we had people lined up around the building waiting to get in. People filled the aisles of the exhibit area all four days of the show. The conference sessions were well attended. The Press Room was visited by numerous representatives of both local media and national media like *Time* magazine.

Afterward, I thought that maybe I'd been a bit premature in seeking to attract a general audience to the event. Many of the exhibitors seemed oriented toward a more technically-minded crowd. I'd sold the event more as what I wanted it to be instead of what it actually turned out to be. But we didn't hear any complaints about the over-reach. And it was a first stake in the ground for the vision that I wanted to pursue.

In a postmortem of the event in his personal newsletter, *Subroutines*, David Bunnell wrote, “Other personal computing show audiences have been heavily dominated by computer hobbyists and computer professionals. They have been ‘insider’ shows. Chicago was an ‘outsider’ show, one that sought out the future market for personal computers.”

Subroutines
Opinions, Observations About the Personal Computing Market
by David Bunnell Issue 5 May 1978

In spite of the competition, both the New York show and the Chicago show were successes with New York drawing over 13,000 people and Chicago over 12,000. Subsequent articles in *Computer Retailing* and other publications praised both events. There was, however, **one very important distinction** between New York and Chicago, in fact between Chicago and all other personal computer shows held prior to and since Chicago.

audience at other shows. Thanks to a superior advertising campaign conducted in Chicago by the Jim Edlin Marketing Co., the audience at Chicago was a solid mixture of small businessmen, professionals, educators, hobbyists and the general public. Other personal computing show audiences have been heavily dominated by computer hobbyists and computer professionals. They have been “insider” shows. Chicago was an “outsider” show, one that sought out the future market for personal computers.

The Future Market

The distinction was that the audience at the Chicago show was radically different from the

David Bunnell's MWPCS postmortem

* * *

The first Midwest Personal Computing Show had been a co-production of *Personal Computing* magazine and a Greenwich, Connecticut-based trade show production company headed by a fellow named Austin Cragg. The aptly-named Cragg – a tall, flinty New Englander – was very pleased with the success of the Chicago event and was eager to do more events like it. He invited David Bunnell and me to partner with him in doing so.

David and I came back to Cragg with a more elaborate proposal. We thought that as the personal computer industry grew and involved, there was an opportunity to segment the audiences of potential atten-

dees and exhibitors and to create events optimized for the needs and interest of each audience.

Our Chicago event, and its predecessors on both the West and East coasts, had brought in an undifferentiated audience of pioneers, early adopters, and curiosity-seekers. We argued that it was now time that four different attendee groups, and exhibitors interested in reaching them, could each be targeted with events aimed specifically at them.

- The personal computer industry itself
- Computer hobbyists
- Business users
- Consumers

To serve these different groups we envisioned one annual National Trade and Technical event, a sprinkling of annual Regional Hobbyist Gatherings, and a multi-city circuit of local Business and Consumer Expositions. The latter would have a business orientation on weekdays and shift to a consumer orientation for evenings and weekends. We would produce all of these events under an umbrella we called the U. S. Personal Computer Show.

Cragg liked our proposal and agreed to join with David and me in realizing it. He set up a new company, International Personal Computer Shows Inc., which he would fund and in which David and I would be partners.

With Cragg in Connecticut, David in Albuquerque, and me in Chicago, we started laying the groundwork to launch and market our concept to prospective exhibitors and supporters. We thought we had a persuasive story to tell.

Though business practices in the trade show world can often be fairly described as “cutthroat,” it was not our intention to compete against established events such as the West Coast Computer Faire and its East Coast equivalents. We had hoped to convince their organizers to partner with us and produce their events under our new umbrella. We argued this arrangement would be beneficial to all parties.

To announce our plan to the personal computer world we scheduled a launch presentation. We planned to tell prospective exhibitors the first event under our umbrella would be back in Chicago that fall.



THE TIME HAS COME!

The time has come to identify and meet the needs of all four groups who make up the personal computer universe.

The time has come to create a strong marketing tool whose sophistication matches the new stature of the personal computer industry.

The time has come for...



**U.S.
Personal
Computer
Show™**

We invite you to join us in making it a reality.

For more information, call or write:
Austin Cragg
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Invitation mailer for USPCS launch event



Slides from our pitch deck for the USPCS

Meanwhile, complications were starting to arise. David was becoming estranged from the Boston publishing company, Benwill, that had backed him in the founding of *Personal Computing* magazine. Benwill wanted him to relocate the magazine's offices from Albuquerque to their Boston headquarters, and they also were renegeing on what David believed was a promise that he would have an ownership interest in the magazine.

Benwill was also unwilling to include Cragg or me in the production of future shows other than Chicago, where Cragg already owned a half interest.

Unable to come to a satisfactory arrangement with Benwill, David decided to part company with them. He took the position that since Benwill had, in his opinion, added no value to the success of the Chicago show, that David was free to pursue show production with Cragg and me.

Benwill, of course, didn't see it this way.

In an example of the cutthroat behavior among show promoters that I mentioned earlier, Benwill quickly partnered with a different show promotion company and announced a Chicago event for a week before the Chicago dates we had announced.

Alas, this was a fight Cragg didn't have any appetite for. Since the known quantity of Chicago had been the cornerstone from which he had envisioned building the larger enterprise, he decided not to proceed.

And since Cragg was the one with the financial wherewithal to underwrite the USPCS concept, that put an end to David's and my plans as well. (We didn't try shopping the idea around to other promoters or backers because we feared Benwill's scorched-earth approach to us would scare people off.)

Thus Austin Cragg tore up his (and our) ticket in the lottery that later paid off so handsomely for COMDEX promoter (and, subsequently, casino magnate) Sheldon Adelson.

With USPCS off the table, David and I went our separate ways and didn't reconnect until a year later, when we both fetched up in the Bay Area. I'll pick up that thread a little later.



I'd been focusing my energy on USPCS and hadn't put any effort into finding additional clients for Jim Edlin Company. When I turned my attention back to that, I didn't make much headway. I picked up a couple of small clients, but nothing that looked like it had real growth potential.

One thing that was becoming clearer to me is why many fledgling ad agencies start out with three names on the door. Those three names often reflect the synergistic chemistry of one partner with writing talents, one with visual talents, and one with sales and client management talents. As a solo founder I had to cover at least two of those bases. Fortunately, I'd begun working with a talented art director, Sam Schiller. Sam, also a solo practitioner, covered the visual base for me.

Introvert that I am, though, sales and client management were a stretch for me. As when I was selling radio time, I could make myself do sales. But I didn't really have the gift. Glad-handing, even socializing, are things that I struggle with.

As the months ticked away without bringing in a new client of substance, I was running through my savings. As much as I hated the thought, I feared I'd have to fold Jim Edlin Company. I began thinking what I'd do if that came about.

To exacerbate things, my financial "nut" had gone up. Marina City had decided to go condo. As a current resident, I had first option to buy the apartment I was renting. The promoters offered somewhat favorable terms. But if I didn't buy, at the end of my current lease I'd have to find a new place to live. The down payment was around \$8,000, which I might have had if I hadn't already invested it in the business. But without a job and demonstrable income, I probably couldn't qualify for a loan anyway. I made some half-hearted efforts to find an investor who wanted to buy the condo at my discounted price and lease back to me, but came up dry.

For a while, I'd wanted to upgrade from my current one-bedroom unit in Marina City to one of the scarcer two-bedroom units that were only on the upper ten floors. Somehow I learned that the fellow who ran the health club in the building, a married guy with a youngish son, who had a two bedroom on the top floor of my tower, was planning to move his family out to a house but was still going to buy his unit and then rent it out. The timing sucked, of course, but since I was facing a need to move anyway, and the two-bedroom was something I'd been lusting after, I decided to go for it. I slightly knew the guy since I was a member of the building health club, so I made him an offer and, despite my precarious financial condition, he agreed to rent to me.

To help offset the increased rent, I gave up my rented office in the Schroepel's Secretarial suite and moved my office stuff into the second bedroom of the new apartment. I really couldn't afford to live there, but I absolutely loved being in the more-spacious unit at the very top of the building on the 60th floor. My view changed from an unob-

structed north view to a south view facing the downtown skyscrapers across the river, but I liked it equally well.

Glumly facing reality, I reactivated my earlier efforts to find an agency job that bridged the boundary between the creative and account management sides of the house. I'd almost succeeded before in this quest, except for the showstopper of it being a tobacco account. Now, I thought I'd be able to tell a more-salable story of having started up an agency and had a success with the Personal Computer Show, even though I wasn't making a go of keeping the agency alive.

I don't recall the details, but somehow someone connected me to Rose-Lee Reinhard, who was a senior person at the Needham, Harper and Steers agency and wife of its chief creative executive, Keith Reinhard. Alongside Leo Burnett, Foote, Cone & Belding, and J. Walter Thompson, Needham was one of the top agencies in Chicago. It worked for some major household-name accounts. I'd applied there multiple times before I landed at Burnett and then Campbell-Mithun, but I never got past their gatekeeper. If I couldn't run my own shop, Needham looked like a pretty appealing place to be.

One afternoon, Rose-Lee invited me to a fancy lunch at the Cape Cod Room of the Drake Hotel, and I felt like we really hit it off, talking enthusiastically well past the usual lunch hour. The indication that it went well was an invitation to come into Needham and meet with her husband, Keith.

I felt that meeting also went well. I got the sense that my involvement in the nascent digital realm was a factor of interest to them. The outcome of our discussions was an offer to come to Needham on a trial basis, as a freelancer rather than on staff, and see how things worked out.

Come the following week, I was installed in an office at Needham and slotted to work with the creative group headed up by a fellow named Neal Vanover. My first assignment was to come up with some new approaches for the Edge shaving foam account.

Edge had a long-running campaign built around the "Edge credit card test." In these commercials, Edge would have a guy shave one

side of his face with his regular shaving product, and the other side using Edge. Then, the edge of a credit card would be scraped along first one of the guy's cheeks then the other. A microphone would be held close to each cheek while the scraping was done. Invariably, on the cheek shaved with the guy's regular product, the microphone would pick up a loud, scratchy sound. On the Edge-shaved cheek, the sound would be far less audible, suggesting a closer shave when using Edge.

Now the Edge people were looking for Needham to suggest a fresh campaign approach that would portray Edge's close-shave benefits at least as effectively as the existing campaign, while moving on from a creative approach they worried might be getting tired.

It was a pretty standard agency creative assignment, and didn't feel like there was much opportunity to delve into matters of strategy. Also, I wasn't invited into any collaborative efforts with the rest of Neal Vanover's team. I was treated as a compartmentalized resource. Some of the ideas I came up with didn't rely mainly on commissionable media, but since commissionable media is the bread and butter of a traditional ad agency, these weren't very well received by Neal.

Eventually the Edge project continued on its course without much in the way of contributions from me. And no other projects came along for me to work on. I would come into the building, go sit in my assigned office, and pretty much have nothing to do.

My hunch is that Keith Reinhard brought me in, but didn't share much with others in the organization about what his hopes or expectations were for what and how I might contribute. After the meeting where he brought me in, I never had another interaction with him.

My failure to engage and thrive at Needham, I suspect, is all or mostly on me. I wasn't proactive enough in selling myself within Needham, reaching out to introduce myself to others and talk up what I hoped to offer. I just passively waited to be called on, allowing my introversion to sabotage me. I felt like I was a "foreign body" that the Needham organization was trying to wall off and reject.

After a couple of weeks of nothing-to-do, I started to feel I was harming my reputation by continuing to submit weekly invoices, which had been set at a rate triple what I'd last been paid by Campbell-Mithun. So I just stopped submitting them. I sent an inter-office memo to Keith Reinhard explaining the situation, reiterating that I was eager to contribute if given the opportunity, but was holding off on further billing until there was something for me to work on. I followed this up with phone calls, but never got through.

No response ever came.

My involvement with Needham just petered out without any formal ending. It was a very unsatisfying and discouraging conclusion. Once again I was having to figure out what to do next.



Back when we were promoting the U.S. Personal Computer Show, I had written an article for *Computer Retailing* magazine advocating that what the personal computer industry needed was a good industry association. While I was sincere in my belief that creation of such a body could be a positive force to help the industry grow, I also had an ulterior motive. I hoped an association, if formed, could be a sanctioning body that might provide an aura of official legitimacy for the USPCS. This was a common model found in other industries for their periodic expositions or conferences.

Around the time when things were going south for me at Needham, I started hearing from people I knew in the personal computer world that various folks in the industry were starting to talk about actually forming such an association. Some of these folks suggested to me that, because of the article I wrote, I might be a good candidate for heading up this association if it did get formed. Also, folks I'd met in Silicon Valley had been kiddingly asking me for a while when I was going to leave Chicago behind and come on out there.

With the prospect of having a role in creating a new personal computer industry association layered onto my ongoing interest in work-

ing with personal computers, it was starting to look like the time to make the move was at hand.

That a Chicago winter was moving in for the kill was an added factor encouraging the idea, as was the fizzling of a hoped-for romance.

I decided to go for it.

9 - The Bay Area

As I'd done previously for my year in Ann Arbor, after clearing it with my landlord, Al, I found a subtenant to move into my Marina City place. This time it was a firm of attorneys from upstate New York who were working on a matter in Chicago and needed local lodgings.

I piled as many of my belongings as would fit into my Fiat. (It was crammed to the headliner.) The end of the 1970s was a time when people traveling the highways, especially truckers, made much use of mobile Citizens Band radios in their journeys. So I borrowed a CB set from my cousins for my trip.

I spent New Years Eve closing out 1978 at the home of friends in the far south Beverly neighborhood of Chicago. Then, on New Years Day 1979 I headed out from their driveway for transcontinental Interstate 80. I did this with some trepidation, as a fairly heavy snow had begun falling. But I was determined to get underway. I didn't know that this snow was the leading edge of what would become known in Chicago as the legendary Blizzard of '79—a storm that would so bury the city in snow that it took months to dig out, and caused the mayor to be boot-ed out of office.

I hadn't traveled far before word came over the CB that the State Police were closing the highway and forcing drivers to exit. I found myself idling in an anonymous shopping center parking lot somewhere near Joliet, Il. Riveted to the CB chatter I heard truckers reporting a westbound entrance ramp that hadn't been sealed off and decided to try it for myself. I figured it wouldn't be any more challenging to press on than to try getting back to my friends' place.

Driving gingerly in the teeth of the storm, I pushed westward, but I didn't get very far. My whole first day of driving got me only to the outskirts of Des Moines, where I packed it in and found a motel.

The next day had cleared somewhat and I made a decent leg almost to the western edge of Nebraska, where I burrowed into a motel for the night in desolate Scottsbluff.

The following day, I think I narrowly escaped dying. I'd crossed into Wyoming and passed through Cheyenne in fairly clear weather, heading for Laramie. Though I'd travelled this road once before on my trip to the Rose Bowl, I hadn't remembered how mountainous the stretch was between Cheyenne and Laramie. Even on the interstate, it's a challenging drive in the best of conditions. And what I had instead was the worst of conditions. As I climbed higher, a whipping snowstorm got worse and worse. Eventually it became what I think is known as a white-out. I couldn't see the road or its edges. All I could see was the vague gray rectangle of the back of the semi truck driving ahead of me.

The prudent thing to do probably would have been to pull over on the shoulder and wait out the storm. But I couldn't really see the shoulder, and I was afraid if I stopped I wouldn't be visible and might get rammed. I might even hit someone myself if I tried to pull over. So I felt my only option was to white-knuckle it, latch myself behind the truck I was following, and hope for the best. If he went over the edge I was going right after him.

That might have been the scariest situation I've ever been in. Happily, after what felt like an interminable stretch, details of the surroundings began to reveal themselves out of the white. By the time I reached Laramie, it was clear again.

My troubles and stress weren't over for the day however. As I passed through the beautiful pines of Evanston, Wyoming and across the state line into Utah the clutch in the Fiat started to slip. What worked in my favor was that from Evanston to Salt Lake City is basically one long descent down the Front Range. So I made that last portion

of the day's miles basically freewheeling, hoping my brakes would hold out. The white knuckles were back.

I limped into Salt Lake with a barely working clutch and stopped at the first motel I could roll into. The motel had a KFC restaurant on the premises, so I got dinner there. This was a Saturday night.

Finding a car mechanic to work on a Sunday in Mormon Salt Lake City, much less a foreign car mechanic, turned out to be an impossibility. So I spent my enforced Sunday visit seeing the sights of SLC—like the Mormon Tabernacle and a very slickly produced Visitor Center telling the story of Joseph Smith and the evolution of the LDS community.

Monday morning, to my great relief, I quickly found a nearby mechanic who knew what to do about a failing Fiat clutch. It didn't cost a fortune and he had me back on the road before noon. That day's leg took me as far as Reno.

I spent my last on-the-road motel night in Reno. Unlike the last time I'd done this trip, going to the Rose Bowl as a college freshman, this time I was old enough to enter adults-only establishments. So I went to see a topless show just because I could—making up for the my last Reno visit when I had to wait in the chilly car while my of-age traveling companions indulged.

The last leg of the trip, from Reno into the Bay Area was a short one, just a few hours and an easy, mostly downhill cruise. Thanks to my WCS friend Keith, I had an initial place to stay arranged.

Keith, who had declared himself a conscientious objector rather than be drafted, had done his CO service time in San Francisco. While there he became friends with a pastor at a church in Berkeley, and had stayed in touch with him. Keith knew that the pastor, Don, made his primary home in the rural West Marin village of Inverness, but kept a two-bedroom apartment near Berkeley for occasions when making the hour-plus, winding drive to Inverness was impractical. Keith reached out to Don to ask if he would put me up in the spare bedroom of that apartment, which he agreed to do. The apartment was in Albany, a town adjacent to Berkeley, in a high-rise complex

called Gateview. Coming from similar accommodations at Marina City, it felt quite familiar.



Gateview condo buildings in Albany, CA

* * *

Once I settled in at Don's place, I started to follow up with the people who were organizing an industry association for personal computers. They were calling it MITA—the Microcomputer Industry Trade Association.

The MITA organizers included Jim Warren, the impresario of the West Coast Computer Faires, Adam Osborne, founder of a publishing firm specializing in personal computer books, Bill Godbout, who had

a thriving business in components and parts for personal computers, and a handful of other folks I no longer recall. I'd already had preliminary conversations with some of them from Chicago, and of course they'd seen the opinion article I'd written in *Computer Retailing*. They knew I was coming out to the Bay Area to explore a role bringing the organization into existence. Now it was time to take the next steps in person.

I had individual interviews with several of the organizers. I don't recall any group interviews. I listened to their visions and hopes for the new association, and we talked through practicalities such as how it would be funded and where it would be housed. Generally the interviews went well. Afterward though, things didn't move fast since MITA wasn't a priority for the organizers; they all had their own businesses to run..

Since the MITA possibility wasn't a sure thing, I also started exploring possible opportunities for me in the San Francisco advertising world. It was a reprise of the process I'd conducted when I was first trying to break into advertising in Chicago. One connection I made was Currie Brewer, a local advertising talent recruiter. Currie gave me an insider's view of the local ad scene and made a few connections for me. I figured even if I ended up working with MITA I might pick some freelance work on the side.

Between my own outreach and referrals from Currie Brewer I managed to get interviews at a few of the bigger San Francisco agencies such as Botsford Ketchum. One of Currie's referrals was to a smaller agency, Schuller, Briggs and Mitchell. No job offers came out of these interviews, but the Schuller agency will pop up later in this story.

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Eventually, the MITA founders did come through with an offer to become the founding staff of the would-be Microcomputer Industry Trade Association. A major caveat was that the fledgling group had virtually no money. It was understood that my first major task for

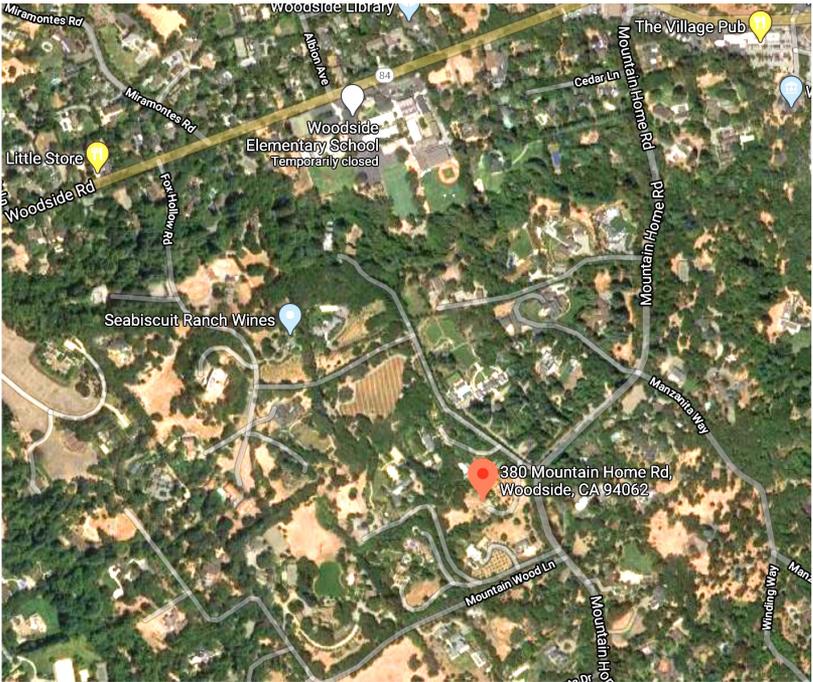
MITA was to bring in enough income to fund my position, primarily by growing the membership. I thought that was worth a shot, and I signed up.

With the MITA offer in hand it was time to move on from Don's condo in Gateview and find myself a Bay Area place to live. I was torn about where to look. As a confirmed "city person" I really wanted to be in San Francisco itself. But personal computer related companies were primarily down in Silicon Valley and surrounding towns in the southern part of the San Francisco peninsula. I decided a good compromise might be in the area around Stanford University and Palo Alto—kind of halfway between "The City" (as San Francisco styled itself) and the Valley.

I started my search by driving to the Stanford campus, getting coffee in the student union, and browsing through the classified housing ads in the campus newspaper. A lot of the more affordable listings seemed to be in East Palo Alto. So I drove over there to check them out. It seemed like a nice enough neighborhood but as I drove around looking at buildings I noticed that among the people I saw on the street there were no white faces. I knew nothing about Bay Area neighborhoods, but coming from highly segregated Chicago I started getting a strong "ghetto" vibe. I figured that, reasonable rents notwithstanding, this might not be the neighborhood for me.

Back at the Stanford union and digging again into the classifieds, I found an ad for a shared house that sounded like it might work. It was in the town of Woodside. Again, I knew nothing about the local neighborhoods, but when I made an appointment and drove over to check this possibility out I discovered that Woodside was a horse-y suburb of huge lots, big houses, winding, tree-lined roads, and only a tiny commercial center with a sprinkling of stores and restaurants.

The house from the ad turned out to be owned by a guy, Peter Olsen, who had gotten rich creating a delivery service that was an alternative to the US Postal Service. His company couldn't deliver first-class mail or place anything in official mailboxes, but it was favorably price-competitive to the USPS for delivering things like magazines and



Satellite view of where Peter's estate was in Woodside CA

advertising circulars. Its delivery people would place the items in plastic bags that they would hang on the doorknobs of the recipient addresses. Peter had bought his house, complete with swimming pool, tennis court, orchard, and several outbuildings, when he had been married, and remained in it after getting divorced. Feeling lonely on his own in the big house, and ever-alert to opportunities to make a buck, he decided to take in paying housemates.

The space currently on offer was a two-room suite with en-suite bath on the second floor, overlooking the entrance driveway loop. My thinking was I could use one of the two rooms as an office for MITA and bill it for half the rent.

In addition to Peter, who had a private wing of his own, there were three other housemates: Jerry, who did something technical at Hewlett-Packard; Bob, who was starting a business; and Jann, a buyer

for Bullock's department stores. In a nearby guest cottage was Gil, an ophthalmologist. There was also another small cottage occupied by a housekeeper/cook. Peter also rented to a gaggle of other folks in the outbuildings that had been stables, garages and workspaces, but those people weren't part of the main-house community. Of course Peter was in gross violation of the Woodside single-family zoning rules. But it was all kept on the down-low and the village never dinged him for it.

Peter's place was kind of rural for my tastes, but the appeal of the swimming pool, hot tub, tennis court, and nicely appointed shared living room, dining room and kitchen, along with a rent amount I could handle (especially if split with MITA) and the general location I was looking for, plus some urgency to get out of Don's borrowed condo, sealed the deal. I was moving in.

I don't have a picture of Peter's house to show; it's been torn down and mega-mansions on its spacious acreage have replaced it. But below is a satellite view of where it was.



By a fortunate coincidence of timing, the American Society of Association Executives was having its annual conference in Los Angeles a week or so after I started with MITA.

Since I was suddenly in the role of an association executive, and had no prior experience of such a role, I thought attending the ASAE conference might help me get a running start. I pitched this to a couple of Board members and got authorization to spend the (still-to-be-raised) money for registration and travel.

I was a bit of a fish out of water at the ASAE conference, a complete newbie among hundreds of seasoned professionals. But there were relevant sessions I found educational. And I just kept approaching people and explaining that I had just been dropped into setting up a brand new association and did they have any advice for me. The experience was actually a helpful getting-started ritual for me. When I got

back to the Bay Area I was energized to start recruiting paying members.

The issue of “paying members” was my first hint of misalignment with my ad-hoc Board. The Board had somehow arrived at the view that MITA’s annual membership dues should be set at a flat \$100 per member. I told them I disagreed with this on the grounds that this wouldn’t come anywhere close to providing reasonable funding for MITA. I suggested that it was common for associations to have a tiered dues structure where larger, more-established member organizations, likely to benefit more from an association’s activities, paid higher dues. Companies like Apple, Commodore and Tandy/Radio Shack weren’t represented among MITA’s original organizers, but I felt we needed such companies as members to be a credible organization. And I had trouble imagining being taken seriously when recruiting such companies if we were asking for \$100 dues.

From my perspective—as I’d laid out in my original op-ed in *Computer Retailing* calling for an industry association—a primary activity of the association was evangelism of personal computers and encouraging of an environment that enabled them to provide ever-increasing value to users.

For example, I wanted MITA to do things like lobbying the Internal Revenue Service to make it possible to file tax returns via a personal computer. (In this I was somewhat ahead of where the technology was at the time. Few personal computer owners back then owned the devices—modems—that enabled their computers to interact with other computers online. Even text-based online services such as CompuServe, The Source and America Online, all that was practical with that period’s slow modems, were a few years down the road. But I believed that’s where things were headed and it was none too soon to begin laying the groundwork.)

I even approached the White House to explore if a personal computer could be donated for the president’s use. (Though it would have been fun deciding which brand of computer got donated if it were accepted.) This went nowhere, since the person I was referred to was

the White House curator, who was more used to donation offers of antique paintings and furniture and the like, and was dumbfounded at the prospect of a personal computer.

As my first couple of months with MITA unfolded I found myself increasingly at odds with my Board. They were dismayed at the constant flow of proposals I was sending their way. It was increasingly clear that my expansive view of the role MITA could play in advancing adoption of personal computers was not what they had in mind in creating the organization, even though that's what I had pitched when applying for the job.

Thus it wasn't a shocking development when Jim Warren, the organizer of the West Coast Computer Faires, who'd taken on a de facto role of Board Chair and my liaison with the Board, came over to Peter's estate one evening to sit down with me and deliver the Board's verdict that the relationship wasn't working out and I was being relieved of my responsibilities. It was my first experience of being fired.

To my knowledge, MITA never had another employee and the organization just faded away.



A few developments had happened during my MITA sojourn.

Peter Olsen still had one small bedroom he was trying to rent out in his house. One day a fellow came to see it but declared it was too small for his needs. He wanted something bigger. Peter, always a wheeler-dealer, described the two room suite I had rented and asked if that would be of interest to this guy. It was. So Peter approached me and asked if I would be willing to move to the smaller room with a shared bath, at a reduced rent. To sweeten the deal, since I would lose the space I was using as an office, he would throw in the use of a ground floor office where he had previously had a secretary working but which was now unused. It included the use of a Selectric typewriter and a multiline phone where I could add my personal line.

Happy to lower my monthly nut, since MITA memberships weren't bringing in any revenue, I went for it. The guy who took over my former rooms was Greg, an insurance salesman and a former Chicagoan like me. Though he was much older, drove a huge boat of a Cadillac, and was heavy into alcohol, we became sort of friends.

Also, I had learned that David Bunnell, my former partner in US-PCS, had moved to the Bay Area. This was well before the era of cell phones or email, so it took a while for me to connect back up with him. But eventually we found each other and resumed our friendship where we'd left off.

It turned out that David had parted ways with his wife, and left their two children with her in Albuquerque. He was in the Bay Area with a new girlfriend and looking for his next thing to do.

With MITA having gone *poof* I also needed to figure out something else to do. I started writing a series of freelance magazine articles for various industry publications, each of which hewed to the formula "Personal computers bode big changes for [industry name]."

After I'd churned out several of these articles, it dawned on me: "Hey, these might add up to a book!"

Since David was already a published book author¹¹, I invited him to join me as co-author of my proposed book – figuring the two of us together would be a more salable package. He agreed, and we started working on a book proposal.

David had a demo unit of a Processor Technology SOL 20 personal computer, along with a 9" black-and-white monitor and a cassette tape copy of an early version of Michael Shroyer's Electric Pencil word processing software—but no documentation for either the computer or the software. So, by trial and error, we began learning how to use these tools so we could write a book proposal with them.

Our book was titled *Micro: The next watershed invention and how it will change your life*.

¹¹ *Personal Computing: A Beginner's Guide* Hawthorn Books, 1978



Processor Technology SOL-20 personal computer

In *Micro* we predicted that the first wave of “microcomputers” (so-called relative to an earlier generation of minicomputers) would evolve into devices that would come to be known familiarly as “micros,” much as televisions became commonly known as TVs.

Our short description of *Micro* was...

Micro will be an “environmental impact report” about “the next watershed invention”—the thing we predict will soon be next in a line that starts (apocryphally) with *fire* and the *wheel*, continues through the *clock* and the *book* in past centuries, and most recently includes the *telephone*, the *automobile*, and *television*.

A jumping-off point for the book was “The Six Laws of Micros¹²”—an article I had written for *Infoworld*. The “laws” were:

- Micros are not computers
- Micros are like Veg-O-Matics
- Micros do not a Micro Age make
- The big business is not small business
- Micros will be commanded, not programmed
- Micros are genies (still bottled)

¹² <http://bit.ly/sixlawsofmicros>

paper using Peter Olsen's IBM Selectric typewriter. Then we began sending copies of the proposal out to literary agents.

It didn't take us long to find an agent, since our topic was now in the zeitgeist. We were taken on by San Francisco agent Fred Hill, who had a pretty solid reputation.

We intended *Micro* to be a "pop futurology" book, along the lines of Alvin Toffler's *The Third Wave*, which had recently been published¹³.

The first nibble of interest Fred Hill got for us was from a book "packager" in San Francisco whose most recent success had been a book called *The New Games*. (A packager, unlike a publisher, brings a book project to readiness for publication – coordinating the writing, editing, typesetting, layout, any illustration, etc. – then hands it off to a traditional publisher for manufacturing and distribution.) The packager's name was Andrew Fluegelman and his office was in a lower Telegraph Hill building that he told us had been where Philo T. Farnsworth had done early experiments with television.

We really hit it off with Fluegelman, but we had our hopes set on a major New York publisher. So we asked Fred to look further. (However, Andrew pops back into this story a bit later.)

Not long afterward, Fred found us what we wanted. He brought us an offer from Warner Books, the publishing division of the Warner Bros. movie studio, which had some big titles on their list. The offer included a \$25,000 advance and a promise of hefty promotion.

We grabbed this offer.



In the meantime, my freelance articles had brought me an invitation to write a regular monthly column for *Computer Dealer* magazine and then, soon afterward, a weekly column for *InfoWorld*. I titled the *InfoWorld* column "The Mass Market Micro" both for resonance with the future book and because my subject matter would be cheerleading

¹³ See *Micro*'s proposed table of contents at <http://nocigarbook.com/micro-toc>

the evolution of microcomputers toward the widely adopted mass-market product I hoped and predicted they would become.

In January of 1980, David and I decided to take a research trip to the Consumer Electronics Show in Las Vegas. After settling into a budget motel room not far from the Convention Center, we cruised the aisles of CES looking for things that might be grist for the book or leads for further research. We gathered up literature by the carload—catalogs, press kits, publications—to bring back for our files.

I'd never been to Vegas before. Once we'd decided to go I started reading up advice on gambling strategy, particularly craps. After CES hours I dragged David from casino to casino, including riding the bus to downtown casinos where I'd read the odds were better. I'd imagined that if I was lucky I might win enough to cover the costs of our trip. But it turned out I was a timid gambler and my winnings didn't break \$10.

On our return from Vegas we started digging into research and writing.

This time, instead of doing our writing on David's old, loaner SOL computer, for which we had no manual and no printer, we leveraged the Warner name to borrow a suite of what we thought was best-available current technology. We wanted our book to be written "using the technology we are writing about."

Rather than the increasingly-common Apple][or TRS-80 computers, we caged a pair of CompuColor II computers, which we thought were more advanced, since they had both a color display and a line-width of 64 characters. (The Apple][had only 40.) It also was the only personal computer that ran what we thought was the best personal computer word processing software, *Comp-U-Writer*, which had been written especially for it. We had discovered it in a tiny, obscure back booth at CES.

For printing, we talked our way into the loan of a very expensive predecessor to laser printers (which were not yet on the market). It was called the Sanders Typographic Printer. It used the then-common approach of "dot-matrix" printing, but at a highly elevated level. By

making four passes over each line with a very fine matrix of dots, it approached near-typographic quality and could print multiple different proportionally-spaced fonts as well as a fine imitation of a Selectric typewriter's output. (Its biggest drawback was that, in operation, it sounded like a dentist's drill at full speed.)



CompuColor II



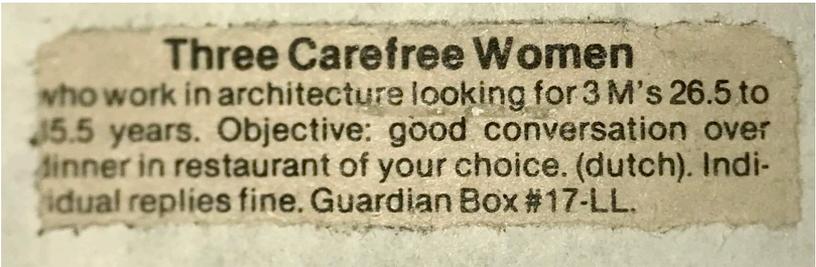
Sanders typographic printer

* * *

Lovely though Woodside and Peter's estate were, I was finding life there just a little too pastoral. I found myself driving up to San Francisco often to see movies, to visit with David, and just to be in a city. While there, I would pick up copies of the *Bay Guardian* alternative

weekly newspaper. One attraction of this publication was its dense pages of “personal” classified ads, which served the purpose that on-line dating sites and apps serve now.

I started replying to *Guardian* personal ads from interesting-sounding women. One who I dated a couple of times was a PhD mathematician who worked at the Lawrence Berkeley nuclear weapons lab, but that didn’t take. Another ad I replied to started out “Three carefree women. who work in architecture...”



Being an architecture fiend, this grabbed my attention. When I replied, for some reason I was in a bit of a rush. So instead of crafting a long, seductive reply, I Xeroxed my entry from a *Who's Who* volume I'd been profiled in back in my Jim Edlin Company days, and sent it off with a quickly scribbled note on the Xerox. (Stay tuned for how that turned out.)

I'd also started thinking that maybe it was time for me to move up to San Francisco. At the time, my housemate Greg was dating a woman, Patty, who lived in a studio apartment in the city, but was planning a move to Sausalito. Greg knew of my interest in moving and mentioned to me that her old apartment was going to be available. I quickly drove up to check it out and found it was a cozy place in an eight-story pre-war building halfway up on Russian Hill, with just a peek of a Bay View.

It was an apartment and a location I probably never would have been able to get into if I hadn't known the current tenant. I submitted a rental application on the spot, and Patty sweetened the deal by of-



2355 Leavenworth St., San Francisco

fering to leave me most of her furniture. Once my application was accepted, I gave Peter my notice in Woodside.

Being a little reluctant to entirely give up the amenities of Peter's estate and the company of housemates I'd become friendly with, I talked Peter into giving me a sort of "country club membership" for \$100 a month that would allow me to come over, hang out, and use the pool. It turned out though that I rarely did so, and soon gave up this arrangement.

David's personal situation was also in flux in that period. He moved from a Santa Clara apartment to one near the beach in San Francisco's Sunset District. He also parted company with a girlfriend he'd been living with. Then, not long after his move to San Francisco, he became involved with Jacqueline Poitier, whom he would eventually marry. A while later he moved again to live with Jackie in her house.



According to the story I was told much later, the “three women in architecture” personal ad mentioned above got written during a party that didn’t go as intended. One day a woman named Bonnie said to her husband Dan, “Hey, you know a lot of single guys and I know a lot of single women, Why don’t we throw a party and invite them all so they can meet each other?” They picked a date, and Bonnie invited all her single women friends, including the “three women.” Dan never got around to inviting his friends.

During the not-quite-party, grumbling about the misfire, Eve Meyer and her friends / co-workers Anita and Merle decided to take action. They sat down in Bonnie and Dan’s kitchen and composed the ad they would run in the *Guardian*.

After the ad ran, Eve, Anita and Merle gathered to look at the replies. When Eve opened the envelope with my reply, she looked at the scribbled note on the *Who’s Who* Xerox, announced, “What an asshole!” and threw it in the trash. Anita said, “Hey, wait a minute. Let me look at that!” and hauled it out of the trash. It is only because of that fortuitous second chance that I found myself invited to a group dinner with Eve, Anita and Merle, along with two other ad respondents, at a Greek restaurant in the Polk Gulch neighborhood.

I don’t recall much about the dinner but I guess it went OK. As we were leaving I proposed an after-dinner drink at a fern bar¹⁴ down the street. Only Eve and Anita took me up on this. After one drink, Eve made her excuses and left me with Anita, who apparently had been the one who had an interest in me. Alas, I did not return Anita’s interest and the last I saw of her was when I walked her to her car. However the next day I called Eve at work and invited her to lunch.

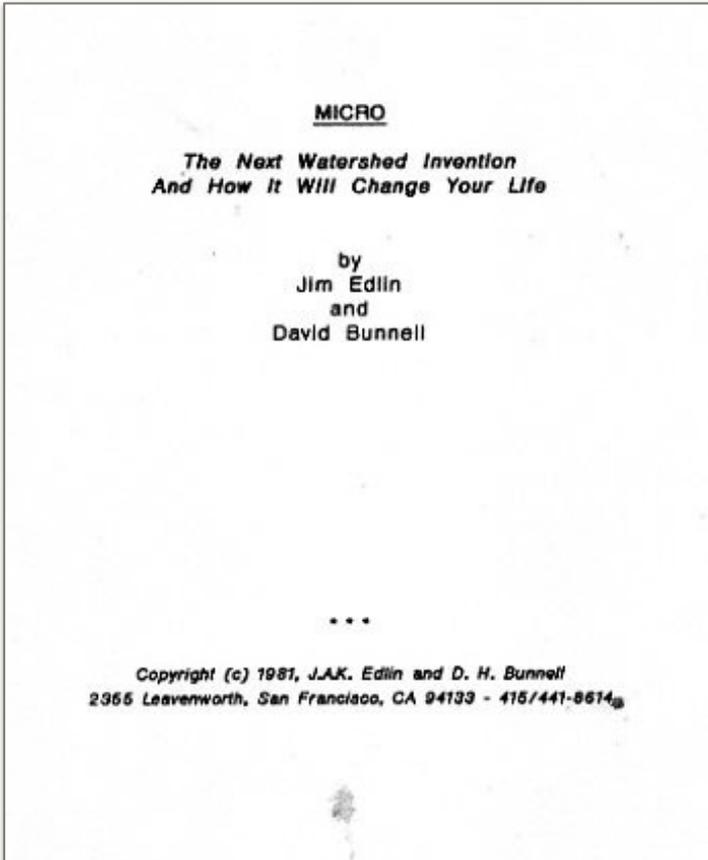
¹⁴ A style of drinking establishment popular at the time in San Francisco, so named because of the profusion of ferns and plants used in its light and airy decor. The original of the type was Henry Africa’s

Jim Edlin

That was the beginning of eight years of an on-again off-again relationship with Eve Meyer followed by, as of this writing, thirty three years of marriage.

* * *

The book research and writing didn't go quickly. It took us about five months to knock out drafts of seven of our proposed 22 chapters. We shipped these off to our Warner editor, hoping to shake loose another installment of our advance money. (Things were getting pretty tight for both of us by then.)



Cover page of our manuscript

We felt pretty good about what we'd written, and were hoping to hear cheers of praise from our editor (along with the heartening news that a check would be forthcoming). But the response we got back was shockingly negative. Despite strong, clear statements in our proposal that we were *not* writing a "how-to-use" book, it turned out that's what our editor thought he had bought. He rejected what we'd sent and proposed bringing in a "book doctor" (who would get paid out of our advance and royalties) to get *Micro* back to what he considered "on track."

Neither David nor I had any interest in writing the book Warner wanted. (David had already written it once.) So we declined the book doctor and appealed to our agent to see if he could sort out the misunderstanding.

Meantime, in increasingly desperate need of cash flow, we found ourselves doing things like temp jobs stuffing envelopes at the State Bar of California, where David's girlfriend Jackie worked. Then David got an offer to become an acquisitions editor at the personal-computer-oriented publishing house Osborne-McGraw Hill. Things going badly as they were with *Micro*, David felt he needed to accept, and thus had to cut way back on his share of any more writing we would do. I also took on other gigs to bring in income, such as doing advertising for the Exidy Sorcerer computer.

Paul Terrell, formerly my client with the Byte Shops, had joined Exidy, an arcade game company, to get them into the personal computer business. The Sorcerer was the computer he created for them. Paul brought me in to help with advertising. This wasn't a project I was capable of handling myself. I needed art direction, production and media buying resources. So I approached the folks at Schuller, Briggs and Mitchell, an agency I'd interviewed at early in my Bay Area days, about collaborating with them. They agreed, and for Exidy I operated a little mini-agency inside their offices. I would pay the Schuller agency for the work they did on the account, such as art direction by Herb Briggs.

**CAST A SPELL.
WIN A
SORCERER.**

There's never enough software. Particularly good software. That's why Exidy is sponsoring a software contest where nobody loses.

Altair programs run on Sorcerer. The Sorcerer computer's Standard Basic is compatible with Altair 80 and 88 Basic. So our contest is open to programs — we like to think of them as "spells" or "sorceries" — written in all three of these Basic versions.

Trade one of yours for one of ours. Just for entering a program in our contest, we'll send you a new, professionally written and documented program. Free. It's a classic game of concentration built a few third-graders for both kids and adults. Plus you'll get our own "off" to 24 color points.

And maybe 99 more good programs. We'll publish a special book of the best programs entered — up to 100 of them, with full credit to each author. If you enter you can have a copy for just the printing and mailing cost. And if your program is included, you get the book free.

WIN THIS EXIDY SORCERER. Use to get up your program to take advantage of Sorcerer's state-of-the-art features. These include 802 by 240 high-resolution graphics, user-defined characters, and dual cassette I/O, among others. You can have it in your very night at the dealer's. And collect your prize and new program on the spot.

Enter now. Send us your entry with the program. Or visit your dealer. But act now — act fast. Entry now. And see if you can't make a live contest appear on your drawing.

ELIGIBLE: All Basic, including Altair-compatible, must be entered by 12 noon (EST) on the date shown on the contest card. The deadline for the contest is 12 noon (EST) on the date shown on the contest card. The deadline for the contest is 12 noon (EST) on the date shown on the contest card. The deadline for the contest is 12 noon (EST) on the date shown on the contest card.

Ad I did, collaborating with SB&M, for the Exidy Sorcerer computer

I had hopes that this arrangement might be a back door leading into a more formal role for me at the agency. But this went awry for the commonest of reasons, a disagreement over money. When Exidy paid and it was time to split the funds, there were conflicting views about who should get how much for what work. This devolved into anger, accusations, and a rancorous end to the relationship.

* * *

Another thing that happened while David and I were trying to make progress on *Micro* was that Mom's health went into a tailspin.

Mom and Dad were living in Miami. Dad had rejoined Mom after a one year prison sentence that followed the unsuccessful appeal of his conviction for conspiracy in the case of influencing the congressmen. Somehow he got at least a little back on his feet financially, and they had moved to a one-bedroom apartment in downtown Miami.

Mom had been a lifelong smoker and had developed COPD (chronic obstructive pulmonary disease) which made it difficult for her to

breathe. The treatment that gave her the most relief was oral steroids, but her doctors were willing to prescribe them only for short stretches due to their side effect of causing osteoporosis. Nevertheless, she did become afflicted with fragile bones, and became hobbled by painful compression fractures of her spine. The combination of these and the difficult breathing resulted in her largely being confined to sitting in a chair.

With all this going on I felt I needed to be in Miami to help out the folks. I started regularly shuttling between San Francisco and Miami. Funds being tight, several of these trips were on a budget service of Eastern Airlines called Moonlight Express. This was Eastern's attempt to siphon off some of the overnight package revenue from Federal Express. They would load up flights that left around midnight with overnight packages, along with passengers willing to travel an inconvenient routing for a low fare. All flights would go to Houston, where we passengers cooled our heels in the terminal—where no services were open—for a couple of hours while they shuttled packages around to their destination flights. Then everybody re-embarked on a flight heading to their actual destination (unless they happened to be heading to Houston).

This being the days before laptops or even “luggables,” I would box up my CompuColor with a lot of styrofoam and bring it along as luggage. However the reality was I didn't get much writing done while being a drop-in caregiver.

I had been bugging anyone I knew who was wired into the medical world to see if I could find a treatment program that would help with Mom's ailments. Finally I got directed to a geriatric medicine program at Mt. Sinai Hospital that sounded like it would help, but was hard to get into. I traded shamelessly on knowing-someone-who-knows-someone to get Mom an evaluation there. At last, they took her in. After one night there though she called early in the morning demanding to be taken home. Apparently, in a fog of confusion, she'd decided they were mistreating her. After we brought her home she insisted on dialing 911, and when a police officer responded to the apartment and sat

in the living room with his gold helmet in his lap, she regaled him with her tale of the horrible program they were running. The officer took this all in patiently and reassured her investigations would follow. After this misadventure, a psychiatrist in the building prescribed some Thorazine for her to calm her down.

Mom's situation was more than Dad could manage, so we started having nurse's aides come in to attend her, especially during the times I would go back to San Francisco. Her situation finally worsened, and one afternoon when I was there she lay down on the living room sofa and seemed to accept she was about to die. I sat with her and we said our goodbyes to each other. I was ready for her to slip away if that was what was going to happen, but Dad was having none of it. He called for an ambulance and she was taken to the Miami Heart Institute, where her physician group had a practice.

There she spent nearly two more months, mostly in misery, before finally passing on. Earlier on the day she finally died, I asked her if there was anything she wanted. Her heart-rending reply: "A cigarette."

We flew to Chicago for Mom's funeral and burial in a cemetery there. Then I flew back down to Florida with Dad, and tried to help prepare him for living on his own.

Survivor that he was, he did build up a support network that kept him going, though I still kept up a bit of the bicoastal shuttling. Dad would soldier on about eight more years, continuing with his financial ventures, before going into a final decline that mirrored Mom's.

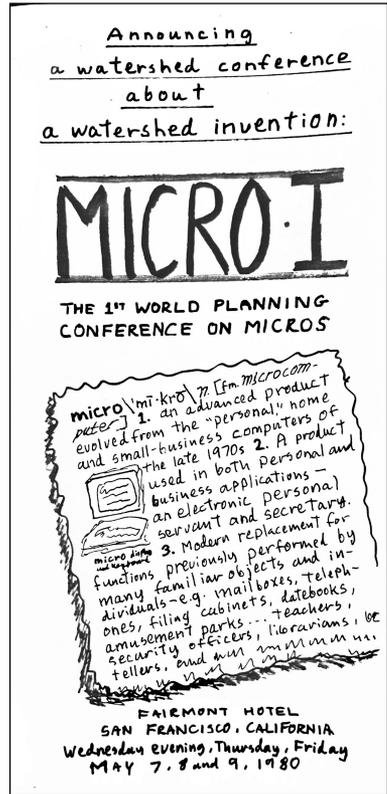


Back on the *Micro* front, one other reason we hadn't progressed as fast as hoped with the book writing was that we came up with a parallel project we were trying to bring forth at the same time. Our idea for the U. S. Personal Computer Show hadn't come to fruition, but we thought we'd try a different take on a conference, one that would be tied to publication of the book.

The concept was a smaller, high-end conference aimed at major players in, or hoping to be a part of, the emerging personal computer industry. We called it *MICRO I - The First World Planning Conference on Micros*, and figured on charging about \$1,000 to attend.

This is the conference, mentioned in the prologue of this book, that we were pitching Microsoft's Bill Gates to get involved with. Our *Micro* book's place on Warner's list of upcoming titles gave us some credibility (our troubles with Warner weren't public), so we were starting to assemble an impressive lineup of speakers from both the personal computer industry and academe.

But our plan foundered on the same rocks as the U.S. Personal Computer Show—money. Neither David or I had funds to invest in it, and we didn't realize we could sell sponsorships to fund it. So we once again missed a high-potential opportunity, one that later proved to be a bonanza for other organizers of high-end PC industry conferences, such as Esther Dyson, with her PC Forum.



MICRO I flyer mockup

* * *

One thing that did come out of the dinner with Bill Gates was that he told me he knew someone else who was saying things to him similar to what I was saying. That person's name was Blair Newman, and

Gates gave me Newman's contact information and suggested we should talk.

Of course I followed this up immediately. Blair and I set a rendezvous at the Lucky Penny diner in San Francisco and once we sat down and started talking it was an instant click. We regaled each other with ideas and opinions for probably three hours before running out of steam.

Blair was an always-wired Harvard MBA who'd found his way out to Silicon Valley and gotten involved in numerous ideas and ventures. He was also a founder of NORML, the National Organization for Reform of Marijuana Laws.

Blair's brainchild of the moment was called Microtype. His idea was that the route personal computers would use to sneak into the average American home would be as "smart typewriters." He had contracted with the Palo Alto lab-for-hire SRI to build a prototype of the device he imagined, using a gaggle of inventive technologies that would allow it to sell for a mass-market price. While he'd raised some money to finance this he was looking for more. I didn't have anything to invest, but I connected him to a friend who did. (The total loss of his investment is a sore subject with this friend even to this day.)

I'm not sure how Blair and Bill Gates first got to be friends, but they were close enough that Blair once convinced Bill to vacation with him on a bareboat charter in the Caribbean. While they were on this sailing trip, I got a ship-to-shore call from Blair who was eager to tell me the news that, from the boat, Bill had convinced Steve Ballmer to re-join him at Microsoft. At the time I didn't know who Ballmer was or why this was exciting enough news to merit a probably expensive radiophone call, but it was clear Blair thought this was big.

Sometime afterward, Steve Ballmer also joined the Board of Blair's Microtype company; as I understood it he was Bill Gates's representative to the venture though I don't know any specifics about how Gates was involved.

Microtype never made it to launch. Among other obstacles, there were unresolved patent issues with the technology chosen for the

keyboard. (This was a clever scheme in which a string like a guitar string ran under all the keys. When a key was pressed, a protrusion on its stem plucked the string. Sensors at each end of the string detected the plucks, and the difference in time between a pluck's arrival at one end and the other end was used to compute which key was pressed.)

Blair was an endless, flowing fountain of business ideas, some being more low-rent than others. There was StarCharm—astrology-based jewelry—and the National Model Registry, which he envisioned being promoted in publications like the *National Enquirer*. Later there would be “SmarTV”—a contraption with robotic arms that juggled videocassettes, which prefigured much of today's video-on-demand landscape. You'll see StarCharm crop up again in this narrative a few decades hence.

Blair became a dear friend, counselor and advisor, and also a sub-tenant for a while when I moved in with Eve and Blair took over my place on Russian Hill. His gushing flow of visionary ideas, however, ultimately couldn't bring him happiness. Far too soon, he took his own life.



Somewhere in this period I got an invitation to work at Adam Osborne's new computer company, Osborne Computer. They had launched the first of the “luggable” personal computers. The Osborne 1 was a sewing machine size creation whose bottom panel flopped open to become a keyboard, revealing a tiny screen, 52 characters wide, surrounded by a pair of 5-1/4” floppy disk drives and some storage pockets for floppies. It ran the CP/M (“Control Program for Microcomputers”) operating system from Digital Research and came including a generous bundle of software including *WordStar* for word processing and the *SuperCalc* spreadsheet. Osborne priced the machine at an aggressive \$1,795, barely more than the sum of the list prices for the bundled software.

Thom Hogan, who I knew from his days at *InfoWorld* was heading up Osborne's software strategy. Thom told me Osborne wanted to start publishing a line of additional programs optimized to run on the Osborne, and asked if I would be interested in leading that effort.



Osborne 1 “luggable” personal computer

Since I wasn't very gainfully employed at the time, it was a tempting offer in some respects. It offered a hands-on role in the industry in which I was so eager to become a more-active participant.

But I was no fan of CP/M (nor would I be a fan of its later near-clone MS-DOS) which I considered “user-hostile”—very far from the easy user-friendliness I believed would be necessary for personal computers to realize their mass market potential. Also I couldn't envision how it would be possible for software to achieve much user-friendliness within the constrained space of the Osborne's tiny 52 character by 24 line monochrome screen. Taking the Osborne job felt like it would be a drastic detour away from pursuing the vision my Six Laws article had outlined and that *Micro* was intended to flesh out. So I thanked Thom for the offer but told him I was declining.



On the book front, Fred Hill eventually got Warner to agree, grudgingly, to let us finish writing the book we had proposed—without a “doctor”—and they would then decide if they still wanted to publish it. But no more advance funds would be provided until their acceptance of a final manuscript. So David and I continued working in fits and starts on additional chapters, but at a much slower rate of progress than before. This state of affairs continued until August 13, 1981, when we launched into our wildest adventure together.

When David worked in Albuquerque at MITS, the maker of the pioneering Altair personal computer, he had a co-worker named Eddie Currie. Currie later moved to New York City to work for Lifeboat Associates, a mail-order distributor of software for the then-dominant CP/M personal computer operating system. Lifeboat was owned by Tony Gold.

Gold had an idea for a sort of hybrid magazine/catalog (these days known as a “magalog”) that would both merchandise Lifeboat’s software offerings and surround the product listings with helpful editorial content. Currie, who knew of David’s background with *Personal Computing* magazine and his publication activities while at MITS, suggested David to Gold as a person who could lead this project.

So, while David was doing his acquisitions editor thing at Osborne/McGraw-Hill, and still doing some writing on Micro with me, he was also having discussions with Tony Gold about the magalog project, which was to be patterned after TV Guide and had the working title Software Guide. I had conversations with David about the project, but didn’t think it was particularly exciting and expressed no interest in being involved. (Shows what I knew! Basically the same idea was executed that year by entrepreneur Ted Leonsis as *LIST* magazine, which didn’t last very long but did sell for \$40 million two years after its launch.)

Then, on August 12 of 1981, IBM announced its Personal Computer. The next day, David and I got together at my apartment, theoretically

to figure out what next things to tackle for our book, but actually shooting the breeze about how this new IBM development was going to affect the personal computer industry.

Somewhere in that conversation I recall blurting out to David, “You know, instead of that software guide magazine, what about doing a ‘machine-specific’ magazine for the new IBM personal computer. If you want to do that, I’ll do it with you.” There were already machine-specific publications focused on Apple][and Radio Shack TRS-80 computers, so there were indications this was a viable idea.

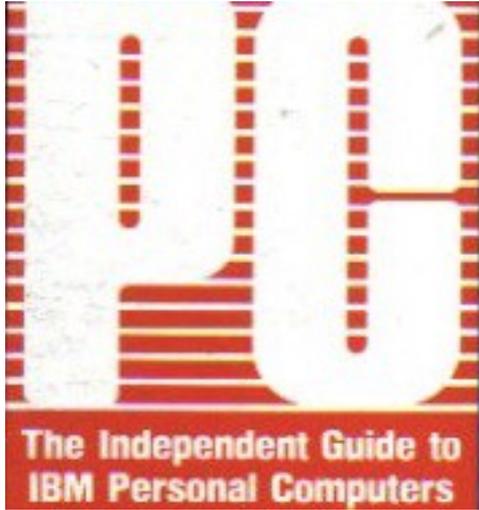
David immediately latched onto the idea, and told me he would try to convince Tony Gold to change course to this new direction. We ended our talk that day agreeing that, if Gold signed on to the change, I would take the role of editor and David be publisher, and we would extend our 50-50 partnership to this new venture. Also, in a moment of incredible naïveté, we decided, “we’ll work on the magazine in the morning and on the book in the afternoons.” (Dream on! From that day forward, we never touched the book manuscript again.)

I don’t know how hard a time David had convincing Tony Gold to change his plan, but he did agree, and our project was on.

In David’s publisher’s column for the first issue of *PC Magazine*, he pegs the official start of our efforts as Oct. 1, 1981—his first day off the payroll at Osborne/McGraw-Hill. But we actually began ramping up as soon as we had the green light from Gold, setting shop in a spare bedroom of the house where David and Jackie lived.

After considering titles such as *The IBM Personal Computer Magazine* and the more concise *IBM PC*, we finally decided to be still more concise and go with *PC* as the title and “The Independent Guide to IBM Personal Computers” as a subtitle.

Rick van Genderen, a designer with a home studio in the Tenderloin, was recommended to us as someone to create a logo for *PC*. After a few late night visits to his studio, we came away with what became the magazine’s iconic logotype. Rick’s inspiration was the paper, commonly used in computer printers of the time, that had alternating white and lightly-colored horizontal bars.



PC Magazine's *original logo*

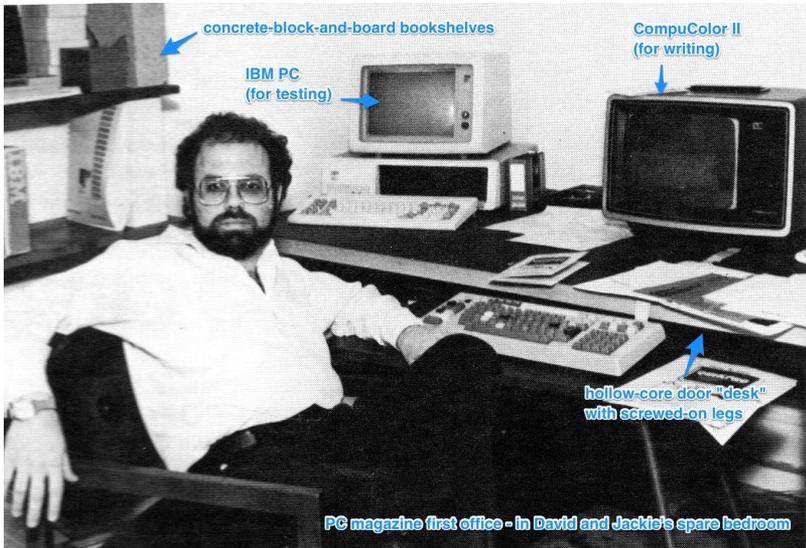
Another person recommended to us was James McCaffry, who became the magazine's first designer/art director. James's home studio became another frequent location of David's and my evening visits, as he began to sketch out the high-end visual tone that would set *PC* apart from other personal computer publications.

The other key member of *PC*'s founding team was Cheryl Woodard, a colleague of David's from Osborne/McGraw Hill. Cheryl was their director of marketing and sales. Smooth-talking David convinced her to give up her steady paycheck there to take a flier on our magazine venture in a similar marketing and sales role¹⁵.

When word reached *InfoWorld* about our impending launch of *PC*, I got a call from its then-editor informing me I couldn't continue my weekly column there. I argued that *PC* wasn't competition to *InfoWorld* since it was "machine specific" but that argument didn't fly. So I was out.

¹⁵ See Cheryl's version of the early *PC* days at <http://bit.ly/PC-Woodard>

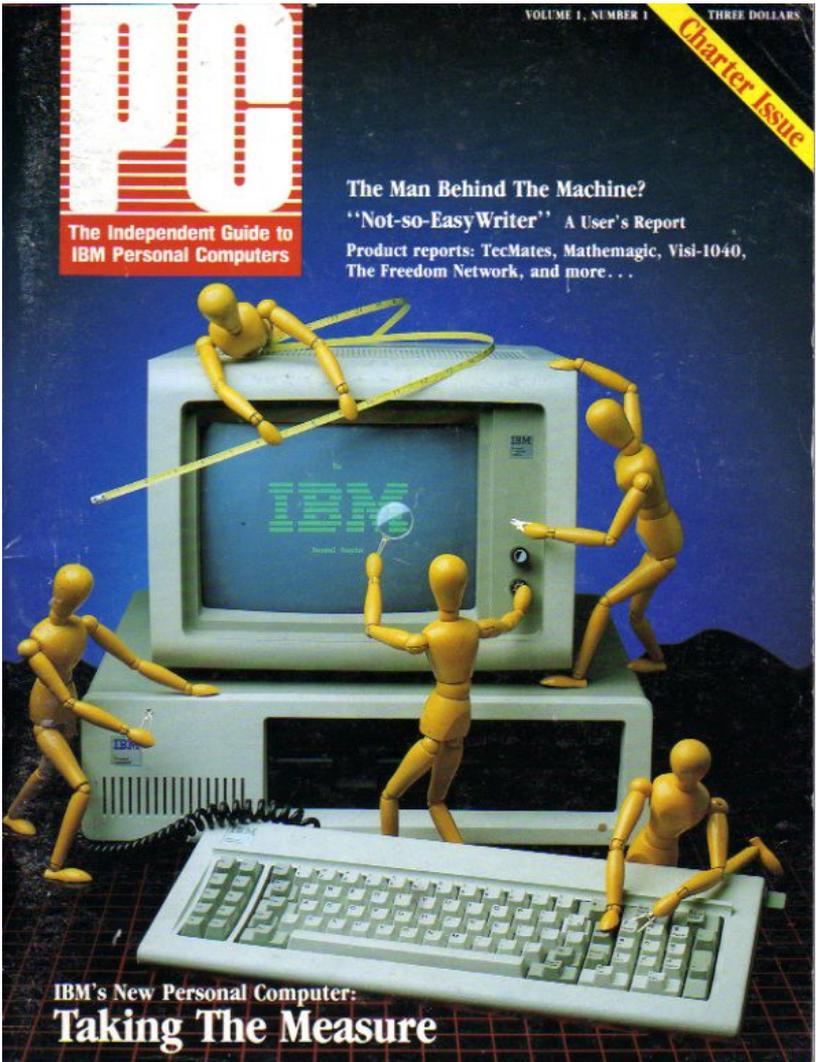
With a PC team coalescing, one of our first official acts was David and I going to a lumber yard to acquire boards, concrete blocks, hollow-core doors and some legs. We put these together to make shelves and desks. These went into a spare upstairs bedroom of the house where David had moved in with his girlfriend Jackie, making it into our first office. (Before long we would spread out operations into nearly every room in the house.)



My corner of PC Magazine's first, spare-bedroom office

Our first project was a 6-page “Preview Issue” to use as a marketing tool for soliciting advertisers and subscriptions. Our goal was to have it ready for the COMDEX show in Las Vegas in late November, where we planned to have an exhibit booth and do our public launch. Our concept for the cover was “taking the measure” of the new IBM PC.

McCaffry came up with an image of a team of “inspectors”—represented by artist’s mannequins—crawling all over a PC using tiny measuring tools. To realize it, he introduced us to photographer Jay Carlson. After a long day in Carlson’s South-of-Market studio, we had the shot. It would front both the preview issue and actual first issue.



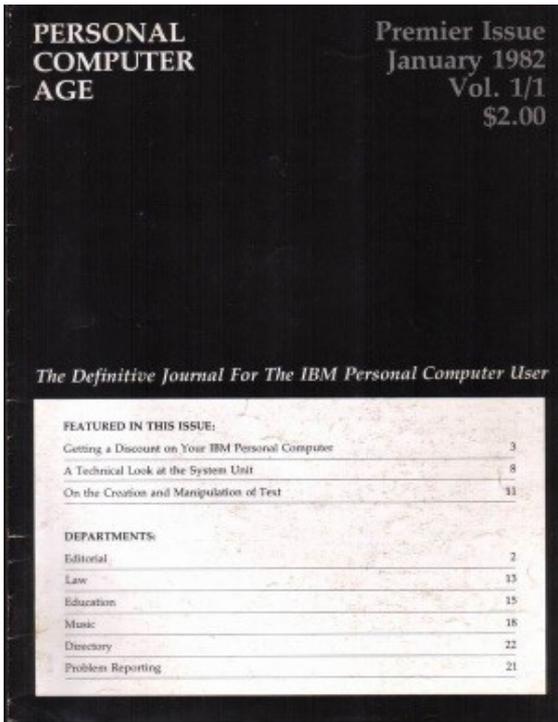
PC issue #1 cover with the McCaffry/Carlson image

The six-week sprint to get the Preview Issue done and delivered to COMDEX was a bit of madness, but with hours to spare we got the air-freighted print run to Vegas and into our hastily set-up exhibit booth.

COMDEX was an exhilarating launch. Our booth was crowded the whole time. We got plenty of interest in subscriptions and advertising,

and from the first day there were people asking us if we were seeking investors. We also found ourselves in the midst of a sea of potential advertisers.

Another thing we discovered was that we had a competitor, *Personal Computer Age*, which also launched at COMDEX. While we thought them a bit underwhelming compared to our planned magazine, we heard they were better funded than we were and thus a cause for concern.



First issue of Personal Computer Age

* * *

One person who came by our COMDEX booth was a real estate developer from Columbus, Ohio, R. Bruce McLoughlin. He'd come to

COMDEX to sniff around for business possibilities in what he saw as an alluring new field, and he decided the PC crew would be good guides for him. He asked if he could come out and visit us in San Francisco after the show.

Demonstrating his entrepreneurial initiative, McLoughlin also asked if we would accept a bound-in postcard advertisement for the first issue. While this wasn't something we had either contemplated or priced, we told him we'd accommodate him if we could.

SOFTWARE LABORATORIES, INC.
PRESENTS

50 FOR THE PRICE OF 1

50 PROGRAMS FOR YOUR PC

Loan Amortization
Depreciation Schedules
Check Book
Math Primer
Text Editor
Weight Control
Income Tax
Shopping List
Blorhythm
Tic-Tac-Toe

**PLUS
40 OTHERS**

Games, Utilities,
and Ideas For
Home or Business

MAILING LIST
Print reports and labels sorted by any field. Includes provisions for new nine-digit Zip Codes, multiple label formats, reference fields, miscellaneous information, and powerful search and update capabilities.

SOFTWARE ORDER FORM

Please send the following items:

<input type="checkbox"/> 50 x 1 Program	\$50.00
<input type="checkbox"/> Mailing List	\$50.00
<input type="checkbox"/> Catalog	FREE
<input type="checkbox"/> Author's Kit	FREE
<input type="checkbox"/> More Information	FREE

* West Virginia residents add 5% Sales Tax • Foreign orders add 10% additional handling (U.S. funds only) • COD orders accepted.

For Phone Orders Call 304-675-5184

Enclosed \$ _____ Check Money order
Bill: American Express BankAmericard/Visa MasterCard
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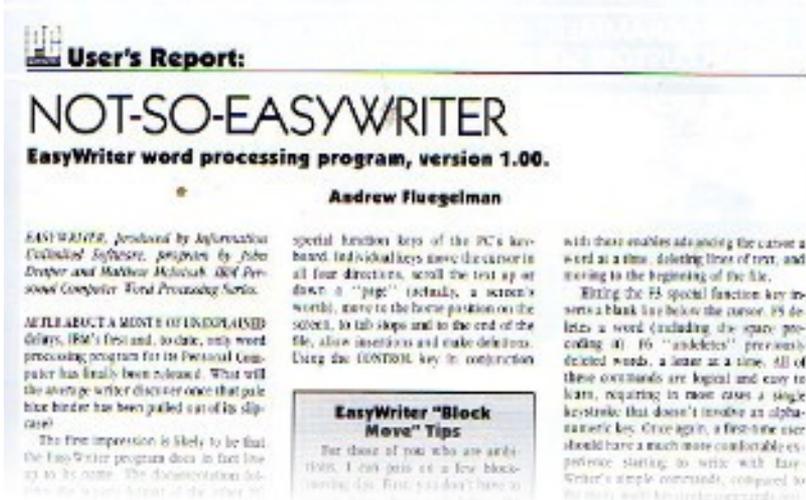
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Bruce McLoughlin's bound-in PC postcard ad

McLoughlin and his wife did come to San Francisco to see us after COMDEX. When his wife commented to us over dinner that she'd "never seen Bruce pick up a penny that didn't turn into a dollar," David and I decided that the business opportunity we would guide him to was us.

We believed that the word processing software that had come onto the market for the IBM PC was generally difficult to use. For example, the featured software review in *PC's* launch issue was of IBM's licensed *EasyWriter* word processing software. It was written by Andrew Fluegelman¹⁶ and was headlined "Not-so-Easywriter."



PC's review of EasyWriter

We thought an IBM-adapted version of the *Comp-U-Writer* software we loved, and were still using to write the first issue of *PC*, would be an interesting opportunity. Our idea was to start a software division of *PC*, get McLoughlin to fund it, and make an IBM-adapted version *Comp-U-Writer* as its first product.

¹⁶ You may remember Andrew as the book packager who was first to be interested in our *Micro* book. This is where he pops back into the story.

Meanwhile, the entrepreneurial McLoughlin had gone back to Ohio, where—almost overnight—he created a company named Software Laboratories, found a programmer to bundle up a bunch of 50 mostly public-domain BASIC-language programs onto a floppy disk, and rushed us this postcard ad to bind into the first issue of *PC*.

Back at David and Jackie's house, things were getting pretty crazy for our little *PC* crew. In the wake of our blowout reception at COMDEX, we felt under great pressure to actually get out the magazine. And now, aware we had a competitor, we were determined to publish something so excellent it would leave them in the dust.

For many years, I'd been a subscriber to *Car and Driver* magazine, a publication for car enthusiasts. I really enjoyed reading it, including its gaggle of irreverent columnists and short items toward the front of the "book" and its take-no-prisoners product reviews. *Car and Driver* became the model that guided me in shaping *PC* as editor.

Editing a magazine was something I blundered into without any real training or experience. I had a vision for the magazine, with *Car and Driver* as an inspiration and non-technical consumer readers as a target audience. But I was totally improvising when it came to the nuts and bolts of the job I had taken on. (David had experience in this from his run with *Personal Computing* magazine.)

Between the pressures we were under to get the first issue out the door, and my inexperience as an editor, I didn't do a great job working with the authors we'd signed up to write articles. Instead of being a thoughtful critic providing feedback to guide writers in revisions of their first-draft articles, I ended up functioning more like a rewrite man. I'd take their submitted copy and sometimes drastically rework it before passing it along for copy-editing and typesetting. I pissed off a few authors this way when they'd see the published magazine and discover how different the content appearing under their byline was from what they'd submitted. After being roasted by a couple of writers over my rewriting, I got a better grasp of how to work with them.

David and I both wrote columns for the front section of the magazine. I titled my column "Zero Base Thinking." This was a riff on the

concept of “zero-base budgeting” in which new budgets are created without automatically carrying forward amounts for line items from a previous budget. In my case, I meant to evangelize against carrying forward conventional “computer-think” (or, in my blunter moments, “computer-shit”) into the emerging consumer market I imagined for personal computers. An example is the column I wrote titled “The Monochrome Mistake” in which I criticized IBM for offering “green screen” versions of its PC as well as versions with color displays. (You can see my infatuation with Compucolor’s computers showing through there.)

For the back page of the magazine I came up with a feature we called “Wish List.” In it we invited readers to submit suggestions of personal computer products or improvements they’d like to see. We’d pick two or three of these each issue, have a cartoonist illustrate the idea, and award a small prize to the ideas chosen for publication. Since there were no reader submissions for the first issue, the first few Wish List items were from me. (Our first-issue Letters to the Editor column got a similar treatment.)

Our early business projections imagined that we might get 10 pages of advertising for our first issue, 20 pages for the second issue, and a hopeful 40 pages for the third. But in short order we had insertion orders for 40 pages of ads for Issue #1—plus Bruce’s postcard. (Issue #2 more-than doubled that to 100 pages. Issue #3 doubled again to 200 pages.)

So we were scrambling – bringing onboard whoever we could recruit to handle the ballooning workload, and taking over room after room in Jackie’s house for things like paste-up and to process the mailbags full of \$10 checks that were arriving for subscriptions.

Finances were becoming an issue though. With ad and subscription numbers running way ahead of our modest projections, costs to print and mail the magazine were skyrocketing in parallel. Plus there were all those new helpers to pay. We would madly bundle together each new batch of \$10 subscription checks that arrived, and rush them to the bank just in time to cover payroll. Meanwhile, David had to cajole

Tony Gold, whom he had taken to calling *le Grand Fromage*, into FedEx-ing us checks to cover the piling-up expenses. Gold's eventual investment in *PC* totaled about \$140,000, but he doled it out to us in dribs and drabs of \$10,000 and \$15,000 at a time.

Once Issue #1 was out the door it was clear that our *PC* team needed to be out the door of David and Jackie's house too, and into a "real" office. We decamped to a vacant apartment above a Japanese restaurant a few blocks away. (Before the end of a year, the staff had expanded to take over four more spaces along a multi-block stretch of Irving Street.)

After Issue #2 was put to bed, Tony Gold summoned David and me to a meeting in New York. There, over lunch in a deli, he voiced his surprising-to-us opinion that the magazine was "an artistic success but a financial failure." By this he meant that the magazine's hypergrowth, instead of starting to return a stream of profit to him, was demanding additional investment from him that he wasn't comfortable (or perhaps even capable of) making. He hadn't anticipated the rapid success scenario, which boded well for the future but in the short term created an intense hunger for working capital.

We discussed the nibbles *PC* had received since its launch about outside investment, but for some reason this possibility didn't appeal to him. He departed the deli with a warning to us that the magazine might have to shut down, or be sold.

* * *

One consequence of doubling and re-doubling our ad pages was that we very quickly had to ramp up the creation of editorial content to balance out the additional ads. David's girlfriend Jackie quit her job at the State Bar to help with getting out the magazine, and she recruited a close friend, Linda Harrison, to be an additional designer and illustrator.

As co-founder and editor, I had strong opinions about the quality of design and writing I envisioned for the magazine. But this turned out

not to mesh well with the frenetic push the hastily-enlarged team had to make to put together the next fat issue against a tight deadline.

In editorial meetings I voiced concerns, including about some work by our new designer, Linda. I have to admit my ability to do this diplomatically, and accept compromise, was poor at the time. (I was a bit of a mini-Steve Jobs, I think.) Nobody, of course, wanted to revisit any work in that high-pressure time. Linda, Jackie and others complained my input was unhelpful.

David was finding himself in the middle, with me on one side and his soon-to-be wife and her very close friend on the other, and not liking it. After one conflicted meeting, David walked up to me while I was getting a drink of water and moaned frustratedly, "I wish you weren't here."

I too was on edge from the pressure. "Is that what you want?" I snapped back. "Because if it is, I don't have to be here." Then I walked out of the office.

This was a true spur-of-the-moment reaction, but I also meant it as a dramatic move to catalyze a process of conflict resolution.

I went home and immediately called Tony Gold to let him know of this development. In this call I also revealed to him David's and my agreement to be equal partners in the magazine. I had been badgering David for months to share this information with Gold, and to get some written affirmation from him of our equity interest in the magazine, but David kept telling me the time wasn't right yet. Now Gold informed me that in his view we were both merely employees and did not have any equity interest.

Shortly afterward, David denied our verbal agreement to be equal partners. *PC* had become so valuable so fast (Gold's concerns notwithstanding) that verbal agreements were just too tempting to walk away from. David found himself on both sides of that harsh reality.

With David's repudiation of our partnership, I was no longer motivated to resolve our conflict and resume involvement in *PC*. David and I agreed I would continue writing my column for the magazine, but otherwise have no further involvement.

My next phone call then was to Bruce McLoughlin. Instead of pitching him on backing a software division of *PC*, I told him I had parted company with David and the magazine and wanted to see if I could interest him in starting a software company with me.

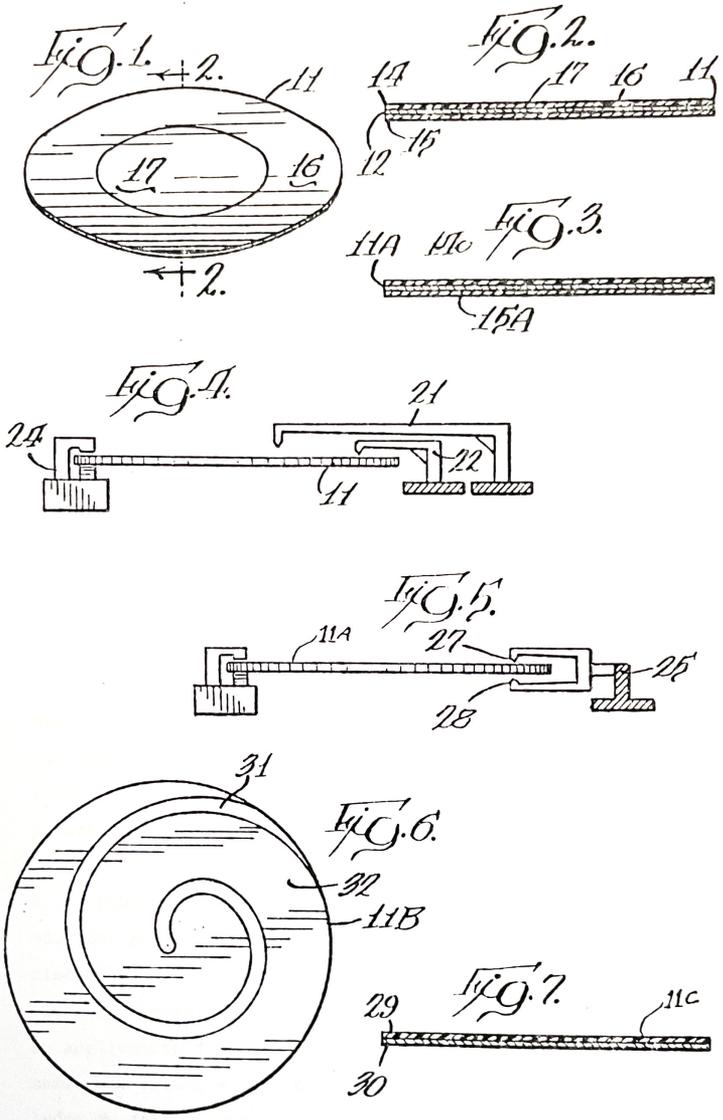
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Having a tendency to toss multiple balls in the air, I also retained a patent attorney around this time to submit a patent application for me. The idea I wanted to patent was inspired by law books, which often were published with a sort of pocket in the back which could hold a “pocket part”—a brief pamphlet the book’s publisher could send out (for a subscription fee) containing updates such as relevant court cases that occurred since the book’s publication.

The connection to pocket parts was that it seemed likely to me that companies would soon begin to publish sizable bodies of information (such as law books) on optical disks readable by computers. Like printed books, optical disks would have their content permanently fixed at the time of production.

My concept was that optical disks could be made with an inner donut of magnetic-storage material that would serve as a repository for updates, and that optical media drives could be augmented with hardware to read from and write to this magnetic-storage area. Together, these could offer the equivalent of the printed book’s pocket and pocket-part updates.

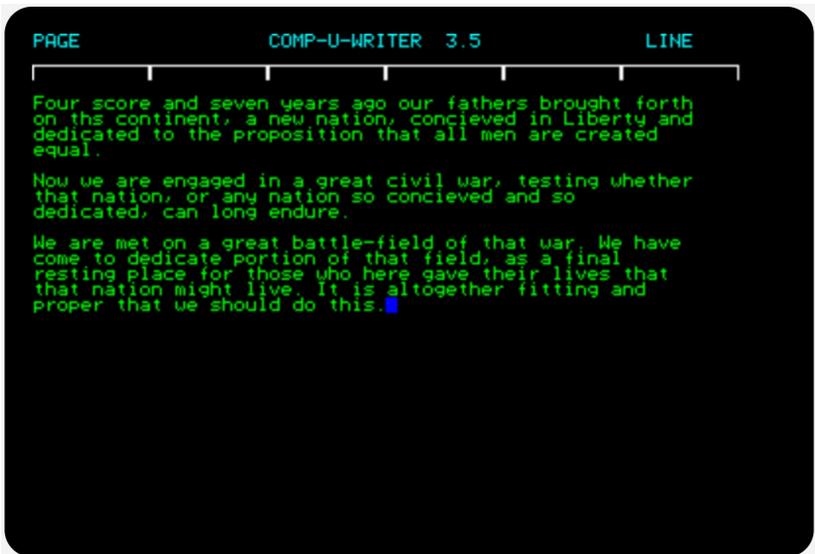
Alas, after a couple of go-rounds with the Patent Office, my application for “Combined Medium Disk System” was denied. The examiner found that an earlier IBM patent, which covered having optically readable tracks on a magnetic disk for the purpose of accurately positioning the magnetic read heads, constituted “prior art.” It seemed to me this was a wholly unrelated matter, but I didn’t have the wherewithal for a protracted Patent Office battle



Figures from my patent application

10 - Bruce & James

The *Comp-U-Writer* word processing software was originally commissioned by Marc Nehamkin and Wayne Sanders, owners of a Silicon Valley manufacturer's rep company, InterSell, that represented Compucolor computers on the west coast. They invested in *Comp-U-Writer's* creation because they believed having it would improve the salability of their Compucolor line.



A screen photo of Comp-u-Writer

The programmer that Marc and Wayne engaged to develop *Comp-U-Writer* was Tom Crispin.

It's lost to the mists of history who designed the program. I'm pretty sure the main designer wasn't Tom. I suspect Marc gets most of the

credit. Whoever came up with the design, I thought its ease of learning and ease of use was miles ahead of the products that were the current market leaders in personal computer word processing, such as *WordStar* and *EasyWriter*. (Products such as *Word Perfect* and Microsoft *Word* were still in the future.) In part, this was because *Comp-U-Writer* leveraged particular attributes of the Compucolor computers it was specifically designed to work on. In several ways, including their color displays, 64-character line length (which was longer than common for PCs at that time), built-in floppy disc drive, and extended keyboard with number pad and function keys, the Compucolor line was more advanced than better-known PCs.

Once I'd parted ways with *PC* I began talking to Marc Nehamkin about my interest in starting a software company that, as its first product, would adapt and enhance *Comp-U-Writer* to work on the IBM PC. Marc and his partner Wayne were generally open to that idea if they would receive a royalty on sales. I told Marc and Wayne about wanting to bring Bruce McLoughlin, back in Ohio, in as co-founder and financial backer for the company. Marc was very helpful in being a sounding board and advisor for me as I negotiated long-distance with Bruce on this plan.

While this was going on, Marc and Wayne hired me as a contractor to write the user manual for a new version of *Comp-U-Writer*. So I got to learn all the ins-and-outs of the program while writing about it. I used the Sanders (no relation to Wayne) typographic printer, which I had ended up with, to produce camera-ready copy for the manual.

Over a period of a few weeks talking long distance on the phone, Bruce and I came to a general agreement about starting the company that we named Bruce & James Program Publishers. (I wanted to avoid the word "software," which I thought was too computer-y for the consumer audience I hoped would be our market. The name was somewhat inspired by the large publisher Simon & Schuster (though not with any anticipation of the role they would later come to play in the business.)

Once Bruce and I agreed on a plan, we began negotiating with InterSell for rights to use *Comp-U-Writer* as the base for our first product, and with Tom Crispin to be its programmer. (Yes, it was to be the product of a single coder, not the sort of large engineering staff that soon became common for such projects.) It would be my role to design the adaptations and improvements we would be making to *Comp-U-Writer*.

The code for *Comp-U-Writer* was in assembly language, a “low-level” programming language that engages with a computer’s CPU and memory by directly shuffling bits and bytes around in the system without benefit of the abstractions, such as strings of text or structures of data, that are provided by higher-level languages. The advantages of using assembly language, in an era where personal computers had relatively slow processors and tiny memories compared to what is common today, is that a program could respond much more quickly to user input and fit into much less memory than one coded in a higher-level language. The disadvantage was that the programmer had to write code themselves to do mundane stuff, like reading files from disk, that higher-level languages and their associated code libraries already had tools for.

Because CompuColor computers were built upon Intel CPU chips, and IBM PCs were built upon a later, more advanced version of those Intel chips, the assembly language *Comp-U-Writer* was coded in was a reasonable starting point for porting to IBM PCs. But there was still a fair amount of adaptation work to do, including because CompuColor used a proprietary operating system whereas PCs used Microsoft’s DOS operating system, and there were significant hardware differences as well.

* * *

Bruce & James got incorporated, with Bruce and I each holding half of the founders’ shares. Agreements were made with InterSell and Tom Crispin; each would get royalties from future sales of the product

we adapted from *Comp-U-Writer*. We christened this product *Wordvision* and adopted the slogan “Programs with Vision”—anticipating that future products would also be titled with the suffix “vision,” such as *Calcvision* and *Datavision*.

One founding concept for B&J that I had sold to Bruce was that we would sell our products at “mass market” prices—in line with the philosophy I’d expounded in my *InfoWorld* columns titled “The Mass Market Micro.” Specifically, I proposed pricing *Wordvision* at \$49.95. This was about a tenth of the list price of then-leaders in the PC word processing market, such as *WordStar* at \$495. My argument was that the PC market was poised to expand by a hundredfold or more, helped along by products designed for average consumers, such as *Wordvision*. With a much larger market to address, I was sure that we could build a profitable business with consumer-level pricing.

This pricing raised the issue of distribution. We feared that computer stores selling the current, pricey software offerings wouldn’t be enthusiastic about selling alternatives at a tenth of the price. So I proposed the strategy of selling our programs through bookstores, where our offerings would be priced toward the high end of items they typically sold.

Exploring the possibility of this strategy, we hooked up with Jack Jennings of BMR, another San Francisco book packager and small publisher. Our initial thinking was that Jack’s company would be our gateway to the bookstore market, and would also help us produce the physical product.

Filling out the team, we began working with a design house, Design Center, to help create our product packaging and company visual identity, and a well-known writer in the personal computer world, John Unger Zussman, to write the user manual for *Wordvision*.

The business side of Bruce & James would reside with Bruce in Columbus, Ohio, where he had staff that would keep the company’s books and accounts and other such work. As these pieces fell into place, my primary task was to design the adaptations and improve-

ments we were going to make to *Comp-U-Writer* to turn it into *Wordvision* and have it run on the IBM PC.

In the summer of 1980 B&J sent up a trial balloon for our strategy of distributing through booksellers by borrowing a corner of Jack Jennings's company's exhibit booth at the American Booksellers Association exhibition and convention.

Tom Crispin hadn't made enough progress on our own program yet to actually demo it on an IBM PC. So, channeling my inner P. T. Barnum, we came up with a sneaky subterfuge. One model of CompuColor computer was built inside the case of a small color TV. We wrapped one of these in glossy white contact paper, disguising it to look like IBM's PC display. Then we perched it, sans keyboard, on top of an actual IBM PC.



We swapped in a disguised CompuColor II to replace the standard display shown in this photo of IBM's original PC model

Tom Crispin wrote a quick program for the PC that took whatever was typed on its keyboard and passed it through a cable running from the PC to a port on the back of our CompuColor II. Then he made a slight modification to *Comp-U-Writer* so it listened for keystrokes coming from that port rather than its usual keyboard, which we left unconnected.

If you didn't look too closely (and we figured attendees at a booksellers convention wouldn't look too closely) it appeared like we were

Jim Edlin

demoing a program running on the PC, even though what we were actually demoing was good ol' *Comp-U-Writer*. And we got the feedback we were hoping for. Many booksellers expressed an interest in carrying what for them would be a high-profit item, even though to a computer retailer it would be a low-profit pariah.

**Introducing
the first
word processing program
for personal computers
that doesn't make buyers
work too hard
or pay too much.**

WORDVISION

Coming this Fall
from Microcolor Corporation

Wordvision:
First in a line of easy-to-use,
popularly-priced personal computer programs
from Microcolor Corporation.

Coming in Fall, 1982 . . .
Wordvision for the IBM Personal Computer.

Coming in late 1982 . . .
Wordvision Jr. for the Altos, Commodore VIC and
Tunix personal computers.

Coming soon —
Wordvision for other popularly priced personal computers.

Wordvision PowerPacks to increase the usefulness of the original **Wordvision** programs — for copy, paste, document formats, spelling and editing help, telecommunication, and several other helpful add-ons.


Marketed and distributed by Bruce & James
The Bookstore's Program Publisher
1668 Lombard St. • San Francisco, California 94123
415-441-9814 • Catalogue 715-835-1949


In association with Harcourt Publishing, Inc., San Francisco
415-775-4740

WORDVISION™

**At \$49.95*, it's the first
word processing program
designed and priced
to be easy for everybody.**

Word processing belongs wherever people write.

Personal computers with word processing programs can do for writing what the pocket calculator did for arithmetic. When drafts are done on a video screen, people can revise, rephrase, and recheck without four hours of pointless or frugal labor are repeated.

Until now, both cost and complexity have been barriers to word processing for most people. But since the barriers are down, word processing makes sense for all who wrestle with the written word—students, managers, professionals, poets, club secretaries, job applicants, list makers, Christmas correspondents, and just about everybody else.

Wordvision, together with the newest generation of personal computers, is the program that makes the barrier crumble — and makes word processing available to a far larger market than ever before.

The complexity barrier crumbles.

Early word processing programs were narrowly hampered by limitations of the available machines. As a result they were complex both to learn and use — tools for skilled trade only.

Today's newest personal computers overcome most prior limitations, but available programs have lagged behind. Existing programs have users going back to earlier machines and still bear the imprint of former constraints.

Wordvision has been designed from scratch for the power of today's computers. It uses the extra power to let the computer handle more of the work — simplifying choices and easing understanding. It has no arcane codes, no confusing menus you just sit down with it and write. You see the results of what you're doing as clearly and immediately as if it were on paper, except it's a 14.4 raster when you want to make corrections and changes.



Wordvision's most-used controls are handled with specially-labeled keys found on new-generation personal computers (key labels are included with the program). All other controls are explained on-screen as you need to use them. On computers with color displays, **Wordvision** uses color liberally to help show what's going on.

Earlier word processing programs were designed for text specialists to use on other people's writing. **Wordvision** has been designed in every aspect — including its simple, readable User's Guide — for ordinary folks who want help with their own writing.

The cost barrier crumbles.

When you have a word processing program that lots of people can use, you can sell it at a price lots of people can afford.



One price still equates in maximizing availability of personal computers. IBM alone is forecast to be producing 1,000 personal computers a day by the fall of 1982, and aggressive marketing by household names such as Tunix and Sony will mean personal computers in ever more hands.

Frankly, even the program now retailing for ten times as much could sell for \$49.95 and make money at those volumes — if they worked easily enough to have wide-spread appeal, and sold themselves without expensive support.

Because **Wordvision is easy to buy and easy to use, and because it will be offered for the first selling new personal computers, starting with IBMs, we can afford to sell it at a breakthrough low price and still make a profit.**

Packaged and promoted for bookstore sales.

Wordvision is designed to fit comfortably into a bookstore's operation. The main difference between it and most books is the computer diskette and key labels that are shrink-wrapped to the back cover. The User's Guide is open for browsing to answer customer questions. A display will be offered for **Wordvision's** several versions and companion products to be announced.



Extensive advertising and co-op programs are planned to build demand. Advertising will emphasize that **Wordvision** is available "at your bookstore." And **Wordvision** is the last product of a line designed with the same philosophy of uncompromising simplicity and volume-sales pricing, so there is plenty of opportunities for repeat business.

Wordvision is the newest product based on the bookstore's oldest stock-in-trade — words.

Wordvision, Wordvision Jr., PowerPacks and the only software used for personal computer programs are trademarks of Microcolor Corporation.

Brochure we handed out at the American Booksellers exposition



Meanwhile, Tony Gold continued to stonewall David's claim (and my subsidiary claim) to any equity interest in *PC* magazine. Gold's decision-making seemed driven mainly by a desire to cash out. Barely a year after *PC*'s launch, this led him to accept a buyout offer from Ziff-Davis, a New York-based publisher of enthusiast magazines such as *Car and Driver* (my lodestar for *PC*) and *Stereo Review*, and to reject alternative offers for buyout or investment from other interested parties that David and his team had sought out and presented to Tony.

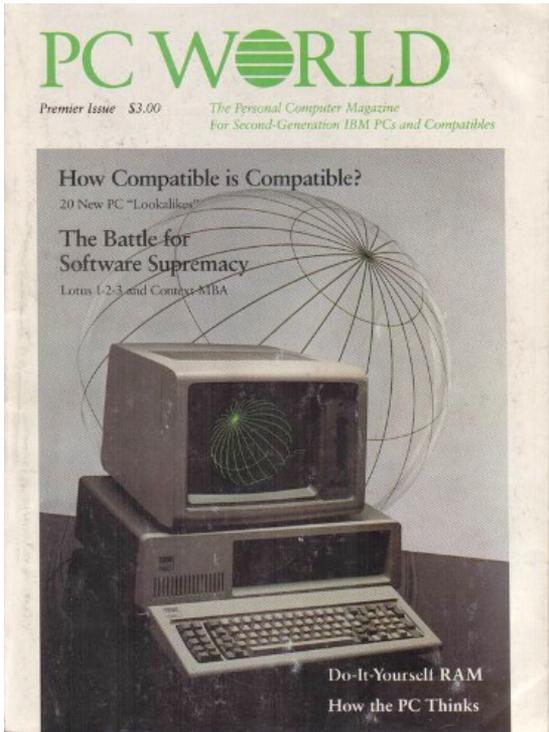
When Gold's sale of *PC* closed, against the wishes of David and the current staff, they activated a "nuclear option" they had threatened. The entire *PC* staff quit. With the backing of *Computerworld* publisher Pat McGovern, they immediately launched a competing magazine, *PC World*. (Ziff-Davis, prepared for this maneuver, at once flew in a replacement staff drawn from other publications it owned, such as *Creative Computing*, and publication of *PC* continued without missing a beat.)

So, at the 1982 COMDEX show in Las Vegas, a year after the one where *PC* was launched, two new businesses made their debut.

Bruce McLoughlin and I launched Bruce & James Program Publishers with a preview of our upcoming *WordVision*. And David and his team made their public announcement of the new *PC World*.

The launch of *PC World* brought an unwelcome development for Bruce & James. Over the preceding couple of months, Bruce McLoughlin and I had been wooing Andrew Fluegelman—who had become an important writer for *PC*, and also a successful software developer in his own right—to join our new company as VP of New Products. Andrew eventually accepted our offer, and we planned to welcome him into the company at that COMDEX, where we expected him to begin seeking out software products we could bring into our fold. His new Bruce & James business cards had been printed up and were ready to hand over to him at a planned rendezvous at our exhibit booth.

But when we met up with Andrew, he quickly mumbled a hasty apology that he wouldn't be joining up with us after all. It seemed David had made an offer to recruit him too, which he accepted, and he would instead be joining *PC World* as its new editor.



Premiere issue of PC World

Going forward from that COMDEX, David and I went our separate ways. He enjoyed success with *PC World* and other magazines that followed such as *Publish* and *MacWorld*. Bruce McLoughlin and I carried on with our new software business.

Pat McGovern's International Data Group and David quickly became embroiled in a multi-year legal battle against Tony Gold and Ziff-Davis involving claims and counter-claims around Gold's verbal agreements regarding ownership of PC and whether any wrong had

been done in the starting of PC World. (The deposition transcripts and other legal documents in this suit would come to fill several feet worth of shelving.)

To advise me what, if anything, I should do regarding that lawsuit, I retained legal counsel from the Palo Alto office of a large law firm which at the time had a big profile in the personal computer industry. (They were Bruce & James's lawyers too.) They came up with what seemed a clever strategy. Since my resources were minimal compared to the other disputing parties, they advised me to steer clear of getting embroiled in the main lawsuit. They suggested I seek a negotiated settlement from Ziff-Davis regarding my claims against them, because my real claim was against David for failing to honor his verbal agreement with me.

The lawyers' sneaky strategy was to file a suit against David on my behalf but not to serve him notice right away. I was told I could wait up to two years before I would actually have to serve him. In that time I could wait and see if he succeeded in his claims against Gold and Ziff. If he did get anything, I could then serve him and proceed to sue for my share. In the meantime, I wouldn't be running up big legal bills I couldn't afford.

A modest settlement with Ziff was arranged fairly quickly, which covered the legal bills I had incurred thus far and provided some funds I could live on and also put a bit into Bruce & James. But after that, things lawsuit-wise went off the rails. First off, the David/IDG/Ziff/Gold lawsuit was nowhere close to resolution after two years. (It ran on for another five years.) Second, my high-powered law firm went bankrupt in the interim. So there was no one left there to observe or act on the tickler they had set up to serve David with my suit before the two year clock ran out.

As a result, I never got any more payout from the meteoric success of *PC* than that modest settlement from Ziff.

Yet with the Ziff settlement in hand, I considered whether it might be an opportune time for me to get an MBA. I had a sense that getting

one might improve my chances of getting venture capital for whatever future business I might start.

When I lived in Woodside I had a housemate who was in Stanford's MBA program, so I knew something about that program and how it fed into the Silicon Valley tech scene. This appealed to me. So I signed up to take the GMAT (Graduate Management Admission Test) exam. As with previous tests of this type I'd taken, like the LSAT for law school, I had pretty good success on this test and notched a solidly high score. I had a hunch with that score and my prior experience with *PC* I'd have a good chance of getting into the Stanford MBA program.

Ultimately though, I decided not to go down that road. I would continue devoting my full energy to Bruce & James.



We retained James McCaffry, who had been the original designer for *PC* magazine, to design the brochures we distributed in our COMDEX booth, as well as print ads. Rather than a sleek, high-tech look, we requested a friendly, almost traditional style. As a location for photography we borrowed the book-lined office of my friend John Rigdon, housed in a classic old North Beach building. I'd gotten to know John because he was possibly the only other person in San Francisco using the fancy Sanders typographic printer that David and I had obtained for our book project. The Sanders people had connected us in hopes we would be a mutual support group.

Even though the Bruce & James exhibit booth was a relative small-fry amid the vast expanse of the COMDEX show and the huge booths of the major exhibitors, our preview introduction of *Wordvision* got a pretty good reception. We even got people dropping by who wanted to join our company, and ended up hiring one of these, Michael Coffey, to join our product team.

As a giveaway at our booth, and also sprinkled wherever we could drop a bunch on tables around the hall, we handed out lapel buttons

featuring a red circle-and-slash over the letters “CS”—our term for the computer equivalent of “BS.” Our rallying cry was, “We don’t want to make people ‘computer literate,’ we want to make computers ‘people-literate.”

At one point, somebody who looked like Steve Jobs (I am very bad at recognizing people) asked me when Bruce & James would offer software for Apple computers. Somehow I ended up channelling my own inner Steve Jobs, responding, “When Apple stops making shitty computers.” (The Apple][in those days still had a 40-column display and lower case letters were optional.) If only I had known the Macintosh was three years down the road.

What made Wordvision innovative?

If you’re unfamiliar with the personal computer and software context of the early 1980s, it might not be obvious what made *Wordvision* different from other products of the time.

WordStar, the most widely used PC word processing program at the time of *Wordvision*’s launch, had a substantial learning curve and was firmly grounded in mainframe-era interface style. *EasyWriter*, a product that had been written originally for the Apple][, had been ported to the IBM PC in time for that computer’s launch. But its actual “ease” didn’t live up to its name. Products that would later become widely used, such as *WordPerfect* and the original DOS version of Microsoft *Word*, also lacked *Wordvision*’s ease and many of its innovations.

The audience we had in mind for *Wordvision* were people who had little or no familiarity with computers, personal or otherwise. They wanted a product easy both to learn and use.

If IBM PCs had offered the user interface richness later provided by the Apple Macintosh, I like to believe *Wordvision* would have looked and worked a lot like the *MacWrite* program introduced alongside the Mac, which I consider a spiritual ancestor to almost all current word processing software.

But the PC, while slightly more advanced than the then-dominant Apple][, was a much more constrained environment to design for than what the Mac (and Windows) later made possible.

Working within the PC's constraints, *Wordvision* pushed as far as it could toward the kind of product later possible on a Mac. (Like Steve Jobs, I had seen the then-futuristic user interfaces Xerox was developing, and I was similarly inspired.)



Wordvision's startup screen. The menu choices followed the traffic light convention—green meant “go”

Wordvision's innovations included:

No “overtyping” - Today's familiar user interfaces have two distinct interface elements, a “cursor” showing where a user action will take effect, and an insertion point, showing where in a document the next thing you enter will appear. You can use the cursor to place the insertion point.

In the PC's day, these two elements were one and the same. The cursor was usually indicated by highlighting one letter on the screen with a bright background color, while making the letter itself black. Sometimes the letter's background color also blinked.

When you typed a letter, it would replace the letter at the cursor location, if any, then move the cursor to the next letter. You had to activate an “insert mode” if you wanted new typing to push existing text over instead of overtyping it. *Wordvision*, in contrast, was “insert-only.” You had to actively delete unwanted text. *Wordvision* used a “displacement cursor” that temporarily pushed following text one position to the right. On today’s graphic screens, the insertion point can be a thin line between characters. On older, character-only screens, our insertion point had to take up a full character space.

```

Page 1 Line 12 Col 26 0%
HERBERT, PRINCE OF DENMARK
Act III, Scene 1
Herbert:

Is it or isn't it? That's a pretty good question. I just can't
help wondering whether it's better to suffer stoically when you
have had luck, or try to do something about it, that you might
regret later. Like cashing it in. Maybe death is like sleep --
but what if you dream? That's the problem, isn't it? What the
heck do you dream about when you're dead? It's when I think
about nightmares that go on and on and on that I hesitate.

As I think about it, that's probably why there isn't more
suicide. I mean, who'd stick around this depressing place --
having to deal with kings and parents and bosses, not to mention
the whole singles bar scene -- if there were a good way out of
it? Who'd hang around if they weren't scared of death of what
happens after you die? Nobody can know about that, except maybe
psychics. Aw, I don't really believe in that stuff anyway, it's
Emphasis & Excerpt Marking ESC when DONE
Undo Mkr/Emp Beg Undrline Beg Excerpt Beg Boldface Smart Chars

```

The small white square midway along the last line of the first paragraph is Wordvision’s “insertion point.”

Simple language - In both the on-screen user interface and the user manual we were always careful to use simple, non-technical words. For example, we called the document currently being edited the “scroll.” When we needed to tell a user a requested action hadn’t worked, we displayed “Sorry” messages instead of “Error” messages. And we called *Wordvision* a “writing tool” rather than a “word processor.” This focus on clear, simple language carried through to *Wordvision*’s user manual as well.

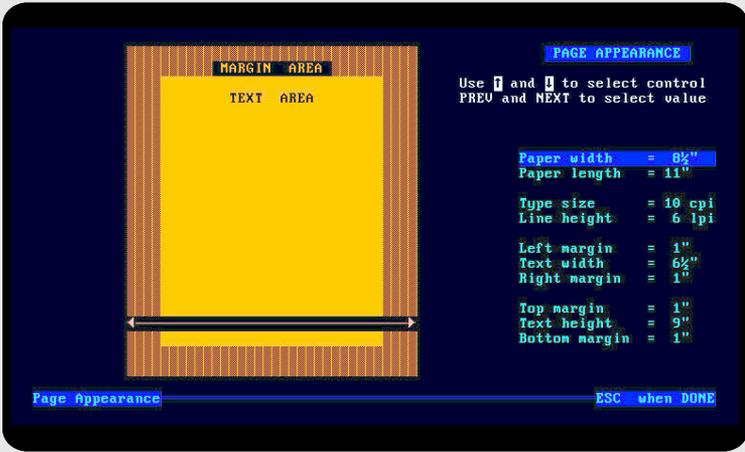
Windows - *Wordvision* didn't use windows in the sense that modern operating systems like Windows or Mac OS do. But within its full-screen display it did use rudimentary windows for features such as showing help information, moving and copying text, and entering text for finding and replacing.



Several Wordvision features, such as finding and changing, employed a visual “window” on the screen.

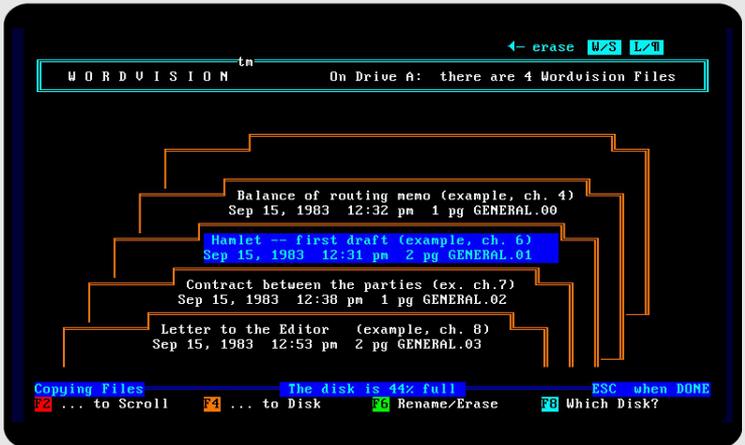
Unique functions - *Wordvision* had some functions still not commonly found in writing software, such as a key that would change CAPITAL letters to lower case or vice versa, and one to flip transposed letters. When the cursor was placed between the e and h in “teh,” pressing that key would correct it to “the.” With the use of “intensifier” keys the transpose key could flip the order of words, lines, sentences and paragraphs too.

Visual orientation - As much as possible, we wanted *Wordvision* to show things visually. So, for example, on the screen for adjusting the page layout, a diagram of the page changed as you adjusted the settings. Likewise, the screen for opening and saving files used a visual representation of file folders.



As you adjusted various dimensions of the page, the diagram would change to show the effect of your choices.

The file management screen also showcased another attribute unique to *Wordvision* at the time—long file names. (Standard PC file names were limited to eight characters.)

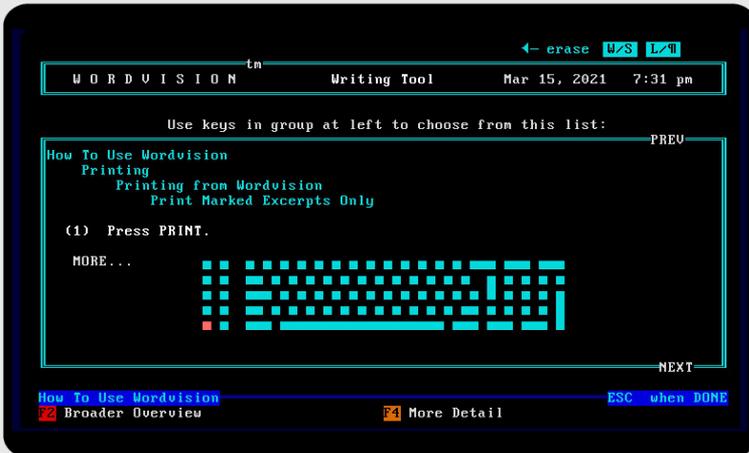


Wordvision showed documents as files and allowed long, descriptive names normally unavailable on IBM PCs

Menus - Lacking a pointing device, we couldn't offer the type of pull-down menus common today. So we did a kind of keyboard-based hybrid. CompuColor keyboards had two vertical rows of five color-coded function keys at the left side. PC keyboards generally had the same key group but without the color coding. So we provided stick-on labels to colorize one row of keys (with symbols for users with monochrome screens), and put menu names on the adjacent row of keys. When a named key was pressed, up to five menu choices would appear across the bottom of the screen, each associated with a color/symbol key.



Built-in help - A user could get help at any point while using the program by pressing a "Help" key. The help content was organized as a multi-level outline. There were broad topics at the top level.



The integrated help system included a diagram to show which keys to press for a desired result

A user could highlight a topic and press a key for “more detail.” This would reveal a nested set of more-specific topics.

At the bottom level of topics, a detailed instruction would be shown, alongside a key diagram showing what key to press to get the desired result.

If *Wordvision* could recognize the feature a user was currently using, it would expand the outline to highlight the relevant topics when the Help window was opened.

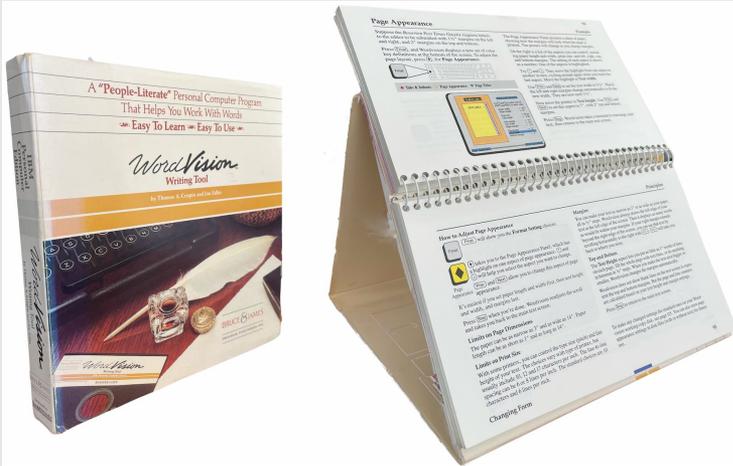
The outline structure of the help content was inspired by Dave Winer’s *ThinkTank* outline processing program. We tried to license Dave’s outline code for our help system, but he declined. So Tom Crispin created similar outline functions. Then John Zussman wrote the help content in the outline format Tom specified.

Aesthetics - In every aspect of *Wordvision*—packaging, manual, advertising—we aimed to convey both high quality and friendliness. Even in sounds. I disliked the rude beep that PCs typically sounded to signal a problem. To show Tom Crispin the sound I wanted instead of a beep. I brought a crystal wine glass to his house and pinged it with my finger. The limited nature of standard PC sound hardware made the rich crystal bong impossible to duplicate. But Tom kept iterating until he got the closest sound that PC hardware could produce.

The typical packaging for software products at the time was a loose-leaf binder containing a manual of half-letter-size pages, fitted into a slipcase. Both binder and slipcase were heavy cardboard covered in drab-colored fabric. The writing style of the manuals was all business.

Wordvision, by contrast, came in a colorfully-printed glossy cardboard jacket that unfolded into an easel for the manual. The imagery on the package was deliberately not high-tech; it was a photo of an arrangement of classic writing devices.

The manual itself was spiral-bound, printed in full color, copiously illustrated, and breezily written.



Wordvision package, closed and opened

To guide readers through the content, the manual featured a friendly little, personified “Mr. Cursor.”

The Main Text Screen

Example

Principles

The *main text screen* is what you see most often while you type and make changes. It shows you several kinds of information.

Text and the Pointer

The most important area of the main screen is the center *text area*, where Wordvision displays your writing. When you write, examine or edit text, it always appears in the text area. If your text is too long to fit in this space, Wordvision displays whatever part you're working on—as much as will fit.

Think of your writing as a long *scroll* and your computer screen as a *window* that lets you see whatever part of the scroll you want. The scroll extends above and below the window.

At the moment there's no text in your scroll, so there's none displayed in the text area. At the top left, however, there is a small bright square called the *pointer* (often called a "cursor" in other programs).

Top-Line Information

Page and line counters. In the upper left corner of the screen, these tell you where in your text the pointer is. They show the number of the page you are viewing (figured according to a printed-page length and other settings you can adjust to your preferences), the line number on that page, and the column number (counting from the left margin) on that line.

A representative Wordvision manual page

One slightly off-the-wall thing about *Wordvision* was a patent we licensed for it. Edmund Skellings, who was the Poet Laureate of the State of Florida, used color in his poetry—with colored chalks on a chalkboard for example, or colored ink when printed—to convey meaning. From this jumping-off point, he had somehow gone on to obtain both a United States and British patent¹⁷ for the use of color on computer displays to convey meaning.

Whether this was a validly patentable thing or not is for others to argue, but the Patent Office granted it to him. Having seen news of Skellings and his patent and found it interesting, I reached out to him. From this, Ed and I became friends. He lived in Fort Lauderdale, and when I visited my folks in Miami I would drive up there and visit with him. (There was a waterside drinking establishment where he hung out that had set aside dedicated barstools for him and his girlfriend, with brass plaques for “Poet Laureate” and “Poet Laureate’s Lady,” and he would take me there for drinks.) In collaboration with the Control Data Corporation, Ed had set up a corporation to license his patent, called Control Color Corporation. He wanted example licensees.

It was indisputable that *Wordvision* used color on computer screens to convey meaning. So Ed got Control Color to grant Bruce & James a license for a fairly token amount, and we noted this license on our manual’s legal copy page alongside our copyright and trademark claims. As far as I know, we were the only licensee Control Color ever had, and after Skellings’ death the whole idea seemed to vanish into obscurity.

* * *

One of my housemates from Woodside, Richard, was an insurance broker who cruised tech conferences looking for clients and, as a side pursuit, women to pick up. One day Rich called me to tell me he’d met

17 US Patent 4,270,284 - Color language teaching method and display and process for creating the display

a woman at a conference that I might be interested in getting acquainted with. She was an editor at *Data Communications* magazine in New York City. It sounded worth a shot, so Rich passed along her number and we arranged to meet for coffee.

Cheryl Weiner was a small and slightly *zaftig* Jewish woman about my age. I wasn't sure if Rich sent her my way as a candidate for romance or a business opportunity, but we hit it off when we met. She was full of enthusiasm and very entrepreneurial. We talked at quite some length. I told her the story of our failed book project and also about our software that we hoped to distribute through bookstores. She told me there was a New York literary agent, John Brockman, that I should talk to who might be able to help on both fronts.

So I reached out to Brockman and told him my stories. He was interested. He was at the forefront of traditional book agents who were beginning to explore representing software authors. I brought Bruce into the conversation, and eventually we all found ourselves in the same city and started to talk serious business. He believed he could get us a book distribution deal with a major New York publishing house. This was a little problematical because we'd already had at least an informal distribution deal through Jack Jennings' company. But Brockman convinced us that the potential would be so much greater if we aligned with a major publishing house. We signed a representation contract with Brockman and turned him loose. It was uncomfortable to break this news to Jack Jennings, who had been so helpful to us, and a real mentor to me, in the early stages of the business. To soften the blow, we agreed that we would have Jack's company do the packaging for our user manual.

Well, Brockman came through. It didn't take him long to bring us an offer for US distribution from Simon & Schuster—a bit of a funny coincidence since we'd modeled our company name after theirs. The offer came with a \$100,000 advance.

Much negotiation followed, a lot of it with S&S's VP of sales, Al Reuben. Bruce was wary of being taken advantage of by sharp New Yorkers, so there was a ton of back-and-forth over the contract before

Bruce was grudgingly willing to sign it. One area of concern was around a conventional business term in the book world—bookstores were allowed to return unsold product for credit. This meant no sale was final for us until a customer purchased a copy from a store. We would have to keep a reserve from “sales” to cover any returns.

When the moment of signing came, we did it in NYC at S&S’s headquarters, with Brockman in attendance. After the signing we celebrated in the office of S&S CEO Dick Snyder, where a white-jacketed waiter came in to present a bottle of chilled champagne and pour us all glasses to clink.

It was a distribution deal. Bruce & James was still the publisher of *Wordvision*, and we were responsible for delivering finished packages of the product (and, ultimately, the follow-on products in the *Vision* line that we’d wrapped into the deal) to the S&S warehouse, where S&S would then take responsibility for selling it through and shipping it to bookstores. We would get to include the S&S logo on the spine of our packages though, which I thought would give the product some extra credibility.

B&J retained rights to direct-to-consumer sales, “bundling” deals with computer manufacturers who might pre-install our software on their products, and international markets.



John Brockman was quite the character, often outfitted with a dramatic hat. He’d specialized in non-fiction books, especially by scientists, philosophers and other intellectuals. One of his claims to fame was having agented *The Whole Earth Catalog* and he was close to its creator, Stewart Brand.

John swept Bruce and me up into his milieu. His S&S deal for us gave him instant credibility in the software world, which he perceived as a major opportunity he aimed to expand into. John loved that I had wide acquaintance in the personal computer universe and could both

introduce him to prospective clients and share intelligence about what was happening in the industry.

When Bruce and I were in New York we'd hang with John and his wife/business partner Katinka Matson. Once they even invited us to spend a weekend with them in their rented summer house in the Hamptons. We were also inducted into The Reality Club, an organization John created for his clients, and gifted with official membership jackets. This "club" met periodically in NYC to debate weighty topics of the day.

A promoter extraordinaire, John later became noted for throwing what were initially dubbed "Millionaire's Dinners" (and later, "Billionaire's Dinners") fêting luminaries from the computer and software worlds, held during industry conferences. I got to attend the first one, but afterward I fell off his list.



With the advance funds from S&S in hand, we decided it was time for Bruce & James to have an actual office in San Francisco. (Bruce had a small office building in the Columbus, Ohio suburb of Dublin, to house his other businesses, and had made space in it for the handful of Ohio folks doing B&J work.) So B&J found and rented a three-room office in the Wharfside Building. This was a converted warehouse near the northern waterfront and Fisherman's Wharf. It was diagonally across from the Buena Vista Tavern, where Irish Coffee was supposedly invented.

Our new digs were an interior suite with no windows, but it was still nice to have a workplace outside my studio apartment, and we were gradually adding a few staffers. Conveniently, it was an easy walk downhill from my apartment. (And a not-so-easy walk back up, but that kept me in shape.)

The Wharfside was actually owned by the U. S. National Park Service and was slated someday to become part of a National Maritime Museum. We rented with the knowledge we could be evicted on short

notice if the museum plan ever moved forward. But we didn't worry too much about this.



The Wharfside Building at 680 Beach St.

The Wharfside has since been mostly converted from offices to the Argonaut Hotel, with some space left for the Museum. The part of the Museum that was already in place was a collection of historical ships berthed along piers at the nearby waterside. One of these was the 1898 ferryboat Berkeley, which we would sometimes use for meetings, since it was open to just walk onto.



The ferryboat we sometimes used as a meeting room

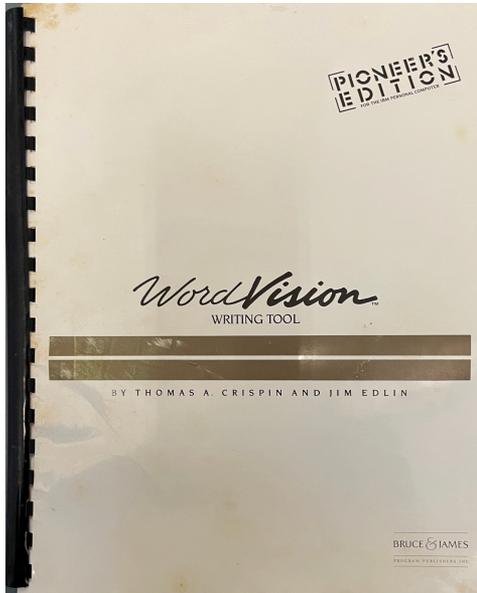
Joining me in the new office were our new product person, Mike Coffey—who had talked himself into a job at our COMDEX launch—and Eileen Haas, who juggled multiple roles as receptionist, office manager, marketing/PR person and general factotum.

Tom Crispin’s coding of *Wordvision* was grinding on ever so slowly. He didn’t come to work in our new office but continued to work in his shared house down the peninsula in Palo Alto. I would periodically drive down there to review progress and offer feedback. I was a rank novice at leading a software development project, and if I had the knowledge and skills I’ve acquired over subsequent years I might have been able to move the process along faster and with a result that was easier to maintain and extend.

Of course, Tom’s coding pace wasn’t the only thing slowing our march toward a shippable product. In the early days of the project, Tom didn’t need much direction from me. He had plenty to do just recreating the underlying infrastructure of *Comp-U-Writer* in the IBM-PC environment. But as time went on and his tasks evolved toward the interface and feature improvements we wanted to build upon the *Comp-U-Writer* starting point, I became more of a bottleneck. It was up to me to specify in detail each new or changed element on each changed or added screen—their working, appearance and behavior—and I was having my usual writer’s-block type difficulties in providing Tom timely direction on what to implement. (I once was lent a book on how to cure procrastination, but it sat on my bedside table unread for more than a year before I sheepishly returned it.) Mike Coffey tried to help move this process along. And eventually, Jack Trainor, who we brought in to do testing and quality control, was asked to also be my “amanuensis,” asking me to talk through how a particular feature should work then writing it down as direction for Tom. But I was a principal contributor to the far-longer-than-expected time it took us to ship.

* * *

Our first public “deliverable” was what we called the “Pioneer’s Edition.” Conventionally, software would receive an “alpha test” by people inside a company, then a “beta test” by a small group of outside users. I decided we should also have a “gamma test” with a larger body of paying customers. We ran ads inviting people to become Wordvision Pioneers by buying a pre-release edition directly from us via mail order at the full planned price of \$49.95. We promised Pioneers that—in exchange for informing us of any problems they encountered, things they liked, and things they didn’t like—they would receive the final edition when it shipped, while getting early access to the product and various other benefits.



The Pioneer’s Edition version of the manual

We sold almost 1,000 of these Pioneer’s Editions fairly quickly, then closed the program. The \$50,000 of receipts was a big help to our cash flow.

While the Design Center team was working on a final package design for *Wordvision*, the Pioneer's Edition would be more quick-and-dirty. The user manual took John Zussman's first draft text and printed it out on 8-1/2" by 11" paper using the Sanders typographic printer. We had a thousand of these run off and comb-bound by a neighborhood quick-printer, and an equivalent number of floppy disks duplicated.

We didn't use a mailing house to send these out to Pioneer customers. Instead it was all done in our California office, with the whole small staff coming together to stuff, label and stamp big envelopes with the manual, disk, reply forms, and a cover letter.

Eileen Haas, who took charge of this project, came to me to ask if we could bring in some temporary help for this work. I suggested she call my friend Eve, who might know people who would want some temp work. A little while later she came back to tell me, a little quizzically, that Eve herself sounded interested in helping out. It turned out that the architecture firm where Eve worked as a hospital planner was going through a lean period and had partially laid off several staff members including Eve. Which is how the woman who would become my wife six years or so later came to work as a temporary employee at Bruce & James for a while.

The Pioneers' Club experiment worked out phenomenally well. Over a third of the Pioneers provided feedback on *Wordvision* to us. Some of it was quite elaborate, including drawings, photos, and even floppy disks with little programs on them demonstrating suggested enhancements or extensions. The responses suggested to us that we had a hit on our hands.

"I am *very* impressed." wrote one Pioneer, "You have the potential to scoop the word processing market. [PS: Within 18 months my company will purchase over 500 PCs for word processing.]"

"Your user friendliness and screen presentation does not have an equal in any other word processing software. ... [Bleep], [bleep] and [bleep] watch out—the new kid on the block is likely to take over," wrote another.

Great! We were clearly on the right track. The only problem was that our train was months behind schedule.

* * *

A second augmentation to B&J's cash flow was something Bruce came up with—a research and development limited partnership. This was a form of tax sheltered investment popular at the time. The partnership was created with intent to fund development of several additional proposed “Programs With Vision” such as *Calcvision*, a spreadsheet program, and *Datavision*, a data management program. I can't recall the total amount raised using this vehicle but it may have been \$100,000. (This sum seems laughably small by present-day standards, especially for supporting development of multiple software products, but it was a bacon-saving capital infusion for B&J at the time. Out of necessity we were less than rigorous about expending the funds only for the stated purposes. In the end, I'm sad to say not a single one of the promised products was developed.)

The R&D partnership was put together and promoted by Chuck Mallet, a financial adviser in Columbus, and was sold as an investment to Columbus-area doctors and dentists. It was pitched to them as much on the basis of immediate tax deductions as on future returns from the promised products.

As development of the IBM PC version of *Wordvision* chugged along, we started to take baby steps toward expanding B&J's offerings. For one, since we had announced that we would also do programs for the Commodore 64 personal computer, we thought the PC version of *Wordvision* was far enough along that we could get started on its sibling for the C64.

The C64 was a computer-in-a-keyboard that hooked up to an external display. It was definitely a consumer-oriented product. But its memory capacity was comparable to a well-equipped IBM PC of the day. Its keyboard, though, was more sparse. We hoped to use the C64's included gaming joystick as a pointing device that could com-



Commodore 64 personal computer

pensate for the more-limited keyboard. (This was a small step in the direction the Macintosh would realize with its mouse).

Actually this move was more than a bit crazy. We were still slogging through completing the specification of the PC version of *Wordvision*. Since I was the only B&J person doing interface design, we didn't have any bandwidth to start specifying a variant interface for a different computer. And, as mentioned earlier, the code for *Wordvision* was in assembly language specific to the Intel 8088 CPU chip used in the PC. The C64 used a completely different CPU chip (MOS Technology 6510) that had a different assembly language. We told ourselves that work could start, as it did with *Wordvision*, by getting the word processing infrastructure in place, not worrying initially about the user interface.

To do the C64 coding, Bruce had found a high school student in Columbus who seemed to have advanced C64 skills. Of course, if it was hard for me to stay on top of Tom Crispin's work when he was an hour's drive south on the Peninsula, it was madness—in a time before email, let alone Zoom conferences—for me to attempt to be involved with the C64 project from three time zones away. It was doomed from the start. At least we could tell people we had started on it though.

In addition to the half-assed C64 project, there was one other piece of the *Wordvision* programming that happened in Columbus rather than being done by Tom Crispin in Palo Alto. This was the “installation” program. Our design was to ship *Wordvision* with a “master” floppy disk whose only role would be to lead customers through the process of making one or more “working copies.” Only these working copies were able to run the program. Customers would have to provide their own floppy disks for the working copies, but we included adhesive labels for two such disks in the package. The thinking was that this approach would minimize the risk of buyers accidentally over-writing their only copy of the program.

The programming for *Wordvision*’s installer was done by Cam Wolff, who had also worked on Bruce’s separate Software Laboratories project (“50 programs for the price of one”). The installer launched automatically on insertion of the master disk, and led a customer visually step-by-step through the process of making their working copies. We wanted a buyer’s first experience with *Wordvision* to immediately make an impression of how simple and easy we intended to make things for them.

Because we were “a company with two offices” (as I suspect a business school case study on Bruce & James might be titled) Bruce made frequent visits to San Francisco and I made frequent visits to Columbus. Since I had a studio apartment, I couldn’t host Bruce when he came west, so he generally bunked at a Fisherman’s Wharf motel down the hill from me near the office. But when I visited Columbus, Bruce and his wife Barbara graciously hosted me in their suburban home in Dublin. They even asked the older of their two daughters to give up her room for my use, sharing her younger sister’s room while I was visiting. Also they made a spare car available for my use. At one point, it seemed I might be in Columbus often enough to justify an apartment there, so I briefly rented a furnished unit there in a tacky prefab development. But that didn’t last long.

* * *

Another thing we started in this period was putting out feelers for other programs we could acquire rights to, “*Vision-ize*,” and add to our catalog. There were conversations with people who had spreadsheet programs, similar to *VisiCalc* and the more-recent *Lotus 1-2-3*, that could be remodeled into *Calcvision*. And there was a developer in Atlanta, Jeff Garbers, whose *Infoscope* data management program was startlingly innovative compared to the market-leading PC database programs and which we lusted to bring into our portfolio with a “*Vision*” makeover. Like *Wordvision*, it was coded in assembly language for speed, and Garbers had a commitment to user-friendly interaction that aligned closely with ours.

Alas, with thin finances and equally thin people resources, we were never able to conclude any of these explorations. Realistically, if we had landed any of them, we probably didn’t have the resources needed to get to shippable product.

About those “thin finances”—you may be wondering how come Bruce & James wasn’t able to raise venture capital to support its growth. Well, it wasn’t for lack of trying. We had conversation after conversation with VCs but never made any headway. It wouldn’t surprise me that our pricing approach was poison to a lot of them, even though few voiced this explicitly.

There’s not a lot of love for a price disruptor in a marketplace where higher prices are making a lot of people fat and happy. Another strike against us was our split company that was half in San Francisco and half in Columbus, Ohio. And neither Bruce nor I had the kind of Stanford / Berkeley / Harvard / MIT pedigree that can help grease the way into VC-land. Even though, after the Pioneer sales, we had good evidence of what today would be considered “product-market fit” and “traction,” we were pretty much pariahs to the VC community. Also, venture capital was a much more strait-laced world in those days.

That’s why we were dependent on alternative sources of capital like the Simon & Schuster advance, the R&D partnership, and pre-launch sales. Bruce himself was our original and only source of venture capital, and while Bruce & James would never have existed without Bruce

putting his money into it, his pockets were nowhere near as deep as venture capital pockets. It's a shame we never broke through the VC barrier, since it would not only have provided more substantial funding to help realize our ambitions, but likely would have helped bring in the staffing we needed to execute better.



In the Fall of 1983 it was time for Bruce & James's second appearance at COMDEX. Due to the growth of the show, we'd been unable to reserve our previous, well-located booth space in the main hall. We were relegated to an auxiliary hall in the adjacent Hilton hotel, but we managed to snag a prime space there, right in front of the entrance.

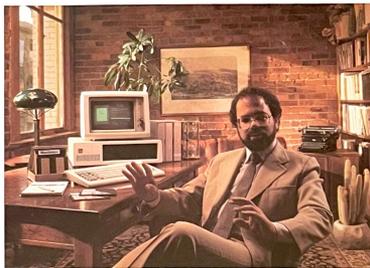
To our shame and dismay, we still didn't have shippable product, but we were a lot farther along. We had shipped the Pioneer's Edition at least, and had a lot of positive feedback from users to share as a result. Reid Neubert and his colleagues at Design Center had completed some innovative package designs for us to show off. (They had also designed our exhibit booth. Their clever creation allowed us to build a booth fairly cheaply but look like a far more substantial and together company than we actually were.)

Simon & Schuster's sales team would be responsible for selling our product into the bookstore trade. Though we weren't optimistic about getting much enthusiasm for our low-priced product from PC software resellers, we didn't want to write off the possibility of being represented there. So Bruce and his Columbus team, in collaboration with Al Reuben from S&S, had been busy lining up relationships with regional product rep firms to sell our product into that channel. COMDEX was an opportunity to firm up and launch those relationships. So we had rented a meeting room where we ran a training and enthusiasm-building session for our newly recruited sales reps. The sales infrastructure was coming together, if only we could finish some product to push into it.

Jim Edlin

WHY OUR NEW \$49.95 "WRITING TOOL" CAN DO MORE FOR YOUR BOTTOM LINE THAN THE OLD \$495.00 ALTERNATIVE.

by JIM EDLIN—PRESIDENT, BRUCE & JAMES, PROGRAM PUBLISHERS, INC.



Introducing WORDVISION™, the people-literate writing tool.

We call our WORDVISION program a writing tool instead of a "word processor" because, unlike previous programs, WORDVISION is not hamstrung by the two leftover influences of yesterday's computers and yesterday's jobs. Many word processing programs still bear the mark of design shackles clamped on by old generation hardware. (Some could run comfortably on a teletypewriter terminal!) They also have roots going back either to secretarial work or computer program editing—which have needs different from personal writing. These drawbacks make them harder to use, harder to learn, and harder to sell than is now necessary.

"People-literacy" sells today's new buyers.

Would you rather try to sell prospects on their need to become "computer-literate"? Or on a product that accommodates them the way they are because it is designed to be "people-literate"?

WORDVISION is the first in a new line of personal tools from Bruce & James where people-literacy is paramount.

We'll never ask our customers to remember arcane codes or keep track of confusing modes. Nor will we ask them to condense the keys to their important information into cryptic, eight-letter file names, then demand they type that name exactly right. Instead, WORDVISION offers them familiar images of file folders, tagged with long and descriptive labels.



If you understand traffic lights, you already know one of WORDVISION's main operating principles. Distinct key labels are included in the package.

that they can point to and select with the press of a key. And formatting a page is done with aid from a simple, graphic diagram.

New-generation prices bring new-generation buyers.

If our program is such a wonder, why are we pricing it to retail for under \$50? Because the time and the economics are right. Personal computers are making the breakthrough to the next, vast wave of prospective customers. And the potent combination of new-generation programs selling on new-generation computers—all at new-generation prices—is what it takes to open the door to these new-generation buyers. If you can capture them with a big bundle of utility at a toe-in-the-water price, you'll not only have these people as continuing customers for a long time to come, you'll have them bringing in their friends too!

We're helping slash the cost of selling.

WORDVISION puts a triple-whammy on your selling cost per unit. The low suggested retail knocks it down below the "considered purchase" threshold, encouraging shoppers to take a plunge on something that looks good. And our self-selling, browsable package does plenty to make sure we do look good. Plus, WORDVISION is designed to be "support-free" after the sale, and our unique Pioneer's Club of "gamma testers" is helping insure we live up to that goal.



Instead of time code-printing, to identify your files, WORDVISION allows for lengthy, descriptive English labels. Files even look like files.

Our powerful, "people-literate" program, priced far lower than prevailing levels, may at first appear to threaten dealers' dollar volume and profitability. But we believe it will boost your bottom line instead. Here's why:

Plus, we'll sell hard so you don't have to.

If you like the way we're telling you our story, wait 'til you see how we tell it to your customers. Our informative, five-color spreads have already started running in the computer-specialty press. And the big push is yet to come.

WORDVISION works for high-budget customers too.

The budgets of customers who are now buying your expensive programs will not shrink just because a lower-priced alternative has appeared. You can still create packages for these customers that take advantage of their available budget. You'll just sell them "more bang for their bucks."

Example: WORDVISION's design as an "in-memory" system encourages packaging it with extra memory. Or, since it exploits color so well, it may tilt the balance to include an RGB monitor in the sale (though it works great in monochrome too). It may even be the factor that brings sale of a hard disk system within reach.

The results of selling these more-powerful systems should be more-satisfied customers who do wonders for your word-of-mouth.

Order a demo now.

Let WORDVISION speak for itself, and try it out on your customers. Order a sample copy with full return privileges, and we'll include an in-store demonstration program to help you sell it. Or take the plunge and order our pre-publication special—seven copies of WORDVISION at our maximum dealer discount, plus a half-size version of the above display included free.



Graphic "control panels" make it easy to make informed decisions about such matters as page layout. Set one value and the text reallocate automatically.



plunge and order our pre-publication special—seven copies of WORDVISION at our maximum dealer discount, plus a half-size version of the above display included free.

Write Chris Schreck at the address below or phone toll-free to 800/531-1309 for more details. Or, if you're attending COMDEX/SPRING, visit us in booth 2693 of the World Congress Center. And let us show you how we can publish Programs with Vision™ and still keep an eye on your bottom line.

Available in spring for the IBM PC, coming soon for others.

WORDVISION has already been delivered to hundreds of Pioneer's Club buyers. The official publication for the IBM Personal Computer edition is scheduled for May, with an edition for the Commodore 64 to follow by early summer, and editions for other volume-selling machines later this year.

Order a demo now.

Let WORDVISION speak for itself, and try it out on your customers. Order a sample copy with full return privileges, and we'll include an in-store demonstration program to help you sell it. Or take the plunge and order our pre-publication special—seven copies of WORDVISION at our maximum dealer discount, plus a half-size version of the above display included free.

Write Chris Schreck at the address below, or phone toll-free to 800/531-1309 for more details. (Or, if you're attending the West Coast Computer Faire, visit us in the Board Room of the Holiday Inn—Civic Center.) And let us show you how we can publish Programs with Vision™ and still keep an eye on your bottom line.

BRUCE & JAMES
PROGRAM PUBLISHERS, INC.

4500 Tuller Road
Dublin, OH 43017
614/766-0110

Dealer Orders—Toll-Free outside Ohio:
800/531-1309

Circle No. 10 on Inquiry Card

Tabloid-size ad, aimed at resellers, that we ran for Wordvision

(Early the next year, Bruce and I would go to Simon & Schuster's semi-annual sales meeting, held at Amelia Island, Florida, to repeat

our training and pitch for the S&S sales staff. S&S was excited by the opportunity they thought PC software represented for them, so we had featured billing at the event. We also had many enthusiastic side conversations with individual sales folks.)

Coming out of COMDEX we had a renewed urgency to ship, ship, ship.¹⁸



There was a lot still to get done. After doing multiple drafts and edit passes on the *Wordvision* user manual content we had to hand it off to Jack Jennings's BMR team. They would add illustrations, typography and layout. Judy Johnstone led the production process there, drawing on the design and illustration talents of contractors Paul Quinn and Jane Radosevic. Since we weren't putting money into the sort of stodgy, slipcased looseleaf binder that was standard for PC software products, we decided to invest instead in full-color printing.

Meanwhile the Design Center folks were looking into getting their innovative package design produced. It turned out that the most economical vendor they found to do this was one who was more used to doing high-volume runs like cereal boxes for Kellogg's. So when I went to their plant to do a press check, I found myself in a forest of tall stacks of things like Frosted Flakes boxes with Tony the Tiger's beaming face. (It was a bit of *deja vu* to my days at Leo Burnett, where Tony was invented.)

Another press check I did was in Appleton, Wisconsin, at the giant Banta printing plant used by major book publishers. They were printing and spiral-binding the manuals that would get slipped into the Design Center packages.

Also slated to go into the package were:

- *Wordvision*'s floppy disk, which needed to have our custom labels applied

¹⁸ You can see a video of me demonstrating *Wordvision* on the Computer Chronicles TV show at <https://www.youtube.com/watch?v=oSGcK5DpbaA>

- A pair of extra labels for buyers to paste on working copy floppies we advised them to make from the master
- the sheet of adhesive key labels
- a price sticker that would go outside the shrink wrap
- and a registration card to mail back to B&J

All of these items had to get made and delivered to the packaging vendor, who would assemble them together into a final, shrink-wrapped product. Plus there was an ingenious in-store promotional display unit, holding a dozen copies, that the Design Center folks came up with.



In-store display unit

Since neither Bruce, I, or any of our team had any manufacturing experience, we were fortunate we had Design Center and BMR who could figure out and ride herd on these processes for us.

There was also one other manufacturing challenge. We imagined that some customers would find our stick-on key labels cheesy. For

them, we came up with a set of slip-over plastic key caps as an optional additional purchase shipped direct from us. The tolerances these needed to be made to were quite tight, so they wouldn't interfere with the normal motion of the keys they were slipped over. Bruce took responsibility for finding a vendor and contracting for these.

Somehow we had imagined that the vendor would sort these into individual sets for us. We were unhappily surprised when what arrived at our San Francisco office were 31 giant plastic sacks each containing a thousand of one keycap version. Once again, future wife Eve Meyer rode in to the rescue. We schlepped all the bags to her apartment and arranged them in a rectangle around the edges of her dining table. Then Eve, I, her housemate Michael, and whatever additional volunteers we could round up, would take an empty box and make a circuit around the table, grabbing a keycap from each bag and dropping it in the box to make sets ready to ship.

Also in this period we obtained and set up the toll-free phone number 1-800-HELPTTEL for *Wordvision* customers to call if they needed assistance with using the product. This line rang in the San Francisco office and whoever was available would answer it. I had suggested we make it a "900" number that charged callers by the minute instead, since I argued a \$50 product didn't need to offer free customer support. But no one else in the company was keen on that idea.

* * *

You may remember in this book's prologue I talk about Global Micro ("the General Motors of the Micro Age")—the company I wanted to create—and that one of its key assets would be owning the interface through which people would interact with "micros." Well, with the PC version of *Wordvision* finally out the door, Bruce & James started to put some effort into licensing the user interface we'd created for *Wordvision* for use in other software products. For one thing, it would seem less like hubris to plaster our key definitions on top of IBM's original key definitions if other programs would also use them. And,

of course, we hoped for a significant stream of licensing revenue from other software companies who would purchase licenses to use our interface conventions and supporting code.

(Of course, this concept somewhat parallels what Microsoft ended up doing so successfully with *Windows*, except they targeted computer companies instead of software companies as their licensing customers, and wrapped the user interface into the operating system. Sigh!)

To promote this, we took out big ads in industry publications touting “the *Vision Interface*.” If *Wordvision* had gone on to be a major success we might have had a lot of customers for the interface. As it happened, though, we had one lone licensee sign up—an accounting package aimed at a specific “vertical” business.

Promoting the *Vision Interface* turned out to be a bad idea for a few reasons.

First, we hadn’t directed Tom Crispin’s work in a way that would make the interface code easily separable from the rest of *Wordvision*. (And it’s not clear that Tom’s coding chops even extended to the architectural juju necessary to structure code in that way.)

Second, our team didn’t include the skills needed to document this kind of interface code in a way that would make it easy for other programmers to wire their code into our interface code. (In a short while, Apple, with vast resources compared to B&J, would show the right way to do this when they published *Inside Macintosh* volumes guiding programmers how to tap into the Macintosh user interface.)

Third, our code was assembly language, which probably wasn’t what a licensee’s product was coded in; some additional “glue code” might need development to enable software coded in other languages to integrate with our assembly language interface code.

Fourth, we really didn’t have staff bandwidth to work with or sell to prospective licensees.

And finally, we bought all those ads promoting the *Vision Interface* on credit. Bruce mainly handled the financial side of the business, and

I wasn't clear that we really didn't have the budget for that advertising, nor was Bruce paying the bills for those ads when they were due.

So why promote interface licensing at that inopportune moment? It was partly out of a fear that the window of opportunity for licensing user interfaces was likely to close soon. I wanted to establish Bruce & James in that market while we still had a chance.

While the launch of Apple's Macintosh and its transformative user interface wouldn't happen for over a year, some of its tropes—windows, the mouse as a pointing device, pull-down menus, etc.—were starting to show up the IBM PC world. At the second COMDEX where Bruce & James exhibited, in 1983, VisiCorp, makers of *VisiCalc* spreadsheet software, previewed its *Visi-ON* operating environment and software that ran within it. (And, yes, we hated that they had given it that name!)

So we were guilty of marketing almost-vaporware, and doing it with vapor-money. The only reason I say “almost” in the preceding sentence is because of that one brave company that actually signed a Vision Interface licensing deal with us and paid us a little bit of money. Tom was able to kludge together enough code, and spend a bit of time working with their programmers, to actually apply a *Vision*-style interface to their accounting program.

* * *

In spring of 1983, as we were finally readying the first release version of *Wordvision* to ship, we began a PR campaign to get it reviewed. Our public relations agency, Ralph Silver, organized an East Coast tour for me. I travelled with a PR minder Ralph had arranged for me, Nina, who came from Los Angeles and usually did PR for entertainment-related clients such as records and movies. To cloak us in an image of prosperity, Ralph's office booked us into upscale hotels such as the Parker House in Boston and the Plaza in New York City. In Boston I visited or met with publications such as *Inc.* and *The Wall Street Journal*. In NYC I had meetings with *Time*, the *New York Times* and similar

media. In all of these meetings I did demos of the product using a sewing-machine size Compaq “portable” I’d carried along. (This and PC-compatible machines like it, which had just come onto the market, were more honestly known as “luggables.”) I also hit my talking points about “people literacy” (as opposed to “computer literacy”) and mass-market pricing for PC software. In general, our press tour was pretty well received.

One publication in NYC that I didn’t meet with, because our tour was focused on general rather than computer media, was *PC Magazine*. In one of those sharper-than-a-serpent’s-tooth moments, when *PC* finally did review *Wordvision* it wasn’t very positive. The headline was “Taking a Gamble With *Wordvision*” and the subhead was “—one wrong keystroke and you could lose everything.¹⁹” It was clear to me that the reviewer, Stephen Manes, really didn’t get what we were trying to do or the audience we were trying to reach. I was mightily disappointed. *PC*’s Letters column a couple of issues later printed mis-sives from *Wordvision* fans challenging Manes’s conclusions, but the damage had already been done.

* * *

While Bruce & James was closing in on getting *Wordvision* officially shipped, various stresses had started to cause turmoil within the company. The biggest stress was money, or lack thereof. We’d burned through what we’d brought in from the Simon & Schuster advance, the sale of the Pioneers’ Edition, and the R&D partnership, and Bruce was increasingly reluctant to cover ongoing costs out of his pocket. (As with Tony Gold and *PC* magazine, we’d hit the discomfort threshold at which a not-truly-deep-pocketed founder-investor no longer felt comfortable putting money into the business.) B&J had stopped paying most of its bills, especially those for advertising, and creditors were

¹⁹ See the full review at <https://nocigarbook.com/manes>

getting restive. Our estimates for when we would finally be ready to ship kept slipping.

I imagine Bruce was troubled with fears that our enterprise, into which he'd invested more than two years of effort and a significant amount of money, was in danger of failing. His trust in my leadership and my decisions was weakening.

In this period, Bruce began having conversations with Rick Selvage, a Columbus-area sales rep for some software lines. Selvage was critical of many of the decisions we had made, including the \$49.95 pricing and the distribution deal with Simon & Schuster. Selvage set about convincing Bruce that if he came into the company in a leadership role he could bring in a round of investment funds.

I was unimpressed with Selvage and thought he was a bit of a huckster.

Since Bruce and I were equal shareholders, and the only shareholders, in the company, Bruce needed buy-in from me in order to go forward with Selvage. In the meantime, Selvage started working with us on an informal basis. One thing he was on a constant soapbox about was that our list price was too low, and he had brought Bruce around to that way of thinking. I hated the idea of a price increase, but the barrage of argument from Bruce and Selvage finally wore me down and I agreed, with the greatest reluctance, to up the list price to \$79.95.

Then, finally, the official edition of *Wordvision* was out in the world, and we began hearing from very happy customers. Some of these were high-profile folks. Judith Martin, the author of the "Miss Manners" newspaper column, let us know how pleased she was using the product for her writing. And so did newscaster David Brinkley, who was using it to write a book.

* * *

Another interesting development came out of left field around this time. People in the EMEA (Europe, Middle East and Africa) division of

IBM had become aware of *Wordvision* and were impressed with it. They approached B&J to inquire if they could license it, have it translated into six languages, brand it as *IBM Wordvision*, and bundle it with PCs sold in their market area. B&J would receive a royalty on every PC they sold. They offered an advance of \$100,000.

Two people from IBM EMEA in England flew over to San Francisco to explore the details of this and negotiate an agreement if they could. Bruce delegated Rick Selvage to come in from Columbus and sit in on the negotiations. With giant IBM on the other side of the table, we felt we needed some top-shelf legal advice in working out an agreement, so we also retained an attorney from the well-respected Silicon Valley law firm Fenwick & West, Bruce Jenett, to be our counsel.

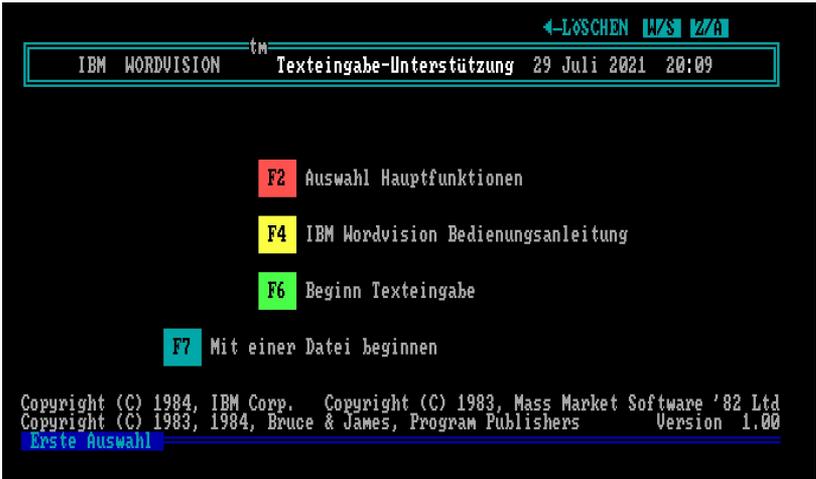
Under a mutual nondisclosure agreement, Tom Crispin put together a package of source code (the assembly language code as written by Tom) for IBM's tech team to evaluate, so they could estimate the effort required to IBM-ize the product and translate it into French, German, Italian, Spanish, Portuguese, and UK English.

To our relief, the verdict came back that the project would be doable at an acceptable cost.

With this green light, the nonexclusive licensing agreement was signed and IBM launched their project. Later, we got the impression that IBM's investment in the project was on the order of \$1 million, though this was never officially confirmed to us.

* * *

We had negotiated with Design Center, as with some of our other vendors, for them to receive a modest equity interest in Bruce & James in return for reduced prices on their work for us. The typical Silicon Valley mechanism for this would have been issuing them stock options, convertible into actual stock only upon a "liquidity event" such as an acquisition or public offering that would give the stock real resale value.



Launch screens from IBM's German and Spanish translations of Wordvision (note: 2021 dates in above screenshots are due to recent screen capture)

For some reason, probably inattention or ignorance on my part, we didn't use the options approach. We simply made a contractual promise that Design Center would at some point get B&J shares.

Now that *Wordvision* was shipping, Bruce told me the Design Center folks were eager to have their stock certificates issued. I didn't twig

that this could be related to the growing conflict between Bruce and me. Design Center had done great work for us, and I thought issuing them their shares would be a nice way to acknowledge that and show our appreciation, so I told Bruce we should go ahead and do it. What I didn't pay attention to was that issuing these shares would end Bruce's and my fifty-fifty "stalemate" ownership of B&J.

One Friday afternoon, Bruce called to inform me that the next B&J payroll was about to come due and we didn't have funds to cover it. The clear implication was that he wouldn't be putting in any more funds to cover the shortfall. So I told him I would put in enough funds from my *PC Magazine* money to fill the gap. I went directly to the bank to make the transfer so the money would be there before the close of business and processing of payroll. Shortly after I made the deposit Bruce phoned again to say that a B&J shareholders meeting was being called for that Sunday in Columbus, and that Ken Rosen, the business manager of Design Center would be flying there to vote their newly-issued shares. The agenda item would be electing Ken to the B&J board of directors, which was currently just Bruce and me. The newly expanded board would then vote to terminate me as an employee and president of Bruce & James. It appeared that Bruce had convinced the Design Center folks that I had become an impediment to the success of the company (and thus the value of their shares) and they had decided to support him to lead the company.

I could have flown into Columbus on short notice for the meeting, but I figured it would just be a waste of breath so I didn't bother. I did, however, bring my computer home from the office. A few days later the mail brought formal notification of my termination along with a caution that I was barred from the office. I learned that the security officers at the front desk of the Wharfside building had been provided with my photo and told not to allow me entry.

You might think with me out of the picture, Rick Selvage and the fellow he proposed to bring in as his number two would have jumped in and done their thing. But perhaps he had cooled of on Bruce & James in the intervening period, because that didn't happen.

I'm not too sure what all went on in B&J over the next few months. I do know B&J got an invitation to visit Apple for a confidential preview of the in-development Macintosh, and Mike Coffey was sent to represent us. However nothing ever came of that meeting. When I learned of this, and later saw what the Macintosh was, I was deeply disappointed because the Mac was in many ways the canvas I wished we'd had to work on (even though I was bummed that it was monochrome only). When the Macintosh was launched it came bundled with *MacWrite*—writing software that I wished B&J had had the opportunity to develop because it was so aligned with my beliefs of how a product like that should work. But the bundling was only for a limited time, and after a while Microsoft's *Word* for Mac became a very successful product. I like to think if I'd been present for that visit to Apple, things might have played out differently.



With me out of the picture, Bruce was in full charge of the company. As it turned out, though, Rick Selvage and Steve Rand did not come on board. They may have decided B&J was too troubled to get involved with.

When we originally set up the company, Bruce and I entered into a buy-sell agreement recommended by the company's attorney. In this agreement, either of us could decide to end our joint ownership. The person triggering this provision could elect their choice from two roles; the "price-setter" or the "responder." The idea was that the price-setter would propose a price for half of the business, and then the responder would have the option of either buying the price-setter's half at the proposed price, or selling their half to the price-setter at the proposed price. The theory was to incentivize the price-setter to name a fair price that was neither too low, which would encourage the responder to snap up the price-setter's half, nor too high, which would encourage the responder to sell.

After four months or so of Bruce's takeover, he decided he would trigger this provision. He proposed that the process take place in a neutral location rather than either in San Francisco or Columbus. The location settled on was an airport hotel near the Denver airport. I arranged for the attorney who was advising me to accompany me on the trip. On the appointed day, we boarded a flight to Denver. As we were getting seated, who should come down the plane aisle also looking for a seat but Bruce. It turned out he had been in San Francisco. If he was in SF it seemed silly to travel to Denver, but we were already on the plane, so off we went.

My problem with the buy-sell process was that I wanted to buy out Bruce's interest but had no money to do so. I think Bruce would have sold if given a reasonable offer, but I didn't have the wherewithal to make one. So I elected to be the responder. But somehow Bruce didn't want to name a price either. We negotiated through the afternoon with no resolution and then decided to rest until the next morning. In the following morning's session there was debate about which outcome would be more promising for the investors in B&J's research and development limited partnership. As we went around that question there was an unexpected knock on our hotel suite door and it turned out to be Chuck Mallett, the fellow from Columbus who had syndicated the partnership. It was a surprise visit obviously staged by Bruce. Mallett expressed the belief that having Bruce own the company would be the preferred outcome from the investors' perspective, then left us to continue negotiating.

Somehow this process never arrived at a conclusion and the lawyer and I flew back to San Francisco with the matter unresolved. I believe Bruce was feeling that the company was about to be overwhelmed by creditors and would go under.

One of the consequences of distributing through Simon & Schuster was that B&J was subject to book industry norms for receiving payment. So even though *Wordvision* had shipped and was getting retail sales, B&J wasn't seeing any immediate income from it. Simon & Schuster would get paid (although none too quickly) for copies it sold

to retailers. But S&S would remit B&J's share only at the end of each quarterly accounting period, and even then only after a delay of a month or two to close the books, and after first recouping their advance, and minus a reserve for "returns" since book industry terms allowed retailers to return unsold inventory to S&S. So there was no short term prospect of incoming cash.

In negotiating its distribution deal with Simon & Schuster, B&J had retained the right to do its own direct-to-consumer sales, as well as sales and licensing "bundling" deals such as with computer companies who might pre-install *Wordvision* on each computer they sold. But B&J was unable to bring in funds from direct marketing because we owed money to all the publications where we might want to run ads, so none would sell us additional space without upfront payment that B&J didn't have funds to make.

Bruce's relationship with Simon & Schuster was also souring. He threatened lawsuits. Bruce found a Columbus attorney with a "pit-bull" reputation who recommended filing a suit in Ohio, forcing S&S to defend the suit there rather than in its home territory of New York. She recommended claiming millions in damages. There was even talk of suing John Brockman. But as far as I know, no suit was ever filed. With all this going on, S&S unsurprisingly lost its enthusiasm for marketing *Wordvision*, and B&J was too broke to advertise it. So sales fell off a cliff.

Eventually Bruce reached a point where he just sort of gave up on Bruce & James. He reached out to me and said if I wanted to attempt a rescue he would go along with it. So I stepped back in.

By this time the remaining staff had been laid off. I moved the contents of the Wharfside Building office into a self-storage locker, probably just a nanosecond ahead of eviction. I forwarded the B&J phone number and 1-800-HELPTTEL to my home phone. You might wonder why doing something like a Chapter 11 reorganization wasn't considered. It might even have allowed abrogating the Simon & Schuster contract. But there were gotchas. B&J's license agreement for the Comp-U-Writer intellectual property had a provision that voided the

license if B&J entered bankruptcy. The licensing deal with IBM would almost certainly be blown up by a bankruptcy. And other licensing arrangements B&J had would also have been in jeopardy.

Whatever might happen with retail sales of *Wordvision* there was still hope of future licensing income from IBM, who was still grinding away at their translation and IBM-izing efforts and hadn't started bundling *Wordvision* yet with PCs sold in the EMEA market. So I went to Jack Jennings of BMR, who was one of the creditors we had stiffed, and asked if he would lead an informal Creditors Committee in doing a non-bankruptcy workout plan. Bless him, he agreed to do this. We would tell all the creditors that there was hope of money from IBM that might eventually pay them off, but that if anybody pushed B&J into involuntary bankruptcy it would end that possibility. Whatever money came into the company we would parcel out to creditors proportionally to reduce what we owed. With one exception, every creditor signed on.

The exception was Banta, the company in Wisconsin who had printed and bound our user manuals. Before printing our order they had demanded a letter of credit from B&J, which we were able to obtain from Huntington Bank in Columbus. When B&J couldn't pay, they demanded Huntington Bank stand behind the letter of credit and pay up. This process took a while but eventually Banta got paid. Then, because Huntington had asked Bruce and me to sign personal guarantees, the bank came after us. Since Bruce had assets, I imagine they recovered at least something from him. I ended up hiring an attorney in Columbus, and negotiated a payment arrangement with Huntington, and ended up sending them annual checks for several years.

Simon & Schuster, after Bruce's harassment, was pretty done with B&J. They had thousands of copies of *Wordvision* in their warehouse, and I arranged to have them shipped to a warehouse and fulfillment company in the high-desert town of Victorville, California.

There was still some residual demand for *Wordvision* and orders would find their way to my apartment. I would box up individual copies and ship them out. B&J's ability to accept credit cards had been

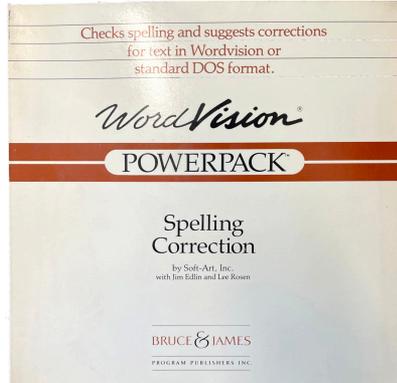
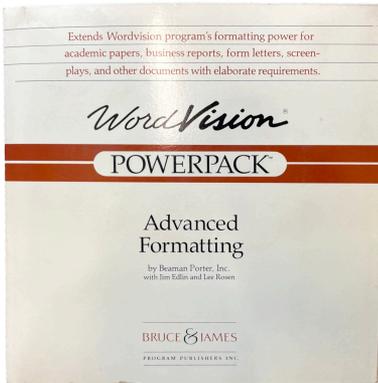
through Huntington Bank in Columbus, and of course that relationship went away. In those days it was difficult for a company to get a merchant account for doing credit card transactions, especially “card-not-present” mail order transactions. Wells Fargo, who I’d banked with personally for years and where B&J also had an account, turned me down flat, as did several other banks. I turned to my friend John Rigdon, who had contacts in the banking community, for advice, and he finally helped me get B&J a new merchant account at the tiny Commercial Bank of San Francisco.

I kept Bruce & James alive as a sole proprietor, kitchen table operation for probably far too long. I even was able to put out three product line extensions. We had claimed from the beginning that *Wordvision* would be extensible via “Power Packs” that we would sell as add-ons.

The first Power Pack I created was a Spelling Correction Power-Pack. For this, I licensed a spelling dictionary then found a programmer in Berkeley who was a *Wordvision* fan and said he was eager to work on adding a spelling correction extension to the product. So I hired him to code it. I also found a designer, Patti Mangan, whose firm, Imagine That, coincidentally had offices in the same building, on the same floor, where Design Center had been when B&J worked with them. Patti helped develop packaging and a manual for the new spelling Power Pack, extending the original product design. She then helped me get them produced.

The second Power Pack was Advanced Formatting. There were numerous features not in the original *Wordvision* that customers would repeatedly make requests for—things like footnotes and tables and multiple columns. To satisfy these requests, I licensed a version of a product called *PowerText* from upstate New York company Beaman-Porter, who did a light customization of it for *Wordvision*. I had mixed feelings about this Power Pack, because it veered well away from the “what-you-see-is-what-you-get” style of original *Wordvision*, and didn’t extend its user interface. Instead, the advanced formatting features were accessed by adding special formatting codes into the text. It felt like a big compromise of my views on how software should work, but

it was the path of least resistance to getting my customers features they were telling me they wanted, and sales of it would be an additional source of revenue for my one-man operation.



The third Power Pack was called File Librarian. If I'd been in a position to keep evolving and improving the original *Wordvision*, this Power Pack wouldn't have needed to exist. *Wordvision* had been designed for IBM PCs equipped with one or two floppy disk drives. But PCs had evolved to offer higher capacity "hard disks" while their operating system had evolved to provide multiple and multi-level directories in which stored files could be organized. *Wordvision* simply had no facility for taking advantage of these improvements. Thus the File Librarian, a standalone program to fill that gap. Somewhat embarrassed that it had to exist, I offered it at a nominal price.

Once these Power Packs were available they added to B&J's trickle of income. With them in hand I decided to try a product relaunch.

Being an almost one-man operation (I did have a friend working part-time to help with shipping and miscellaneous tasks) I decided to market *Wordvision* under the banner of "kitchen table software."

To announce the relaunch I announced a blatantly low-rent press conference to be held at a Palo Alto McDonalds restaurant. (Typically such events would flaunt a company's prosperity by being staged at fancy venues.) The McDonalds people, of course, knew nothing about



PHOTOS BY MICHAEL CARR/PACIFIC HORIZONS

Bruce & James cofounder Jim Edlin (right) courts the media at a lavish press conference (above) held at McDonald's.

Silicon Valley's first "fast food" press conference could be the start of a new marketing trend. Bruce & James software publishers pulled off a minor coup at, of all places, a McDonald's restaurant in Palo Alto, California. Cofounder Jim Edlin says McDonald's was the chosen spot because it's the only place at which the company can afford to treat reporters to lunch.

Edlin called the conference to announce "a drastic reorganization and retrenchment" designed to pull the troubled company out of serious financial woes. Dubbing the company's WordVision word processing program the "Hill Street Blues of software," Edlin suggested that the program has the same potential as the acclaimed television program to grow from a cult favorite into a top-10 hit.

As the last of the fries were devoured, Edlin promised, "next time it'll be at Denny's."

press conferences. I had to tell them my event was a birthday party, which meant attendees got cake. This press conference was goofy enough that it did get decent attendance from reporters and got me some follow-up ink²⁰.

The next step in my relaunch was to exhibit at an upcoming personal computer expo. I rounded up a few other software solo entrepreneurs, including VisiCalc co-creator Dan Bricklin, who had a new product he was promoting, to share

the cost and staffing of a small exhibit booth. Then at a second-hand

²⁰ *InfoWorld*, Vol. 6 No 18 (July 9, 1984), p.16

furniture store I bought a classic old Formica and steel kitchen table set with vinyl-covered chairs. We set these up in our booth with a “Kitchen Table Software” sign.

This new round of activity gave a short burst of new life to *Wordvision* and its new Power Packs. But it was fated not to last. Tom Crispin had done a brilliant job of bringing my vision of *Wordvision* to life and making it fast and making it fit in the limited memory of early PCs. But when I had other programmers look at the code with an eye to making improvements and updates, I was informed it was “spaghetti code” and would be very difficult for anyone but the original author to work with. At that point I had no money to pay for a serious programming project anyhow. PCs kept advancing in capability, and competitive products were proliferating and also adding more and more capabilities—though still nothing rivaled *Wordvision* for ease of learning and use, until the Macintosh and *MacWrite* came along.

It was time to face up to the reality that *Wordvision* and Bruce & James were coming to the end of their road.

Grieving a little but pressing forward, I stopped taking orders—which were fewer and farther between anyway. I sold off or trashed the contents of the storage locker where I’d stashed the contents of B&J’s Wharfside office when I closed it down. I told the warehouse people in Victorville they could do whatever they wanted with the stock of product they were holding for me, but I would no longer pay for them to store it. So somewhere in a landfill near Victorville, thousands of copies of *Wordvision* lie buried.

Meanwhile, IBM’s EMEA division had finished their work creating *IBM Wordvision* in six languages, and I’m told they invested more than a million dollars in the effort. But, as happens in big corporations, there had been a change in the cast of characters. The people who had been our champions there and entered into the contract with B&J had moved on. The new people in their roles were not *Wordvision* believers, and the decision came down that they were not going to bundle, or even release, the customized versions they’d created.

There would be no future royalties coming to B&J from IBM.

I sent out a last round of small checks to all of the B&J creditors, accompanied by a letter sharing the glum news from IBM and letting them know that the attempt at a workout plan was over.

And, like the Cheshire Cat, Bruce & James Program Publishers, Inc. quietly faded away—leaving behind only the bronzed sign that once graced its Wharfside office door.



I was going to have to find something new to do.

A Bruce & James post-mortem

For me, the worst part of how Bruce & James ended was all the people who didn't get what they'd expected or hoped for from our venture. I think if the folks who lost money had just been venture capitalists, I would have been sad but OK with it, because VC investors are prepared for many of their investments to fail.

But Bruce & James wasn't funded by sophisticated investors. Far too much of its "funding" came from credit extended by contractors and vendors whose bills never got paid—many of these were individuals and small concerns who could ill afford the loss.

And, the "doctors and dentists" who put money into the B&J's R&D partnership probably weren't truly deep pockets immune to the total loss of their investment (tax benefits notwithstanding).

Also, even though some of Bruce McLoughlin's decisions likely played a role in B&J's discouraging outcome, it pains me to contemplate the losses he incurred. Bruce believed in me, supported my vision, and put substantial chunks of his personal wealth, credit, and good name—plus years of his time—into B&J.

So... What went wrong?

For one thing, B&J simply didn't have adequate resources for what it was attempting to do. While we recognized this to some degree, I didn't really grok how fatally underfunded we were.

Another factor: I was a novice at leading software development. Though Tom Crispin was a brilliant programmer, more knowledgeable leadership of his efforts might have yielded a shippable—and more maintainable and extensible—product sooner.

Another now-commonplace concept that might have helped us back then is “Minimum Viable Product”. Though I would have worried about people dismissing *Wordvision* as a “budget” product not competitive with the market leaders, it still might have helped the company survive if we'd shipped a more bare-bones version of *Wordvision* earlier.

I also have to accept a share of blame due to my own sometime paralysis in pressing forward with critical tasks in a timely manner. Although this wasn't the only reason it took so long to get *Wordvision* out the door, it definitely played a role.



More than a dozen years after *Wordvision* first shipped, PC industry author and columnist Jim Seymour described it as:

“a brilliant, highly graphical DOS word processor that shot through the skies of the then-new IBM PC software world in 1982 like a comet: burning brightly, then disappearing. In retrospect, *Wordvision* has served as a free R&D department for the software business—its bones picked over for a decade by programmers looking for so-called new ideas.²¹”

²¹ *PC Magazine* Vol. 13 No. 5 (March 15, 1994), p. 99

11 - Between Companies

Amid the wreckage of Bruce & James, it may seem weird to want to do another software project. But that’s what I began exploring as B&J was winding down. I wrote up a 15 page proposal for a product I called *Connect* Telecommunication Tool—with the tagline: The “Wired Nation” Program.

For context, this is happening in 1984. “Information utilities” such as The Source and Compuserve—which offer online editions of a handful of newspapers, airline schedules, CB-radio style chat, an early form of email, some simple games, and the like—had been around in some form for about five years, but had yet to break 100,000 users. The similar America Online service is almost two years in the future. Broadband consumer internet is decades away. Remote connections from personal computers are almost exclusively via the standard phone (landline) network using slow modems (short for “modulator-demodulator”—meaning digital data was modulated into sound waves at one end and reconstructed from them at the other).

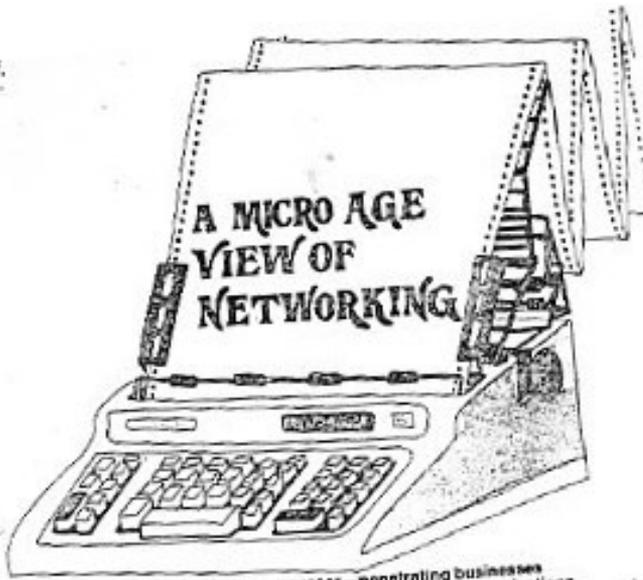
No personal computer at that time came with a modem as standard equipment. Only recently could modems connect directly to the phone network rather than requiring the handset of a standard telephone to be placed into a computer-connected device that hears and generates data in the form of audio tones.

Simple telecommunication software for personal computers had been available for a while, including Andrew Fluegelman’s impressive-for-its-time “shareware” *PC-Talk*. But their capabilities were fairly rudimentary.

Driven by the same philosophy that led to *Wordvision*, my idea was to craft a product for the mass market that I envisioned was coming. It

would be designed for non-technical customers who just wanted things to work. It would have a minimal learning curve.

Underlying my concept for *Connect* were ideas I had first laid out in a 1979 article in *Telephony* magazine and later expanded on in an article in *Data Communications* magazine.



The coming mass-market microprocessor—penetrating businesses and homes—could drastically change the rules of data communications.

Today's microprocessors and microprocessors have become necessary structural elements of data communications. But the next generation promises to go far more sophisticated. The impact of the new Micro Age products and the changes they will produce will split over into data communications activities and bring a wholly new view of the rules of Data Communications.

The Micro Age (telephony) will be characterized by mass-market microprocessors and microcomputers, while fully-penetrating sales will force these operations into wide range home and business. While some current products, such as the So-Strak's Data Computer and Commodore's 6400, already cost below \$1000, they are not yet cheap enough to be mass-market. However, by the expiration of the current microprocessor cycle, 18 months to 3 years away, outdoor prices will not be long on the Micro Age.

Data Communications (Nov 1979)

For example, that their delivery products will sell for prices higher than \$400. However, they will provide very large increases in utility—more bang for the buck.” It should.

In a market that could, microprocessor market sales have soared to \$1.2 billion, according to Venture Research Corporation, in Mountain View, Calif. The market players are an odd assortment of eleven or twelve startups. They include:

- Start-up companies that have already pulled away from Apple's lead, or have just begun, among them Apple Computers, Heath Star, and Vector Graphic.
- Consumer electronic companies such as Zenith and Radio Shack.
- Toy and arcade game companies (Atari, Intellivision, Exidy).
- Calculator manufacturers (Texas Instruments, Hewlett-Packard).
- Traditional companies of several stripes (Pitney-Bowyer).

The Data Communications article where I propounded my “laws”

Along similar lines to my earlier “Six Laws of Micros,” I postulated a handful of Micro Age “laws” of digital communications. One example: “Processing is cheaper than bandwidth.”

This law asserted it would be less expensive to use computing power to highly compress data at the sending end and reconstitute it at the receiving end than to send uncompressed data through a digital communication channel. (For all I know, this may have been an obvious truism even then to people working in the field. But the editors of a respected industry publication thought it novel enough to print it. And compression was no part of any broadly available personal computer communication product or service at the time. Today, of course, it certainly is a truism. Every video stream, for example, gets squashed to a fare-thee-well before being sent out over the internet to a device that unsquashes it so you can watch it.)

Gun-shy from my Bruce & James experience, I didn’t want to start a software company to develop and market *Connect*. Instead I wanted to find a publisher who would advance funds to develop it and then bring it to market. By this time, John Brockman’s software agent practice had grown into something substantial, so I approached him to represent my concept. Given the B&J history, I’m a bit surprised he was willing to work with me. But I guess any bad blood was more between him and Bruce than him and me, and he agreed to take it on.

I wrote up a 15 page proposal for *Connect*. Brockman pitched it, according to a letter he sent me, to nine potential publishers: Addison Wesley, Bantam, CBS, Harper & Row, Microsoft, Prentice-Hall, Random House, St. Martins, and (hah!) Simon & Schuster. But three months later he wrote to say, “I’ve come up with absolutely nothing.” He went on to reassure me this was “not a reflection of the proposal, but mainly a reflection of the software publishing industry, which is at a total standstill.” So he advised me to pursue “other avenues” for the project.

While I don’t question that book publishers may have cooled on the idea of expanding into software, I suspect this was mostly just a polite letdown. In any case, it became the end of pursuing *Connect* for me.



Contemplating other things I might pursue, I started a list of expertise I had that I could leverage. Three things came to mind: the advertising business, personal computers, and publishing.

I was aware of several examples of people publishing fairly narrowly scoped newsletters covering matters of high economic consequence to particular business niches, and charging high subscription prices for them, like several hundred dollars a year. It seemed to me that personal computers were poised to transform the advertising business, perhaps even more so than other businesses. So I came up with the idea of doing one of these high-end newsletters focused on personal computer use in advertising.

I figured that my years-ago experience putting out the daily management newsletter at Illinois Bell, and my abbreviated experience with *PC* magazine, would give me a reasonable set of tools to become a newsletter editor/publisher. I could imagine plenty of content areas that would provide ongoing fodder to fill the pages: Case studies, product reviews, success stories and the like.

I'd also noticed that many successful newsletters were closely associated with their authors, whose name became a part of their branding (the *Kiplinger Washington Letter* for example). Thus was conceived *Edlin's PCs In Agencies Newsletter*.



While I was trying to figure out how to evolve my work life, there was also some significant activity going on in my personal life.

I'd begun shuttling back and forth to Florida again as my Dad's health ran into trouble spots. After my Mom's passing he'd managed to create a new support infrastructure around himself. Family friends the Durkins continued to look after him, get him groceries, take him out to dinner (which he bought) and the like. And he'd found a woman named Estelle who functioned as a secretary and general factotum, doing a lot of what Mom had done for him. He remained living

in the apartment-hotel tower of the Dupont Plaza complex in downtown Miami, so he had daily cleaning service, and there was a coffee shop and a dining room that he could go down to for meals.

Though well into his eighties, he never let up on his business activities, which often involved flying around the country. One of his business collaborators was James Roosevelt, son of the former president, who lived in Newport Beach, California. On one of his visits there some issue cropped up with his heart, landing him in a local hospital. When they were ready to release him, I flew down there to check him out of the hospital and accompany him on a flight back to Miami.

On another occasion while I was with him in Miami he was having issues with a hernia that was becoming strangulated, causing him serious pain. We called his doctor, who advised that he come into the hospital for immediate surgery, but in his usual ornery manner he refused. Of course, as the day went on it got worse and worse until, around midnight, he finally allowed me to take him to the hospital, where emergency surgery ensued.

Eventually his health declined to the point that he was not really able to take care of himself. As we'd done previously for my Mom, I arranged for private-duty health aides to be with him. When it became clear that this time he wasn't going to be able to continue living independently, I arranged three shifts of the aides to take care of him while I flew back to San Francisco to see if I could figure out an assisted living situation for him near me. While I was exploring possibilities, he phoned to say he didn't think he needed to be attended overnight while he slept. So we stopped the overnight aides. A few days afterward I got an early morning call from the morning aide coming on duty. She had arrived to find him dead in a living room chair.

As had been the case seven years earlier for Mom, Dad's funeral and burial were in Chicago. Afterward, my cousin Sue volunteered to fly back to Miami to close out Dad's apartment. In a few days of madness we made arrangements for disposal of Dad's furniture and belongings, and we packed up several boxes to UPS back to myself in San Francisco. While doing all that packing I made frequent use of the

Swiss army knife Dad had given me for a thirteenth birthday present and which I had carried with me continuously ever since. But after the last box was taped and shipped, somehow the knife was nowhere to be found.

With Dad gone, the knife that reminded me of him had left me too.

As I worked through sorting out Dad's affairs after his death, I discovered that he had lived just precisely long enough to run through the very last of his assets. This gave me the sneaking suspicion that he knew full well that he'd come to the end of funds to pay for his care, so, as a final act of will, he simply made a decision to stop living so he wouldn't become a burden on me.

* * *

Eve Meyer gave me a lot of emotional support as I was negotiating Dad's decline and death. A while afterward though, we somehow mutually concluded that the other person wasn't *quite* who we were looking for as a life partner.

We did enjoy each other's company though. So, theorizing that a person was a more attractive potential partner when validated by already being with someone, we hatched a plan that we'd continue keeping company while helping each other search for the person who might suit us better.

Yeah, sounds like the plot for a rom-com. I know.

Pursuing this plan, we bought season tickets to the Symphony together, threw and went to parties together, and otherwise generally hung out.

One day, our mutual friend Hal announced that a woman friend from his Seattle days, Linda, had just moved to San Francisco and he wanted to introduce her to his friends in town. Eve volunteered to throw a party at her house for the purpose, partly scheming that Linda and I might hit it off. (The rom-com continues!)

At the party, it appeared Eve might have guessed correctly. Right in front of Eve, Linda invited me to have lunch with her the next day. And I accepted.

When the party ended, I stayed behind to help Eve clean up. As we schlepped dirty glasses to the kitchen, it became clear that Eve was very upset with me. When I asked her why, it emerged she was angry that I had accepted the lunch invitation from Linda.

I expressed puzzlement. "I thought that was what you had in mind when you threw this party," I said to her. Eve acknowledged that was true, and said she didn't understand why she was having that reaction. Somehow this quickly escalated into a furious fight about what were we doing with each other. At some point in this imbroglio I was surprised to hear myself declare, "I think maybe we should either never see each other again, or move in together."

Well, that was a conversation stopper.

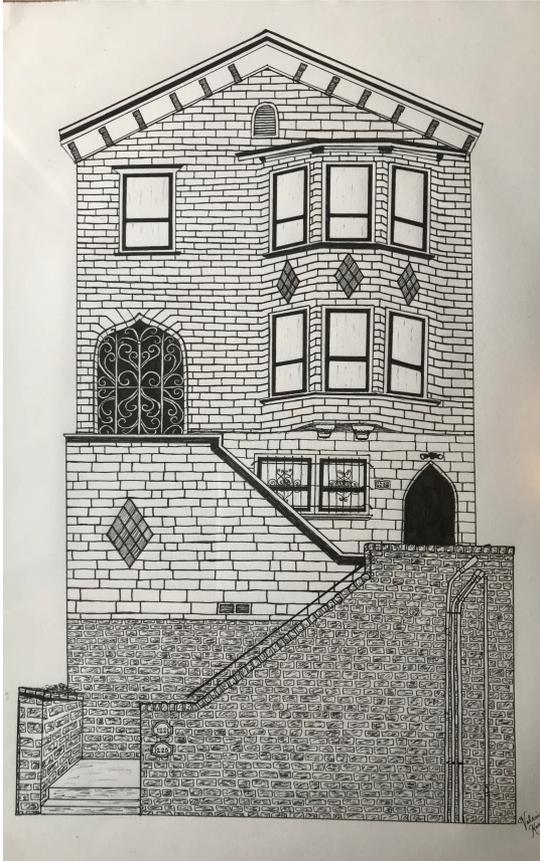
But after we'd both caught our breath we began to seriously discuss moving in together. By the end of the discussion we'd decided to do it.

I never did have that lunch with Linda, (though she later became an important contact in my future work activities).

The following weekend, I started hauling piles of my stuff up the three flights of stairs into Eve's place. As if still following a rom-com script, while doing this I was suddenly afflicted with a vicious "bug" of some kind and threw up all over Eve's stairs. But we managed to hose down the stairs and finish bringing things in. Then, officially moved in, I collapsed into her bed, sick.

Complicating our new cohabitation, Eve had recently acquired a housemate. Alicia (aka Wai Leng) was a young Singaporean woman Eve had rescued from an abusive situation. Alicia became our proxy adult daughter. (Those rom-com writers were working overtime.)

So we all settled into a household in the upstairs unit of the two-flat that Eve and her tenant-in-common Sarge Holtzman had bought together in the Haight-Ashbury neighborhood, at 1221 Waller St. It was a place I had earlier helped her move into, never imagining I would eventually share it with her. Let alone for the next 30+ years!



1221 Waller St. in San Francisco - a Craftsman-style Victorian 2-flat built in 1898. We lived in the upper unit. (Sketch by Valerie Kamen)

For a while, I kept my studio on Leavenworth St. as an office, and of course as an insurance policy in case things didn't work out.

Later on, when things in our cohabitation seemed to be going OK, I sublet the place on the down-low to my friend Blair, who burrowed in there to work on his "Smart-TV" project. (That's another story. As usual Blair was well ahead of his time in envisioning something very similar to how people watch TV now, though his technology was an

analog stew involving a fleet of video cassette recorders and robotic arms controlled by a personal computer, rather than the digital approach that came to pass.)

Eventually, Blair moved out and I finally gave the place up.

* * *

Eve's work life was in flux when we started to live together. She had masters degrees in both social work (from University of Chicago) and health service administration (from University of Michigan). When we first met she had been working for a firm of architects that built hospitals and her role was to help in hospital planning to meet both patient and community needs. When I moved in with Eve she was marketing director for a psychiatric hospital. Then, not long afterward, someone she knew encouraged her to apply to be the Executive Director of the San Francisco Suicide Prevention agency.

We had a fair amount of conversation about whether this would be a good move for her. But when the Suicide Prevention board offered her the role, she decided to accept it.

Her first week in the new job, Eve received the news that a substantial amount of funding the organization received from the City and County of San Francisco would not be renewed for the following budget year. In what proved to be a spectacular launch to her career there, she told staff and volunteers they should immediately do a practice run of what would happen if they had to shut down due to loss of funding. She had the people answering the hotlines tell callers that the agency might have to close because of the defunding, in which case callers might have to phone the Mayor's office for hotline help, and would they please help test out how this would work by redirecting their call now to the office of the Mayor. Callers were only too glad to do so.

Naturally, Eve also called the press to alert them this test was in progress.

It didn't take long before the Mayor's office called with a furious demand that Suicide Prevention stop this call redirection. Eve sweetly explained that this was merely a precautionary test to assess what might have to happen if the proposed funding cut was carried out and the agency was no longer around to handle its typical volume of callers.

Upon rapid further investigation, city officials got back to Eve to inform her that the omission of the agency's funding had been a simple oversight rather than a deliberate choice. Of course the funding would be restored in the next iteration of the budget.

I was so proud of Eve.

From this beginning followed Eve's 30+ year career leading San Francisco Suicide Prevention as its Executive Director.



As I've mentioned earlier, Ted Nelson's two-sided book *Computer Lib / Dream Machines* had a big influence on my involvement in and views of the personal computer world. One idea in the book that resonated with me was Nelson's vision of "hypertext" and "hypermedia."

Nelson coined these terms in the mid-60s for his vision of a vast, interconnected web (yes, there's that word) of documents and media. By the time I moved to the Bay Area I was already keeping track of how the realization of his vision, christened Project Xanadu, might be brought about by the group of supporters that had coalesced around him. Discouragingly, it was slow going, with few tangible results.

From time to time I would be exposed to various products built by others that attempted to implement modest realizations of the hypermedia concepts. But none of them ever really caught on.

Then, in 1985, Apple's Bill Atkinson, one of the original members of the Macintosh team, began creating a program for the Mac first called WildCard and later dubbed *HyperCard*. Apple launched it in mid-1987. While Ted Nelson dismissed *HyperCard* as a flawed and incomplete

execution of his vision, others—including me—saw it as brilliant and wonderful, despite it not incorporating some of Nelson’s key concepts.

In parallel to *HyperCard*’s launch, author Danny Goodman published *The Complete HyperCard Handbook*, a thick volume rich with detail of how to use *HyperCard* and suggestions of things it could be used for.

HyperCard had been getting a lot of advance publicity and I was intrigued. The instant Goodman’s book was available I grabbed a copy. Though I didn’t yet have *HyperCard* to try out, I burrowed into that book. I sat on the couch with the book in my lap, drinking in every page and playing with *HyperCard* in my mind. I couldn’t wait to get my hands on the software. I saw so much potential.

In November of 1987 I went to Las Vegas for the fall COMDEX show. I went hoping I’d find inspiration there for the next thing to get involved in, and imagining that might somehow involve *HyperCard*. Since I had no current income, I went with a much lower-budget approach than in past years, driving there instead of flying, and staying in a third-tier motel instead of a nice hotel.

At COMDEX there seemed to be a lot of buzz around *HyperCard*. I got into lots of conversations with people I knew, including many fellow members of the Computer Press Association. (I had retained my membership in that organization even though I had years ago exchanged my writing hat for that of a software entrepreneur.) One thing I kept asking people was, “Are you seeing any new business opportunities created by *HyperCard*?”

One person who seemed to be on a similar wavelength to me on the subject was Tay Vaughan, who I knew slightly from the Computer Press group. (He had been one of the people who helped bring it into being. More than one of the organization’s meetings had been in his house in the Oakland hills.)

Tay, a person given to taking action, collected names of people who were interested in doing something around *HyperCard*. After COMDEX ended he reached out to people on that list, and some oth-

ers he knew, inviting them—me included—to a meeting at his house to kick around ideas for possible opportunities.

About a dozen people showed up at that meeting (some accompanied by spouses and children). In the meantime Tay had approached the computer book publisher Que with a proposal for a group-authored book on *HyperCard*—a competitor to Danny Goodman’s book. Tay invited people at the meeting to become collaborators on the book, and several of us signed up to write chapters.

The book was published as *Using HyperCard: From Home to HyperTalk*²². I believe it was in that meeting at Tay’s that the name The Hypermedia Group first emerged, as a collective byline for the book. However when the book came out it somehow was under Tay’s individual byline, with the full author group credited on an interior page.

* * *

The other thing I talked up around COMDEX was my *PCs in Agencies* newsletter idea. One guy I mentioned this to was enthusiastic about the idea and told me I ought to meet his friend Stephanie Kott, who worked at the ad agency that handled the IBM personal computer account and who happened to be attending COMDEX. He arranged to make an introduction at a party we would all be attending.

I did get introduced to Stephanie at the party and told her that in each issue I planned to feature a different agency that was using personal computers in interesting ways. I suggested to her that, with her agency’s IBM connection, it would be a perfect candidate to be the featured agency for my premier issue. Stephanie liked this idea and promised she would run the possibility by her agency management when she got back to New York.

After a while, Stephanie got back to me to let me know her management would be pleased to participate. She even offered to put me

²² Que, 1988, 750 Pages (ISBN: 0-88022-340-5)

up at her apartment in Fort Lee, NJ, when I came to New York to do interviews.

So off I went to NYC to do a round of interviews at the Lord, Geller, Federico & Einstein ad agency, whose offices were in a nondescript high rise on Madison Avenue. But my first stop in the city was at 47th St. Photo, where I bought a new Olympus micro cassette recorder and a little Rollei camera to use while doing interviews.

Stephanie was a fabulous host at the Lord Geller offices. She had put together a two day schedule of interviews for me at the agency, steering me to every department that was making use of personal computers and to executives who would talk strategy and policy. I took lots of photos with my new Rollei and taped several hours of interviews with Lord Geller folks.

Back in San Francisco, I sat down at my Macintosh—the “fat Mac” version of the original model—and began to put together a twelve-page newsletter—three 11”x17” pages folded in half. The first six pages would be my feature story about Lord Geller, the rest being other ad-agency-related stories I’d been collecting. I’d settled on *Ready-Set-Go* as my “desktop publishing” software, finding it more intuitive to work with than the then-category-leader, Aldus *PageMaker*. With it, I started roughing in a layout.

I got my film from the trip developed and started choosing photos to scan and drop into the story I’d begun writing. I’d already developed a logo and masthead for the newsletter. (Unfortunately, I have no examples of the newsletter to show here. I may have some of the files on old Mac floppies. But a couple of years ago during a basement cleanout I finally threw out my stored *Ready, Set, Go* distribution floppies, imagining I’d never have occasion to use them again.)

This is where my troublesome difficulty in shipping things sabotaged me. My plan had been to assemble a list of names of potential subscribers, print the first issue, then mail it out to my list as a free sample along with a pitch to subscribe. But I found myself unable to get to that endpoint. It was a real blow to my self-confidence. I stalled out with a partly-finished newsletter.

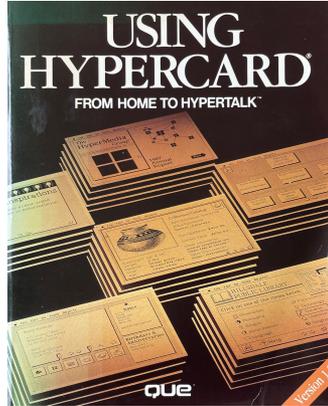
Maybe I had trouble working solo with no collaborator. Maybe I just at bottom didn't believe enough in the potential of the project to keep pushing on it. Maybe failure to launch was a way of shielding myself from finding out whether this brainchild of mine would be a success.

Whatever it was, *Edlin's PCs in Agencies Newsletter* never made it to a first issue. All the time the Lord, Geller folks gave me, and especially the generous support of Stephanie there, was for naught. (I worried that my failure to publish ended up making Stephanie look bad at work.)

My self-esteem was in a crater.

* * *

However there was continued activity on The HyperMedia Group front. All of us contributing authors got our chapters in for *Using HyperCard*. Some of us helped Tay Vaughan pull it together into a book manuscript. We went through the typical cycle of back and forth with the publishers over editing requests and error corrections. And then it was published.



With the book project finished, the group's talk turned to further discussion of whether there was a business opportunity in doing development in *HyperCard*. Initially, each of the dozen collaborators put up \$100 to provide some modest initial funding. But as discussions proceeded, only three of the original dozen—Tay Vaughan, Eric Alderman and me – proved serious about moving forward. All the others chose to continue with their current activities.

The three of us began to get serious about making something of The HyperMedia Group.

12 - The HyperMedia Group

Tay Vaughan was something of a renaissance man. In his earlier life he had been a seaman, master carpenter, licensed sea captain, marine surveyor, sailing school founder, and had dipped into variety of other pursuits. He had built a 31 foot ocean-going sailboat and sailed it widely, including from San Francisco to Newport, Rhode Island via the Panama Canal. More recently he'd been doing computer journalism—he was one of the organizers of the Computer Press Association—and freelance technical consulting as Key Thinkers, Inc. (though I'm not sure there was an actual corporation).

Eric Alderman was also a computer journalist and freelance consultant, largely in the area of word processing. He had published three books on word processing programs. He was a bit of a prodigy, about 20 years younger than Tay and me.

These were the two partners I joined with to start The HyperMedia Group (HMG, as we would call it among ourselves).

There was an odd intersection at this point with my former business partner David Bunnell. David and I had mostly not spoken since I separated from *PC* magazine. Now David had gotten involved in another magazine, *New Media*, focused on the emerging world of digital media such as CD-ROMs. By a quirky coincidence, the company that published *New Media* was named HyperMedia Communications, Inc.

As participants in the same new field, the two HyperMedia companies ended up having various involvements with one another. Some of HMG's work won awards from *New Media*, and HMG's work was occasionally covered in the magazine. HMG even did some project work for the magazine. Each company occasionally got communications intended for the other. But all this happened without me having any direct interaction with David.

At the beginning of HMG, the three of us worked mainly out of a basement office in Tay's house. Linda Stone, who Tay and I both knew²³, was working in a relatively senior position at Apple. She pointed us toward some *HyperCard* work opportunities at Apple. (Tay had already been doing some solo *HyperCard* work there.)

An early project HMG did for Apple was *OptiCat*, a demonstration of how libraries might use Macintoshes to replace their physical card catalog with a CD-ROM-based digital version on Macs.

In the early days of graphical user interfaces, a design approach called skeuomorphism—picturing real-world objects as elements of the user interface—was in vogue, especially on Macs. For example, an image of a physical desk might dominate the screen. It might have items on it such as a Rolodex (clicking this might open a contact list), In and Out trays (click for an email program), a typewriter (to open a word processing program), and the like. We took this approach for *OptiCat*.

The idea was to “emulate, but supercharge” traditional library tools. The launch screen was a drawing of a library, prominently featuring a button to open the card catalog.

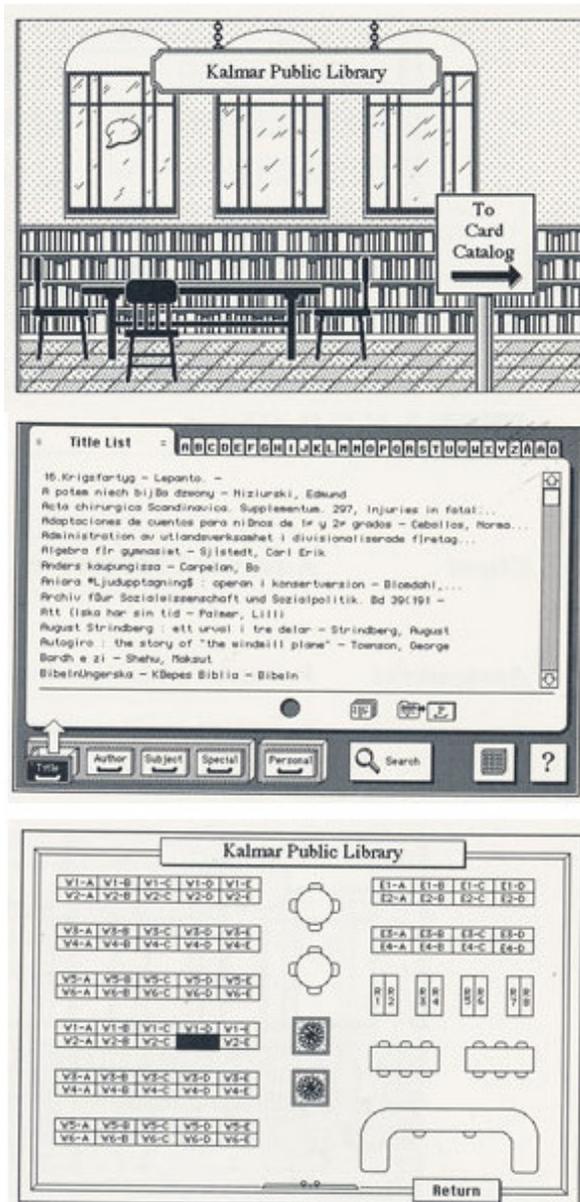
The card catalog itself was a drawing of a traditional wooden cabinet having drawers for Title, Author, and Subject listings. Clicking these opened list views a user could scroll through. Then a user could click on a line in the list view to bring up a full card. Cards could then be scrolled to the right or left to see the next or previous one. Our prototype had a feature I haven't seen in any of the digital library catalogs that followed. When viewing a card you could click to change the “drawer” containing the card, so scrolling would move you along the dimension of the new drawer you selected: title, author, or subject. There was also a button on each card that would show you the book's shelf location on a diagram of the library's shelf layout.

Apple paid to fly the three of us to New Orleans for the American Library Association convention, where we demonstrated *OptiCat* in

²³ Linda was the woman who, by inviting me to lunch, precipitated the epic fight Eve and I had that ended with our deciding to live together.

No Cigar

Apple's booth. It seemed to be very well received, but the project never moved beyond our demo prototype.



Example "cards" from the OptiCat "stack"

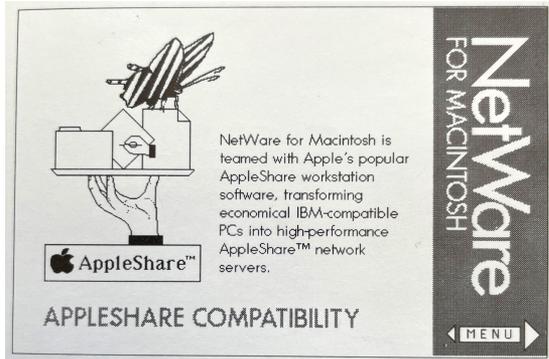
Another early HMG project was for Novell, the maker of Netware local networking software. Novell wanted a demonstration disk for their introduction of Netware for Macintosh.

None of HMG's founding partners had visual design or art direction skills, so we needed to find people with those skills for our projects—first as freelancers and later as staff. I wish I could remember the name of the person we brought in to do design and illustration for the Novell project, because I'd like to credit him for the excellent, imaginative work he did. "Loren" is all I can grasp at, and I'm not even too sure about that. Loren came up with the motif of a butterfly to tie together our on-screen presentation of the various capabilities and benefits of Netware for Mac.

HyperCard did not offer much in the way of animation capabilities beyond simple transitions, like slide-in and slide-out, to navigate from card to card. But clever developers quickly found a way to shoehorn simple animations into a product that wasn't designed to offer them. The technique was known as "font animation." It relied on the ability for developers to create and install their own "custom" typefaces to supplement those that were pre-installed on Macintoshes.

In those days, Mac typefaces were not yet made up of mathematical shape descriptions that allow them to be rendered smoothly onscreen at any size from tiny to huge. Instead, they were bitmap images of each character at a given size. If you wanted both big and small characters in the same typeface you would need a font file for each size. The characters of the larger size would each be made up of a much larger array of dots than the equivalent character in the smaller size.

The first trick that enabled font animation is that the drawings making up a custom font file could be pictures of anything, not just pictures of standard letterforms such as "A" or "Z." Loren created a custom font file where the characters were drawings of a butterfly in a collection of different angles and perspectives and with wings in a range of positions that, shown one after another, would create an illusion of flapping and flying about.



A card from the Novell Netware HyperCard stack

The second trick underlying font animation was using the HyperTalk programming language to manipulate *HyperCard's* text fields. These were areas that could be placed on a card into which text could be shown. The letters displayed in a text field could be controlled by HyperTalk commands, as could the position of the field on the card. For font animation, code could rapidly replace the content in a single character field—in the Novell case it was set to use our font of butterfly drawings—with one character after another.

Say, for example, the font slot corresponding to A was a drawing of the butterfly with its wings fully horizontal. And the slot corresponding to E was the same drawing but with the wings fully vertical. B, C, and D would be drawn with the wings in transitional stages between the horizontal of A and the vertical of E. By rapidly filling a field first with an A (the code would have no idea this was a drawing of a butterfly and not the common letter), then replacing it with B, then C, then D, then E, then reversing the sequence back to A, the illusion of wings flapping was created.

If, at the same time, the code was causing the text field with the butterfly drawings to migrate smoothly from one screen position to another, you would have the appearance of a butterfly flapping from place to place on the screen.

We didn't invent this font animation gimmick, but our Novell project was likely the first widely circulated *HyperCard* "stack" to exploit it. Novell duplicated their stack onto Mac-size floppy disks and handed them out liberally at trade shows and to dealers and customers. They were a digital equivalent of a marketing brochure. Thanks to the wow factor of its butterfly animation, as well as generally being an effective product promo tool, the project got HMG a lot of buzz. It launched our reputation for a category of work that became a bread-and-butter HMG offering—the interactive product demo.

In a way it was a revisit to my days of print ads and TV spots. But since the medium was in some ways so different, I liked to say I had come "full spiral" rather than "full circle."



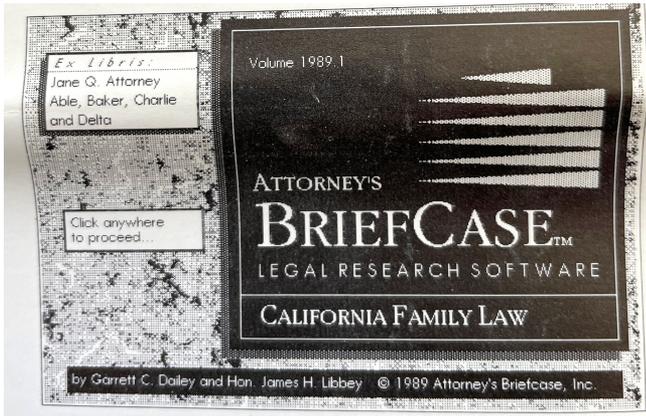
The clients that found their way to The HyperMedia Group—and in the early days it was more often that they would find us than that we would find them—were a mix of established companies like Apple and Novell, and startup entrepreneurs with interesting ideas.

Among the earliest in the latter group were Bruce Wolfe and Garrett Dailey, who had started a businesses called Attorney's Briefcase. Dailey was a prominent family law attorney practicing in Oakland. Wolfe, an heir of a wealthy Ohio publishing family, was also an attorney but was mostly wearing an entrepreneur hat.

They wanted to publish a line of what, in a prior era, might have been printed legal treatises, but now would leverage computer search and organizing capabilities to make case law and interpretations more readily accessible to attorneys doing research. Their first product would cover California Family Law.

Their plan was to publish their research on CD-ROMs and they retained HMG to build the user interface and content storage using *HyperCard*.

It was during a progress review meeting with Bruce Wolfe at his house in Tiburon, on the Marin County side of the Golden Gate



Opening card of Attorney's Briefcase stack

Bridge, that we felt a slight shake that we figured was a minor earthquake. A bit later, we decided to switch on a TV to see if we could learn exactly how bad the quake had been. We were astonished to see images of a portion of the Bay Bridge hanging down towards the water. While it hadn't felt severe in Marin, it turned out what we'd experienced is what became known as the Loma Preita earthquake, which did quite a bit of other damage as well as rupturing the Bay Bridge. We immediately ended the meeting to head to our homes. Not knowing if further shocks might be on the way, I drove back over the Golden Gate Bridge fearing a plunge into the water the whole way across.

For the next while, until emergency repairs got the Bay Bridge back into service, its outage put a crimp into what had been my fairly frequent trips to the East Bay to collaborate with Eric and Tay, both of whom had homes there.

Another entrepreneur who found his way to HMG was a Frenchman, Dominique (I wish I remembered his last name), whose company, Open Mind International, wanted to develop interactive multimedia language training. The goal of their product, *Speak 92*, was teaching American English to non-native speakers more efficiently than tra-

ditional training methods. *Speak 92* was focused on business communication and used video extensively in its lessons.

Video on personal computers was then limited to the size of a grainy, jerky black-and-white postage stamp at best. So Dominique's vision was to have his video language lessons delivered on a hybrid system pairing a Mac computer with a laser-disk player for full resolution color video. Laser disks were a video technology that had a brief moment on the market before the advent of DVD digital video disks.



Speak 92 screen capture

HyperCard at this point had not expanded beyond its original black-and-white capabilities. But a fellow named Bill Appleton had created a near-clone of it, called *SuperCard*, that added several key capabilities unavailable in *HyperCard*, notably working in full color on the range of Macintoshes with larger color screens that had become available. HMG expanded its capabilities to work with *SuperCard* as soon as it became available.

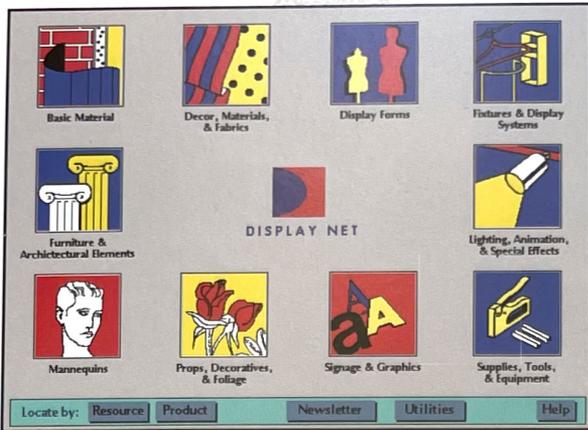
SuperCard on a Mac could control playback of video from a laser disk which, unlike the then-dominant VHS videotape cassettes, could be accessed randomly without lengthy waits to fast-forward or rewind. So we built *Speak 92* with *SuperCard*. We completed the proof-of-concept prototype for Dominique, but I don't recall that

much happened with it after that. I'm not sure why it didn't move forward (or, if it did, we didn't remain involved).

One more entrepreneur who found his way to HMG was Jay Fisher. Jay was from Cincinnati, though partially relocating to San Francisco because he was engaged to a woman who lived here. Jay's business sold products used in retail stores for product displays—a broad assortment of items from giant letters that could be mounted on walls, to display fixtures, to sign holders. Jay also had a vision, to create an “electronic catalog” for selling this large array of items. Jay retained HMG to realize his vision, and he set up Electronic Catalog Corporation—“ECAT”—to house the venture.



Internet-based e-commerce was way over the horizon at this point. So Jay's *DisplayNet* product was conceived to be distributed on CD-ROM's. This was another project where we turned to SuperCard.



DisplayNet main menu

Eric Alderman dove deep into the *DisplayNet* project. Except for the fact that it was built using a CD-ROM rather than the internet, what Eric crafted had all the elements now common in e-commerce

Now viewing: ♦ Mannequins
 ♦ Specialty
 ♦ Children 2 of 35



Resource: Flatsco, Inc.
 Name: Little Ones
 Item ID: FLT-20076
 Description: Constructed from high-density foam
 beads, colorfully screened.
 Economical yet effective forms.
 Size: Ages 2, 4, 6, 8, & 10
 Color: Various
 Accessory: None
 Price: \$45.00
 Unit: EA
 Min. Order: \$100.00
 Delivery: 48 hours

[Order Product](#)

DISPLAY NET [Compare](#) [Help](#) [Main Menu](#)

Compare Products 1 of 2 pages



Resource	Flatsco, Inc.	Fome 'n' Wire
Name: <u>Softie Mannikin Co.</u>	Name: <u>Little Ones</u>	Name: <u>Twisties</u>
Price: <u>\$59.00</u>	Price: <u>\$45.00</u>	Price: <u>\$69.00</u>
Delivery: <u>2 weeks</u>	Delivery: <u>48 hours</u>	Delivery: <u>30 days</u>
Clear View	Clear View	Clear View

DISPLAY NET [Purchase Order](#) [Help](#) [Main Menu](#)

Purchase Order Number MS-4501-843 Date 6/17/89

Bill To Mega Stores Corp. Accounts Payable P.O. Box 20507 Metropolis, MR 16917	Ship To MegaRama Attn: Visual Merchandising Manager 134 Eastchester Mall Beaver Falls, MR 16992
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Resource Name	Qty	Unit	Item ID	Description	P.O. Number	Price	P.O. Subtotal	Extension
Fome 'n' Wire Co.					X30379			\$365.00
	2	EA	FDH-99432	Twisties, 4 year-olds, yellow		\$69.00	\$207.00	
	2	EA	FDH-99432	Twisties, 4 year-olds, blue		\$69.00	\$138.00	
	2	EA	FDH-99440	Base, glass		\$10.00	\$20.00	
U.S. Basics					X30380		\$241.50	
	6	EA	USB-19923	No-jam tacker		\$21.50	\$129.00	
	50	YD	UBB-20002	Fabric - moire, scarlet		\$2.25	\$112.50	
Total								\$606.50

Notes: New store opening
 Sidemark: Children's dept.
 Must be in store in 3 weeks

DISPLAY NET [Send Order](#) [Help](#) [Main Menu](#)

Screens from DisplayNet

sites. It had category pages, product pages, search, and ordering capability, along with a suite of authoring tools.

Jay and his colleagues evangelized the display industry firms he knew from his legacy business to include their products in the DisplayNet catalog. So reams of product information were delivered to us, photos were scanned and data entered.

We and Jay both knew that once we had built a system for an electronic catalog, it would have wide application beyond his particular use case. So we negotiated with him to discount our fees for the project in exchange for joint ownership of the technology and software. We envisioned offering it to other businesses who might want to publish electronic catalogs.

I was actually amazed at how slick and complete a product DisplayNet turned out to be when we finished it. The bulk of the credit goes to Eric and the long days he poured into figuring it out and building it. *DisplayNet* even won some awards.

DisplayNet and ECAT, alas, never realized the potential we saw for them. Neither Jay nor we were ever able to find anyone else who wanted to publish an electronic catalog using the tools we had built.



Jay Fisher (L) Eric Alderman, Tay Vaughan, and me (barely visible), along with our significant others, after accepting an award for DisplayNet

As much as anything else in this memoir, the “No Cigar” lament seems to apply in this case. Except for the online element, which wouldn’t become practical for years, we really had created a solid prototype for modern e-commerce. I don’t know if we were unable to exploit it successfully because we and Jay were just too early, or because we were ineffective in our sales efforts, or what. But I feel like we sure did miss a giant opportunity.

* * *

HMG was growing and adding people to our team. It was clear that we needed to move beyond working out of our houses. Of course, I would have loved for us to get an office in San Francisco, but my two partners both lived in the East Bay and were implacably opposed to locating in the city. The best compromise I could swing was to look for space in Emeryville, right at the eastern end of the Bay Bridge. This would give me the shortest possible East Bay commute.

We found a space in the Hollis Street Project, an adaptive reuse of what had been an International Harvester tractor factory. It had 6,000 square feet, much bigger than our current needs. But it had been nicely built out by a company that then never occupied it. The landlord was willing to give us rent concessions to help us grow into the space. The build-out included four private offices on the ground level, so Eric, Tay and I each took one, and turned the fourth into a conference room and library. We initially had no need for the upstairs level, and were lucky to find a small consultancy to sublease it from us.

Because Tay, Eric, and I often worked a “second shift” at home, and Macintosh laptops didn’t yet exist, the three of us each acquired a second color display, keyboard, and mouse to keep at our houses. Each evening we’d throw our Macintosh II computers, sans their peripherals, into a bag and schlep them home. There we’d hook it up to the duplicate display, keyboard, and mouse and be all set up to put in our additional hours. In the mornings, we repeated the process in reverse before heading back into the office.



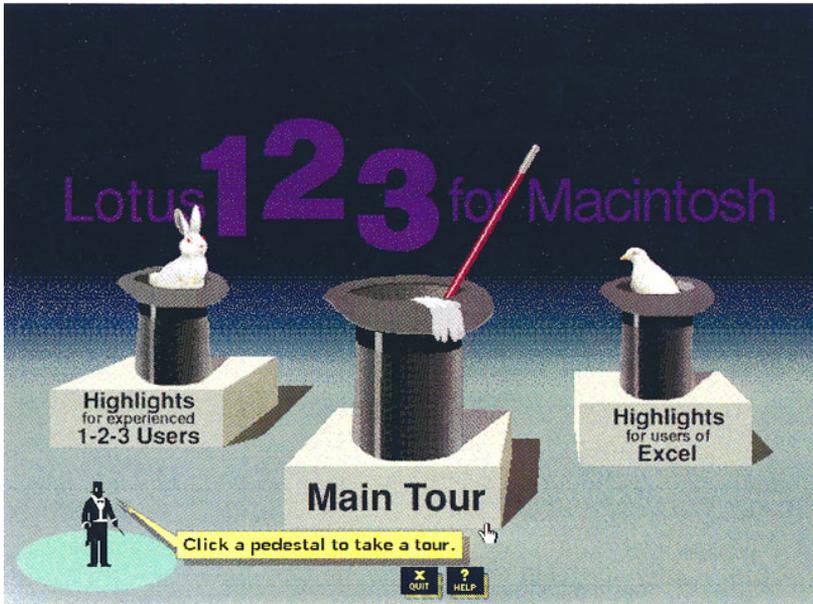
5900 Hollis St. in Emeryville. HMG, in suite O, had its entrance facing the building's parking lot rather than the street.

Our business structure also evolved around the time we moved into the Hollis St. office. Our tax accountant had advised us that a partnership would work best to minimize our taxes. But Tay in particular was pushing us to incorporate, fearing risk to his home and personal assets from any liabilities HMG might incur. So we accommodated him and became The HyperMedia Group, Incorporated.

Having the expense of the new offices to cover also spurred us to bring in our first dedicated sales person. It was time for us to start finding clients instead of just letting them find us.

HMG's practice creating digital brochures and product tours continued to chug along. We did one of these for TOPS, our Emeryville neighbor, who was a dominant networking product for Macintoshes at that time. And then we got a client that was decidedly not a neighbor. Lotus, makers of the market-leading 1-2-3 spreadsheet program, who were across the county from us in Cambridge, Massachusetts, retained

us to develop an interactive, on-screen user orientation tour for their new *1-2-3 for Macintosh* product.



Opening screen of the 1-2-3 for Macintosh interactive tour

This project caused HMG folks to start doing a lot of cross-country travel, basing ourselves in the Royal Sonesta hotel down the street from Lotus's Cambridge offices. Back when people didn't have to present positive identification to fly, in order to take advantage of bargain fares we would advance-purchase airline tickets to Boston in the name of "Staff Member", knowing somebody would probably need to fly but uncertain exactly who.

Our interactive tour of 1-2-3 for Mac was another award winner for HMG. It incorporated animation far more elaborate than our original butterflies for Novell. This project occasioned expansion of HMG's primary toolset beyond the "xxxCard" products. We became big users of the *Director* multimedia authoring tool from Macromind (later Macromedia, then Adobe).

John deLorimier, a talented animator/illustrator/designer, provided much of the creativity that went into Lotus's magician-themed product orientation, which incorporated alternative paths for new users, experienced users of Microsoft's *Excel* spreadsheet, and experienced users of Lotus 1-2-3.²⁴

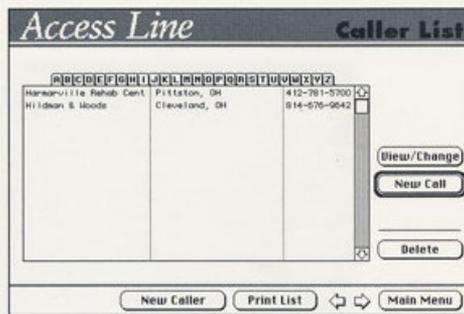
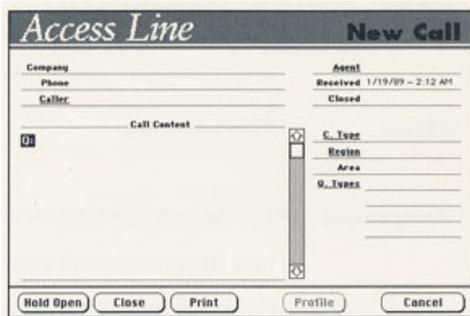
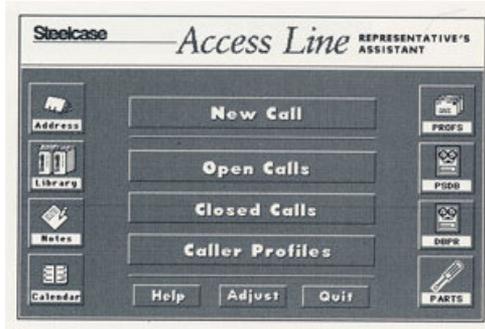


Another new client we got from outside the Bay Area, a referral to us from Apple, was Steelcase Furniture, in Grand Rapids, Michigan. Steelcase had a group of people highly trained and knowledgeable about its product line who staffed its "Access Line"—a call center available to answer any questions someone might have about any of its products. They wanted a new system to help Access Line representatives to keep track of calls and create a database of answered questions and resolved problems the reps could search in case a new caller raised a previously-addressed issue. In essence, they wanted something synthesizing features of what we now know as a customer relationship management tool like Salesforce.com, a "trouble ticket" management system, and a searchable free-text database.

Unusually for HMG, on this project we acted as a "systems integrator." In addition to designing and developing the software, we were tasked to recommend the Apple products for Steelcase to purchase for the system: a workstation for each representative, a server for the shared database, and a network to tie them together.

We built Steelcase's Representative's Assistant using *HyperCard*. Like with DisplayNet, we knew that this tool, once built, could be adapted to many other clients with similar needs, and our contract with Steelcase reserved us the right to do so. Alas, also like with DisplayNet, we never succeeded in realizing that potential. It was another "no cigar" situation.

²⁴ See a portion of the tour on YouTube at <http://bit.ly/hmg123tour>



Representative Access Line screens

Were we once again too early to successfully develop a market for what we had built? Or did we simply lack the resources (or initiative) to take it to the next step.

* * *

As The HyperMedia Group was becoming more and more of a real company, filling up our space on Hollis St. with new team members and adding blue-chip names to our client list, there were also developments in my personal life.

When Eve and I began to cohabit, she solemnly informed me that we could live together but she would never marry me. (A strategic move? Could be. It was yet another act in the rom-com story of our relationship.) Eve said she had tried marriage once, it hadn't worked out, and she wasn't up for trying it again. But after we'd been living together for a couple of years, it felt more and more like marriage was what I wanted. Especially since we'd been talking about having a child, which was something Eve deeply wanted.

One evening I took Eve out to dinner at the Elite Cafe, a New Orleans style restaurant we were both fond of. At one point I stepped away from the table, nominally for a rest-room visit but actually to find our waiter. I handed him a tiny box containing my Mom's heirloom engagement ring, and asked him to deliver it to our table when it was time for dessert. In due course our entree dishes were cleared and the waiter came and handed the ring box to Eve. "Did we order this?" I asked. Then Eve opened the box, saw the ring, and I delivered my proposal. Despite her previous protestations and to my relief, she accepted. The people at neighboring tables applauded, and those nearest us ordered us a bottle of champagne.

After the champagne, coffee, and more-edible desserts we floated outside and danced in the street to the music in our heads. We were engaged.

Now to plan a wedding—a process that turned out to be so filled with little conflicts that they almost torpedoed the whole thing. But we got through it. One potential minefield was that while I am of Jewish heritage, I'm not an active practitioner of the faith. Eve is. The rabbi of Eve's congregation (which in a loose way became mine too), the wonderful Yoel Kahn, wisely and gracefully led us through all the decisions and issues to craft a ceremony that felt right for both of us.

We reserved the entire Alamo Square Inn, a bed-and-breakfast with an event space, for a weekend in November 1988. It was located across from San Francisco's iconic Alamo Square park. We invited our out-of-town families and friends to book rooms there.

We both felt that for us to get married was such a crazy idea (given our rom-com history) that we decided on a circus theme for the wedding. We were both lovers of circus in general and the local Pickle Family Circus troupe in particular.

It was an early-afternoon ceremony. We hired a circus juggler (not a Pickle, but someone recommended by them) to lead our processional as well as entertain before the start of the ceremony. Among the inevitable overlooked details: when we told the juggler what we wanted he looked at us wide-eyed and said, "Nobody told me I would need to walk and juggle at the same time!" Nevertheless he pulled it off.



To play at the reception we hired the Pickle Family Circus Band. We were expecting them to play the circus-inflected jazz we so enjoyed when they accompanied the circus, but we were a little surprised that mostly what they played was standard wedding band fare. Despite this, everybody loved them.

Our one-night honeymoon was up in wine country at the Sonoma Mission Inn. We didn't feel it was the right time to take a more traditional honeymoon because things were quite busy at The HyperMedia

Group with important deadlines looming. Things were pretty hectic at Suicide Prevention too.

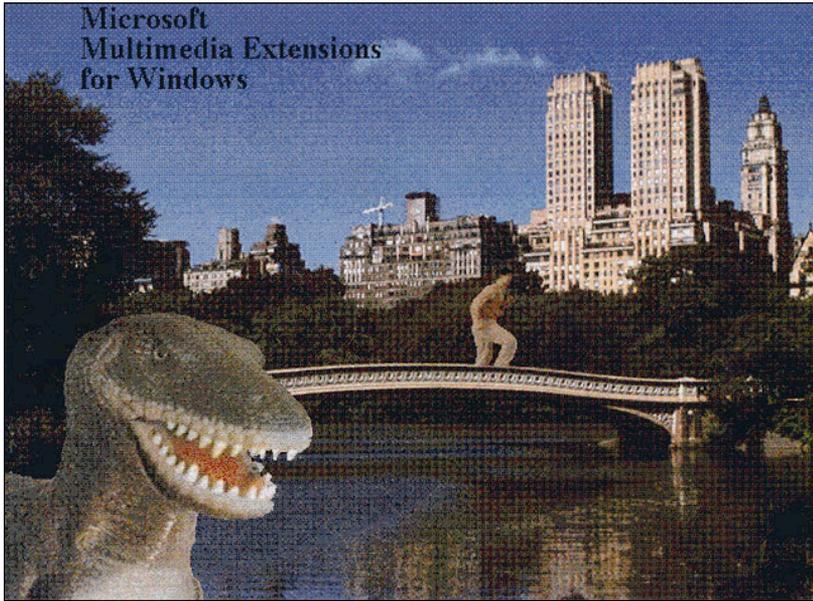


* * *

The HyperMedia Group started its life focused on an Apple software product and with Apple as a major client. As technologies evolved, our capabilities expanded to other tools and platforms. One result was that Microsoft eventually joined our client roster.

Microsoft wanted to evangelize a new standard for multimedia-capable personal computers. It dubbed these “MPCs”—Windows PCs equipped with CD-ROM drives, audio capabilities, enough graphics power to support animation and video, and Microsoft software to facilitate the use of these capabilities. An early HMG project for Microsoft was a multimedia demonstration that would be used in a launch event to promote the MPC standard.

The launch event was set for a venue in New York City. The concept for our little part of it was a scenario in which a tyrannosaurus would chase Microsoft CEO Bill Gates through Central Park and the streets of New York.



A frame from HMG's animation for Microsoft's MPC launch event

Our multimedia confection, running on MPC hardware, would be projected on a large screen to introduce the launch event's keynote presentation. In the finale, the giant dino would chase Gates off the edge of the screen. Thereupon, Gates in person, dressed in the same outfit he wore in the animation, would come bounding out from the wings onto the stage to begin his speech. This gimmicky opening got big applause from the audience.

A little bit later, when Microsoft was releasing version 3.0 of Windows, they'd arranged to bundle with it a product called *ToolBook*. This software, created by a company backed by Microsoft co-founder Paul Allen, was a not-quite-clone of *HyperCard*. It produced "books"

instead of “stacks.” The idea was to give Windows a kind of parity with Macintosh’s bundling of *HyperCard*. Microsoft engaged HMG to create an interactive introduction to *ToolBook*. They’d include in the Windows distribution alongside the bundled copy.

While *ToolBook* was conceptually an implementation of the general ideas that underlay *HyperCard*, the specifics weren’t quite identical. Possibly this was an intentional strategy to fend off lawsuits.

By the time of *ToolBook*’s launch *HyperCard* had been out in the world for about three years. In this time there had been a great profusion of *HyperCard* stacks created—some commercial products, some in-house tools for organizations, and any number of personal projects. It seemed likely that many of those stack creators would like the ability to make their creations available to Windows users via *ToolBook*. But *ToolBook* (again perhaps seeking to avoid lawsuit exposure) didn’t have any capability to import and run *HyperCard* stacks.

HMG was approached by friends of ours at Heizer Software, a company whose products included several *HyperCard* stacks, to investigate the feasibility of a software tool that would transform stacks into *ToolBook* books. We reported back to them that we thought it could be done. So they invited us to build the tool and publish it through them.

The result was *ConvertIt!*, a two-part product. One part, itself a *HyperCard* stack (with some special enhancements we built into it), ran on a Macintosh. It would take a selected *HyperCard* stack and write out a comprehensive description of it in an intermediate file format we created and called HIFF—HyperMedia Interchange File Format. The second part of *ConvertIt!*, a *ToolBook* book, would take in a HIFF file and create a *ToolBook* book from it.

Our thinking in creating the HIFF format was that *ToolBook* was only one example of an emerging collection of *HyperCard*-style software tools. *MetaCard* had appeared to run on Sun and other Unix computers. *HyperPAD* would arrive to approximate the *HyperCard* concept for non-graphics-capable computers running pre-Windows Microsoft DOS. Others were in the offing. We wanted to provide a path to get creations from any one of these tools to any of the others.

ConvertIt! The Hypermedia File Format Converter

Convert Your HyperCard Stacks to ToolBook Books!

What Is ConvertIt!?

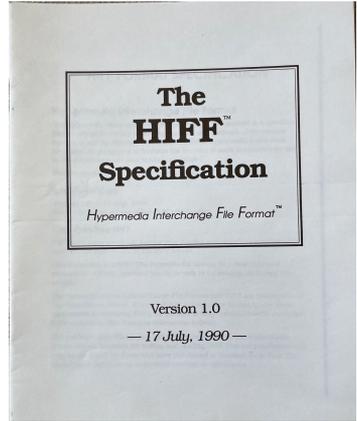
ConvertIt! is a utility that translates hypermedia documents from one environment to a form that will work in a different environment. This edition of ConvertIt! translates HyperCard® stacks which run in the Macintosh® environment into ToolBook® books which run under Microsoft® Windows™ 3.0 on IBM® PC and compatible systems.



Page from a ConvertIt brochure

ConvertIt's HIFF format was intended to be a common “hub” enabling movement of content among any of these environments, playing a role like the city of Memphis plays for routing FedEx packages.

I took the lead in writing a specification for HIFF. I was a complete newbie at that kind of project, but I did a lot of research into exemplars such as Microsoft's RTF (Rich Text Format) file format for styled text, Adobe's PostScript file format for documents, and the TIFF (Tagged Image File Format) file format for images. After a ton of work, we published a 22 page booklet detailing a draft 1.0 version of the specification.²⁵



To get *ConvertIt!* shipped, we built it using our draft version 1 of HIFF. But we then declared HIFF an open standard, hoping to have buy-in and eventual support for it by all companies with products in the *HyperCard*-inspired space. To encourage this, in January of 1991 we sent out invitations to all potentially interested parties we could think of to participate in a conference on evolving and supporting a HIFF standard.

We rented a meeting room in the Park Hyatt in San Francisco and put on a two-day event. About two dozen folks attended, representing 17 companies—including Apple, Aldus, Asymetrix (ToolBook), Authorware, DEC, IBM, Hewlett-Packard, Macromedia, and Sony.



Attendees at the HIFF conference

²⁵ View the HIFF spec and related material at <http://nocigarbook.com/hiff>

Among the attendees was Dr. Charles Goldfarb from IBM, known as the “father” of Standard Generalized Markup Language, or SGML. Dr. Goldfarb gave a detailed technical presentation on SGML and strongly evangelized that HIFF be based on SGML. Version 1, however, wasn’t, (though it might have been if I had known about SGML when I was coming up with the specification). Instead HIFF was most influenced by Microsoft’s Rich Text Format (RTF), which itself was influenced by the TeX typesetting language.

The energy at the conference felt pretty positive to us. We were pretty pumped up by the end. The conference concluded by voting to agree on three goals, which were announced in a press release. These included (1) advancing the format with participation from all interested parties, (2) all attendees recommending support of the format to their companies, and (3) exploring moving to an SGML-based format for the next HIFF version and seeking to place the format under the purview of a standards body.

Well, no cigar. That conference was the high water mark for HIFF. It was never advanced beyond the draft 1.0 version or extended beyond the original two products.

Dr. Goldfarb did invite me to make a presentation about HIFF to an SGML group meeting held at IBM’s Almaden research laboratory, which was quite an experience. And there was one more HIFF-related no-cigar occurrence. An industry publication ran a story on HIFF and our conference. On the back side of the page where our story was printed, there was an announcement of Tim Berners-Lee’s creation of the HTML standard (which *was* a subset of SGML), and the World Wide Web it supported.

* * *

While many things were going well at The HyperMedia Group, conflict was starting to arise among the three co-founders. Tay Vaughan was pushing the company to do some commercial products of our own in addition to our service business. His first proposed candidate

was to be a collection of clip art. The idea was to create a library of illustrations related to a variety of common topics. People creating *HyperCard* stacks, ToolBook books, Macromind Director animations and the like could copy art from this library to add visual interest to their creations.

We got as far as coming up with a product name (which I've forgotten), mocking up a package (this still being the era when software was sold in boxes), and doing a sprinkling of example illustrations. But it was difficult to clear time for our art and design folks to do work for the project, because their time was being fully used up by client projects.

This situation was partly a consequence of HMG having no financial reservoir. The only money that had ever been invested in HMG was the \$100 contribution put in by each of the co-founders. We were entirely at the mercy of our cash flow from client billings. And as our headcount kept growing, this became an ever-greater concern.

In fact, this led to the company instituting a quirky "variable salary plan" that I came up with. When we brought in a new hire, we pegged their nominal salary to what we believed was the current Bay Area market rate for their particular skill set and experience. But we told them that their actual pay for a given month could range between 80% and 110% of the nominal amount, dependent on the previous month's collections from client billings. If collections fell short of the business's monthly "nut" we could reduce the next month's pay proportionally, but not lower than the 80% floor. If collections more than covered the "nut" then a portion of the overage could bump up that month's pay by as much as 10%.

This focus on collections was likely influenced by my days selling radio time at WITL. The commissions I and my fellow sales folk earned were not paid on "sales" when orders were placed, but only on funds collected when advertisers paid their bills. This incentivized the sales staff to personally bug any slow payers to pay up.

On those occasions when HMG's collections didn't even bring in enough to cover the minimum pay (darn those slow-paying clients

who were always in a big rush to get their work but never in a rush to pay for it) and when we couldn't get away with slow-paying enough of our own bills to compensate, Eric, Tay and I would go scurrying to the nearest Wells Fargo Bank branch to get cash advances on our credit cards and deposit them into the company account to cover payroll. No paychecks for us, of course, in those months.

HMG was experiencing the cash flow curse run into by many growing but underfinanced businesses. You might remember we ran into it at *PC* magazine when our backer, Tony Gold, told us early on that the magazine was an artistic success but a financial failure.

Eventually HMG was able to get a \$100,000 line of credit from Wells Fargo, but they demanded personal guarantees from all three cofounders. Having this helped smooth out our cash flow, though we still kept the variable salary plan. But providing Wells Fargo the guarantee became a factor in Tay Vaughan's increasing discomfort with the business. He, and particularly his wife Karen, were nervous about the risk of losing their house if HMG's business went south.

Another major factor in Tay's discomfort turned out to be a mismatch of styles among the cofounders. Tay had kind of a "shoot first, ask questions later" approach to our business and projects. I tended to be more methodical and inclined to think through plans. Eric landed somewhere in the middle. Eventually the arguments that kept happening due to this mismatch became intolerable to Tay.

I didn't want Tay to leave HMG. Style mismatch notwithstanding, I really appreciated the talents Tay brought to our collaboration. But he had made up his mind. Eric and I worked out an agreement with Tay to buy out his interest in HMG over a four year period, hoping we could cover the payments out of earnings. With the matter settled, we came into the office the next morning to discover Tay had cleared out all his personal stuff from his office overnight. Bang! He was just gone. (This reminded me uncomfortably of when I had done pretty much the same thing leaving *PC* magazine.)

* * *

In this period, some big things also had been happening for me on the home front.

Eve very much desired to be a mother. Due to some earlier-in-life medical complications, Eve believed that becoming pregnant was unlikely. But we tried anyhow. When it became clear it wasn't happening, we began to discuss adoption.

There were a variety of approaches available to pursue adopting a child, including through nonprofit agencies, private adoption, and "fost-adopt" through government social services. We went to a lot of meetings educating ourselves about these possibilities. Our ages apparently made some of these options less likely than others to work for us. Eventually, we settled on the private adoption route. We selected a husband-and-wife team specializing in private adoptions, Marc and Bonnie Gradstein, an attorney and a social worker, to help us.

An early step in our process with the Gradsteins was to write a letter that would be relayed to birth mothers and couples who were considering placing an infant privately for adoption. We iterated repeatedly over every line of this, trying to craft the prose that would convince prospective birth parents that Eve and I would be the ideal couple to nurture and raise the child they were considering giving up. To accompany the letter we got our friend Greg McGee, both a Hypermedian and a neighbor, to take a photo of Eve, me, and our golden retriever Jonah that would make us look like a family that they could imagine their offspring becoming a part of.

The Gradsteins would advertise to mothers-to-be that families seeking to adopt could be found through their service. When contacted, they would inquire about the qualities that the mother-to-be hoped to find in an adopting family. Based on what they learned, they would send the mother-to-be a selection of letters and photos like the ones we provided.

Eve and I had our letter chosen by a young woman in Sioux Falls, South Dakota. After some back and forth via telephone, we flew to Sioux Falls to meet the woman and the baby's father, to whom she was not married. We took them out to dinner and spent the evening

figuring out if we were comfortable with one another. It seemed to go well because eventually we heard from the Gradsteins that she had selected us to adopt her child. As is not uncommon in private adoptions, we made arrangements to support the birth mother financially through the remainder of her pregnancy.

After some months the birth mother let us know that the birth was imminent. We had assembled a go-kit of things we would need to care for the baby—clothes, diapers, a carrier/car seat, and the like. So we grabbed this and headed to the airport to fly to Sioux Falls again. After arriving and checking into a hotel we proceeded to the hospital where she had planned to give birth. Outside the hospital, on our way in to find our birth mother, we were intercepted by an older couple that proved to be her parents.

The birth mother had not informed her parents of her pregnancy or her plan to give the infant up for adoption. However, when the birth mother checked into the hospital, somehow they had her parents on file as an emergency contact, and for some reason they called the parents to let them know their daughter was in the hospital and about to give birth. They went immediately to the hospital and apparently convinced the daughter not to give up the baby. So when Eve and I showed up, before we could even get in the hospital door, they found us on the way in and informed us the plan was off. We were in shock. The parents didn't want to talk further right then but promised they would come to our hotel and speak with us later.

Later that evening we met the parents in the hotel lobby. They explained that had they known of the daughter's pregnancy they would have strongly discouraged her from considering adoption. At the hospital, they assured the daughter that they would assist in raising the child and managed to change her mind. The parents expressed their gratitude for the support we had provided their daughter but were firm in saying things would go no farther. We were forbidden from attempting to speak to the daughter herself. Just to make this scene more unreal, as we were sitting in the lobby having this conversation, the band ZZ Top, with their comically long beards, who were doing a

concert in town and staying in that hotel, came marching by us to check-in.

Devastated, and unable to face dealing with all the baby paraphernalia we'd brought to town with us, we just boxed it all up and took it to a FedEx office to ship back to San Francisco, then flew back home.

The Gradsteins were sympathetic but reminded us that in private adoptions this kind of occurrence was a risk. They assured us they would continue to help us find a baby to adopt and that the right pairing would come along.

Over the next months, there were a few contacts that seemed like possibilities. One couple that came up from the Monterrey peninsula to interview us asked us such detailed questions of every aspect of how we would treat their birth child, including had we verified that there was no lead-containing paint in what would be the baby's room. We got back to the Gradsteins to share our feeling that we weren't sure this couple was really ready to give up their baby for adoption.

More time passed. We were becoming discouraged. Then the situation changed with remarkable suddenness. Around 10 on the morning of January 17, 1992, when I happened to be working at home, the Gradsteins called to say that a woman who had just given birth, at a hospital a couple of hours away, had picked us to adopt her baby, provided we could get to the hospital quickly.

That day, Eve, who was in a fellowship program with the Coro Foundation, was scheduled to be with her fellowship class visiting a collection of public art installations at multiple locations around the city. She didn't have a cell phone; they were still rare at that time. No one at the Coro office knew what locations the group would be visiting, or when. So I would have to wait until early afternoon to find her when the group was scheduled to finish their tour with a discussion at a conference center.

In the interim, I pulled together items for our baby go-bag, packed suitcases for Eve and me, and drove to await Eve's arrival at the post-tour discussion. I parked in front of the building, and when I saw the group arriving I ran to Eve to tell her she needed to skip the rest of the

event and come with me. As we got into the car I breathlessly explained the situation to her. Then we were on our way to David Grant USAF Medical Center, located on Travis Air Force Base in Fairfield, California. To add drama to this already stressful drive, the heavens opened over I-80 while we were en route and drenched us with rain.

Although we were headed to an Air Force hospital, the woman who had just given birth was not in the military. She had been admitted as an emergency case, and her baby was born very soon after her arrival. We had the impression that, though the woman was married and had other children, this child had not been fathered by her husband and she had concealed the pregnancy from her family. As soon as we arrived at the maternity area of the hospital we were ushered in to meet the birth mother. The first words out of her mouth upon seeing me were, "He's going to look just like you!" (Perhaps this had influenced why she chose us.) After a very brief conversation, she told us that she would indeed allow us to adopt her baby, then confirmed this to the hospital staff.

Shortly afterward, the birth mother checked out of the hospital against medical advice. We never saw or heard from her again. She had given a false name when registering, so we had no way to find her.

There Eve and I were, in the very unfamiliar environs of a large military hospital, in the totally unfamiliar role of being brand new adoptive parents of an hours-old infant. Ratcheting up the weirdness of the situation, the sound system in the hospital hallways kept playing the music from the movie *Top Gun* on an endless repeat loop.

We were given a room to be with the newborn and sat there marveling at him. Soon we realized we had to choose a name. We hadn't pre-selected a name. Eve had a book of names and began working her way through its list, asking the baby, "Are you Arthur? Are you Billy?" and so on through the alphabet, looking for any sign of response. The strongest response we got from the baby was when we got to names starting with the letter G. "Are you Graham?" got a kind of a gurgle and we took that as a sign.

The nurses encouraged us to leave the newborn in their nursery overnight and check into a nearby hotel for some sleep, advising us it might be the last good sleep we got for a while. Sometime in the wee hours, Eve popped awake in the hotel bed, woke me up by announcing, “Gabriel! He’s Gabriel.” then falling back asleep.

The hospital didn’t want to send Gabriel home right away. The doctors felt he needed another day of observation before discharge. So we took a break from hanging out with him to visit a nearby Target store and load up on baby supplies.

The following day they sent us home. We tucked Gabriel into his never-before-used car seat / carrier thing and headed back down I-80 for San Francisco. This time we had sunshine for the trip.

When we got back to our house, I carried Gabriel in his carrier, like a basket, up the 54 steps into our apartment, let the dog sniff this new arrival in our home, then plopped the carrier down on the dining room table, turned to Eve, and said, “*Now what do we do?*”

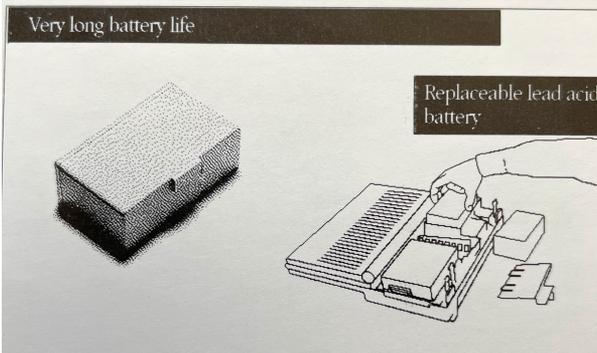
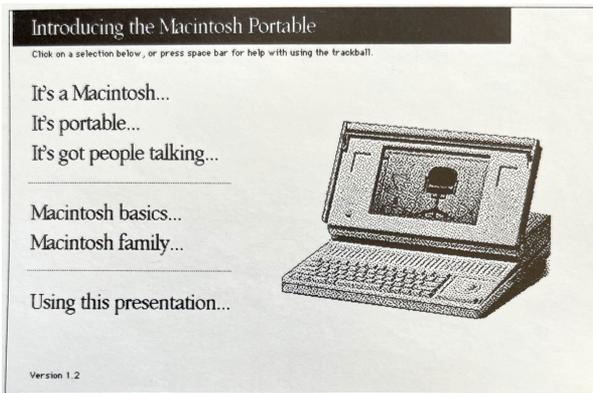


With our brand new son in the house, I took some time off from The HyperMedia Group to negotiate the transition to parenthood. Eve hastily made arrangements for an interim person to step in for her at Suicide Prevention so that she could take a few months of maternity leave. I didn’t feel it was possible for me to take that kind of leave from HMG though. After a week I was back at work.

Apple had assigned HMG the most substantial project they’d ever given us. We were retained to develop a self-introduction presentation for the still-secret Macintosh Portable. Apple’s first attempt at a portable wasn’t one of the slim and stylish PowerBooks and MacBooks that came along later. This was a Macintosh that weighed seventeen pounds and had a form factor like an overgrown portable typewriter. Much of its weight was because it used a lead-acid battery, like a tiny cousin of a car battery. This was what Apple believed was needed to

give its Portable the long battery life they wanted. Battery technology for portable computers was not very advanced in those days.

The self-introduction would be part of the software package installed on the hard drive of each Macintosh Portable. It would have two modes. One was to run continuously when the Portable was displayed by retailers, helping the product sell itself. The other mode introduced Portable buyers to the capabilities and benefits of the computer they had just purchased. It would run when they started it up for the first time.



Screens from Macintosh Portable self-introduction

Apple projects we had worked on before were for various lesser divisions of the company. This was HMGs first assignment creating work for Apple's main product line, and the first time working directly for its Creative Director, Hugh Dubberly.

The self-introduction would include a full audio track with a voice-over narrator. Choosing a narrator was a bit of a bump in the road for this project. HMG had included audio in projects for other clients, but never for a client as high-profile as Apple. We'd never previously been concerned with whether a voice actor needed to be a union member. From my advertising days, I was aware that major companies generally were signatories to contracts with talent unions. So there was some back and forth with Apple about whether we needed to present them auditions only of union voice actors. For this medium, we were ultimately told, they weren't obligated to use union members.

Apple was super-strict about the secrecy requirements for working on this project. We were given one pre-production Mac Portable to use as a photo model and for testing. But we were obliged to keep it in a locked room accessible only to team members working on the project. Occasionally we pushed the boundaries of this since we sometimes worked at home. So sometimes the "locked room" was the dining room of my house, where the Portable was concealed under a tablecloth when we weren't working on it. And sometimes we continued to work using the Portable while driving from our office down to the Apple campus in Cupertino. On those occasions, the person working would sit in the car with a blanket draped over themselves and the computer while someone else drove.

Apple was a demanding client and insisted on a high level of polish in our work. Since our self-introduction was part of the software package that would be installed on Mac Portables at the factory, it would be a component of the software "golden master" that would be released to manufacturing at 8 a.m. on a certain date. All of us on the project had been putting in long, sleepless hours to meet this schedule. On the final day before the deadline, Eric Alderman and I traveled to Apple to work in their test lab, where we kept squashing bugs

throughout the night, wrapping up what we hoped was the last one moments before the 8am zero hour.

We were so exhausted at that point that neither Eric nor I trusted ourselves to make the drive back home. So we drove only as far as the hotel closest to Apple's campus, where we checked ourselves in. The desk clerk may have clocked us as a couple of gay guys wanting the use of a room by the hour, but really we just needed to find a place to crash and sleep.

* * *

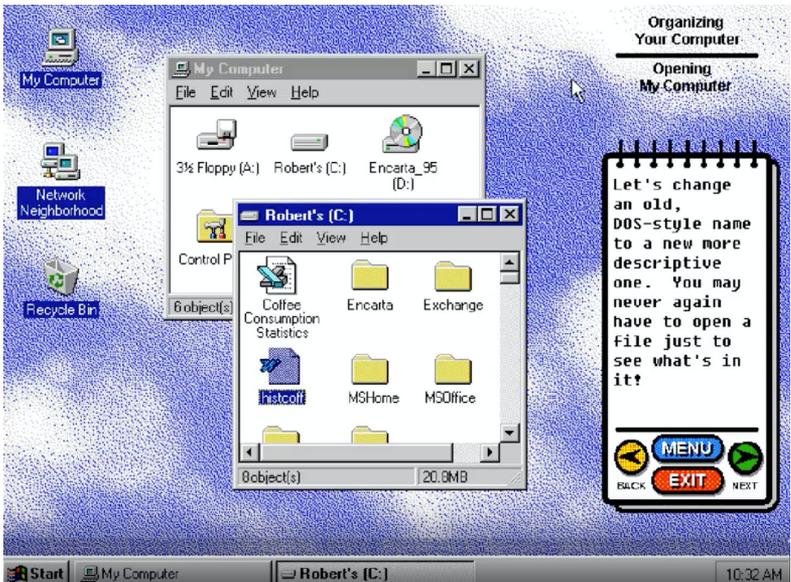
A similar but much bigger project came to HMG from Microsoft. They hired us to create the self-introduction for their *Windows 95* product. This was to be a major evolution of their *Windows* operating environment. It would introduce innovations such as the "Start" button. And it would incorporate user interface enhancements, such as long names for files. Altogether, the changes had the effect of making Windows notably more comparable to the Macintosh user interface.

Accounts from Microsoft insiders have told of the lengthy gestation of the *Windows 95* product within the company. There were apparently many delays from its original planned ship date. By the time HMG was brought in though, a real ship date had been settled on and the timeline they demanded for our work was extremely aggressive.

One reason HMG was awarded this project was our prior experience producing work in multiple languages. But Microsoft's requirement went well beyond what HMG had done before. We were to deliver the project simultaneously with text and narration in 14 languages.

Before accepting the assignment, HMG had some intense internal debate. It was clear from the scope of work and the timeline that near-superhuman effort would be required. On the other hand, we imagined successfully completing the project would be a compelling credential for HMG in future sales efforts. We surveyed the entire staff, asking if they were willing to commit themselves to what promised to

be a sustained period of grueling work. After some well-founded hesitancy, the collective answer came back “yes.”



Screen captures from HMG's Windows 95 self-introduction

Knowing that a lot of midnight oil would be burned, we took steps to help the team cope. For the length of the project, we hired a “concierge.” This person would be available to take on some of the mundane tasks of daily life for team members, freeing them to focus on the project. If team members needed clothes taken to the cleaners, items picked up from the market, and the like, the concierge could handle these chores for them. We also began catering meals for the staff (commonplace today in tech companies, but less so back then).

The project turned out to be even more of a grueling grind than we predicted. But HMG’s team came through and delivered a pretty impressive self-introduction for Windows 95, in all 14 language versions, on schedule.²⁶

Almost predictably, because HMG had taken the project on a fixed price basis, the Windows 95 project turned out to be a money-loser for the company. But we felt it had bought us a lot of credibility in making pitches to future clients, so we viewed that loss as an investment. Nevertheless, considering the sustained stress the project im-



Front and back of T-shirt HMG’s Windows 95 demo team created for itself after the end of the project

²⁶ View a video of the Windows 95 auto-demo at <https://nocigarbook.com/win95demo>

posed on the whole team, the collective sentiment around the company was, “Let’s never do that again!”

The HMG folks who worked most intensively on the project dubbed their area of the office “The Bear Pit.” After the project shipped they created a commemorative T-shirt for the team. The back of the shirt memorialized the Bear Pit designation in each of the 14 languages in which the demo had been made.

* * *

HMG’s multi-lingual capabilities continued to attract new business. DFS Group Ltd., the company operating duty-free stores in airports around the world, retained HMG to build a series of interactive training tools for their sales staff.

These trainings, each focusing on a segment of products sold in the stores, such as women’s fashions or electronics, would be offered in the key languages used by both staff and customers.



Projects like this were examples of an emerging major practice area for HMG, training. Over time, this would eventually become the company’s sole focus. IBM and the Equitable life insurance company were among the large companies that retained HMG for interactive training projects.

IBM commissioned HMG to develop training for veteran COBOL programmers on using a new programming tool it developed. Equitable hired HMG to create just-in-time training for its 4,500 agents on a new suite of Windows 95 software applications it was launching.

Another area I was eager for HMG to break into was online interfaces for financial companies. For months I bugged our sales team to bring in a banking client. I especially pushed them to try getting Wells Fargo, which was HMG's bank as well as my personal bank.

I had personal experience with the online banking tools Wells Fargo offered at the time. I considered these extremely lame. I was sure HMG could develop something so much better. Thus I was overjoyed when Ross Gillanders, our VP of sales, announced he had finally and spectacularly broken through at Wells Fargo.

HMG was being offered *two* significant online projects by Wells. One was to upgrade their consumer online banking experience. The other was to help create an ambitious business banking project they planned to launch.

As it turned out, the consumer banking project evaporated fairly quickly. Wells hadn't really figured out what they were prepared to invest to improve that area. As we gave them proposals, it became clear Wells hadn't yet developed an internal consensus to commit resources to online consumer banking. This was a big disappointment for me. I longed to realize a user-friendly online banking vision that was already well fleshed out in my imagination.

Wells's business banking project, on the other hand, had a massive commitment of resources.

Wells called it "Business Gateway." Beyond intending to provide online access to many of Wells' business banking services, Wells had negotiated partnerships for their Gateway to provide online access to a broad collection of business services. They'd signed up Boise Cascade to offer a full catalog of office supplies through the system. Dun & Bradstreet was signed up to offer online access to its credit reporting services. And so on. In essence, it was to be a mini-internet for business services, a couple of years before the actual internet was a thing.

HMG's part of the project was to build the "front end" that Wells business customers would interact with. Wells internal programming teams would build the integrations between our front end and their in-house mainframe banking systems. And the partner companies

would be responsible for providing the integrations between our front end and their systems.

Today, if you saw the specifications we and Wells were working out for Business Gateway, you'd say, "Hey, that looks like the internet, like the Web!" The vision included, for example, online delivery of forms to apply for a business loan, illustrated marketing documents for Wells loan offerings, and dense legal documents setting forth loan terms.

At that moment though, the internet and Web were still only glimmers peeking over the horizon. To the extent that the Wells people were aware of the emerging internet, they were convinced that business customers in particular would not consider it secure enough for financial transactions. If Wells folks thought about the internet at all, they thought it was irrelevant to their project.

To build our front-end for Business Gateway we turned to a software toolset that hadn't previously been a key part of our practice, Microsoft's Visual Basic. We didn't recognize it at the time, but Dave Wright, our technical lead on the project, was basically using Visual Basic to build an early, limited approximation of a web browser.

As is true of perhaps all software projects of any size, our work on the front end fell behind schedule. But Wells didn't complain about this because their part of the project—undertaken by an internal team that occupied the better part of an office tower floor—was falling even farther behind schedule.

Finally, a working proof-of-concept was finished by both the Wells and HMG teams. To mark this accomplishment a small celebration for both teams was held on the Wells team's tower floor. Commemorative sweatshirts were handed out to all. On the front, they had the Business Gateway logo. On the back, presumably referencing the late delivery, were the words "No blame. No fear."

Shortly thereafter, the whole Wells implementation team and their sweatshirts were gone from the tower floor. HMG, miraculously, was not sent packing and was kept on for the next phase of the project.

The office tower floor was repopulated by a contract consulting team from DEC, Digital Equipment Company. For every actual soft-

ware engineer, the DEC team seemed to have two officious project managers sporting clipboards and checklists and schedules. The DEC folks were not a pleasure for us to work with. In turn, they probably considered HMG's folks a bunch of undisciplined West Coast hippies.

Alas for DEC, the Wells side of the project turned out to be imperious even to their clipboards and checklists and schedules. After additional months of work and little progress to the goal, the DEC team in their turn were sent on their way from the tower floor. HMG, even more miraculously, was still not sent packing.

Somewhere in that period, Bill Baker, an early pioneer of personal computing, came by the HMG office to show us something he thought we would find interesting. I'd first run across Baker years earlier, during my visit to the First West Coast Personal Computer Faire. He'd come from his Indiana home to have a booth at the Faire for his tiny company, Information Unlimited Software, which sold a freeform database product called *Whatsit!*

Later, Baker had moved to the Bay Area and began selling the early word processor *EasyWriter*. He'd come to our office because he had a new business venture in mind and thought HMG might have some role in it. He wanted to demonstrate the technology that would underpin his vision. That technology was the World Wide Web.

We'd heard about the Web, but Bill's demonstration was my first actual exposure to it. On his laptop, Baker gave us a tour of various early websites, using the original NCSA *Mosaic* web browser. It was an eye-opener, and I became an immediate convert.

HMG never did get involved with the project Bill Baker had in mind. But we definitely decided the World Wide Web would have an important future role in our business.

After digging further into the web and its technology, we went to our Wells Fargo clients and told them that the web could be a solution to their needs. We recommended they scrap the work we had been building for them in Visual Basic and adopt the web platform instead. It was a solution that met their requirements and was already built out

and working. Absolutely not, they said. They still feared that business clients would not trust the internet with their financial activity.

When the team from DEC was dismissed, Wells also assigned the Business Gateway project to new leadership internally. The two folks who had been our primary contacts on the project were no longer involved. The person who took over was a higher-level manager at the bank. On meeting with this new leader we were relieved to hear that he still wanted HMG to remain involved with Business Gateway. However, he was bringing in a new outside resource to work on the project.

That resource turned out to be an East coast based company called Sapient, which was in the process of opening a San Francisco office. Sapient had a proprietary process called “RIP”—Rapid Implementation Prototyping. We were informed Sapient was going to do a RIP on Business Gateway for Wells Fargo, and HMG would participate.

Sapient’s RIP was a three-day process bringing together a cross-functional group of stakeholders in the project to work together quickly in arriving at a detailed specification of what was to be built. It involved a rhythm in which full-team sessions would alternate with small breakout group sessions. In the larger sessions, goals and requirements would be collected. Then breakout groups would go off for a short session to formulate proposals for the best way to meet a requirement. At the next full-group session each breakout group would make a presentation of their proposals. After incorporating any comments from the larger group, accepted proposals would be added to the emerging specification.

Overnight, after each session adjourned for the day, a second-shift Sapient team would take the accepted proposals and turn them into a rough working prototype for the group to evaluate the next day.

Wells invited key folks from HMG’s Business Gateway team, including Eric Alderman and me, to participate in the upcoming RIP meeting. Sapient initially objected. But Wells told them we had been involved in the project for more than a year and they wanted our input included. Sapient then demanded that HMG sign a nondisclosure

agreement with Sapient before we could participate. We considered doing so, but ultimately decided to refuse. We feared it might somehow place restrictions on our ability to do work for other clients. We told Sapient we were already under a contract to Wells that included nondisclosure provisions. We argued that was sufficient. Wells agreed, and Sapient reluctantly conceded.

Sapient's RIP process was a revelation. We were super impressed with how effective RIP was at moving the client organization through a series of decisions and ending with a clear outline of what was to be built in the next stage. We were so impressed that we put out feelers to the Sapient executives at the session about the possibility of HMG collaborating with them on future projects. Alas, they were stonily unresponsive.

After Eric and I provided our input during the RIP, HMG's involvement in the Business Gateway project pretty much ended. Sapient had it well in hand and Wells let them run with it.

As we had proposed earlier, Sapient's solution was to build on World Wide Web technology. To work around Wells's resistance to using the public internet, their solution involved licensing a proprietary offshoot of the *Mosaic* web browser and embedding it within a Wells-branded wrapper. Instead of dialing up public internet access points to connect (internet was still mainly dial-up over phone lines in those days) this Wells browser would dial into Wells proprietary access points.

To their credit, Sapient and Wells actually built out a usable Business Gateway system, in far less time than the previous failed iterations had taken. But in the end the product never launched. Events had overtaken it. In the time Business Gateway was in development, the internet and web had emerged as a viable channel for the type of online service Wells had envisioned. Companies like Dun & Bradstreet didn't need Business Gateway to offer their services online. They could just set up their own web site. Online banking, including Wells Fargo, moved rapidly from proprietary systems to the Web.

HMG never got the showcase banking project I'd hoped our Wells Fargo work would provide. But we did take one valuable thing away from our involvement with Business Gateway. Observing Sapient's RIP process gave us a whole lot of inspiration for improvements we could make to HMG's own working process.



Eric Alderman and I sat in alongside Wells Fargo's folks in the RIP (Rapid Implementation Prototyping) process conducted for Wells by the Sapient company. Both of us were quite taken with the process Sapient had devised. It was immediately clear to us that a process like RIP would be quite useful in future projects HMG might take on for other clients. On our return from the Sapient/Wells activity we began talking through what HMG might adapt from what we'd had the opportunity to observe. (And we sighed with relief that we hadn't given in to the demand to sign a nondisclosure agreement with Sapient.)

We began weaving the Sapient concepts in with HMG's own processes for initiating new client projects. It had been HMG's general practice, when invited to take on larger projects, to demur from submitting a cost and time estimate or fixed bid until the client participated in a separately priced specification phase providing a well-detailed itemization of the scope of HMG's expected work. While sticking to that philosophy, we began transforming what had typically been a two- or three-week project into a RIP-like, high-intensity event where all relevant client stakeholders gathered offsite from their workplaces for three uninterrupted days to devote their full attention to hammering out a specification.

Augmenting the concepts we acquired from our Sapient experience, HMG began building a set of proprietary software tools to increase the utility of the process. These included support for real-time cost estimating, so clients could factor in cost considerations when debating requirements. We also built a kit of parts (inspired by our *HyperCard* origins) that facilitated the rapid assembly of prototypes.

In drafting some marketing copy for our new process, I dubbed it “Accelerated Specification and Prototyping.” When I handed this copy off to a co-worker, they pointed out something I hadn’t noticed: “Hey, the acronym for that is ‘ASAP’”—in other words, the familiar acronym for “As Soon As Possible.”

Thus was born HMG’s branded ASAP process. We priced it at a flat \$30,000 for the three-day exercise and began marketing it as a point of difference compared to HMG’s competitors. One of our designers whipped up a cute little coffee cup logo for ASAP.



As HMG folks grew practiced at doing ASAPs, and kept refining our toolset, clients who participated really loved and praised the experience. Their glowing reviews flowed into our marketing materials.



ASAP Sample Agenda for Day One			
1.0	Introduction	2	High-Level Contents
1.1	ASAP Objectives	3	Development and Delivery Environments
1.2	Schedule Overview		
	Break		
	Mission and Objectives	Detail	Instructional



* * *

In some notable respects, The HyperMedia Group had been growing and prospering. *California Business* magazine had included us in its Multimedia 50 list of top interactive multimedia businesses in the state. When HMG’s revenue doubled from 1994 to 1995, *San Francisco Business Times* ranked us number 24 on its list of the one hundred

fastest growing Bay Area private companies. And HMG was honored with a constellation of industry awards for our work for Compaq, DFS, Intuit, Kathleen Brown's campaign for California Governor, Lotus, Paramount, Sun, and other clients.

Inspired by the examples of major ad agencies and consulting organizations, Eric Alderman and I had a vision of growing HMG to a multi-city, national and eventually global business. Imagining the benefits of scale, we hoped to do a "rollup" of existing interactive multimedia businesses in other cities. But HMG was constrained by the lack of capital to grow since its income pretty much just covered its expenses. We would have liked to raise venture capital, but repeatedly got feedback that VC investors had no interest in service businesses.

When we encountered companies we admired after collaborating with them on projects or subcontracting work to them, we'd float the idea of merger or acquisition. But we got no takers.

To execute the substantial rollup strategy we envisioned, we figured outside investment would be essential. However we decided to see what we could do without investment, using a sort of franchise model, as a proof-of-concept that could help convince potential investors. We put out the word that we were seeking partner companies to share our brand. It wasn't long before two companies took up our invitation.

One was a small advertising agency in St. Louis, Reuss & Reuss, that had ambitions to expand into the digital space. The other was a computer skills training company in Singapore, System Education Centre (SEC), that saw an opportunity to expand their service offerings. We entered into affiliation agreements with both. The HMG affiliation would, we hoped, give these companies credibility to market digital services to their local client bases. We would help train their people and make our intellectual property available to them. They, in turn, would pay HMG a commission on digital work they brought in, and would also subcontract significant portions of their projects to be done by our team.

Soon, both “The HyperMedia Group at Reuss & Reuss,” in St. Louis, and “The HyperMedia Group at SEC,” in Singapore and Kuala Lumpur, had been established. With our collaboration they developed marketing materials and began seeking clients for their new service offerings.

Eric and I and other HMG staff began making trips to St. Louis to help with projects and participate in sales pitches. And I flew to Singapore for a week to work with their people and to participate in a gala marketing event they put on to launch their new service. This trip also included driving up to Kuala Lumpur for a day to do a similar event at SEC’s office there. SEC also sent two staffers to spend a month each working in HMG’s Emeryville office, apprenticing with our team to grow their skills and learn our procedures.

Alongside these efforts we began drafting a business plan to pitch to venture capitalists in hopes that we could overcome the VC prejudice against service businesses. Unlike the current convention of pitching VCs with a “deck” of slides telling the company’s story, at that time VC pitches were typically done with an “executive summary” document that laid out the highlights of a more fully fleshed out business plan document, which would be larded with spreadsheets of projections.

You may remember that in earlier days HMG had the “cobbler’s children²⁷” problem of being unable to devote resources to developing our own marketing materials because our staff was fully engaged with client work. We now had a similar difficulty finding time to work on the business plan. Eventually we dealt with this by hiring a business plan development consultant to work on our “BP.” He would sit in lengthy meetings with us to draw out the raw information which he’d then take away and craft into the plan.

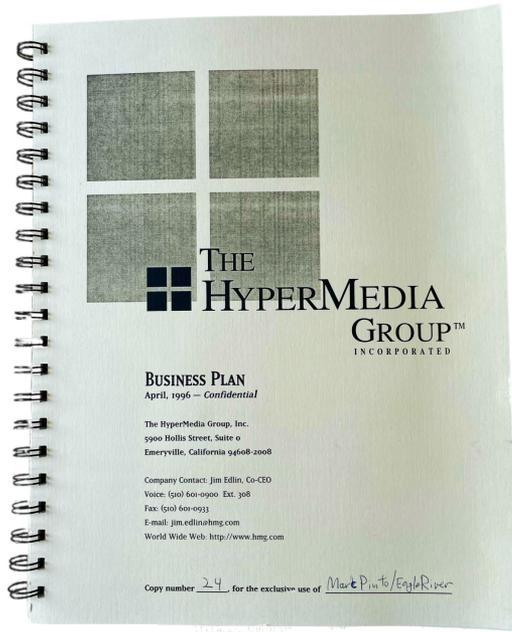
In dealing with our BP consultant’s output I could probably have used a reminder that “the perfect is the enemy of the good.” We’d get a draft from him and I wouldn’t think his writing was very good, or it

²⁷ A parable in which the children of the shoemaker go barefoot because he is too busy making footwear for paying customers to make any for his family

missed some key nuance. So I'd want to do edits, but I didn't have the time, or my persistent writer's block would get in the way.

Once I even arranged with Eve to go away for a long weekend, secluded myself in a Days Inn room, and tried to get to a finished draft. But even this push didn't succeed in getting to a version I felt good enough about to send out. The ever-expanding delays were driving my partner Eric crazy.

We finally got a version out in front of some venture capital companies, but the reception we got was cool.



Then something interesting happened. Some promoters acquired a Colorado company whose original money-losing business was outdoor advertising on ski lift towers. They refashioned this into Eagle River Interactive, which became a direct competitor of ours. Within two years, Eagle River did an initial public offering on NASDAQ, raising \$50 million, valuing the company at \$250 million.

We were boggled. This was a company in many respects comparable to HMG, but with a shorter history and a less impressive client list. We thought to ourselves, “Hey, if Eagle River could pull that off, maybe we can bypass the venture capital phase and go straight to an IPO.” (This was naive, because we didn’t realize we’d still need at least some investment to cover the costs of preparing a public offering.)

So we began reaching out to investment banks to explore the possibility. Thanks to the Eagle River example, there was enough interest to get us initial meetings with a few more-prestigious investment banks. But these discussions didn’t go very far.

Around this time, David Bunnell’s HyperMedia Communications, Inc. managed to do an initial public offering through a smallish, third-tier New York underwriting firm. This firm then invited David to be a bird-dog for them, directing other deal flow possibilities their way. Word of our IPO explorations got back to David, who invited himself over to our office to pitch us on working with the underwriters he was representing. But that company felt kind of sketchy to us and we decided we didn’t want to get involved with them. The meeting with David was, other than casual encounters, the first face-to-face conversation David and I had since COMDEX in 1982.

We did finally get one IPO term sheet for HMG from a third-tier, Los Angeles-based regional investment bank. This felt good for about a minute-and-a-half. But when we really dug into the details and discussed it with our attorney we decided the terms were too onerous to make any sense for us.

Meantime, we started to get potential acquirers sniffing around HMG. One guy, who wouldn’t reveal who he was representing, spent a fair bit of time romancing us and trying to get business details out of us. But it seemed we didn’t tell him the story he wanted to hear. We later learned his principal was the advertising agency Bozell & Jacobs, which did end up acquiring at least one company in our field.

Another guy, a former salesman at Oracle, arrived for his meeting with us driving a flashy, yellow Ferrari. We had reserved a parking space directly in front of our office for his use. But somehow nobody

told our office manger that this car belonged to someone meeting with us. Annoyed at what she concluded was an overly entitled individual brazenly usurping a space belonging to our company, she had the Ferrari towed while we were closeted in a conference room with the guy. When the meeting was done and Eric and I were walking the guy out to his car, we were shocked to find the Ferrari gone. Copious apologies ensued when we found out what had happened. We drove the guy over to the tow lot and paid the towing and storage fee. Perhaps unsurprisingly, we never heard from that guy again.

Yet another person who expressed an interest in HMG was Barry Schuler. He had been CEO of a hard disk drive manufacturer, Jasmine, and, before that, CEO of Cricket Software, a Boston company that did graphics software for Macintoshes. His story was that he wanted to get into the interactive multimedia business and was exploring whether his best option was to buy or build a company. We got fairly far along in conversations with Schuler.

As the possibility of working with Schuler began to seem more likely, we went into “due diligence” mode. Someone we knew connected us with Darragh Muldoon, the founder of Cricket Software, to do a reference check. She declined to comment though, on the grounds that her daughter was Schuler’s girlfriend (wife?). We interpreted that as not being a ringing endorsement. That, plus learning that employees of the now-bankrupt Jasmine company had made up t-shirts reading “Cricket and Jasmine - Dead and Barryed,” killed our interest in working with Barry Schuler.

Schuler eventually decided to build rather than buy, and launched Medior, Inc. Medior seemed to build up its business pretty quickly. One of its major clients was American Online (AOL).

Coincidentally, an AOL team had once flown out to interview HMG as a possible vendor. But that went sour when they realized we had done extensive work for Microsoft. Microsoft at that time was launching MSN—the Microsoft Network—which was viewed as an AOL competitor. Though HMG had nothing to do with MSN, AOL told us they

considered our work for Microsoft as a disqualification for working with AOL.

The Medior / AOL relationship grew so strong that AOL later bought Medior for \$30 million (another no-cigar moment!). Barry Schuler joined AOL, and eventually became its CEO.

* * *

At home on Waller St., when Eve's maternity leave from San Francisco Suicide Prevention was cut short by the abrupt early departure of her interim stand-in as Executive Director, there began a United Nations-worthy procession of nannies for Gabriel. Among them were Mariangela from Brazil, Oxana and Svetlana from Russia, Henrietta from England, and Margaret from Ireland. Gabe was learning to understand a variety of languages, even if only ephemerally.

Gabe also became a traveller from an early age. When Eve spoke at a conference in New Orleans, eight-month-old Gabe and I tagged along for a mini-vacation. One night while there, we brought Gabe along in his carrier when we went for an elegant dinner at Commander's Palace restaurant. Miraculously, with the carrier parked under our table, he slept through the entire meal.

Eve and I began touring preschools in early preparation for when Gabe would turn two-and-a-half, though as far as Eve was concerned there was only one choice, Pacific Primary, if Gabe was fortunate enough to get in there. Children of friends had attended there and sung its praises highly, and we loved its nurturing *gestalt* when we toured there. We were lucky; Gabe got in, provided he could become reliably toilet-trained before the term started. As the date approached it was a bit touch-and-go, but Gabe finally figured it out.

I began dropping Gabe off at Pacific Primary on my way to work in the mornings and picking him up again on my way home. Staying late at the office was no longer an option, with the hard daily deadline of Pacific Primary's 6:30pm closing hour demanding I get on the road

each afternoon with enough slack to handle whatever delays the Bay Bridge might throw at me.

* * *

While I was never anything close to the firehose of product and business ideas that my friend Blair Newman was, I did have some tendencies in that direction.

One example was what I called “Cards in Minutes.”

As soon as laser printers were generally available, I had started using them to print up quick and dirty business cards. In the beginning, this involved using a paper cutter to deconstruct the laser-printed letter size pages of card stock into pieces of standard business card size. But I saw an opportunity to productize this.

I imagined “Cards in Minutes.” as *HyperCard*-based software with tools for entering and formatting the contents of a business card, combined with laser-printable card stock that was micro-perforated to disassemble into individual cards after printing. The software would include a gallery of card designs that could be customized with the user’s choice of typography and with logos and images either from an included library or scanned in by the user. Of course there would also be refill packs of the perforated card stock.

While I discussed with my HMG partners making “Cards in Minutes.” a company project, they felt it wasn’t a good fit for HMG. So it became what we now refer to as a “side gig” for me. I thought I might do the *HyperCard* work myself and find a supplier for the perforated card stock, then take the all that to a software company who would finish turning it into a product, market it, and pay me a royalty. I imagined the cards as the first product in a future line of “Stationery in Minutes.”

I made a start at this project, including mock-up packaging. But the demands of HMG, and having a toddler at home, didn’t leave me enough time to take it all the way to completion or market it to potential publishers. Of course, as time passed, companies like Avery, the

label people, saw the opportunity and added card stock sheets with perforations for business cards to their product lines. (Later, these evolved to peel-off cards on a backing sheet, eliminating the telltale ridged edges the perforated cards had.) Soon, they also offered software for designing and printing cards onto their special stock.

Once again, no cigar!

Another product idea came to me when I grew frustrated at having to hand-address an envelope for a business letter after printing out the neatly word-processed letter itself. The letter, hewing to the traditional style, would have the recipient's full name and address at the top of the letter. Of course, it would be possible to create a separate, envelope-sized document with the recipient's address and perhaps a return address as well, and futz with the printer to adjust it for printing envelopes. But that was a lot of work. It often would result in a few failed trials and wasted envelopes before getting a usable one.

The solution I dreamed up was a dedicated little envelope and label printer, along with "smart" software that would observe the stream of data being sent to your main printer and, when it recognized what appeared to be a letter with a recipient address, would capture the address and offer to print an envelope on the auxiliary printer.

I described this idea to Blair Newman, who responded that he knew just the guy to work with me on pursuing it. At the time, Blair was consulting with Morrow's Microsystems, a small personal computer company founded by the personal computer pioneer George Morrow. Blair introduced me to David Block, an engineer with both software and hardware skills, who was then working at Morrow.

Like with Cards In Minutes, I offered to pursue the idea as a HMG project. But this idea too was deemed too far outside HMG's mandate. So David Block and I began working on it as a side-gig. We named our product *AddressMate*.

David started out by exploring possible printer mechanisms that would be appropriate for an auxiliary envelope printer and that would be inexpensive enough to allow us the \$199 retail price point we thought was the most we could charge for our product. These turned

out to be hard to find. There were mechanisms used in printers that printed bar codes on labels, cash register tapes, and the like. But most of these turned out to be either too expensive, too poor print quality, or otherwise unsuitable for printing envelopes.

In parallel, David started noodling out the software side. For the IBM PC compatible computers that were dominant at the time, there was a technology approach for auxiliary programs known as Terminate and Stay Resident, or TSR. Among other things, this approach was used for “desk accessory” type programs such as pop-up calculators, address books, and the like. Users would run a TSR program that would install itself in a corner of a PC’s memory then yield control back to the operating system so the user could launch a primary application program like a spreadsheet or word processor program. The accessory program would lurk in the background, monitoring the user’s keystrokes and waiting for the occurrence of the special key sequence (or other designated event) that would cause it to activate, like Ctrl-Shift-Y. When the special sequence was keyed, or event occurred, it would cause the background program to temporarily get control of the PC so the user could take advantage of its capabilities.

David began developing a TSR program that could watch any data that a primary program might send to a printer attached to the PC.

Once that ability to observe the print stream was in place, David’s next task was to create a pattern recognition algorithm that would notice if the print stream contained a character sequence that had a high probability of being the recipient’s name and address in a letter. If it recognized one, it would capture it. (An ability like this later became fodder for sarcastic jokes when Microsoft introduced a product called *Bob* that would attempt to offer users helpful assistance by popping up speech bubbles asking questions like, “Hey, it looks like you’re writing a letter. Would you like help?”)

The final piece of the TSR software was, when an address was recognized and captured, to pop up a window on the PC screen showing the recognized address and asking, “Do you want to print an envelope with this address?”

After a while, David, who is both a brilliant engineer and exceptionally diligent, had a demonstrable prototype.

Around this time we heard about a company called Tidemark. It turned out they were a startup building their whole business around auxiliary printers. We set up an appointment and went down to visit their offices in the East Bay city of Fremont. We wanted to learn how far along they were compared to our efforts, and also to explore if there was any potential to join forces.

Unlike David and me, who were just two guys working nights and weekends on the idea, investor-funded Tidemark had a full-time staff, a typical Silicon Valley-style office, and all the accoutrements of an actual company. They'd made a fair amount of progress and had working prototype hardware for their Address Express product²⁸.

The Tidemark folks, pretty full of themselves, seemed to have no interest in working with us. For our part, we thought the software David and I had come up with was better than what Tidemark showed us. We also thought Tidemark's planned pricing was too high.

Perhaps we were right about that, because eventually Tidemark flamed out without ever launching their product.

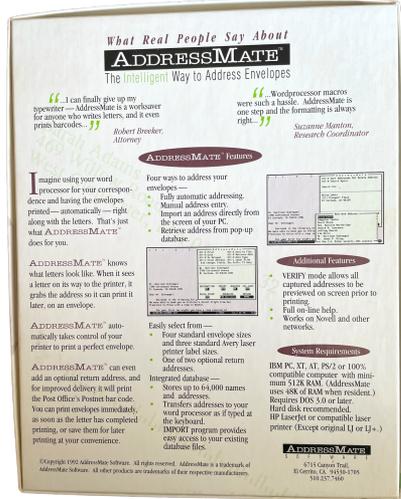
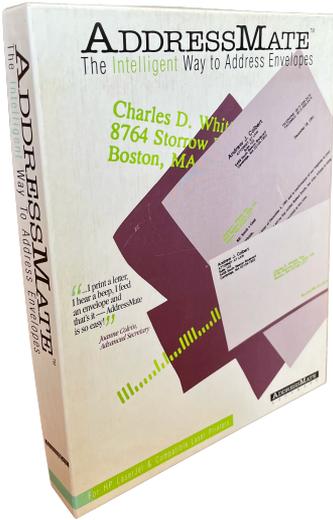
A lesson David and I took from observing Tidemark was that maybe we didn't want to be in the hardware business. We couldn't get to a point where the economics made sense. So we decided to turn *AddressMate* into just a software product that users could use with whatever printer they wanted.

With David doing most of the work—my contribution was tweaks to the user interface and documentation—we got *AddressMate* to the point of being a shippable packaged software product. David got nice boxes made up, disks duplicated, and all the rest. I was mainly a cheering section, though Eve and I spent at least one afternoon in David's garage shrink-wrapping boxes.

AddressMate did sell a modest amount of boxed software. In the end, there was a "cigar" of sorts, but it was David Block who (de-

²⁸ See a video of it at <https://www.youtube.com/watch?v=LlOlPCg5COI>

servedly) collected it. A company called CoStar came along and finally made a go of selling auxiliary printers, primarily for labels. David convinced CoStar that they needed *AddressMate*-like software. As a result, they hired David in a senior engineering leadership position.



The boxed version of AddressMate

CoStar didn't acquire the AddressMate business itself. So I didn't get anything out of the deal. But AddressMate became the foundation of future versions of CoStar's proprietary software for their printer.

Over time, CoStar got acquired by Dymo, then Dymo got acquired by Newell Rubbermaid. David Block continued to work there through these transitions in a senior role. So maybe we count *AddressMate* as at least a "cigarillo." But it was David who got to enjoy it.

To this day, Eve remains a little bitter that we never saw any upside from *AddressMate*. I believe all the effort that mattered was David's though, and he deserved the modest reward it yielded.



Back at HMG, things were a little bumpy.

We continued to be awarded interesting projects from prestigious clients, such as a CD-ROM based electronic “Advice Nurse” for the Kaiser Permanente health system.

Kaiser had protocols used by their phone-accessible human advice nurses. When someone dialed in and described a complaint to a nurse, the nurse relied on asking a pre-specified series of questions which, depending on the answers, would branch to other questions. In most cases, this process would ultimately lead to a recommendation, which could be for a home treatment, further phone conversation with a doctor—possibly followed by a prescription, scheduling an appointment with a clinician, or being sent straight to a Kaiser emergency department. In this process, of course, the nurses’ own clinical training and judgement could inform, and sometimes override, the established protocols.

Kaiser’s assignment to HMG was to work with Kaiser physicians and educators to adapt these protocols for use by lay patients rather than trained nurses. As an alternative to phoning into the Advice Nurse line, a Kaiser subscriber could load the advice CD-ROM into their personal computer and be presented with an interface that would somewhat replicate the dialog process used by the advice nurses. At the end of an interaction, the user would be presented with a recommended next step from a set similar to those available from the Advice Nurses staffing the phone line.

When this project was ready for demonstration, Kaiser invited HMG to present it in a booth at their annual event showcasing all the research projects undertaken within Kaiser. We were impressed with the large quantity of such projects. Booths for the many research projects filled up a large hall in the Oakland Convention Center. HMG folks felt honored to have our own small role in Kaiser’s apparently vast tapestry of activities advancing the frontiers of medical care.

Another area HMG got into was politics. When Kathleen Brown, sister of the former (and subsequent) governor of California, Jerry Brown, launched her own campaign for California Governor, HMG

was commissioned to develop interactive kiosks to support her campaign.

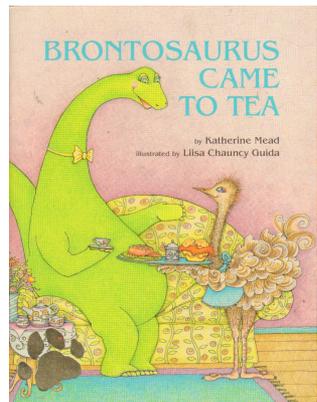
These kiosks were to be placed at various high-traffic locations around the state. Like HMG's earlier *Speak 92* project, these relied on laser disks to provide video. Kathleen Brown was recorded doing short video segments. Each presented her views on a particular campaign issue, such as taxes or schools. HMG wove these video segments into a touch-screen user interface allowing people to step up to the kiosk, touch their choice from a list of issues, and see video of Kathleen Brown expressing her views and positions on that issue.

Brown's kiosks were among the first forays of political campaigns into interactive media, and got a lot of press coverage as a result.

Possibly HMG's work for the Brown campaign helped get us the invitation from the California Democratic Party to do the California website for Bill Clinton's 1996 reelection campaign. That was the high point of HMG's political work. When Clinton came to campaign in the Bay Area, Eric Alderman and I got to attend a big campaign event, where we each had a photo op shaking Clinton's hand. During my handshake, Clinton admired my necktie (I was later told was a common conversational gambit of his), a fundraiser for the Save The Children nonprofit that featured art by a schoolchild.

But it was another emerging practice area that grew into major significance for HMG and ended up changing the course of the company.

The educational publishing company Silver Burdett & Ginn (a subsidiary of Simon & Schuster—*deja vu!*) commissioned HMG to develop an animated, CD-ROM version of the children's book *Brontosaurus Came to Tea*. This became the beginning of a lengthy collaboration on educational CD-ROMs, including the *Top Hat Tales* series and *AstroWord*, a 17-title phonics spelling, and vocabulary series aimed at K-6 students.



All this work kept HMG's creative and technical staff plenty busy. Regrettably though, it wasn't leading to profitability and financial stability for HMG. In fact, the company's financial situation was becoming ever more dire. We had still not brought in any investment capital beyond the \$300 originally put in by the founding partners, and the company really was in need of some.

Driven by a philosophy of transparency, in our biweekly all-hands staff meetings I took to making regular reports reviewing income, cash and credit reserves, and expenses. Leaning on the old idiom for financial peril, "the wolf is at the door," I would summarize my report with a crude drawing of a wolf, HMG's door, and a line between them showing the number of weeks that our cash flow analysis suggested currently separated the two.

This shtick was good for transparency, but it turned out not to be strategic. The nearer the wolf in the drawing moved to the door, the faster that staff members started sending out resumes, presumably fearing the likelihood of impending layoffs. We lost some key contributors this way.

Since I had set myself up as the deliverer of unwelcome news, staff members increasingly started seeing me as the "bad guy" and my fellow Co-CEO Eric as the "good guy."

This was exacerbated because I wasn't fully on board with the pivot toward education and training. It was the kind of work we seemed to be able to get, but it wasn't an area that I personally was very interested in, and I didn't feel that it was a big enough opportunity to carry HMG toward the kind of success we'd seen happen with Eagle River and Medior.

I wanted HMG to build on its "digital agency" roots and push harder into website work. Unfortunately, with the loss of Wells Fargo's Business Gateway as a demonstrable sample of our capabilities in that area, we didn't have much example work to show prospective clients. Our sales team was having no luck bringing in substantial website projects, despite my continuing exhortations to them.

To overcome our lack of credible web examples, I proposed that HMG undertake a web project on our own account. In the past, I'd been reluctant for HMG to do entrepreneurial projects like the clip art product. I'd felt they were a distraction. But in the current situation I felt the benefit of gaining both a solid work example and a potential new revenue source was worth taking a shot.

The proposal I came up with was an online marketplace for freelance work—Freelance Exchange, at the domain fex.com.

It was a website where freelance workers—artists, writers, programmers and the like—could post profiles and work samples. Also, seekers of freelance help could post requests for proposals on the site, either generally or to specific freelancers. Interested freelancers could then use the site to submit proposals in response.

Evolved versions of the site, I suggested, could act as an intermediary throughout a freelance engagement, facilitating transfer and review of work along with invoicing and payment.

What my proposal outlined was pretty much what was later introduced by eLance.com and then subsequently

WEB SITE CONCEPT...

FREELANCEXCHANGE

- www.freelanceexchange.com
- **Dynamic, transactional site**
- **Multiple revenue streams**

 THE HYPERMEDIA GROUPSM

OFFERINGS FOR FREELANCERS

- **Market their capabilities**
 - in a structured form
 - with optional freeform support
- **Explore & respond to RFPs**
- **Facilitate performance and delivery of work, and receipt of payment**
- **Access useful content**

 THE HYPERMEDIA GROUPSM

OFFERINGS FOR CLIENTS

- **Learn about potential resources**
- **Post RFPs and receive responses**
- **Facilitate management and receipt of work, and receipt of payment**
- **Access useful content**

 THE HYPERMEDIA GROUPSM

Slides from my fex.com pitch

replicated by oDesk.com. (These two businesses eventually merged to become Upwork.com.)

I put together a presentation about Freelance Exchange and pitched the idea to an all-hands staff meeting. To my disappointment, it didn't meet with much enthusiasm. What it did accomplish though was further widen the gulf that was growing between me and my co-founder and co-CEO, Eric.

Eric seemed to view my fex.com pitch as evidence of our increasing lack of alignment about where the company should be going. Eric was already displeased with me over the excruciatingly long time I was taking to finalize our business plan so we could get it out to potential investors. In some ways, what was happening was an echo of the discord that led to my rupture with *PC* magazine—a clash between my tendencies to perfectionism and the business's practical needs to move forward.

All this finally built up to the point where Eric informed me that he no longer wanted to work together with me. He wanted to become HMG's sole CEO. He suggested he had the support of key staff members in making that change.

Over the next few days, I met individually with these key staff folks—our CFO, our VP of administration, and our creative and technical leads. They all told me they supported this plan and couldn't be persuaded to change their minds. It became clear that HMG and I were going to part ways.

We had an example of how to structure my departure from when Eric and I bought out Tay Vaughan's interest in the company. This time, however, the stakes seemed bigger, so there was more process.

I retained an attorney from one of the bigger firms in town to represent me in negotiating my exit. HMG's regular attorney recused himself from involvement in the process except for representing the business itself, so Eric also retained personal legal counsel to negotiate the separation.

The general plan was to buy out my interest in HMG with installment payments over a four year period. Because I knew HMG was in

precarious financial shape, and I didn't want to put extra strain on its finances, we agreed that in any month where Eric deferred part or all of his HMG salary, I would accept a proportional deferment of my monthly buyout installment. Our agreement also included provisions that if HMG had a "liquidity event" (be acquired or go public) before my buyout was complete, whatever portion of my interest I still retained would be acquired from me at the new valuation established by the liquidity event.

The outcome of all this was a multi-inch thick pile of documents to sign, along with some not-insubstantial invoices from three law firms.

While the lawyering was going on I was under instructions from my attorney to continue going in to the HMG office as usual, in order to avoid any suggestion that I was abandoning my position at HMG. But I no longer had any active role in HMG's work. So I spent my workdays closeted in my office, digging through ten years worth of accumulated physical and digital files, organizing things to pass on to others, discarding whatever was no longer of value, and putting aside things that had personal meaning. It was a lonely and discouraging time.

Ultimately the pile of documents got signed by all parties and my tenure at HMG came to an end.

I sent out an email to all my contacts announcing the change. I told people I believed HMG would continue to excel in its areas of specialization and I encouraged everyone to keep on bringing their appropriate projects to HMG. I went on to say, in part...

In the last year, however, I've grown more and more excited personally about opportunities for creating entrepreneurial businesses on the Web, rather than just building sites for others. We looked closely at expanding HMG's business model in this direction, but ultimately chose not to dilute HMG's clear focus as a service business. Since my own enthusiasm for the potential of Web-based businesses remains high, I decided to leave HMG and pursue these opportunities on my own.

So I'm starting a new company (#4 - I never learn!). Its working name is Websites Mondial. Its mission is to identify and exploit opportunities arising from two broad trends I believe the Web is kicking into overdrive:

-- Expansion of historically-local commerce activities to wider geographic horizons.

-- Migration of historically "made-for-sale" commerce activities to a "made-to-order" model.

I'm convinced each of these trends is creating inviting opportunities for Web-based businesses. Where the trends overlap, the potential is even more inviting. I aim to create Web sites in this space that have revenue models based primarily on transactions rather than advertising or subscriptions.

Under Eric's leadership HMG went on to double down on its focus on interactive education and training. Eric and CFO Kari Gothie, who'd come to HMG after completing an MBA at Berkeley's Haas School of Business, began exploring potential acquirers or merger partners for HMG that were aligned with this new focus. As the likelihood of such a transaction increased, they were able to arrange private financing of a bridge loan to keep HMG afloat while waiting for one of these possibilities to close.

The company that finally decided to acquire HMG and operate it as a subsidiary was Wilson Learning, itself a U.S. subsidiary of a Japanese public company. The sale closed about 18 months after my HMG departure. The investors who'd provided the bridge loan about doubled their money in the space of a year. Thanks to the good work that went into structuring my buyout agreement, I was able to enjoy a fair share of the acquisition proceeds. In terms of this memoir's title metaphor, my share was nowhere close to the kind of "cigar" I hoped to be awarded if one of my grander visions, like Global Micro, had been realized. But this was sure better than the proverbial poke in the eye with a sharp stick. Let's say I got at least a few puffs of a Cohiba.

It did gladden my heart that a healthy chunk of the acquisition proceeds went to the many HMG staff who had stock options, especially those with enough longevity to have endured the days of the old “variable salary” plan. Eric, of course, made out the best, what with retention bonuses and the like meant to keep him around after the acquisition.

Wilson’s acquisition deal included an “earn-out” element. Additional payments were to be made to HMG shareholders after one year if HMG achieved specified revenue and profit targets in that year. Unfortunately, in an odd echo of what had happened with Wordvision and IBM, Wilson Learning had management changes shortly after the HMG acquisition. The new leadership was not as enthusiastic about HMG’s potential as the previous leaders had been. As a result, investment Wilson had promised to make to grow HMG was never made. Without that investment, the targeted numbers for the earn-out were never achieved, and I and the other HMG shareholders never saw a dollar of the contingent payments.

After a couple more years, Wilson absorbed HMG into its main business and HMG ceased to exist as a separate entity.

13 - Interlude After HyperMedia

My daily commute over the Bay Bridge to Emeryville had ended. The next phase of my work life would take place in my home office on Waller Street.

While still at The HyperMedia Group, I had begun experimenting with Cold Fusion, an emerging software tool for developing interactive websites. I now decided that Cold Fusion was the tool I would focus on, build skills in, and use for the web development I wanted to do. Cold Fusion's straightforward elegance grabbed me in the same way *HyperCard* had done a decade earlier. (Software and tools for building websites, especially interactive ones, were still in early stages. I found the two most popular toolsets, Perl and PHP, both crude and unintuitive compared to Cold Fusion, and I had little appetite for dealing with either of them.)

Something I called "Move-in Express" was the first idea I prototyped. The opportunity I saw was simplifying the process for people moving into a new residence. This potentially involves interacting with a multiplicity of organizations—utilities, movers, services. I envisioned a website that could provide a sort of one-stop-shopping for all the busywork of moving. At the same time, it could provide a marketing opportunity for businesses who had things to offer people who were about to move.

In each geographical area it served, Move-in Express would establish relationships with as many landlords and relevant service providers as possible, interfacing with their business systems where it could. Someone preparing to move could then visit the Move-in Express website, sign up with their new address, and take care of a whole series of move-related steps without re-entering their data.

For example, they could:

- order electric service (and perhaps cancel their old service)
- do the same for other utilities if needed—gas, water, etc.
- solicit proposals from moving companies, if desired, or alternatively reserve a U-Haul truck or trailer
- file a postal change-of-address
- view offerings from cable and satellite companies, signing up if desired
- ditto for newspapers and magazines (still important in those days)
- see offerings for cleaning services
- receive introductory coupons from local businesses
- and so on

All this would be free to the person moving. The site would make money from companies marketing to those people.

I wrote up a proposal, mocked up a prototype,

MOVE-IN EXPRESS Confederate Point Apartments
On The Ortega River

WELCOME

Please review the information and enter your unit number below, then click NEXT.

Welcome to Move-In Express™

Now that you've rented your new apartment at Confederate Point Apartments, let Move-In Express help you arrange everything else so you can *move right in, get connected, and get comfortable!*

Move-In Express offers you quick, one-stop ordering and information for ...

<input type="checkbox"/> Moving	<input type="checkbox"/> Local Phone
<input type="checkbox"/> Electric Service	<input type="checkbox"/> Long Distance Phone
<input type="checkbox"/> Cable / Satellite TV	<input type="checkbox"/> Cellular/PCS Phone
<input type="checkbox"/> Housecleaning	<input type="checkbox"/> Newspapers
<input type="checkbox"/> Insurance	<input type="checkbox"/> and more...

To get started, enter your new apartment number:

About you

MOVE-IN EXPRESS Confederate Point Apartments
On The Ortega River

TENANT INFORMATION

Please review and complete the information below, then click NEXT.

Apartment: 301

Name:

New Address: 4455 Confederate Point Road, Apt. 301
Jacksonville, FL 32210

Prev. Address:

Employer:

Employer Address:

Work Phone:

Temp. Phone:

Welcome Cable TV

MOVE-IN EXPRESS Confederate Point Apartments
On The Ortega River

CABLE / SATELLITE TV

Click your choices of service and options below, then click NEXT.

MediaOne Cable Service
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut.

Basic cable (00 channels): \$00.00 / month, \$00.00 installation

Add 00 cable networks: \$ 0.00 / month

Add HBO & Showtime: \$ 0.00 / month

Call about more options. Best time:

DirecTV Satellite Service
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut.

Basic plan (00 channels): \$00.00 / month, \$00.00 installation

Add ipsum dolor sit amet: \$ 0.00 / month

Call about more options. Best time:

Tenant Info Electricity

Screens from my Move-In Express demo, showing an example apartment complex

and sent these out to a handful of folks I thought might be interested in getting involved. But nobody bit. In all honesty, I didn't make a full-court press for Move-In Express. When my trial balloons didn't elicit any interest, I didn't persist. I set the idea aside.

If the funding and support environment for entrepreneurs that exists today had been around back then, I probably would have pursued Move-In Express further. I'd have done more research to put numbers around "total addressable market" and revenue potential, and put together a pitch deck. To gauge customer interest, I might also have put up a "false door" landing page, then run some Facebook or Google ads to bring it traffic. I might also use one of the services that help entrepreneurs match with co-founders. And even apply to an incubator or accelerator like Y Combinator. But none of that infrastructure existed back then. Without that supportive environment, I didn't have the passion to take Move-In Express beyond the concept stage. It's always been difficult for me to advance projects without at least one collaborator.



The next idea I began pursuing came right out of my thesis that the Web would enable historically-local activities to expand to wider geographic horizons. An example of this was the garage sale. (I had a lot of experience with these since Eve was an inveterate garage sale shopper.) I called the idea "The World's Exchange" and registered the domain twex.com for its website. In some ways, Twex was a cousin to the Freelance Exchange idea I had tried to get The HypeMedia Group to pursue. The "World" part of the name came out of the global scope I had in mind when I named my new-business-to-be Websites Mondial (using the French word for "global") and bought the webmond.com domain.

The core premise of Twex was enabling anyone anywhere in the world to sell something—be it a good or a service—to an interested buyer anywhere else in the world. This meant that the website would

provide capabilities to overcome barriers of distance, language, borders, and currencies.

It would be many years before the idea of a startup building a “minimum viable product” or MVP would become a commonplace in the entrepreneurial world. Too bad, because I could have used a lot of encouragement in that direction. My Twex vision was grandiose and imagined solving a whole constellation of hard problems.

I wanted Twex to take as much friction as possible out of transactions that might well be international. If seller and buyer spoke different languages, I imagined Twex doing the translation to let them communicate. If seller and buyer used different currencies, I wanted Twex to handle the details of foreign exchange. If seller and buyer operated within different legal regimes, I envisioned Twex providing an intermediary middle ground. If goods needed to be shipped from seller to buyer, Twex would offer interfaces with shipping companies to make it happen, generating any required customs documentation and even providing materials for packing.

To enable parties to embark on a transaction with confidence, I saw Twex providing escrow services so that a seller wouldn't receive a buyer's payment until the purchased thing had been received and accepted. Twex would also include a public reputation system so that trading parties could build a record of reliability.

In other words, there was an enormous amount of stuff to figure out—an overwhelming challenge for one guy working alone in a home office. My research was all over the place. I looked into what tools were available for language translation. I requested sample product from companies that sold packing materials. I began educating myself about customs forms.

Somewhere in this process that, in retrospect, feels like wheel spinning, I heard of a company that was building a sort of digital garage sale called eBay. Because of the name, I mistakenly assumed that this company was locally focused on what Bay Area folks refer to as the “East Bay”—the cities on the eastern side of San Francisco Bay. “This isn't a potential competitor to worry about.,” I thought. “Their

scope is very local and mine is the whole world,” I thought. (This was a misapprehension. It turns out eBay is actually a contraction of Echo Bay, the name of founder Pierre Omidyar’s previous consulting business. It had no particular focus on the East Bay.)

eBay was, in a way, sort of a minimum viable product of my grand Twex vision. It wasn’t internationalized. Payment facilitation wasn’t provided, though third parties such as PayPal, later acquired by eBay, emerged to fill the gap. Integration with shipping services like US Postal Service and UPS were added in well after eBay’s launch. But getting eBay’s minimal (from my perspective) product launched was the initial step on the path to a very successful business.

In the couple of decades since, no service has emerged with the global scope I envisioned for Twex. Perhaps this is an indication of just how difficult a goal I had set for myself. Or perhaps it’s an indication that the opportunity I imagined isn’t appealing enough to entice anyone else to address it. So, no cigar. Since I never so much as mocked up a prototype, I’m not sure I even deserve a “close, but...” for Twex.

I held onto the twex.com domain for many years, thinking someday I’d get around to doing something with it. With the passage of time, pronounceable four letter domains became scarce and a little valuable. A few years ago I got an offer to buy it and finally decided to let it go. To my dismay, the buyer used it for a Chinese porn site. But last I checked, there’s no longer any site at that address.



Home life continued to be dominated by parenthood. Gabe’s three years at Pacific Primary felt like they flashed by. We couldn’t have asked for a better preschool. All the teachers and staff were so caring and nurturing. The collection of parents, assembled like a dinner party by the head of school, was an eclectic mix of delightful people. Their children were a wonderful peer group for Gabe. There was an inspiring amount of art and music activities included in the curricu-

lum. An example of the general atmosphere at Pacific Primary is that every Martin Luther King day the school would conduct a peace march. The kids would make signs, then parade around the neighborhood singing and chanting for peace and justice. Many parents, including Eve and me, marched along.

By Gabe's third year it became time to figure out what his next schooling step would be. We toured many elementary schools, both public and private.

A school we kept hearing about was Nueva. It was down on the Peninsula and not especially convenient to us, though there was a bus. It was focused on "smart" kids and attracted a lot of Silicon Valley families. Their application process included an IQ test, which Gabe took, and he scored 132, so he was definitely a candidate to get in. Appealing as it was though, it was expensive and inconvenient, so we decided not to apply.

A public school was our preference, both for economic and philosophical reasons. But San Francisco's complex lottery system for public school placements made it difficult to choose a school and be confident of admission. There were a handful of possibilities that felt like good choices, but these schools drew many more applicants than could be accommodated. The lottery could easily end up assigning Gabe to a school that we didn't feel would be a good place for the next step in his educational and social growth. So we wanted to have some private school options as fallbacks, but that was chancy too since all those we liked were also far oversubscribed by applicants.

As the selection days approached for both public and private possibilities it was a nail-biting time.

Our friend and neighbor Michael Farmer, whose son Ian was also about to make the move into elementary school, devised a good luck ritual and invited us to participate with him. Michael had purchased a bunch of basketballs. On each one we inscribed the names of Gabe and Ian. Then we went around to each of the candidate schools, approached the fence around each school's athletic field, and had one of

the boys toss one of the inscribed basketballs over the fence and onto the field.

The school gods, alas, did not reward our supplication, at least in Gabe's case.

The public school that the lottery assigned Gabe to wasn't one we felt would be a good choice for him. And none of our private school applications was selected either.

Of course there were waiting lists and subsequent rounds of the lottery as schools figured out which of their selected kids would actually enroll. Things weren't settled yet, and the nail biting continued.

The public school program we had named as our first choice in the lottery process was the Japanese Bilingual Bicultural (JBBP) program hosted at Clarendon Elementary School. Why Japanese? Not that we had any specific attraction to Japanese language or culture, though we did believe that any bilingual program, and especially one with an Asian language, would be a positive thing for Gabe.

Our choice of JBBP was for a more prosaic reason. Our next-door neighbors, Susan and Stacy Allen, had two sons. Their older son, Robby, had been attending JBBP for three years. JBBP was known to be a strong elementary program and had far more applicants than available spaces. The Allen's younger son, Nicky, Gabe's age and a good friend of Gabe, got admission to JBBP as a sibling.

That year, tragedy had struck the Allen household. Stacy had been afflicted with an aggressive cancer, and had died near the beginning of the year.

Gabe's odds of getting a seat at JBBP through the subsequent lottery rounds and waiting list process were very small. But Susan, Nicky's mom, approached the JBBP principal and told her it would be a help to Nicky, still reeling from the recent loss of his father, if his friend and neighbor Gabe could join him in attending JBBP. The principal, eager to support the Allen family in their time of loss, chose to bypass the school district process and jump Gabe to the head of the line for the first seat that opened up. Soon we got word that Gabe was in.

The horrible fortunes of the Allen family had somehow perversely created a stroke of good fortune for our family.

And it *was* good fortune for Gabe. His six years at JBBP was a generally quite positive experience for him. Like at Pacific Primary, the teachers were caring and nurturing. Also like at Pacific Primary, Eve and I became involved in parent activities. I volunteered in the computer lab, where each class had an hour a week doing projects on a bank of Apple II computers. We also worked on JBBP's annual fundraising auction, for which I developed a computer program volunteers could use to enter in and track the auction items. Eve and I both would chaperone on field trips.

We even got a dose of Japanese culture ourselves. While about half the JBBP families had at least one Japanese parent, the rest of the families came from diverse cultures. For anyone interested, Japanese language classes for parents were offered, which we took. And during the annual Cherry Blossom Festival in Japan Town, Eve would hawk bowls of *udon* noodles sold from JBBP's booth.



While I was doing explorations for twex.com I also dabbled a little in online stock trading during the dot-com bubble. I made modest profits investing in stocks like eToys.com, catching them on their upside and selling before their abrupt crash and flameout. Given my enthusiasm for Cold Fusion software I jumped at the opportunity to invest in the company that made it, Allaire, when they did an IPO, and I made money on that too. But the investment that wiped out all my gains was Webvan, an early entrant in online grocery ordering and delivery. Perhaps my Webvan enthusiasm had something to do with my years doing advertising for Kroger, or with HMG's work on ECAT, but I really believed in the potential for Webvan. It was the brainchild of Louis Borders, who had scored a previous success with Borders Books. Among other promising signs, Webvan was making a major

investment in automated shelving carousels in their warehouses to enable quick, efficient picking of people's grocery orders.

As was the dot-com playbook at the time, Webvan's strategy was to grow as fast as possible to cities across the country, capturing what was considered the valuable "first-mover advantage."

From my Kroger years I knew grocery sales itself was a very low margin business. But I could imagine a lot of ways Webvan could evolve in ways that might improve its margins. Unfortunately, Webvan brought in a CEO and management team heavy on former McKinsey consultants, and their imagination seemed a lot more limited than mine.

In fact, I really wanted to work for Webvan and evangelize some of the opportunities I was envisioning. (Though I probably wouldn't have made any headway in that McKinsified environment.) For example, I thought that instead of trying to be a competitor to the Safeways and Krogers of the world, Webvan should be a vendor to them, selling virtual shelf space and order processing. They could also offer a shoppers the benefit of expanded selection by making virtual shelf space available directly to package goods companies. Shoppers might not be able to find the fifth-most-popular flavor of Fanta soda at Safeway, where shelf space was always constrained, but Webvan could provide a service both to Fanta and fans of that flavor by making it available in their online market.

Webvan, with its intense expansion agenda and lagging growth of sales, was running out of cash fairly quickly, which was causing the stock to plummet. As it fell, I would close out my other positions and buy more and more Webvan shares, lowering my average cost per share, believing the opportunity was so good they just *had* to figure out a way to come back from their troubles. I guess I was still fantasizing that I would go to work there and help turn the ship around. Instead, the McKinsey robots steadfastly held the ship on its doomed course, sinking lower and lower into the waves, until my Webvan shares became worthless, wiping out everything I'd made in other dot-com investments.

To this day, Eve remains angry about the money I lost in Webvan.

Me? I remain sad. Played out differently, with a little more vision and creativity, Webvan could have been Amazon!

* * *

As it became apparent that I couldn't move forward with twex.com, I began looking around for something I could do to get some income. I started perusing help-wanted ads for web development work. This led me eventually to a company called Arizona Bay. (The name comes from a hypothetical body of water that would be formed if California fell into the ocean.)

Arizona Bay was a truly distributed company, long before this sort of arrangement became commonplace. It had no office and it preferred not to have employees. It liked its team members to have established business entities, with official tax IDs, that it could deal with as contractors. Since I had already set up Webmond LLC as a home for my post-HyperMedia Group activities, I had that base covered.

In some ways, Arizona Bay was similar to HMG. It was a custom development house. It had no products or services of its own, but was hired by clients to develop projects for them. I would have preferred if Arizona Bay had been seeking people to work with Cold Fusion, but their projects mostly were built on PHP. I was no fan of PHP, but I put in a little time getting more familiar with it and decided I could work with it.

The client Arizona Bay brought me in to work with was Jumpstart Automotive Media. This was a digital advertising subsidiary of a large media company. Their market was car companies and dealers. They would embed advertising in web sites and pages with car-related content.

Jumpstart's embeds generally were some variation of a form visitors could use to request more information about a type of car they were interested in. Essentially they were lead-capture tools. A visitor

would be invited to enter details about what kind of vehicle they were interested in purchasing.

When a visitor submitted their filled in form, a very high-speed behind-the-scenes auction would take place. Jumpstart allowed advertisers to specify what sorts of leads they were interested in. They could say what geographic locations they wanted leads from, what specific car details—sedans, minivans, etc.—met their lead criteria, and, critically, how much such a lead was worth to them. In less than a second, the back end software would attempt to match the submitted details with advertisers' lead criteria. Upon finding one or more matches, the those offering the highest bids would be selected to receive the leads.

The visitor would be shown a display suggesting they follow up with, say, XYZ Ford, or ABC Toyota. And Jumpstart would send the advertiser the lead's contact and vehicle-interest details. As a result, in a day or two, a visitor might get a phone call from a sales rep at ABC Toyota, saying, "I understand you're interested in a new Camry."

I didn't work on the back end software, which was probably a bit out of reach for my skill level. What Arizona Bay had me working on was tools for advertisers, allowing them to customize the inquiry forms that were presented to site visitors.

As it happened, Jumpstart's office was in San Francisco, so I did occasionally visit their physical premises. But that was atypical for Arizona Bay. I was the only San Francisco person on the Arizona Bay team working on that project. We would coordinate our work with regular Skype calls, email and the like. With just one exception, I never met an Arizona Bay collaborator or manager in person.

The kind of work I was doing for Arizona Bay, laboring in my home office, wasn't what I was interested in doing long term. But it paid well, I was building skills, and I liked and respected the people I was collaborating with remotely. Also, Arizona Bay occasionally took on venture-type projects where its compensation was partly in the form of equity in the client, and team members could participate on this basis as well. So I saw the potential for more upside in future projects.



One day I got a call from China Brotsky, a fellow Pacific Primary parent we'd become friendly with. China was a senior person at a local nonprofit, Tides Foundation. She told me Tides wanted to do some upgrades to their website and had solicited proposals from a few companies. China had been tasked with evaluating these, but said this wasn't really her area of expertise. Since she knew I had worked in this area, she asked if I'd be willing to help review the proposals.

So I got the proposals and looked them over. Mentally comparing them with a proposal I imagined HMG would have submitted for the project, I found them all unimpressive. What Tides was looking for didn't seem particularly challenging to me. So instead of telling China which one of the proposals looked best to me, I told her I couldn't really recommend any of them, and I impulsively said, "Why don't I just do this for you?"

To my surprise, she took me up on this offer. That became the beginning of nearly a decade working with Tides.

14 - Nonprofits (With Side Trips)

Tides is a group of nonprofits with shared socially progressive values. When I started working with them, its main components were Tides Foundation and Tides Center, two separate tax-exempt 501(c)(3) organizations sharing leadership and infrastructure.

Tides Foundation's mission was working with donors. It offered donor-advised funds. People could open one of these, get immediate tax benefit for funds they contributed to it, then recommend ultimate recipients for the contributed funds at their convenience. Donors also were offered services to help them manage and direct their donations to recipients aligned with their philanthropic interest areas. For philanthropically inclined people whose resources weren't large enough to justify creating a family foundation of their own, opening a donor advised fund at Tides Foundation offered similar benefits at a more practical scale and cost.

Tides Center's mission was to provide support and infrastructure to nonprofit organizations that didn't want to, or weren't ready to, establish a full-fledged 501(c)(3) entity of their own. A person or group wanting to pursue a philanthropic mission could focus all their efforts on their mission-related work, outsourcing all the non-mission-related work to Tides Center. The Center, upon vetting an applicant to become one of its projects, would become that project's "fiscal sponsor," providing a place where contributors could make tax-exempt donations. The Center would also handle all the bookkeeping and filing of required reports, and all the human resources needs such as payroll and benefits.

There were other entities under the Tides umbrella as well. Tides Shared Spaces managed the adaptively-reused old military hospital in the Presidio of San Francisco where Tides itself had its offices and also rented space to several dozen other nonprofits. Later, Shared Spaces would build out and manage a similar facility in lower Manhattan, and also establish a national support network for other operators of shared nonprofit spaces. There was also a non-tax-deductible 501(c)(4) entity that was an analog to Tides Foundation but for supporting activities that didn't qualify for tax deductibility, such as voter education and registration. Later there would be another principal entity under the Tides umbrella, which I would have a role in launching.



Tides offices in the “Thoreau Center for Sustainability” in the Presidio

My involvement with Tides started slowly and informally with the little website improvement project I first took on for China Brotsky. Once my camel nose had poked into the Tides tent though, it turned out there was an ongoing flow of other projects I got asked to participate in. As I got to know other Tides people, they generally seemed to like me and appreciate my contributions. Before I knew it, I had a desk of my own at Tides and was spending at least a few days there each week.

The thing I noticed almost instantly at Tides was how *nice* the culture was. How caring and thoughtful the people were. It was my first nonprofit organization (other than my volunteering for the Chicago

Architecture Foundation) and it felt detectably different from all the other places I had worked. Yes, including the companies I'd co-founded. I really felt comfortably enfolded there. Also, I felt well aligned with Tides values and objectives.

Another thing I noticed about the Tides culture though, was that it had hardly any affinity for technology. To the extent Tides relied on computers, for example, most were older PCs running DOS. There was little if any Windows in use and certainly no Macintoshes.

* * *

After I'd been working with Tides for a while, I got involved helping them launch a new organization under their umbrella.

As the internet became more widely adopted in US society, more and more nonprofit organizations started using it to solicit and receive donations. Because donation requests on the internet could be seen in any U.S. state, some state regulators objected to their residents being solicited by organizations not registered as charities in their states.

Tides leadership noticed this emerging issue and had an idea to address it. They proposed creating a nonprofit registered to receive donations in all 50 states. They'd offer this registered-everywhere nonprofit as an intermediary that could receive donations over the internet on behalf of other nonprofits. This idea applied an existing Tides competency—Tides Center was already a fiscal intermediary receiving and passing along donations for projects under its aegis—to a new need.

In addition to resolving the state registration issue, the new service would offer a further benefit for many nonprofits who might not have the technical chops to process donations online. It would give them a turnkey solution for receiving online donations. Client organizations would be able to create a customized donation form they could easily drop into a web page or email, and the new service would handle the processing.

They named this new organization eGrants. My friend and colleague China was tapped as its founding Executive Director. And China invited me to join the team bringing it into being.

While other team members dealt with getting eGrants set up to receive donations legally from residents of any US state, my initial role was helping design the technology side.

Among things to be figured out were:

- Enabling a client organization to embed an eGrants donation form into their web pages, customized for their needs.
- Receiving donations via credit and debit cards, then passing the details into an accounting system that would ultimately get the donated money into the hands of the designated organization.
- Allowing client organizations to sign up for eGrants and to monitor the donations to them made through eGrants.

With a specification created, the consensus was that Tides didn't have the in-house capabilities to build what we had designed. So we were going to seek an outside vendor to build it. We put together a request for proposal and circulated it to candidate companies we'd identified. (This was the sort of project The HyperMedia Group would have loved to get back in the day before its turn to training and education, but HMG was no longer an option.)

After reviewing proposals, our choice of development house was a company in Vancouver, BC. They did the building, but I did a lot of the design of what they were asked to build, and I played a substantial role in directing their work as it came together.

One issue that got a lot of debate in architecting eGrants was whether eGrants should offer donors an option to create an eGrants account. If we did, donors could save their information and wouldn't have to reenter it for a future donation either to the same organization or another eGrants client. I was a strong advocate of building this capability. But I and others in favor of this were overruled by folks who feared nonprofit prospects for eGrants' service would be reluctant to have a third party in possession of what they would consider their proprietary donor information.

Too bad. If eGrants had gone down the rejected path, it might have become the nonprofit world's analog of PayPal. (If you have made donations to Democratic political campaigns via the ActBlue service, you may recognize ActBlue as having adopted a similar variation on this theme for the political donations world.)

eGrants.org SM ▶ About Us ▶ My Account ▶ Contact Us

Online resources for change

▶ RECEIVE through eGrants ▶ DONATE through eGrants ▶ PARTNER with eGrants

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eGrants launches Donate Now! button program!
To find out how your organization can begin receiving online donations directly through your web site, please click "More." [More >](#)

eGrants.org is a nonprofit, Internet foundation created to facilitate online donations for nonprofit groups working for positive social change. We are committed to using the Internet to link together online donors with progressive organizations who share a vision of healthy communities and a sustainable environment.

For [social change nonprofits](#), eGrants offers the capability to [accept online donations](#) directly on their web site and opportunities to be included in online donation catalogs hosted by our portal partners.

For [donors](#) looking to make a difference with their donations, eGrants offers opportunities to donate to social change organizations through [portal sites](#) and direct links to the nonprofits themselves. eGrants also creates special [issue-focused giving opportunities](#) for donors who want to spread the impact of their giving.

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customerservice@egrants.org
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eGrants is a member of the TIDES family of organizations

Home page of eGrants.org launch website

Once eGrants launched and began to develop a body of nonprofit clients, it also began to evolve organizationally. China, whose charter had been to bring eGrants into being, began to recruit a new Executive Director to replace her for the next phase of eGrants' growth.

When that person, Dan Geiger, was chosen and came on board, he embarked on building a larger permanent staff for the organization,

including a technology team. Dan also initiated a process to give the organization a new name, since eGrants didn't seem to be conveying the desired message. The outcome was renaming eGrants to Groundspring. Another of Dan's initiatives was to identify additional technology services Groundspring could offer its growing list of nonprofit clients. The first one picked to pursue was a bulk emailing service. As all this activity went forward, my involvement with eGrants/Groundspring began phasing out.

* * *

One afternoon at Tides I randomly checked my home answering machine for messages. There was an unexpected one from a fellow named Lou Hawthorne asking that I call him back.

When I reached Lou he told me he was representing somebody who wanted to start a web and interactive media development company and was looking for someone to head it up. He said some other staff had already been recruited but they were still looking for someone to take the top role. I told Lou that I had recently left such a role, I was happy with what I was doing at Tides, and I wouldn't be interested. Lou urged me to at least come have a face to face conversation. Perhaps I could at least offer them some useful advice. So I agreed to meet and we set a time and place.

When I arrived at the place it turned out to be a grand Pacific Heights mansion. The owner, it turned out, was John Sperling, the multi-billionaire founder of the University of Phoenix. He was behind the plan to create the new company. Lou Hawthorne was Sperling's sort of honorary stepson and was assisting with the project.

I learned that Sperling had a habit of creating companies he would own that would be vendors to University of Phoenix and his several other ventures. For example, one of his companies was a real estate developer that built buildings which would then be leased to the University. It seemed he now wanted to create one of these captive companies to do the kind of work The HyperMedia Group did. (Later I

learned that Sperling had previously sniffed around about acquiring HMG, though that ending up going nowhere.)

Sperling, I further learned, had numerous other business interests beside the University of Phoenix. UOP's initial public offering had made him rich. This gave him the wherewithal to fund a whole collection of entrepreneurial ventures. The idea was that these ventures, as well as the University, would become clients of Sperling's new interactive media company.

One person I was introduced to in the meeting at the Sperling mansion was the medical director of a Sperling venture called The Kronos Group. This company's mission was extending healthy human life.

Lou Hawthorne, who had organized the meeting, was also leading one of Sperling's entrepreneurial ventures, called Genetic Savings and Clone. Its mission was cloning animals, initially cats and dogs, and cryogenic storage of animal DNA samples to bank them for possible future cloning.

In the course of the afternoon I learned about these and other ventures in Sperling's portfolio, including one doing salt-water agriculture with salicornia. Sperling wanted a company that would do web sites and interactive media for these ventures.

Lou Hawthorne had already provisionally recruited a small team to staff this new company, a programmer, a writer, and a designer. (They all happened to be personal friends of his.) Now Sperling, with Hawthorne as his agent, were in search of someone to lead the venture. This person would build out additional staff and have final approval on those provisionally recruited.

Even though I had said from the get-go that I wasn't a candidate for this role, Sperling proceeded to more or less interview me for it.

I was impressed with all these ventures, a bit awed at the wealth that enabled Sperling to pursue so many potential opportunities, and a little overwhelmed by the multiplicity of pies Sperling seemed to have a finger in. But as the afternoon was wrapping up I told them I was flattered at their interest in me but reiterated that I wasn't interested in heading up this newest Sperling venture.

John Sperling, as you might guess, was not someone who easily accepted “no” for an answer. He told me that before deciding I should come to Phoenix and learn more about his venture portfolio. He proposed flying me down there to meet some more folks and attend a staff meeting of the Kronos life extension company.

Being pursued so eagerly was a new experience for me and I was a little bedazzled by it. What did I have to lose, I thought. So a week or so later I disembarked at Sky Harbor airport, where I was picked up by the Kronos medical director I’d met. He chauffeured me to the Kronos offices in his high-end sports car, further reinforcing the impression of a lot of wealth sloshing around those in the Sperling orbit.

This impression was further driven home by seeing the Kronos offices. I was invited to sit in as an observer in what appeared to be a monthly staff meeting, where a couple dozen people sat around a long table giving updates on the status of their projects. The sense I got was of a well organized and disciplined team pressing forward fast on an ambitious plan.

After the meeting I was toured around the office and introduced to more people. The introduction that really grabbed my attention was to Kronos’s head of facilities. His office featured a large US map which had pins indicating planned Kronos Optimal Health Centers in 40+ cities. I was given to understand he was already well along in negotiating for locations in many of these. Clearly, these people were *serious*.

After the office tour I was taken out to a fancy lunch to get better acquainted with the Kronos CEO, Jonathan Thatcher. Then I was taken for a tour of Kronos’s initial medical lab facility, which was in a different location from the headquarters. The lab, still under construction, ratcheted up my impression of Kronos one more notch. It was filled with large, advanced-science-looking devices that each seemed like it must have a six-figure price tag.

Having been suitably awed, I was driven back to Sky Harbor to fly home. Sperling proposed that we meet again at his San Francisco home the following weekend.

Now, keep in mind that one common thread across my entrepreneurial adventures up to this point—Bruce & James, The Hyper-Media Group, even Jim Edlin Company—was capital starvation. I never had access to sufficient funds to fully realize my visions. And I had just been shown a new business that seemingly had access to gushers of funding. What's more, it was only one among a collection of such. Further, I'd been given to understand that these were all fully funded personally by John Sperling; there were no venture capitalists or other investors involved. Given my past struggles around funding, it's not surprising that my head was a little turned by what I'd just seen.

While I was nowhere near the fountain of business ideas my friend Blair Newman was—he could spew forth a dozen concepts in the course of a day—I did have some tendencies in that direction. (As evidenced by, for example, Cards-in-Minutes and AddressMate.) A long-held dream of mine was to have a startup incubator, a studio with the capability of evaluating business ideas and nurturing the promising ones into reality. The example that inspired me was IdeaLab, a Pasadena company that was the poster child for this model.

I knew I didn't have an appetite for recapitulating my HMG experience, especially as a captive business. But having seen both John Sperling's enthusiasm for entrepreneurial ventures and his capacity to fund them substantially, I had an idea. At my next meeting with Sperling I made a proposal to him: I will get your interactive media business launched if, after a year, you let me recruit someone to replace myself in that role and you will then back me in doing a startup incubator. It was a wild shot. But Sperling agreed.

* * *

I still wasn't feeling solid about Sperling's deal. And I didn't want to give up my relationship with Tides, which I felt really good about. So I asked Tides if they'd let me cut back to one day a week while I did a one year outside project. Then I got Sperling to agree I could continue giving one day a week to Tides. With that settled, I—and the crew Lou

Hawthorne assembled—got started on Sperling’s project. Sperling had a pattern of giving his ventures classical Greek names, like Kronos. (Genetic Savings and Clone was an exception.) Thinking of our founding band of four, we christened our new entity HydraStudios.



I felt we needed an office to work from, but Hydra still felt pretty tentative. So I didn’t feel ready to get into viewing possible spaces or negotiating leases. As it happened, one of the flats in the building next to ours on Waller St. had just been vacated. I asked my neighbor Susan, who was the landlord, if I could rent it temporarily month-to-month as an office, and she agreed.

I sent my new team down to Office Depot with my van and credit card. They came back with four flat-pack desks, four desk chairs, a flat-pack conference table, a bunch of side chairs, wastebaskets, power strips, and the usual supplies. After a flurried afternoon of assembly, we had an office.

Still feeling tentative, I hesitated to have Pacific Telephone install a line for the office. I already had a separate phone line for my home office next door, so I just strung a line out a window in our apartment, across the alley, and into a window in the Hydra flat. For the nonce, we’d make that Hydra’s line. In similar fashion, I extended my apartment’s wi-fi to give us internet in the new office.

Further reflecting our general tentativeness, neither I or my three colleagues chose to become employees of Hydra. We all began working for Hydra as contractors.

I had a vague impression that John Sperling had formed a corporation to house the Hydra venture, but I didn't have any details about it. I'd simply been given contact information for a woman who worked for John in Phoenix, and told to send her all bills for payment. I'd also never been given any budget or financial parameters. I had the informal understanding that I should spend what I thought was necessary and it would be taken care of. Much later, I learned Sperling had funded Hydra with \$500,000.

Hydra's first two assignments were websites, one for Genetic Savings and Clone, and one for The Kronos Group.

GS&C was headquartered in the Bay Area, though most of its operations were in a facility in College Station, Texas, where its cloning scientists were affiliated with Texas A&M. So we had Lou Hawthorne to work with locally on that project.

The job was twofold. One part was the public website to educate, provide details about GS&C's services, have an order form for gene banking, and also a registration form for vets who wanted to work with GS&C. The other part of the job was developing an intranet for GS&C for viewing and managing orders and samples.

GS&C wasn't actually ready to offer pet cloning services at the time of its launch, so the main business objective was to get customers to bank the genes of pets they might choose to clone in the future. GS&C believed it did have the technology to clone livestock successfully, so that was also an available option.

The gene banking process involved taking an animal to a veterinarian who had registered with GS&C and become authorized to offer its tissue sampling procedure. Specifying the vet who would do the tissue sampling was one step in the ordering process. Once an order was submitted and a schedule date assigned, one of GS&C's proprietary "BioBoxes" would be sent to the vet. This contained all the supplies necessary for preserving and shipping the tissue sample. GS&C required scheduling of the tissue sampling procedure to make sure its lab would have capacity to process a tissue sample immediately on arrival.

The screenshot shows the home page of the Genetic Savings & Clone website. At the top is a navigation bar with the company logo and menu items: PETS, LIVESTOCK, WILDLIFE & ENDANGERED SPECIES, and ASSISTANCE & RESCUE DOGS. Below the navigation bar are login fields for 'login ID' and 'password', and buttons for 'client go', 'veterinarian go', and 'login help ?'. The main content area features a large heading 'Welcome to Genetic Savings & Clone' and a sub-heading 'We provide gene banking and advanced genetic services — including cloning for certain species — to the general public via the Internet.' To the left of this text are four categories with images and text: 'PETS' (dog), 'LIVESTOCK' (horse), 'WILDLIFE' (panda), and 'ASSISTANCE & RESCUE DOGS' (dog). A paragraph explains gene banking: 'Gene banking means the long-term storage of cellular DNA, for use in cloning and other purposes. We'll help your veterinarian obtain small tissue samples from your animal, which we'll then specially prepare and store in liquid nitrogen, where they can safely remain indefinitely.' At the bottom, it states: 'Genetic Savings & Clone (GSC) currently has two active divisions: [Pets](#) and [Livestock](#). Soon we'll add divisions for Wildlife & Endangered Species, and Assistance & Rescue Dogs. Regardless of whether the animal in your care is a

Home page of Hydra's initial website for Genetic Savings & Clone

The screenshot shows the 'Site Credits' page of the Genetic Savings & Clone website. The navigation bar includes 'GENETIC SAVINGS & CLONE PET DIVISION' and menu items: OVERVIEW, COMPANY, NEWS, SERVICES, VETERINARIANS, EMERGENCY, ETHICS, ACCOUNT, and FEEDBACK. Below the navigation bar are login fields and buttons for 'client go', 'veterinarian go', and 'login help ?'. On the left side, there is a vertical sidebar with the text 'SITE CREDITS' and a photo of four people. The main content area has a heading 'Site Credits' and text: 'The Genetic Savings & Clone website and the GSC Lab Management System (intranet) were developed by **HydraStudios**, a San Francisco-based online business incubator.' Below this is the contact information for HydraStudios: 'HYDRASTUDIOS.COM', '1217 Waller Street', 'San Francisco, CA 94117', 'tel. 415-552-2683', 'fax 415-358-4066', and 'info@hydrastudios.com'.

Credits page for the GS&C site. The photo at the upper left is the four HydraStudios team members. From left: me, programmer Scott Shores, designer Aimee Kilmer, and writer/project manager Ben Carlson. Note the aspirational language describing Hydra as an "online business incubator."

When a sample arrived in College Station, GS&C would prepare it for cryopreservation, then store it in frigid liquid nitrogen until such time as cloning was available and a customer decided to proceed.

GS&C's intranet was to be a web-based business system for its staff to use in managing its workload and maintaining its customer relationships.

HydraStudios wasn't staffed adequately to handle all the database portions of the GS&C work, and I didn't feel solid enough about the whole Hydra deal to begin recruiting and hiring additional staff. Instead, I outsourced some of the more technical work to CIS, a company founded by a couple of smart guys I'd gotten to know through BACFUG, the Bay Area Cold Fusion Users Group. Unfortunately, their company had recently been acquired by a large corporation, and dealing with them suddenly became both bureaucratic and expensive. This caused the cost of Hydra's work for GS&C, including the passed-through cost of the outsourced work, to balloon well past the original budget estimates, causing some friction with Lou Hawthorne.



HydraStudios other initial project for a John Sperling company was for The Kronos Group. This was an entity with multiple divisions. What seemed to be the highest-potential division was the planned chain of Kronos Optimal Health Centers. But the group also included a compounding pharmacy (which prepared drugs to order that were not available off-the-shelf), a skincare division, and a research science division.

Because the Kronos folks didn't have an immediate plan for what they wanted in their website, I proposed doing a version of The HyperMedia Group's ASAP process. I dubbed Hydra's version of this process QuicSpec. The Kronos folks liked this idea and gave the go-ahead. At HMG, the typical team to run an ASAP process was eight to ten folks. At Hydra, we were only four, so I recruited Nathan, one of the founders of our outsourcing company CIS, to join our QuicSpec

team. We'd have to scale back from HMG's full process, but I thought with five on the team we could still do a credible version.

Kronos booked function rooms for the QuicSpec at the Royal Palms resort in Phoenix, along with rooms there for the Hydra team. They also arranged catering for the two days of the event—breakfast, lunch, and morning and afternoon snacks. The Hydra team flew in on a Monday to get things set up, then ran the session on Tuesday and Wednesday.

I thought it went pretty well, and the feedback we got from the Kronos folks suggested they were pretty happy too. John Sperling sat in on a lot of it, and afterward told me he'd like to do a QuicSpec at the University of Phoenix for a project he had in mind. So I guess we'd made a pretty good impression.

Unfortunately, that's the last thing that went well with our work on Kronos.



Home page of a website for The Kronos Group that we partly developed before our services were no longer required by Kronos.

I got crosswise with Jonathan Thatcher, Kronos CEO, on the approach to take with Kronos's public website. Oddly, this disagreement didn't surface during the QuicSpec, but later Jonathan told me he

wanted his website to be “like nothing anybody had ever seen before.” I told him I didn’t believe he needed gimmicky novelty. I argued that Kronos had a great story to tell and simply telling it well would get them the results they wanted. This disagreement festered and began to manifest in discussing particular aspects of the site. Thatcher wanted a dramatic, *2001*-style animation and sound extravaganza to greet visitors when they came to the Kronos home page. I cautioned that this kind of thing was considered unwelcome in the web world. (At least this was true back then. They’re more likely to be seen in the present day because connections and computers are way faster now. Back then, many people reacted to them like poison.)

Dissatisfied with what he was hearing from me, Thatcher brought in a Phoenix ad man named Win Koerper, who made proposals much more in line with Thatcher’s view of things. I flew to Phoenix for a three way meeting with Thatcher and Koerper in which I wasn’t very diplomatic and was pretty assertive about my view of things. This turned out to be the last straw in the Hydra-Kronos relationship. Shortly afterward, Thatcher fired Hydra.

* * *

Before things went pear-shaped with Kronos, the Hydra team had returned to Phoenix to do the second QuicSpec that John Sperling had requested.

This one was to work on Sperling’s idea for a website that would be a hub or portal for everything to do with adult education. In other words, it wasn’t to be a University of Phoenix website, though UOP would be well represented on it. It was to be a place on the web that anyone interested in any form of adult learning could visit to learn about and engage with the options that might available to them.

This QuicSpec was put on in UOP’s own, quite impressive, headquarters conference facility. John Sperling arranged for all of UOP’s leadership to participate, as well as a broad representation of key

people in relevant UOP departments. There might have been an outside expert or two as well.

This QuickSpec didn't go as well as the one for Kronos had. It turned out that Sperling hadn't really prepared the attendees for the idea he'd convened them to work on. There was conflict and uncertainty around whether the group was trying to define a University of Phoenix project or something that would become an independent entity indirectly benefitting University of Phoenix. Instead of the process progressively filling in the details of a vision, my sense was there was a lot of flailing. Compared to the Kronos QuicSpec, where it felt like people's enthusiasm grew as they saw themselves closing in on a plan to move forward, I felt this group growing restive by the end of day one.

That evening, the Hydra group huddled to discuss how we might turn things around for the second day. Our contracted team member, Nathan, argued strongly that the group didn't have enough of a common goal to gain value from pushing on with the exercise. He encouraged us to recommend calling off the second day. It didn't feel like this suggestion would be well received, but we tentatively felt out John Sperling about the possibility. Of course he rejected it. "People will think I'm an asshole if I do that," he responded. He reminded us that he had prevailed on people to do things like adjust vacation plans in order to participate in the QuicSpec.

So we soldiered on through the second day. The vibe was not positive. The goal of the QuicSpec process (like its antecedents) is to create an actionable plan that an assigned team can then proceed to execute. We came nowhere close to that.

As far as I'm aware, Sperling's idea for an adult education portal on the web quietly slipped beneath the waves after the QuicSpec. Too bad, because I believe it was a viable business idea that could have prospered if it had a dedicated and passionate team driving its creation. But the group Sperling brought together didn't have the right mindset for that. They were focused on their University of Phoenix responsibilities. This seemed like a rare misstep for the en-

trepreneurial Sperling. Also, the failure of the QuicSpec to advance his idea helped take the luster off Hydra in Sperling's eyes.



HydraStudios did get some solid work out its door, such as the website for Genetic Savings & Clone. I even talked Tides into hiring Hydra for a project, which I might have done in-house at Tides if I hadn't cut back my time there to do Hydra.

But things increasingly were going sour at Hydra. Kronos had fired us. The University of Phoenix project came to a dead end after the QuicSpec. GS&C was happy with our work but kept having to defend us to Sperling because our costs were escalating well beyond our over-optimistic initial estimates. A project we had started exploring for a Sperling-linked real estate company, Daedalus, was suddenly yanked after our falling out with Kronos.

I started hearing disappointment from Sperling that Hydra was not bringing in work from outside clients. This came as a surprise since I understood we had been created as a captive to serve needs within the Sperling universe. I hadn't made any effort to develop a sales staff for Hydra, believing we had no reason to need one.

In retrospect, I feel like I got so dazzled by Sperling's entrepreneurialism and very deep pockets that I failed to ask a lot of important questions before moving forward with HydraStudios. I was so eager to just get building on the projects that had been laid out that I dropped the ball on nailing down specifics around funding and expectations for Hydra. I was being tentative and cheap in how I proceeded with Hydra, and those turned out to be the wrong moves. There were clearly things I should have got in writing.

It wasn't a shock but it was a relief when I got the word that Sperling wanted to wind down HydraStudios. I was sad, but I was ready.

I'd had a tantalizing taste of allying myself with someone who promised to be an ideal patron. But, perhaps largely due to my own failings, no cigar!



With Hydra wound down, Tides was pleased to welcome me back full time. I transitioned from contractor to employee. Invited to choose a title for my new role, I proposed Technologist-in-Residence. There was an abundant flow of things for me to work on at Tides, and I felt valued and respected. I got a lot of satisfaction from what I was accomplishing there.

On the home front, Gabe's six years in the Japanese Bilingual-Bicultural program at Clarendon had flashed by and it was time for him to move to middle school. Hoover was the recommended middle school follow-on for JBBP students. It offered a continuation of Japanese language classes. But Gabe, tuning in to the scuttlebutt among his peers, expressed a preference for A. P. Giannini middle school instead. "AP", as the kids called it, was less geographically convenient for us. And school bus transportation wasn't offered beyond fifth grade. But it seemed an OK choice to us, so we went with it.

My morning commute then involved driving in exactly the opposite direction from Tides to drop Gabe off at AP, then reversing course to head to my office.

Gabe seemed to do reasonably OK at AP, and he related well to his teachers. As an arts elective, he took band, where he was assigned to learn and play the trombone. Gabe also went out for track.

Around then, it was also time for Gabe's Bar Mitzvah. I had never been into Judaism and had emphatically rejected having a Bar Mitzvah for myself. But I had acceded to Eve's wishes for Gabe to have a Jewish education and Bar Mitzvah. He'd been attending our temple's religious school since first grade.

In our synagogue, it was the custom to designate a mentor from the congregation to help prepare members' children for their Bar or Bat Mitzvah. Gabe scored a wonderful mentor, Andy Fyne. Working with Andy and our very caring rabbi, Camille Angel, Gabe managed to learn a Torah portion and prepare a heartfelt "drash" (sermon) for the occasion.

Family members came from many places around the country to attend. The weekend was capped by a grand party, held in a decommissioned firehouse in the Presidio of San Francisco we rented. The only stain on the weekend was that Eve's brother and sister-in-law had a robber invade their bed-and-breakfast room while they were in it sleeping, giving them a terrible fright. They were staying at the same B&B where our wedding had been held, which they had loved and wanted to return to. We quickly relocated them to a hotel.



Gabe with Eve and me, in front of the temple after his Bar Mitzvah

* * *

One day, I happened to see an email to Gabe from a girl on his track team. She wrote, "I like the way you run." The next thing we knew, this girl, Gaby (Gabriella) had become his girlfriend. They became so joined at the hip that Eve and I got invited to Thanksgiving at Gaby's grandparents so Gabe and Gaby could spend the holiday together.

In track competition, Gabe focused on the mile. By eighth grade, Eve and I had the pleasure of sitting in the stands at Kezar Stadium for

the city track finals and watching Gabe run to the All-City championship in the one-mile run.

And once Gabe hit eighth grade, the search for a high school commenced. In some ways, it was a rerun of the experience we'd had choosing an elementary school for Gabe. Numerous tours and site visits. Lots of research. But this round was different because Gabe, now an engaged teen, played a much more central role in the process. We considered both public and private schools. There were applications to be completed. Tests taken. Even some shadowing. And of course, the decision processes of Gabe's friend group factored into his process too.

Gabe got admitted to four of the private high schools he applied to. They ranged from traditional and stuffily academic to hipper. The Bay School, which was about mid-way on this spectrum, was conveniently (for me) located in the Presidio very near the Tides building. The one I was pulling for, though, Urban—the most hip and progressive of the bunch—was even more convenient. It was a few blocks walk from our house. We had briefly hoped that Gabe's record as a star runner might get him scholarship consideration from the private schools since the tuition costs were stiff. But it turned out athletic scholarships aren't a thing at the private high school level. At least not in San Francisco.

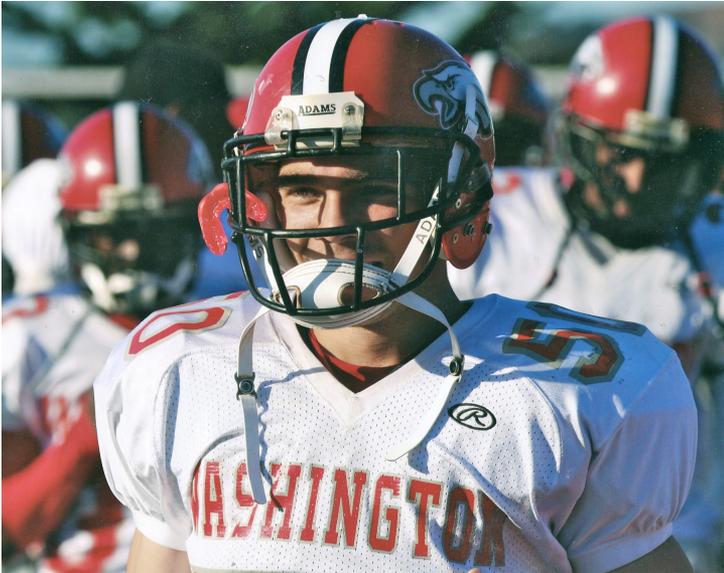
Anyhow, Gabe didn't want to continue running. He wanted to play football. (More cautious parents might have kiboshed this possibility from the outset, but we wanted to give Gabe the opportunity to follow his dream.) And football wasn't an option at any of the private schools he considered. The ones that did offer football, like Catholic St. Ignatius, were very much not to his taste and didn't even merit an application. So public school was going to be the choice. And the public high school admission lottery came up offering Gabe his first choice, George Washington High School. So "Wash" it was.

Gaby, Gabe's girlfriend, ended up going to a different high school. This seemed to put an end to their relationship.

In terms of my daily commute to Tides, Wash was less inconvenient than Gabe's middle school, though still a trip in the wrong direction to

drop him off in the mornings. In his sophomore year, when he had classes in the very early “zeroth” period to leave more time free for afternoon football practice, I had to drop him at an hour that was ungodly for me, since I’m decidedly not a morning person. After dropping Gabe I’d head on to Tides where I’d have the empty office to myself for an hour or more. (By his junior year, Gabe could drive himself and this was no longer an issue. Phew!)

Eve and I became football parents—attending practices, games, fundraisers. The coaches encouraged player’s families to put on substantial potluck dinners the night before game days, to assure that players were well fed ahead of the game.



Gabe the football player

Gabe seemed to be struggling with some of his classes. Eve and I had meetings with his teachers and guidance counselor about this, but they didn’t lead to much improvement. Someone suggested we have Gabe evaluated by a PhD learning specialist, Susan Lydon. After Lydon administered a battery of tests and had multiple interviews

with Gabe, she presented a detailed report with recommendations. It emerged that Gabe had difficulty remembering lists with more than three items. And he had difficulty writing things down. So if a teacher announced a homework assignment with more than three parts, he'd never complete the latter parts.

One of Lydon's strong recommendations was that Gabe be encouraged to use a laptop in class, which was not the norm at the time (at Wash, anyhow) and was frowned on. We advocated hard for this with the school and teachers. Once Gabe was able to do this, his school struggles went away.



Tides' offices occupied two floors of their building in the Presidio. I often found myself bounding up the stairs connecting the floors two steps at a time. One afternoon, when I got to the top of the stairs I found myself feeling woozy and strange, and with my heart beating abnormally. I stood quietly for a few minutes then began to feel normal again, and continued going about my day.

That evening, Eve and I had an appointment with a therapist we were seeing together. In the course of our session, I related what had happened to me earlier in the afternoon. Our therapist, who is also a nurse, advised us not to ignore what had happened but to get checked out right away. At her suggestion we cut short our appointment with her and Eve drove me to the Kaiser emergency department.

There I got a little panicky, and Eve requisitioned a paper bag for me to breathe into to help me settle down. I don't remember exactly what diagnostic measures the ED staff took that evening, but the upshot was they felt I should remain in the ED overnight and see a cardiologist first thing in the morning. Eve left me to pick up Gabe and take him home. I spent the night attempting to sleep on a gurney in the middle of a row of them, a mostly futile endeavor due to incessant noise from the other patients I was sharing the room with.

In the morning, Eve came back and went with me to be seen by a cardiologist, who gave me a treadmill test. He apparently didn't like the results, because his verdict was that I should remain in the hospital and have an angiogram. So I was admitted, and in due course was wheeled to the "cath lab." It was a scary experience, but with the edge taken off by the drugs they were pushing into my IV. From a puncture in my groin they threaded a catheter up to the blood vessels around my heart, pumped in a contrast dye, and viewed the blood flow via X-ray. What they saw was apparently not encouraging.

Back in my hospital room, I was told they found blockages in my coronary arteries, but not ones that could be remedied by angioplasty through the catheter. What I needed, the cardiologist said, was bypass surgery. And in their opinion, the need was urgent. I got this news on a Friday afternoon, and they proposed to do the surgery the following Monday. I asked if I could go home for the weekend then, but the docs vetoed this. They told me I should remain in the hospital over the weekend.

So I stayed in the hospital room over the weekend, with a nitroglycerin drip in my IV, both bored and worried. At one point, Eve and Gabe were visiting me and I was helping Gabe work on a school project. The project involved cutting pieces out of cardboard and foam core to build a model of a Victorian house. A doctor came in while I was wielding an X-acto knife, and admonished me to be extra-cautious since I was on blood thinners.

Early Monday morning the cardiac surgeon, Dr. Nora Burgess, arrived for a pre-surgery interview. She asked me if I was ready to proceed, which I really wasn't, but figured I had no other option. She also warned me that this would be way more serious surgery than a hernia operation, which is something I'd had years earlier.

With the consent forms signed and strategic areas of my body shaved, I was wheeled off to surgery.

When I came to, apparently several hours later, I was on a table in an ICU ward. A machine was still breathing for me through a tube down my throat. Once the nurses saw that I was awake and somewhat

alert, the tube was removed and I was once again breathing on my own. Eve was there holding my hand. I learned I'd had a "triple bypass"—blockages in three coronary arteries had been routed around by plumbing in alternative paths using vessels harvested from my legs. In medical parlance, this was termed a CABG.

Lying on the table in the ICU alcove, I complained to Eve that I was having pain. Eve relayed this concern to the nurses but they apparently had reached the limit of relief they could offer me. Eve, my advocate and hero, phoned our anesthesiologist nephew, Barry, in Texas to ask for advice, and he suggested they consider adding Tramadol. Eve proposed this to the nurses, they got authorization for it and administered some, and it helped.

After a night in the ICU I was moved to a regular hospital room. I was instructed on how to hug a pillow to my chest if I needed to cough. And I was given a device to exercise my breathing and told to use it once an hour.

I remained in the hospital for four days. Much of this time I was quite out of it. I remember one occasion when some game show was on the room TV, and I was very muddled about the boundaries between what was on TV and what was real life.

When I finally was discharged from the hospital, since Eve had to work and Gabe had to attend school, Eve arranged for home health aides to be with me for several days. Halloween happened in this period, and I remember the aide helping Gabe to carve a Jack-O-Lantern since I didn't feel up for it. All told, I stayed home recovering for a little over a month. My first trip out of the house was on Thanksgiving, when I felt well enough to cook a turkey to bring next door for a shared celebration dinner with our neighbors.

It was a week or so later that I began returning to work at Tides, working short days. I'd bring lunches adhering to the low-fat diet my cardiologist had evangelized for me, causing a co-worker to comment, "You eat like my four-year-old." After New Years, I was back to my regular schedule, except for breaks to visit Kaiser for physical therapy sessions.



While I was in a groove at Tides, entrepreneurial fires still smoldered within me. I continued to dream up business opportunities. With the advent and spread of smartphones, one opportunity I envisioned was a website or app focused on tours of all kinds.

Possibly the tour concept resonated with me because of my days giving architectural tours in Chicago. iTours was the working name I gave my tour concept. iTours would be what people in the business termed a two-sided marketplace. eBay was an example; it sat between sellers and buyers and enabled them to connect. In iTours' case, the sides of the marketplace were tour takers and tour creators. My elevator-pitch description for iTours was, "YouTube for tours."

A few years before I came up with iTours, a phenomenon that became known as "accelerators" had emerged in the tech world to supplement traditional venture capital. An accelerator would periodically gather a group of promising would-be businesses into a class. It would then provide each set of founders a few months worth of modest seed funding, and engage the class members in a structured process including counseling, referrals, helpful lectures, and peer-to-peer support. The object would be to move each fledgling business along to its next stage of readiness to launch. The process would conclude with a demo event where all the class members could pitch potential next-stage investors. Perhaps the earliest and best known of the accelerators was Y Combinator.

I put together an application to Y Combinator for iTours, roping in my longtime friend Mark Friedman as a proposed cofounder.

At the time, 2008, Y Combinator ran two groups per year, one in winter in the Bay Area and one in summer in Boston. Since I had the iTours idea in spring, I didn't want to wait an extra half year to do the next Bay Area class, I wanted to get going. So I applied for the summer class in Boston. If we'd gotten in, Mark and I would have had to relocate to Boston for a few months.

Alas, however, we didn't get in.

Excerpts from our iTours application to Y Combinator

What is your company going to make?

A player, portal, authoring tool, and sponsorship system for digital guided tours of all kinds (for art exhibitions, neighborhoods, pub crawls, you name it...) delivered via iPhones initially, followed by other smart, location-aware mobile devices (e.g. Android) as market opportunities emerge.

What's new about what you're doing? What are people forced to do now because what you plan to make doesn't exist yet?

Interactive guided tours are an opportunity area for iPhones and other smart, connected, location-aware mobile devices. No one appears to have entered this space yet.

Examples are the guided audio tours that people can rent at art exhibitions. These are migrating from cassette players to digital devices. But the guided tour opportunity is much larger than these when you add an easy authoring tool for user-generated (as well as professionally-created) tours, a portal to find and access them, a sponsorship (and/or micropayment) system to monetize them, and a recommendation system to promote them.

What do you understand about your business that other companies in it just don't get?

First, that this opportunity exists. Second, a vision of how to take advantage of it.

Who are your competitors, and who might become competitors? Who do you fear most?

No known competitors at present. All the usual suspects (Yahoo, Google, et al) and possibly other startups could become competitors. Both Yahoo (possibly starting from Flickr) and Google (possibly starting from YouTube) could become significant competitors. Our hope would be to establish momentum in this new category quickly and make it more appealing for a major

company interested in the category to acquire us rather than build from scratch.

How will you make money?

Ad-sense-like sales of sponsorships for tours (everything from "This tour of Chicago blues clubs is brought to you by Miller High Life" to "Posters of this Monet are available in the museum gift shop starting at \$8.95 - 15% off with the coupon code displayed at the end of this tour.") Possibly also user-purchasable (iTunes style) premium tours with exclusive content and professional production values.

Y Combinator had a policy of not telling applicants reasons why they weren't accepted. But I think it's a fair guess that a program with questions on its application like "Do any founders have commitments in the future (e.g. finishing college, going to grad school)?" has a target demographic in mind different from Mark and me. I think they simply didn't know what to do with a pair of 60+ year old founders.

Having failed to get into Y Combinator, I lost motivation to pursue the iTours idea further. An unfunded, unsupported, bootstrap startup just wouldn't have worked in my life at that point, with a child just a couple of years away from college. Even today, two dozen years later, I still think the iTours idea has potential. Feel free to run with it if you are so inclined. While many museums and other places have built individual apps providing tours of their offerings, no overarching portal or toolset has emerged. The website Voicemap.me seems like a step in that direction though.

iTours—yet another unrealized cigar.



I've long had an interest in politics. as demonstrated by my volunteering for McGovern in 1968, by my run for Democratic Convention

Delegate Elector in 1972, and by my work for the Independent Precinct Organization in my Chicago years.

After I came to California though, I acted on my political interest mainly by sending checks to campaigns and doing occasional spurts of phone banking. In 2007 however, looking toward the 2008 presidential election, my political inclinations came together with my beliefs in the internet's potential, and inspired me to a passion project. I wanted to experiment with what the internet might bring to improving the process of elections.

Of course, online elections had already been explored extensively by many. These explorations would generally end up concluding that having elections online was impractical due to some combination of inability to provide security, audibility, transparency, availability, and a secret ballot.

But that wasn't going to stop me. Of course I knew I lacked anything like the deep knowledge of cryptographic and other technologies that serious researchers in the field brought to the subject of digital elections. But I still had a hunch that the internet would offer the same potential for disruption to elections that it brought to so many other fields of endeavor, and I wanted to see if my creative abilities might have anything to add to the discussion.

So I asked Tides for a three month leave of absence to work on my elections passion project. There were several ideas I wanted to explore in the presidential context, such as:

- How easy and broadly accessible could voting be made? How would people without access to a personal device and internet connection be enabled to cast their votes?
- How would a single, direct, national primary compare to the existing system of state primaries and caucuses? A single direct national election?
- How would adding in ranked choice voting be received? And what could an interactive system do to improve the ranked choice experience compared to conventional ballots?

- How would having online polls open 24/7 for an extended period, like a month, be received?
- Was the conventional wisdom against release of any partial vote tallies until after polls closed really valid? What if the current tally was reported in near-real time the whole while polls were open?
- What if we allowed people to change their vote at any time up to the final closing of the polls?

I bought the domains onlineprimary.us and onlineelection.us to use as homes for my experimentation. Then I wireframed the designs for a site and, through a freelance website (my fex.com idea, realized by someone else!) hired a designer in Thailand to give me a visual design. (I went with offshoring because I was funding this project out of my own, not-very-deep pocket.)

onlineprimary.us
An experiment in a new, Internet Age way to do elections

Bing | Wiki | Source Code | Privacy Policy | Contact

Did you ever wonder...

- ✦ How the results might be different if we had a **single, direct, national presidential primary?**
- ✦ How **"Ranked Choice"** voting might change the outcome of the presidential primaries?
- ✦ Whether we could have a simple, open but **secure way of voting on the net?**
- ✦ **And a bunch of other things** about how we could **select our leaders better** in the 21st century. There are some of the questions this site sets out to answer [Read More ...](#)

VOTE HERE

Choose a ballot

Democratic

Republican

Open Primary

RESULTS SO FAR

00,000,000 Votes Cast
as of 9/10/2007, 10:30 PM EDT

	Democratic	Republican	Open
CANDIDATES	VOTES	PCT	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	
John Edwards	00.450000,00	00%	

PRIMARY CENTRAL

Obama, Guliano lead in latest Florida poll
Obama, Guliano lead in latest Florida poll
[more news ...](#)

- Primary Calendar
- Candidate Sites
- Polls
- Debates
- Primary News

The content and code of this website is licensed under Creative Commons Attribution - Noncommercial - Share Alike 3.0 License - 2007, Online Primary,Us

Home page of my prototype for onlineprimary.us

In addition to building a prototype of the online primary site in Cold Fusion, I did a lot of thinking and writing wrestling with the issues of how desires for a secret ballot, auditability, security, and resistance to hacking, which often seemed at cross-purposes, could all be satisfied together. I posted this content as part of my website, and I even managed to get a tiny bit of press coverage of my efforts.

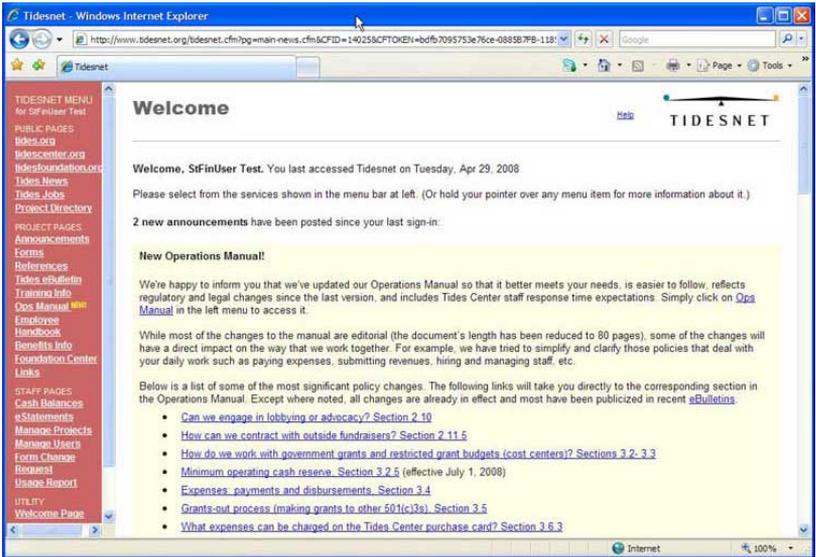
But I had a hard deadline of three months, which is what Tides had been willing to give me while keeping my position open and benefits in force. Predictably, I didn't get nearly far enough in that time to do an actual national trial. And there was another hard deadline in the picture too—the actual 2008 election schedule. I'd fantasized that I might get far enough in three months to be at a jumping-off point for a serious internet election project, which I thought I might try convincing Tides to sponsor. But, once again, my metaphorical humidors were destined to remain empty. When my three months were up, I sadly set the project aside and returned to work at Tides.



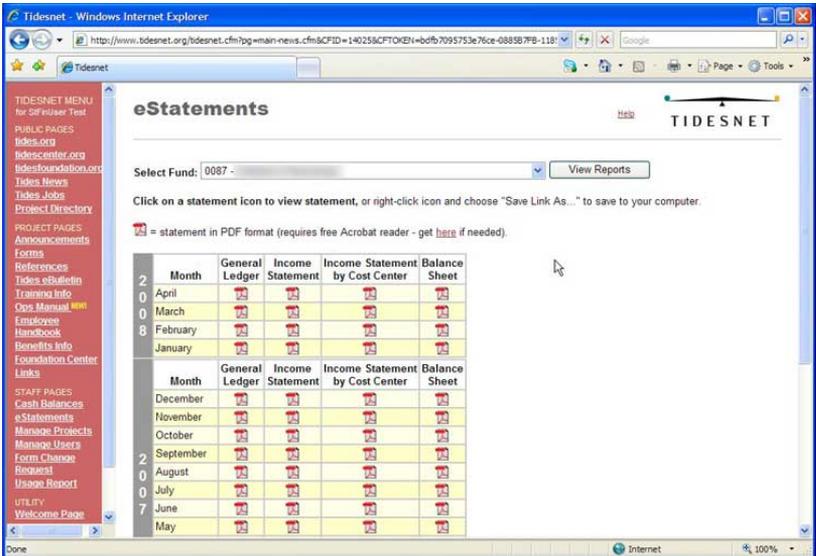
Tides's organization was evolving. As the internet grew into an ever more central role in organizations everywhere, Tides began beefing up its staff devoted to tech. At some point my job title transitioned from "Technologist in Residence" to "Business Application Architect". A major project for me became creating and then expanding Tidesnet, an intranet/extranet for Tides staff and the people and organizations Tides worked with. It was also a hub that linked out to Tides' various public websites including job postings.

Tidesnet was a fairly typical example of its type, a repository of reference information and documents such as the employee handbook, a collection of online and downloadable forms, a feed of Tides news and announcements, and access to frequently referenced financial reports. Like all of the web work I did at Tides, Tidesnet was built with Cold Fusion.

No Cigar



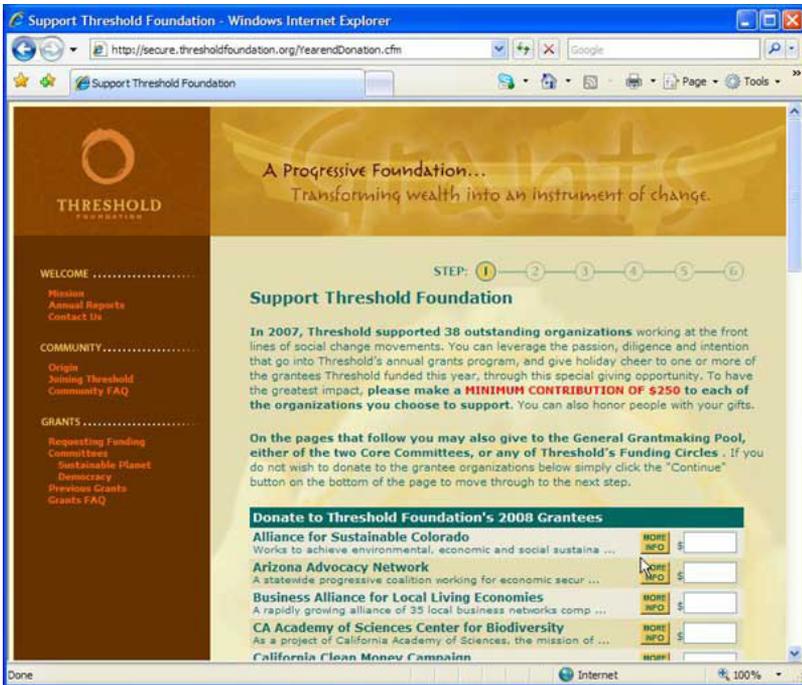
The welcome page Tidesnet users would see after signing into the system



A Tidesnet page where a user could select a specific accounting unit then access several months worth of its financial reports in pdf format

The Tidesnet project included building out a system of user accounts and permissions so that each user would have access only to the information appropriate to their role. We also needed to build the ability to tap into various Tides databases that stored relationship details and financial information. The team I collaborated with on Tidesnet included a database specialist and a couple of other web developers.

Besides Tidesnet, other projects I worked on during my Tides years included a time-tracking system for staff, and an e-commerce-like tool for donors in the Tides-affiliated Threshold Foundation to distribute donations across a selected set of recipients for the year.



Threshold Foundation's annual grant distribution form

As the Tides organization continued to evolve, the qualities that I had found so pleasing about working at Tides began to slip away. A

woman who had been a vice president at Microsoft was brought in to head up information technology. I found her a very toxic presence. Tides became increasingly “corporate” and I was no longer loving being there. Not coincidentally, I wasn’t fitting in all that well with the evolving team. Eventually, my position was eliminated, and my time at Tides came to an end. Once again, I needed to find a new thing to do.

* * *

I was back to working out of my little home office on Waller St. I let the folks at Arizona Bay know I was once again available to work with them, and they very quickly found me a project. This time the client was SmartRoam.net, a Singapore-based virtual phone service provider. My new Arizona Bay team was very distributed; one member was in Asia, another in Central America, a third somewhere in the U.S. southwest, and me in the Bay Area. The logistics were a bit challenging, but Arizona Bay had been working this way for a long time and had systems and practices in place to make it work.

Also, somehow (I forget how) I got connected with people at Electronics for Imaging, Efi, a Silicon Valley company that made high-end print servers.

Efi wanted someone to develop a system they could use to track the status of products they had in development. Their requirements were similar to some Tidesnet work I’d done. I put together a proposal and they retained me for the job. They were quite pleased with what I delivered, and kept coming back to me with requests for additional features. Eventually, they commissioned a next-generation version.

* * *

Arizona Bay and Efi projects were generating income for me, but I felt like they were stopgaps, so I kept looking around for something more substantial to get involved in. One day I came across a Craigslist ad for a startup seeking a Cold Fusion developer.



Product Tracker

Last Updated: 8/24/2021

99 Active Products

198 Total Products

Select: Active Completed All

Products:	List	Detail	Print by FCS	Print by Mgr
Boards:	List	Edit/Add	Print by Product	Print by Board
Manuals by Product:	List	Print		
Manuals by <input type="text" value="Final Draft"/> :	List	Print		
Manuals by Writer:	List	Print		
	Edit pop-ups	Export to Excel		

© 1997-99 EFI

Main page of the Product Tracker I developed for EFI

When I reached out to them, I found out the product they were creating was a website to help couples stay together. The elevator pitch was: “There are a zillion websites that help people *get* together, but none that help them *stay* together.” The latter was going to be their niche. They named the company and website *The2ofYou*.

Curiously, this wasn’t the first time I’d run across their concept. I’d heard it twice before, years ago, from other startup groups. But I was never interested enough to get involved on those previous occasions. As far as I knew, neither of the ventures I’d heard about before had made it to market. So I was a little skeptical of this latest effort.

The2ofYou’s CEO was Richard Clayton, a cheerful Australian with an entrepreneurial itch but no prior software or startup experience. Its content expert was Jan Stribolt, a marriage and family therapist based in Marin County. The third team member was Aaron Cronan, a lawyer in Portland, a friend of Richard’s who got pulled into the project. These three had commissioned an early prototype website back when Richard lived in Portland.

After using the early prototype to do user research, and after Richard relocated to San Francisco, they parted company with their

original developers and were looking for someone to build the next iteration of their website. Being skeptical, I was in no rush to join their startup, but I agreed to do some contract development work for them while we got further acquainted.

This initial phase of work went OK. But after they'd paid me for that they allowed that as an unfunded bootstrap business they had no additional funds to pay for further work. In the meantime I'd gotten to know and like Richard and Jan (Aaron was largely an offstage presence) and begun to think the concept might be viable. So I signed on as CTO of The2ofYou, buying a quarter of the company in founders' stock for a couple hundred bucks. (This was a bit of a touchy subject on the home front, as Eve was strongly opposed to my getting involved with any more startups after living through Bruce & James and HMG with me.)

Thus began a year of effort to develop a launchable version of The2ofYou.com and also trying to bring in some venture funding.

It was something of a well trod startup path for me. In addition to coding, setting up servers and the like, I joined the team in pitching at startup events, helped produce pitch videos²⁹, met with prospective investors, etc.

Through a friend, I'd gotten a referral to Jon Layman, an attorney at Wilson Sonsini, the high-powered Silicon Valley law firm. We met with Jon, he liked our story, and he then proceeded to convince Wilson to take on The2ofYou as a startup client. Wilson would provide their services partly in exchange for equity and would defer their remaining reduced fees until we got funded. Our hope was that Wilson, deeply wired into the Valley, would provide us some warm introductions to potential VC investors.

Unfortunately, when we received Wilson's proposed agreement, it had provisions Richard found unacceptable. It appeared to expose the

²⁹ View a 2-1/2 minute tour of The2ofYou's prototype at <https://vimeo.com/8326766> and a 3-1/2 minute video about The2ofYou's philosophy by its LMFT cofounder, Jan Stribolt, at <https://vimeo.com/7598074>.

founders to substantial personal liability for legal fees if the company went under. Despite verbal assurances from Jon Layman that Wilson had never asserted such a claim against a founder, Richard was unwilling to sign. So this potential entrée into VC investors slammed shut.

Our other efforts at getting VC investment were not making any headway either. Partly this was our misunderstanding of what funding we should be trying to raise. We had a business plan calling for a \$3 million raise. Generally, VCs considering this level of investment for our type of business were looking for companies with demonstrable “traction”—evidence that customers were signing up for the product. We were still a ways from having a complete prototype, let alone opening it up to customers.

What we really should have been seeking was more along the lines of a few hundred thousand dollar seed round from angel investors, rather than VCs, to get us to an initial launch. (Richard’s initial prototype had launched to a small group of test customers, but that was considered product research and that version was scrapped before I came on.)

Around this time, Eric Reis’s “Lean Startup” and “Minimal Viable Product” (MVP) concepts had been getting a lot of buzz. I had become a big believer in them. So when I first started working with Richard and Jan, I talked these ideas up to them. They sort of paid lip service to the MVP idea, but Richard and Jan had a definite vision of all the features they wanted in the product. Their idea of an MVP included all of them.

Early stage startups need the founding team to wear many “hats,” which I was doing, but the critical ones I was supposed to be wearing were systems architect and web developer, since neither Richard or Jan had those skills. I wasn’t making as much progress in those areas as our business circumstances demanded.

Richard and I were both “running on batteries”—working without income. Richard was married and had a young daughter. His wife was working, but at low-wage jobs. Eve was working at Suicide Prevention, which paid OK but at nonprofit levels. So neither of our families was

the2ofyou.com

Invest in your relationship, stay connected as a couple.

Even with careers, children, and lunch on the run, you can still feel connected. [Learn more...](#)

FUN
A note here, a question there. Flirt and converse. How well do you really know each other?

EASY
take a minute or take an hour. It's always there.

INTERACTIVE
A vibrant mix of lively guided exchanges, facilitated by the2ofyou. You don't have to do it alone!

EFFECTIVE
Couples say it really helps bring them closer together again.

Take a 2½ minute tour to see how it works.

the2ofyou.com is FUN and FREE!

Curious? Come on in and **invite your partner.**

your first name:

your email address:

choose a password:

re-enter password:

invitation code:

[Sign up now](#)

The2ofyou.com is currently in limited testing; so you need a code to sign up. If you don't have one, submit the form with just your first name and email address, and we'll put you on the waiting list for an invitation.

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Home page of our prototype site for The2ofYou

the2ofyou.com

The Value Proposition

The stages of a committed relationship

Connection builds relationships

Books, Videos, Questionnaires	Static, Solitary, Just Educational
Counseling	Expensive (time, \$, travel, commitment ...)
the2ofyou.com	Builds connection with every click

A slide from the investment pitch deck for The2ofYou

Our Workspace

Upcoming Events

Lorem ipsum dolor sit
Prasent hendrerit valpha

-  send a message
-  write in journal
-  upload a photo
-  add a goal
-  add to calendar

 You added a profile photo:
3 day ago


 You wrote a journal post: my post
2 days ago
Now is the time when all good **men** will come to the aid of their **party**.

 You sent a message: To Kate
2 days ago
this is the place

 You sent a message: To Kate
2 days ago
now is the time

2 The2ofYou has an activity for you: Invite Your Partner
Monday, November 2 2009

Send your partner an email invitation to join you at the2ofyou.com.
Partner's first name

Partner's email

Your invitation message

I just signed up for us to try a new website called the2ofyou.com. It's designed to help us enhance and strengthen our relationship.

The next step is for you to sign up at the2ofyou.com as my partner. It's easy - just click on the link below and complete the very short sign-up form.

As soon as you sign up, we can get started trying this out together.

Jon

(a signup link will be added to your message above)

[Send invitation](#)

 You responded to a profile questionnaire: My Favorite Movies
Monday, October 26 2009
 Favorite comedy: aaa
 Favorite drama: bbb
 Favorite scary movie: ccc
 Favorite action or sci-fi movie: ddd
 Favorite animated movie: eee

An example The2ofYou user session

covering our monthly “nut.” And Jan had greatly scaled back his MFT practice, accepting fewer clients, in anticipation of putting more time into The2ofYou, so his finances weren’t in great shape either.

If we’d been able to bring in a seed investment, we could have paid ourselves modest salaries while forging ahead with the development, and also hired some help to move things along faster. But none of us knew enough to refocus our fundraising toward seed investors. (Nor

did any of the VC firms we approached suggest this path to us.) The seed funding marketplaces that exist today that could have facilitated our quest, such as AngelList, hadn't yet emerged. Meanwhile, institutional VCs we reached out to didn't want to talk to us until we had "traction"—which we couldn't achieve until we'd launched a product.

As a result, the financial pressure to get something launched was pretty intense. And it was taking me a lot longer to make progress than any of us were happy with.

At the heart of the The2ofYou were modules of interactive exercises devised by Jan Stribolt to help the couple build and reinforce connection. The initial module was called "Give to Get." Its 37 steps began by asking each partner to recall what had attracted them to the other when they first met.

The central modules were surrounded by several more tools to foster connection and introspection. There was a place for each partner to keep a journal. There was a section where both shared and individual goals could be recorded and progress toward them tracked. There was a shared calendar, and shared photo albums. And there was a shared messaging space, a sort of private social network for just the couple (plus their therapist, if they were working with one).

It was an awful lot for one guy to build, much less in a compressed time span and with the pressure of worry that were all were teetering on a personal financial precipice if we didn't bring in funding.

In retrospect, if I'd had a grasp then of development approaches that now are commonplace, such as user stories, sprints, and other practices of "agile" development, and if we'd been more ruthless about trimming feature scope to get to an MVP, and if I'd been able to push myself to be more productive, we might have limped our way to launching "version 0.1" before the strain of no income or funding became intolerable. But none of those things happened, and the time finally came when I lost the trust of my colleagues.

Richard and Jan (and Aaron, back in Portland) blamed me for our failure to get to a launchable prototype fast enough. (Honestly, I felt I did deserve a fair portion of the blame, even though there were other

factors in the mix.) So they voted me out as CTO of The2ofYou, and the company repurchased all but a token bit of my founder's shares.

That token bit, of course, never became worth anything. The business never progressed much farther. It appears Jan went back to his MFT practice full time. Aaron was never that engaged in the business and presumably just carried on with his law practice. I've lost track of Richard; I don't know what he went on to do.

I felt like I'd failed them all.

* * *

Yet again, I was in need of something new to do.

There were plenty of ads seeking web developers and I started answering some of them.

It turned out that the Cold Fusion programming language and toolset I'd been working with for the past several years had not won the favor of the rapidly growing web development community. It was an also-ran. Far more widely used was the php³⁰ language and toolset. Php skills were what a lot of the help-wanted ads were looking for. "Ruby on Rails" was also a rising language. I spent a little time beginning to teach myself Ruby on Rails, but somehow it didn't resonate with me. So I switched horses and started growing my php skills. I already had some experience with it from my Arizona Bay projects.

For years I had been contemptuous of php, finding it "clunky" and difficult in comparison to Cold Fusion. But I began to discover it had evolved substantially since I was first exposed to it. A rich ecosystem of tools had emerged around it. Fairly quickly I became more comfortable with php. I felt on reasonably solid ground responding to a Craigslist ad seeking a web developer with php skills.

The company who'd placed the ad turned out to be located in one of the repurposed military buildings in the Presidio, a few minutes down the road from the Tides offices. It was called Chug. It was a

³⁰ "php" is one of those recursive acronyms so beloved by computer geeks, standing for "php hypertext processor."

startup working on building a “vertical search engine” for cars for sale. Chug was one of many companies trying to be a specialty version of Google in a particular, focused category of information. Their category was cars.

Like Google, a central piece of their concept was programmatically visiting other websites and gathering information about cars offered for sale. Their “spider” software would repeatedly visit auto dealer websites, classified ad sites, and any other site where they believed for-sale cars might be listed. It would gather and organize all this data into one giant master index that visitors to Chug could search.

Chug’s concept also included adding value to the information its search engine gathered. So it had negotiated a deal with the Carfax service to attach a teaser amount of that company’s data on a vehicle to each listing, along with a one-click link for a visitor to purchase that vehicle’s full Carfax report. Chug also made similar deals with other third-party sources of vehicle and market information, such as Edmunds.com.



The Chug home page intentionally aped Google’s simple approach

For visitors using Chug to search for cars they might want to buy or lease, the idea was to present all the gathered information in a standardized structured form to make it easy for visitors to compare among listings. Visitors coming to Chug would be presented with a Google-inspired two-field search form that would accept free-form typing then interpret a query from whatever was entered. So queries like “2010 Toyota Corollas” and “San Francisco” or “convertibles under \$20,000” would yield a results page of car listings conforming to the search specification entered. A visitor could then click on any listing on the results page to drill down to a car details page with full information.

I went in to interview at Chug, apparently passed muster, and was offered a contract position as a web developer. The whole Chug team at the time was probably under 20 people. On the technical side there were two primary groups. One was focused on the spidering, data gathering, and database building. The other, which I joined, was tasked with building the presentation website where people would come to search for cars.

At Chug, I was a worker bee, an “IC³¹” in their parlance, not any kind of founder or manager. I would just come in in the morning, review with my team and its leader what the day’s goals were, then get down to coding. In some ways it was the first time I’d been in that kind of role since I’d left Illinois Bell decades ago. After the travails of The2ofYou it was kind of a relief. I was enjoying it. I liked and was impressed with the people I was working with (though less so the senior management). I liked the feeling of accomplishing the bite-size coding tasks I was assigned. And I was learning things. I wasn’t just growing my coding chops by seeing how my more-experienced colleagues approached things, but also being exposed to development management practices that would have been really helpful to use at The2ofYou.

What I considered the fly in the ointment at Chug was the company’s leadership and board. In an annoying (to me) echo of The2ofYou,

³¹ Individual Contributor

they were quite resistant to the idea of launching a minimum viable product. And they were indecisive. My team would work for a couple of days implementing a design they'd settled on, then they'd have second thoughts. So we'd discard that work and start building a revised version.

There were also some setbacks in doing what Chug's leaders had envisioned. Chug's goal was to have its database contain every internet listing of a car for sale, no matter where it was listed. So Chug's spider was scraping car listings from Craigslist as part of this goal. Craigslist was adamant that they would not allow this. Reluctantly, Chug had to back off.

After I'd been at Chug for a while, it seemed to me the product was easily ready to get some feedback from real customers. But leadership didn't see things that way. Meantime, the company was running out of runway from the round of venture capital it had raised. There were ominous-seeming meetings with board members happening in the CEO's office.

One evening close to Christmas, a couple of hours after I'd gotten home from work, I got a phone call from my boss. He told me I shouldn't come in to work the next morning. Chug was shutting down development operations and taking a step back to reevaluate things.

Liking Chug and believing in the potential of the product, I told him that if it was a matter of a temporary cash shortage I'd be willing to work "on the come" for a while until things sorted out³². He thanked me for the offer but told me that wouldn't make a difference. He wouldn't be going in to work the next day either.

So my time at Chug was over.

Yet again, it was time to figure out the next thing.



³² A car search site of sorts still exists at <http://chug.net> url (as of 2021) but it's only a shadow of Chug's original vision. They went in a different direction.

That next thing turned out to be Kiva, the nonprofit crowdfunded microlending website.

I hadn't been aware of Kiva before I learned they were seeking to hire a web developer. A few years earlier, while I was still at Tides, Kiva had briefly investigated the possibility of becoming a Tides Center project. But our paths didn't happen to cross at that time.

A recruiter introduced me to Kiva. Kiva was about five years into its existence when it decided to make a bold investment into its next stage of growth by doing a sizable wave of hiring. I'm not sure whether Kiva had worked with outside recruiters before, though I'm pretty sure they never did again during the eight years I worked there. But on that occasion they had decided to outsource their recruiting. I came to the recruiter's attention by replying to a Craigslist ad. With my nonprofit experience at Tides, they thought I'd be a good fit for Kiva.

Kiva's founders originally came up with the idea of their website after traveling in Africa. They were inspired by the example of Muhammad Yunus, the Bangladeshi Nobel Peace Prize winner who, with his Grameen Bank, pioneered the ideas of microcredit and microfinance.

Matt Flannery and his then-wife Jessica Jackley came back to the Bay Area, joined forces with Premal Shah, and ginned up a crowd-funding website for microlending. People could visit the site, which they named Kiva, to learn about entrepreneurs who sought small loans to grow their businesses. At first these entrepreneurs were all in Africa. If a visitor found a would-be borrower's story compelling they could pitch in to help fund a small loan to that entrepreneur. Loans were typically in the hundreds of dollars. People could participate in increments of \$25.

Kiva partnered with organizations in the entrepreneurs' countries to handle sourcing and vetting of prospective borrowers, distribution of loans, and collections of repayments. As loans got repaid (which the vast majority were) the repayments would get parceled out to the orig-

inal lenders. They could then use the repaid funds to support other loans.

The idea of crowdfunding online was already bubbling up in the zeitgeist around the time of Kiva's founding. (Donors Choose, a site for crowdfunding school classroom needs, was an existing example. Sites like Kickstarter and GoFundMe would soon be emerging.) In this nurturing environment, Kiva began to find an audience of lenders. It was helped along by exposure from Oprah and endorsement by Bill Clinton.

When I came to interview at Kiva for their web developer position, they were housed in a repurposed 19th century trunk factory on 18th St. at Folsom, in a no-mans-land between the Mission and Potrero Hill neighborhoods.



The building at 18th St. and Folsom that housed Kiva when I started there.

The prospective position was working on further development and maintenance of Kiva's lending website. Like Chug's website, this was built with php, so I had relevant technical experience to go with my

nonprofit experience. The interviews seemed to go well. Fairly quickly I was offered the job.

Kiva's technical staff was divided into teams focusing on different task areas. One dealt with the back end databases and all the accounting involved with funding loans and distributing repayments. Another dealt with internal tools. My team, dubbed Rocketmonkey, comprised of four developers and a team lead, was charged with maintaining and enhancing the lending website. Once again, I was in the role of an "IC," without management or leadership responsibilities.

My experience settling into Kiva was not unlike my experience at Tides, except it was less gradual and tentative. I really liked the people I found myself working with, and I was immediately impressed by how capable they seemed. Moreover, I was very simpatico with Kiva's mission. In an echo of my onetime sentiments at Tides, it wasn't long before I found myself telling people Kiva was "the best place I ever worked."

Compared to the detail I've gone into above about my earlier work adventures, I don't have much to relate about the eight-plus years I spent at Kiva. I showed up. I did the work,. And I felt good about what I accomplished. I also learned a huge amount along the way.

In the time I worked there, Kiva's lender-facing website went through three generations of technology, and I played a role in facilitating those transitions. When I started, Kiva's site had a then-typical server-rendered technology "stack" using the php language and a templating tool called Smarty. The next iteration relied much more heavily on Javascript and "client-side" rendering. It was built using a component-oriented approach called "atomic design" which I had advocated for. The third iteration was built on a Javascript framework called Vue, which we chose after having a bake-off among Vue and two alternatives, React and Angular. Each of these transitions gave me an opportunity for new learning and skill building.

The Kiva culture was an interesting pastiche of Silicon Valley tech company and social justice nonprofit. The office had the usual tech company rows of worktables sporting keyboards and screens. These



The building Kiva moved to in 2011, at 875 Howard St.

were interspersed with sofa-equipped lounge areas. But the nonprofit side showed itself on a wall with a giant world map having pins in all the locations where Kiva Fellows were doing field work.

Several months after I joined, Kiva decamped from from the funky former trunk factory to spiffier, but still frugally appointed, offices in the South of Market area. They were just down the block from the Moscone Center convention hall.

Tech-style accoutrements in the new office included a room with a hammock and a library that doubled as a nap room. A break area had two fancy espresso machines, a generous offering of gratis snack items and cold drinks, and even a beer tap that poured the products of a small craft brewery that had been funded by a Kiva loan.



In early 2013 I was invited to attend an opening reception for “pioneers” of the personal computer industry at the Living Computer Museum in Seattle. The museum had been founded by Paul Allen, co-founder of Microsoft with Bill Gates, to house and keep alive artifacts of the history and evolution of personal computers. I believe it was Paul Terrell, founder of the Byte Shops retail chain, who got my name added to the invitees list. It was a grand weekend, with all expenses for the invitees, including travel, covered by Paul Allen.

Naturally, David Bunnell, my onetime partner in *PC* magazine and other adventures, was one of the other invitees. Seeing each other there was the first time David and I had socialized since *PC* days³³. We greeted each other warmly.

During the reception, David and I even had a funny, reminiscing conversation with a group of the *Creative Computing* folks Ziff-Davis had flown in to take *PC* over after its original staff had walked out.



Each Kiva Fellows class began with an intensive week of training at Kiva’s San Francisco office. It was inspiring to see the classes of generally idealistic and enthusiastic Fellows-in-training be brought rapidly up to speed on Kiva and the particulars of how they’d support its mission. A graduation ceremony was held at the end of each Fellows Week. Most Kivans in the office would gather to applaud each new Fellow. Sentimental me would tear up a bit at every graduation.

The post-graduation tradition for Kiva Fellows was joining the staff for a generally raucous evening of Karaoke. I usually picked a song in advance—Werewolves of London was one—and rehearsed obsessively

³³ David and I briefly had spoken previously at a memorial service for his son Aaron, after Aaron’s tragic, premature death,. We also spoke when David visited The HyperMedia Group to pitch the investment bank he was working with. But the LCM event was the first time we’d really socialized in 33 years.



David Bunnell and me at the Living Computer Museum's reception for personal computer industry pioneers



Group photo of personal computer pioneers attending the Living Computer Museum's reception. I'm in the upper middle.

in hopes of not embarrassing myself too badly.

Another Kiva tradition that intersected with the Fellows program was “partner trips”. These were a perk for US-based staff that, once every two years, offered a one-week trip to work on-site with a field partner. The idea was to give those of us toiling in the office a closer connection to Kiva’s actual mission and work.

The field partners we could choose to visit on a partner trip were those that happened to have a Fellow currently working with them. The on-site Fellow would be our liaison for the week of our visit. Usually groups of three or four staffers would travel together on partner trips.

My first partner trip was to Cambodia, where I got a chance to interact with three field partner organizations based in Phnom Penh. One of these arranged for my colleagues and me to visit the factory of a business that made solar power systems for people living in locations without electricity.

This company’s tackle-box sized systems stored up power from a set of solar panels during the day, then could power LED lamps at night. A family could have light—for nighttime schoolwork for example—without burning expensive and polluting kerosene. The solar power could also charge cell phones and the like. Kiva’s field partner worked with this company to facilitate Kiva loans allowing buyers to pay for a solar power system over several months. It was also inspiring to see that this small factory in the countryside also provided jobs for several local people.

On another day, we got to tag along on a borrower verification visit. Borrower verifications were a primary task for Kiva Fellows in the field. They would make in-person visits to a random sampling of a field partner’s Kiva borrowers, verifying that the loan details submitted to Kiva by the field partner were accurate, and that the loan had been used by the borrower for the stated purpose. On this occasion we accompanied both our host Fellow and a loan representative of the partner to visit a rural borrower whose loan was to buy feed for her livestock. We drove more than an hour outside Phnom Penh, then had

to hike the last half mile or so down a narrow track to the borrower's home. The borrower graciously gave us a tour of her animals in their pens, then we sat on an outside platform of her modest dwelling for a conversation about what the loan had made possible for her.

A visit to a third field partner in Phnom Penh was spent mostly at their office, discussing improvements they were requesting in Kiva's online systems for partners.

It was common for Kivans on partner trips, who had traveled to a distant land at Kiva's expense, to extend their trips with some vacation days for sightseeing before returning home. This was the plan for me and the two colleagues I was traveling with. But one of us became sick and retired to her hotel room. My other colleague and I spent a day touring Phnom Penh, including a trip to the memorial at the notorious "killing fields." Then we flew to Siem Reap for a couple of days touring the temples of Angkor Wat.



Between my last day as an employee at Campbell-Mithun and the day I became an employee at Tides, nearly a quarter century had elapsed where I hadn't worked for a company I hadn't founded or co-founded. In fact, I feared I wasn't capable of functioning as a conventional employee again. This didn't turn out to be an issue at Tides, until near the end of my time there, because my role was largely "intrapreneurial." But at Kiva this became more of a struggle for me.

My official Kiva job title was "senior software engineer." I didn't feel this was a great fit; "engineer" felt a little grandiose to me. I would have preferred just plain old "web developer" but that's how Kiva's system of titles classified me. I imagined that job title pegged me with my coworkers and managers as pretty much a "code monkey." And indisputably, that's what I had signed up for. But as my familiarity with Kiva grew, it became increasingly difficult for me to confine my contributions to that assigned niche.

I longed more and more to have greater involvement in matters of user interface, design, writing. And I'd observe Kiva's marketing and imagine many things that might be tried to grow the number of lenders and the amount of lending. But in a structured organization where those matters belonged in other people's spheres of responsibility, my attempts to contribute outside my official lane weren't especially welcome.

For my first couple of years at Kiva I'd casually toss out suggestions just to see if they would land anywhere, but I wouldn't be assertive about pushing anything that wasn't well received. I'd try to stick to my assigned knitting. But as time passed and I became more comfortable with the organization and people, and as organizational churn created openings in other areas where I felt I could contribute, I became more proactive in seeking a broader Kiva role.

In reviews and meetings with managers I would regularly say, in essence, "Yes I have the skills for my current role, and feedback indicates I'm doing well at it. But I also have additional skills and experience that might benefit Kiva in other areas. I didn't stress these parts of my background when I applied for my current position. But now I'd like to bring them to your attention in hopes you'll invite me to contribute in areas outside of programming."

At one point, word circulated that Kiva was going to invest in working with an outside branding firm on a brand update and site redesign. I made a pitch to be included in the process, and was delighted when my overture was accepted. The process was being led by the woman who led both marketing and product management at Kiva.

My initial task in this project was to review and comment on proposals submitted by branding and design firms. No sooner was a firm chosen, though, when our project leader left Kiva to take a position at Facebook.

In the leadership vacuum that resulted, it felt to me that the project

was floundering. So I suggested to the acting CEO³⁴ that I could lead the project effectively. I'd been advocating a project of this type at Kiva for some time, and I had some definite ideas of how it should proceed.

In particular, I proposed that the project include research on an update concept for the lending website that I'd also been advocating for some time. I called this concept "PIHP" for Personalized, Integrated Home Page. This would be a major change from the existing experience in which anyone going to the kiva.org URL without specifying a specific interior page saw the same home page, a general pitch to lend or begin lending.

In my concept, what was presented on the home page would vary according to what the site "knew" about a visitor's previous experience with Kiva. That was the "personalized" part. The "integrated" part was that the home page would include more kinds of information that would encourage a visitor to become involved with Kiva, or deepen their involvement with it.

For a visitor new to Kiva these additional elements might include feel-good stories about how Kiva loans were helping communities in different places around the world.

For experienced lenders, the additional elements might include invitations to use Kiva features they hadn't yet explored, such as lending teams, invitations, Kiva Cards (a kind of gift certificate), and auto-deposit. We already had data showing engagement with these features increased lending amounts and grew the lender community.

My proposal to lead the project wasn't welcomed though. I was told flatly that exploration of my PIHP concept wouldn't be considered as part of the project, Perhaps overreacting to this rejection, I decided to withdraw from the project team. I pulled in my horns, and returned my focus to my regular coding work.

³⁴ Matt Flannery, the founding CEO, had recently resigned to do a new startup, and a replacement hadn't yet been chosen. Premal Shah, the remaining co-founder, was acting CEO in this period.



My Kiva for loans.lender@yahoo.com

Personalize

My Updates

KENYA: Funded globally, crafted locally



Veronica and I meet at a petrol station in Kibera, an area that makes up the largest slum in Nairobi and...

US: LA Entrepreneur



Ezequiel Olvera was just 11 first met Alfredo, a cobbler...

My Basket

- Dennis Uganda \$ 25.00
- Kiva — donation to fund our operations \$ 3.75

Total: \$28.75 [Checkout](#)

My Notifications

- The loan to Lamula in Zambia you joined is now fully funded
- You received \$0.84 repayment on your loan to Camimemos AI Future B Group in Peru
- You received \$1.34 repayment

My Impact

Loans	\$450 in 18 loans
Countries	7
Deposits	\$225
Donations	\$55
Invitees	3
Teams	1

Fundraising Loans My lendable Kiva credit: **\$23.18**

Ukraine - In the News

Due to recent unrest in the region, it's become even harder for entrepreneurs to gain access to funds. Your loan helps bring stability to someone in the Ukraine.

31% Funded



Sonnia Maria Ukraine
A loan of \$1,075 helped Sonnia Maria to buy rice, meat, fish and other groceries.

90% Funded



Galina Ukraine
A loan to purchase an additional 50 pairs of boots.

My Teams

Friends of Bob Harris

- 5 new posts, 1 from team captain
- 10 new supported loans

[Join another team...](#)

My Auto-lending

You haven't set up auto-lending yet

[Learn more about auto-lending...](#)

My Kiva Subscription

You haven't set up a subscription yet

[Learn more about a Kiva subscription...](#)

Loans to men and women **in** any country **for** any purpose

21% Funded



Olga Tanzania
A loan to buy cassava in bulk and to pay the cost of transporting her...

24% Funded



Banaza's Group Iraq
A loan helps a member to pay for education fees.

Give Kiva Cards

Print It Email Postal Mail

Kiva Now Lending in real-time

[Map view](#) [Message view](#)



Women Supporting Families

Around the world, women often have a harder time finding loan funds. With these loans you can help women to create better lives for their families.

A mockup of one version of my PIHP concept.



When my next opportunity for a Kiva partner trip came up, the destination I chose from the available options was Ecuador. The plan was to visit partner organizations, including a cocoa farming cooperative, in the rural interior of the country. Traveling to them would be a multi-hour bus ride from the capital city of Quito.

On my previous partner trip to Cambodia I had traveled just with Kiva colleagues. For this trip, I encouraged Eve to come along. I proposed we wrap a vacation around the Kiva portion of the trip and spend some time as tourists in Latin America. Our plan was to leave a week before the official partner trip. We'd visit Peru then go on to Quito where Eve had some relatives we wanted to meet.

Originally we had wanted to see Machu Picchu in Peru. When we investigated the logistics though, including coping with the high altitude, we decided it was a more challenging journey than we felt capable of handling in the time we had available. Instead we decided just to spend time in Lima and its environs.

We arrived in Lima in the wee hours of the morning, after a lengthy, two-leg plane flight. Soon after checking into our hotel, I began having one of my "heart" episodes.

Although I had successfully completed the prescribed rehab program after my bypass surgery, and generally felt quite well, every so often one of these annoying episodes would crop up. They weren't heart attacks, but they were a scary impersonation of one. When I first started having them, I'd rush into the ER. They'd do a troponin blood test, then I'd stew for several hours on a gurney, IV'd and wired, until the results came back suggesting there hadn't been a heart attack. Then they'd tweak my meds and send me home.

Once, one of these episodes happened when I was a chaperoning a field trip for Gabe's fourth grade class. I was driving a carload of kids to a three-day adventure in Gold Country. Probably unwisely, when I started to feel symptoms I gritted my teeth and pressed on, driving until we got to the camp location. Then I got another parent to drive

me to an urgent care clinic in the nearest town. The doc there, while making soothing noises to me, had her aide call an ambulance. The next thing I knew I was in a small community hospital. Since my insurance was Kaiser, the hospital contacted them. My Kaiser cardiologist was brought into the picture, and very quickly she had Kaiser arrange to have me medevaced in a small air ambulance to the main Kaiser hospital in San Francisco. When I was evaluated there, it proved to be another false alarm.

After experiencing this false alarm movie a few times, I started to resist reflexively running to the ER when I felt the onset of one of these episodes. (On a few occasions, I'd go sit in the ER waiting room as a precaution, without signing in.) Instead I'd just gulp down an Ativan, stick nitroglycerine under my tongue, and try to walk off the symptoms, while both Eve and I would worry that maybe this time it wasn't a false alarm.

However, when those same old symptoms cropped up so far from home, in a place where we didn't even speak the language, we weren't sure what to do. I got on the internet and found the recommended Lima hospital for foreign visitors that had English-speaking docs. We decided that going there would be our back pocket option but for the time being, we'd just wait and watch.

By the following afternoon, I'd begun to feel normal, so we elected to do a little close-to-the-hotel tourism. This went OK, but every so often I'd get new little twinges. Eve and I debated whether we should try to proceed with the trip. It was one thing to be in Lima with ready access to a hospital if needed. But going to rural Ecuador seemed inadvisable under the circumstances. We decided to cut short the trip and fly back. I emailed Kiva and the trip companions I was supposed to rendezvous with, letting them know I was bailing on Ecuador.

When I contacted United to see about changing our flights, they couldn't get us out for a couple of days, but they could convert the rest of our ticket, which had a Lima to Quito leg as well as a return to San Francisco, into first class for the first return flight they could get us on. In the meantime, in periods when I felt better, we continued

our Lima touring. As the time neared for us to fly, my symptoms cranked up again, probably due to stress.

For most of the flight home, which left at 2am, I slept on the lay-flat first class seat. But it was a nerve-wracking flight for Eve, who kept listening to make sure I was breathing. The day I got back, I saw my Kaiser cardiologist. After an EKG, I was told it had been another false alarm. My meds were once again tweaked, and I was sent home.

These episodes kept occurring randomly. When there was a long gap between them, I kept imagining I was done with them. But one morning at Kiva I was hit with a particularly strong one. I was *almost* sure this was just one more of the usual, but Eve convinced me to go to the ER. It was, of course, the same old story: troponin tests, IV, EKG, and after a lengthy sojourn under the harsh lights, surrounded by ER chaos, a tweak of the meds and discharge. But this time there was a twist. A new cardiologist working in the ER looked at the imagery from my years-ago bypass, which showed one vessel they hadn't been able to open up. He told us he thought that vessel might be the culprit for my episodes and he believed if I consented to a new angioplasty he could fix it.

My regular cardiologist allowed it was worth a try, so the procedure was scheduled. On the appointed morning I checked into the cardiac procedure floor of the San Francisco Kaiser hospital and, after all the prep work was done, I was wheeled down to the "cath lab." It's a bit of an otherworldly procedure. I was sedated but awake. Lying on a table I was surrounded by high tech equipment, bright lights, and a phalanx of gowned and masked practitioners. In my peripheral vision I watched a screen displaying images of the blood vessels feeding my heart as the attending doctor threaded a catheter through them, seeking blockages.

No new blockages were found, which was good. But again the old one they hoped to clear proved too challenging and they had to leave the blockage in place. They wrapped up the procedure and I was wheeled back upstairs to my room to recover. As I lay there, a proces-

sion of caregivers kept passing through the room asking how I was feeling, checking my EKG, and otherwise monitoring my condition.

Apparently, they didn't like what they were seeing. Because, inside of an hour, they were wheeling me back down to the cath lab and doing the whole thing all over again. Eve, of course, was freaking out, but nobody would tell her anything. I'm still not sure what happened. There was a vague suggestion that they feared the first procedure had triggered a heart attack, but nobody has ever confirmed that.

If things had gone as planned I would have been sent home at the end of the afternoon. But with the second procedure they decided to keep me overnight. By the following morning I was feeling pretty normal again and was eager to get the heck out of the hospital.

I'm not sure there was a direct causal relationship, but after that day of cath procedures, the frequency of my episodes ratcheted up. It was disruptive enough that eventually I got my cardiologist to write a letter for Kiva recommending I cut back my work hours. That turned out to be problematic though, because when I was feeling okay I wanted to work a regular schedule and Kiva wouldn't let me. So I got another letter cancelling the first one.

Again, I'm not sure of cause and effect and don't want to draw any conclusions, but since I retired from Kiva (more than three years ago at this writing) I haven't had another episode. (Knock on wood!) Maybe the latest adjustment of my meds finally got it right.



My last encounter with my *PC Magazine* cofounder David Bunnell, who had been such a pivotal figure in my life, was in the final year of his life. For some time David had been fighting a battle with cancer, but this did not deter him from his final writing project. He doggedly continued working on a photo-illustrated book—*Good Friday on the*

*Rez: A Pine Ridge Odyssey*³⁵. This harked back to his younger days in Nebraska when he was deeply involved with Native American causes.

David invited me to attend a reading he was doing from the book, alongside an exhibition of his photographs from the reservation, at a cafe in Berkeley. Though David's fragility was noticeable, it was a moving reading, and the photos mounted on the cafe walls were very evocative. I loved seeing David reconnecting with his early Nebraska roots in such a heartfelt way.

Soon afterward, David died. After his death, I was honored to be invited to a gathering of remembrance at his and Jackie's home. There, listening to others recount so many of the generous and interesting things David had done in the 37 years since our friendship and business association had ruptured, I was moved to reflect on what might have been.

I realized that even though I had painfully lost my connection with *PC*, a venture I had co-created and felt very proprietary about, and I'd also lost out on most of the potential financial return from *PC*, in retrospect my greatest loss from those events was the three-decades-plus of friendship and association I could have enjoyed with David, a special person I had once been so close to and enjoyed so much.



Back at Kiva, a couple of years later, when a vacancy occurred on its product management team, I formally applied for the position as an internal candidate. Nothing came of this for a while. Kiva's process to fill the position stretched on interminably. It took a few months before I was finally told another internal candidate had been selected.

A few years into my tenure at Kiva, its founder CEO resigned to do a venture-capital funded, for-profit startup in an international lending space somewhat adjacent to Kiva's. After several months with an acting CEO, a new person was recruited to take the role. This man was

³⁵ St. Martin's Press, 2017

billed as an “operator” and most of his effort went into improving Kiva’s operations and business systems. There wasn’t a strong emphasis on growth or innovation.

A few years farther on, this CEO too decided to move on. After yet another transitional period, a third CEO was recruited. Like his predecessor, this fellow came from the for-profit world. But unlike the predecessor, this guy was all gung-ho for growth and innovation.

In meetings, the new CEO tossed around terms like “customer lifetime value” and “customer acquisition cost” that were e-commerce commonplaces, and things I had long been advocating Kiva pay attention to, but which hadn’t previously been important metrics at Kiva. I thought, “this is somebody I can relate to.” Once again, I began pitching myself for a larger product and marketing role at Kiva, this time to our new CEO.

In support of my pitch for this transition, I made a slide deck laying out my thinking. I shared this with the new CEO and a few others.

Of course, nobody had asked for this, and it soon became evident nobody was especially interested in engaging with it—or me—to follow up. Sigh!

One of the new CEO’s early acts was to bring in a new VP of Engineering. As part of getting acquainted with this new VP, I included him in my pitch for a changed role. I suggested I was doing well in my current position but believed I could bring more value to Kiva in the product and marketing areas. He seemed receptive to this possibility, and told me he would help me find a suitable new Kiva role.

In the meantime, under the new CEO, Kiva was changing. Unlike his predecessor CEO, who had been focused on operations, the new guy was aggressively working at driving change and innovation.

In an echo of my later-years experience at Tides, Kiva was becoming more “corporate.” Between layoffs and voluntary departures by folks disgruntled with the changes, more than a third of Kiva’s staff left the organization inside the span of six months.

Around this time, midsummer of 2018, I shared with my manager, Jen Kobiyashi, that I anticipated retiring from Kiva at the end of 2020,

Changing the trajectory
Kiva Core growth opportunities

Jim Edlin - March 2018

kiva

The three challenges...

- Bring more people **to** the front door
- Bring more people **through** the front door
- Grow the **value** of Kiva for lenders, and vice versa

Start Lending

Total deposits: **\$2,229**
Total amount lent: **\$6,760**

Changing the trajectory **kiva**

Grow lender ↔ Kiva value to each other

Introduce features in the flow at appropriate points in the lender's journey...

Auto-deposit (and let's brand this!)

Set up an auto deposit

Automatically add money to your Kiva account every month so it's available for borrowers that inspire you the most.

\$25 each month on the 27th

Teams

Lending Teams
Connect with Kiva's lender community.
Lending teams are self-organized groups built around common interests, school affiliation or location.
Join as many teams as you'd like, and rally around shared lending goals by counting each of your teams at checkout toward the team's impact.

Invitations

Maximize your impact by inviting more people to join Kiva and make loans to alleviate poverty.

etc...

Changing the trajectory **kiva**

Slides from my pitch deck

when I'd be 72. A few months earlier, Eve had retired from San Francisco Suicide Prevention after three decades as its Executive Director. My Kiva colleagues were aware of Eve's retirement, and I imagined some were speculating whether I would soon be doing the same. So I announced my planned schedule to be transparent.

A month or so after doing this, Jen came back to me and suggested I retire sooner. Like right away. She was diffident about this; it was clear that this push was being delivered through her from her boss, the new VP of Engineering, and wasn't her idea.

Yep, this was the same VP who had previously offered me warm reassurances that he would help find me a new Kiva role best fitting my skills and interests. Apparently, he'd now decided that role was "former employee." It seemed he'd rather have a younger, more typical engineer-type filling the slot I occupied.

I gave a brief thought to trotting out the "age discrimination" cudgel. But the fact of the matter was that mine was "at-will" employment. Plus I cared about Kiva and didn't want to start down a road that would involve unpleasantness, costing Kiva funds it could deploy for better purposes. Kiva also laid on some modest financial inducements for me quietly to get with the program and say *sayonara*.

Dammit though, I wasn't ready. While I wasn't thrilled about some of the organizational changes that were happening, I still really enjoyed Kiva and my colleagues. I also got a strong sense they appreciated me. While I'd hoped to evolve my role, I still got satisfaction from doing the work of my current position, and I felt I was doing it competently. (A string of positive semi-annual reviews supported this.)

Financially, another couple of years of salary and 401(k) contributions felt like they'd be more like icing than cake, which made the decision to accelerate my leaving easier.

So, just short of eight years at Kiva, that chapter of my work life came to an end.

15 - StarCharm and Retirement

I've mentioned Blair Newman a few times in this story. Blair was my friend who was the fountain of business ideas, gushing forth an unending stream of them. One idea he floated in my presence was StarCharm. The concept was to market jewelry engraved with a person's unique astrological "natal chart." When Blair proposed StarCharm it was well before the advent of the internet. He proposed using cheap, "back-of-the-book" ads in lowbrow publications like the *National Enquirer* to flog these astrological baubles.

Since I had previously studied chart casting, I knew what Blair was talking about. The idea kind of stuck in my head. Blair never pursued StarCharm, of course. But some years after Blair's death, when online commerce was starting to develop, it occurred to me that StarCharm might work as an internet business. Though I had no immediate plans to do anything with it, I bought the web domain starcharm.com on a whim. I imagined someday I might try realizing the business, as a kind of memorial to Blair.

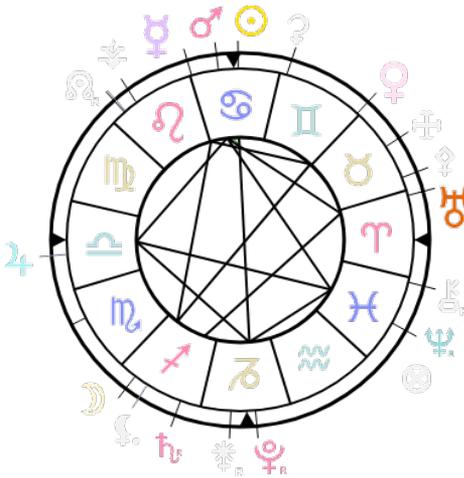
For years I kept shelling out the annual ten bucks or so to retain the starcharm.com domain. But I made no move to do anything with it.

As looming retirement crept into my consciousness though, the idea of bringing StarCharm to life bubbled back up as something I might do. Entrepreneurial "side gigs" were very much a thing in the Silicon Valley culture, and I decided to tiptoe my way into StarCharm as a side gig while I still had my day job at Kiva. I began identifying and seeking out the pieces I thought would be required to make StarCharm a reality.

I gave myself a budget of \$10,000 to get StarCharm launched. (Later, after I fell into a small cryptocurrency windfall, I upped this to \$12,000.) This limit was guided by Eve not being a big believer in en-

trepreneurial ventures. (This was an ongoing a source of stress and conflict in our relationship during my many years doing entrepreneurial things.) I hoped this amount was small enough for Eve to grudgingly accept as an investment into my little flyer.

The first StarCharm requirement I focused on was astrology software for chart casting and interpretation. I identified and researched several candidates. What I needed was software that, given a date, time and location of an event, would spit out the visual of an astrological chart in a form that could become input to an engraving process. The event would typically be a birth, but could also be a wedding or any noteworthy occasion. Ideally, the astrology software would also supply an interpretation of the chart that could be printed as a companion to the engraved jewelry.



Example of an astrological “natal” chart

After eliminating possibilities who’s business terms didn’t seem workable to me, and experimenting with the handful that were left, I started to focus in on a software package called *AstroMart*, from a company in Bulgaria called Astro-Soft. The owner, Frank Burns, and I started negotiating via email about the customizations to his software I needed to use it in the e-commerce website I planned to build. We

also negotiated about the cost for a royalty-free perpetual license for the customized software.

AstroMart wasn't an ideal choice from my perspective. Much of it was black-box, compiled code that I couldn't modify. It was also hardwired to work with Firebird, a somewhat obsolete database. I would have preferred a more mainstream database such as MySQL. All things considered though, *AstroMart* looked like the best choice available to me. So I came to an agreement with Frank. Once he made my requested customizations, my astrology software piece was in place.

The next piece was turning the astrological chart illustrations output by Frank's software into physical pieces of engraved jewelry. I shopped around on the internet and found a promising vendor in Utah called Engravologist. Their website allowed customers to plug in any arbitrary artwork into a design that Engravologist would then engrave on a selected item. I plugged in an example chart, generated by my newly-licensed software, into Engravologist's ordering interface, and ordered a stainless steel pendant. It arrived in a few days, and it was exactly what I'd been envisioning for a StarCharm product. Yay! So I reached out to Engravologist's owner, Brandon Young, to explore if I could work with his company as a wholesale customer, where I could transmit orders into his system and his company would produce the items, package them, and ship them to StarCharm customers.

It sounded like we could make the relationship work both technically and financially. So I mentally checked this box off and told Brandon I would get back to him when I was close to launching a website. That would turn out to be several months later.

The next puzzle piece would be building an e-commerce website that would connect up with Frank's *AstroMart* software behind the scenes. It would show StarCharm's catalog of items that could be personalized with a birth chart, and provide a user interface for inputting data to generate a birth chart. The prospective customer would then be shown a mockup of the personalized item, and could proceed to order it.

Initially I planned to offer pendants and key fobs, in silver or gold-tone stainless steel only. Over time, I hoped to expand the offerings to real silver and gold as well, and to other types of engravable items.

While I felt I had the skills to build such a website from scratch, I first wanted to see what I might be able to get off-the-shelf and customize to my needs. If I didn't have to deal with personalization and showing previews of the personalized items, I might have been able to use a turnkey service like Shopify. But it didn't seem like Shopify would be easy, or perhaps even possible, to link up with my astrology backend for creating and showing the customized birth charts and interpretations. (I've since seen this done by another company.)

Having ruled out Shopify and the like, that left me evaluating software packages I could run on a web server of my own. Fairly quickly I honed in on WooCommerce, an open source e-commerce solution built on top of the also open source Wordpress content management system. These two are widely used and well supported products. Reportedly more than a third of all websites on the internet run on Wordpress and about a third of all stores on the internet use WooCommerce. They both have rich ecosystems of add-ons and extensions to expand their functionality.

I'd never used Wordpress before, but I felt confident I could learn to work with it. It's underlying code is php, which by then I'd been working with at a fairly sophisticated level for several years.

With the Wordpress/WooCommerce choice made, I signed up with a hosting company to rent space on a shared server for StarCharm's www site. But that shared server wasn't going to work for the AstroMart software, which depended on the not-very common Firebird database. I needed a server I could set up from the "bare metal" for AstroMart. Fortunately, virtual private servers have become cheap in recent years; I got a quite fast and capable one from Vultur.com for \$6 / month, including regular backups. (I looked into doing this with Amazon Web Services, but it appeared that would involve more effort than going with Vultur.)

Installation of *AstroMart* on the virtual server did *not* turn out to be a piece of cake. Emails flew back and forth between me and Frank in Bulgaria as I struggled to get the thing working. Never having had any experience setting up Firebird, I found it quite finicky to work with. I finally had to give Frank a login to the new server so he could make the final tweaks. Eventually, though, I was finally able to make requests to astrologer.starcharm.com and get back a birth chart or interpretation.

* * *

Wordpress's technical architecture provides for arbitrary plug-ins to extend its functionality. My next puzzle piece was to create a plug-in that would integrate my Wordpress / WooCommerce site with the AstroMart backend to show prospective customers previews of their custom birth chart items. In addition to this customer-facing side, I also needed the site to be able to provide engravable birth chart artwork to my engraving vendor.

Having never built a Wordpress plugin before, I decided to turn to the freelance ecosystem to get my plugin built. On the Upwork site (what my FreelanceExchange concept might have become if it had ever got off the ground) I found Evgen, a Ukrainian programmer with a solid record of plugin projects, who agreed to take my assignment for a fee that fit my budget. After the usual rounds of back-and-forth, Evgen delivered basically what I needed. And since I had all his php code, I could modify it as needed. I later I proceeded to do so on several occasions.

I also used the freelance ecosystem to get a logo designed for StarCharm, this time using the website Fiverr, which specializes in more creative types of work. A logo designer in Pakistan, Sadafziya, came up with a handful of alternative possibilities. I picked one of the directions and we iterated on it.

Eventually Sadafziya provided me the source files for the logo and I did some final tweaks on it myself.



With my plugin and logo in hand, I began to rough in the customer-facing website for StarCharm.

Once I knew my time at Kiva was coming to an end, in September of 2018, I harbored a brief hope I could launch StarCharm in time for the 2018 holiday season. With this in mind, I got back to Brandon Young at Engravologist to firm up the arrangements for them to be my engraving and fulfillment vendor.

Working with Engravologist would simplify a lot of things for me. They already had supplies of blank pendants and key fobs to engrave my natal charts on. They also had chains for the pendants, packaging materials, and the ability to ship out orders. If I could just somehow integrate my website's back-end data of new orders into Engravologist's order management system, the whole business of producing and fulfilling orders would be a turnkey arrangement for me.

Alas, though it had seemed like a done deal when I first talked to Engravologist on a conceptual basis, things began to unravel when we actually started working through the details. There were multiple issues that kept us from reaching a final agreement, some technical and some financial. But the most daunting was that Engravologist wanted me to guarantee and prepay for a sizeable minimum order volume. Since I was approaching StarCharm from a toe-in-the-water perspective and had a tightly limited budget, this proved to be a dealbreaker.

Without Engravologist, I had no chance of launching for the 2018 holiday season. So manufacturing and fulfillment temporarily went on the back burner.

Once I left Kiva, I signed StarCharm up for the Atlas program offered by Stripe, the company that supplies websites with tools for accepting credit card transactions. For \$500, the Atlas program sets a business up with its choice of a Delaware C corporation or LLC (I chose LLC), opens a merchant bank account for the new business, creates a Stripe account for the business, and provides a whole bunch

of other helpful services and discounts relevant to a startup. Star-Charm LLC was born.

Next, I started approaching engraving companies as possible suppliers. I was in for a lengthy and bumpy education in laser engraving. The easy success with Engravologist turned out to be beginners' luck. In my mind, laser engraving an image on metal would be a lot like laser printing it onto paper. You'd just send the image to the engraving machine, with the metal instead of paper as the medium. This turned out decidedly not to be true. The bumps I encountered included...

- Input issues: A lot of laser engravers only accept input in formats from certain programs, like Adobe Illustrator or Corel Draw. They don't accept the "scalable vector graphic" (".svg") format that my chart creation software put out.
- Business issues: Many job shops that do laser engraving aren't oriented toward relatively inexpensive consumer products. So their business models include things like per-job setup fees ranging upwards from \$75—obviously untenable for a product that might sell for \$50 or less.
- Technology issues: I learned many laser engravers aren't powerful enough to engrave metal. (They do just great with wood, plastics and other less-challenging substances.) Also, not all have the resolution to engrave fine lined intricate patterns in a limited space.
- Quality issues: I wanted a specific engraving result where the chart pattern was etched into the jewelry item but also had darkened lines to make the pattern more visible. Some suppliers could do a high-quality job in etching the pattern with the desired fineness and depth, but told me they couldn't do the darkening without compromising the resolution.

I started my engraver search with companies located in the Bay Area, since I thought it would be easier working with a local vendor. I was surprised when no local companies I contacted turned out to be able to meet my needs.

Having struck out locally, I expanded my search to companies I found on the internet. It was a frustrating experience. I ended up con-

tacting more than 70 companies. Some were scratched off my list after a first conversation. Others got to the stage where they produced prototypes from my sample chart file. None of these prototypes approached the quality of the first sample I'd obtained from Engravologist, which was the only vendor so far to meet my standard of a sellable product.

I even looked into the possibility of acquiring a laser engraving machine to do my own production. You could find devices marketed as laser engravers on eBay for a few hundred dollars. But as I dug into this I learned that these low-end devices didn't have the capability to engrave metal, or the resolution for the intricate pattern of a birth chart on a blank not much bigger than a penny. If I wanted to do DIY engraving I'd need an industrial-level device well beyond both my budget and my comfort level.

I was despairing that I'd never find an engraving source when, after 70+ strikeouts, salvation came from a company called InnoTech, in a Philadelphia suburb. They had really put some effort into making a sample for me. Their breakthrough in achieving my quality standard was a process where they engraved the pattern twice at two different laser frequencies and powers. Their work matched the standard that was first set by Engravologist.

Even better news was that InnoTech could handle packaging and shipping for me.

It wasn't 100% turnkey with InnoTech, as it would have been with Engravologist. I'd have to source and provide them with a supply of blanks and chains. And I'd have to produce and provide them my own custom StarCharm packaging, plus acquire and provide the other items that would comprise a finished package shipped to a customer. But it was still the breakthrough that enabled me to move forward with the business.

I hit the internet again to find sources for my engravable blanks and chains. Big surprise—pretty much all the potential sources I found were in China. Sticking with my toe-in-the-water approach, I only ordered 100 each of silver stainless pendant blanks, gold-tone stainless

pendant blanks, and stainless key fob blanks, plus chains to accompany the pendant blanks. I got a reminder of how much niggling detail I'd have to deal with when I realized I'd also have to get jump rings to attach the chains to the pendant blanks. These necessitated buying a small, special purpose hand tool for attaching the jump rings. When the blanks arrived from China I unpacked them, then sat at my dining room table attaching all the jump rings to the pendant blanks.

When Engravologist made my first prototype, I was impressed at the clever, multifold packaging they shipped it in. I decided if I was going to get nothing else from Engravologist, I was going to clone their package design.

I went back to Fiverr and hired another designer, Anies, also from Pakistan, to do the graphic design for StarCharm's version of the cloned packaging. Then I began looking for a company to print and die-cut them. For the modest quantity I wanted, most of the bids I got were prohibitive. But one bid, from a company called Custom Packaging Hub, in Dallas, was right in my ballpark. The increment over getting the 300 I wanted to getting 1,000 was not huge, so I went ahead with the larger order.

In a surprisingly short time, the finished packages arrived—from Pakistan. It turned out the Texas folks were brokers for an offshore printer. By odd coincidence, the packages ended up getting produced in the same Pakistan city where they had been designed.

The outer wrap was the biggest piece I needed to solve for the packaging, but there were additional pieces too. On Etsy, I found a company to make custom-printed backing cards to hold the engraved items. From Amazon, I got clear plastic envelopes to slip the card and item into. I also got some tiny plastic envelopes to hold the chains for the pendants. The final piece was padded shipping envelopes for the assembled package.

As I marched toward readiness to launch, niggling little work projects kept popping up. For example, the birth chart artwork output by my customized version of the *AstroMart* software used astrological symbols—for the Zodiac signs, planets, and the like—that different



The StarCharm package, folded and partially unfolded



Pendant inside the package

types of computers rendered differently and in some cases unappealingly. To fix this, I needed to create a custom type font that would render the astrology symbols consistently and nicely. Then, once I created the font, I had to program the StarCharm website to use this custom font for the symbols.

Another unanticipated project was polishing up the language of hundreds of sentences in AstroMart's database of astrological interpretations. The software drew from this database to assemble individualized interpretive reports to accompany the charts it created. When I looked closely at these, I realized many had what I thought were awkward bits of writing. So I ended up putting in four solid days hand-editing these sentences to read better.

The parade of small but essential tasks kept marching on. Accounts needed to be set up with various online services. I signed up with Shiprobot.com to manage shipping of customer orders. Through Shiprobot I also signed up with Express1.com to purchase postage for shipping. Then Shiprobot needed to be integrated with my Woocommerce ordering system.

I also signed up with two different email services, Mailgun.com to handle sending emails from the website for such things as order confirmations, and MailChimp.com for sending marketing emails. Then I created accounts for StarCharm on Facebook, Instagram and Twitter.

There were a bunch of extensions to Woocommerce that I needed to install and set up on the website. One was a plugin for creating and managing coupon codes, another printed out packing lists to go with orders. Others included one for search engine optimization, one for calculating sales tax, one to link up with the Stripe service for accepting credit cards, and so on. Each of these took a chunk of time, including testing that all was working as expected.

Photography was another task that needed to be taken care of. My son Gabe has a high-end camera, so my first approach to this was asking him to take the shots we needed. But we quickly realized that taking beauty shots of shiny metal jewelry having fine detail called for skills and equipment we didn't have.

So it was off to Fiverr again to hire a photographer. The proposal I accepted was from Larry, a photographer in Miami. I shipped Larry all my product samples to make product shots. The results were way better than our home grown attempts. Still, I ended up putting in a few days work with his shots in Photoshop, cropping, tweaking, making

various sizes for different uses, and slimming down the image sizes to make them load faster on the website.

When all the pieces were finally in place, I packed up a suitcase with my metal blanks, packaging materials, and everything else needed for production and fulfillment. Then I cashed in some United miles and flew to Philadelphia to meet with the InnoTech people. I spent the better part of a day with them. Mark, my account executive, and Josh, the laser production tech, were super-accommodating and a pleasure to work with.



Examples of Larry's product photos

First I set InnoTech up with a login to the back end of the Star-Charm website. Then I oriented them to its New Orders page. We practiced how they would produce an order. Step one was to download the artwork for a pendant or fob from the website, transfer it to their laser engraving machine, and engrave the front side of the item. They showed me the dual-pass process they'd figured out in order to provide the engraving quality I'd asked for. We then worked through step two—the process of grabbing the text the customer specified for the back side of their item, then engraving it.



InnoTech's Josh removes the first pendant produced for a StarCharm order from their laser engraving machine

In the next work session, we practiced the several steps of packaging an engraved item: attaching it to a mounting card, bagging the chain, if any, on the back of the mounting card, slipping all this into a clear plastic envelope, folding the presentation folder, slipping the prepared item into it, placing the result into a padded shipping envelope, and finally printing and attaching a shipping label.

While InnoTech would handle the physical business of shipping orders, the generation of and payment for US Mail shipping labels would be done through a service called ShipRobot, integrated into my Woocommerce order processing system. So the training included logging into and using ShipRobot, plus details like how to add funds to the postage account.

InnoTech treated me to a nice lunch that they brought in for their whole staff, and over lunch I got to meet the father-and-son owners of

Wear Your Stars! Personalized Astrological Birth Chart Jewelry



Let *StarCharm*™ engrave the astrological chart of the heavens—as seen from your (or someone special's) birth time and place—onto a beautiful adornment.

Do the stars influence your future? Many people know their "birth sign" — the sector of the Zodiac, like Taurus, Virgo, or Scorpio, that is ascendant at the time of their birth. But astrologers believe determining the influence of the heavens on a person's life and future involves a **far more subtle and elaborate calculation than merely the Zodiac sign**. It involves planets, the sun, the moon, and other heavenly bodies and their relationships to one another.



What's a "Natal Chart"? It's a chart of the positions and relationships of heavenly bodies as seen from the precise place of someone's birth at the very moment of their birth.

As the celestial bodies spin in an ever-changing ballet across the firmament, their specific configuration for a given time and birthplace, captured in a Natal Chart, is **almost as unique to an individual as their fingerprint**.

StarCharm can engrave this unique pattern onto a lovely piece of jewelry.



A Natal Chart

StarCharm jewelry

StarCharm offers personalized pendants in 14K gold, .925 Sterling silver, and polished silver or gold color stainless steel, and a stainless steel key fob. Click your choice below to start customizing it with a Natal Chart from birth information you enter.



Natal Chart Pendant — *make yours now*



Natal Chart Key Fob — *make yours now*

Home page of StarCharm's website (top part only)

the company and much of the rest of their staff. Afterward I got to see several of their other projects in production.

By the time we wrapped up our day of working together, I felt very comfortable that systems were in place for InnoTech to process StarCharm orders as they came in. I felt very fortunate to have found InnoTech.

My day in Philadelphia wrapped up with a visit to my nephew Bruce Meyer and family, who live in the suburb of Villanova. The next day I had some time before my flight back to San Francisco, so I did touristy stuff like a visit to the Liberty Bell.



All the infrastructure was finally in place. The website was built. StarCharm was ready to launch.

It was time to run some ads.

While I could imagine someday running ads for StarCharm in traditional media, like next to the horoscope feature in newspapers, or even in the supermarket tabloids that Blair Newman had once envisioned as StarCharm’s natural medium, my initial ad strategy was all digital—Facebook, Instagram, Google, Reddit.

For Google, I bought keywords like “birth chart”, “natal chart”, and “astrological birth chart.” With my toe-in-the-water philosophy, for the first Google round I set a budget of \$5 per day.

Ad · www.starcharm.com

Natal Chart engraved jewelry | See yours now free

Astrological chart of heavens at time and place of birth engraved on a pendant or fob.

Ad · www.starcharm.com

Wear your stars | Birth Chart Jewelry | In gold, silver or stainless

Your astrological birth chart custom-engraved on a pendant or key fob. Includes interpretation of your Natal Chart.

First Google search ad

Second Google search ad



StarCharm

Sponsored · 🌐

👍 Like Page

Jewelry with your (or someone special's) astrological Natal Chart engraved



StarCharm

Give the gift of the most personal jewelry - the astrological chart of the heavens at the time and place of a person's birth - engraved onto a lovely pendant, charm or other adornment

STARCHARM.COM

Shop Now

Desktop version of a Facebook ad for StarCharm -

Over the course of a week, my \$35 first round spend bought just under 3,000 views of the ad, which got 56 clicks to the website. I later did a second round with a \$25 daily budget and got 81 clicks from 2,000 views.

On Facebook and Instagram I tried various ad formats and locations, including in stories. I also tried promoted posts. All told I spent \$477 on Facebook and Instagram ads, reaching about 38,000 unique people with over 42,000 impressions. I tried both pay-per-impression and pay-per-click models. For pay-per-click my cost averaged about 33 cents per click.

I also looked into marketing through “influencers.” I discovered this had become a sizeable and organized segment of online marketing.

My hopes of offering free samples in exchange for mentions were quickly dashed. Influencers with significant followings were asking hundreds or thousands of dollars for placements. These were well beyond my budget.

Anticipating the holiday gift season, I sought out lists of both online and traditional publications that planned to run holiday gift guides, so I could pitch StarCharm to them. I wanted to approach those that were editorial rather than advertising, so my maximum investment would be a free sample item. But I hadn't realized how long a lead time was required to approach these guides. By the time I started sending out pitches I was too late for many.

The sad bottom line is that by the time I'd hit my self-imposed spending limit, StarCharm had booked only 13 sales.

It's possible that, had I continued to invest, ultimately StarCharm could have become profitable. But I didn't want to stir up domestic strife that might end up being criticized as "throwing good money after bad." I'd hoped StarCharm could have bootstrapped itself, but it ultimately became clear that my shoestring budget wasn't going to cut it. Not only marketing but also inventory was an issue. I thought precious metal versions could be popular higher-margin offerings, but I didn't have the cash to lay in even a small supply of silver and gold blanks to engrave.

In fact I was even worried that, if my advertising did produce a bunch of orders, I'd run out of the small supply of stainless steel blanks I'd ordered, and it would take uncomfortably long to resupply from my Chinese sources if orders were pending.

To complicate the situation, InnoTech was losing interest in working with StarCharm. The onesie-twsie production orders they were getting from me were too few to be worthwhile business for them.

It was looking like StarCharm was lining up to become a member of the No Cigar club. Possibly this was due to the same cause as previous No Cigar outcomes—insufficient funding—though it could also be that it just wasn't a great business opportunity.

When the pandemic came along, InnoTech halted operations for a while, and I used that to put up a “closed due to pandemic” banner on the StarCharm website. But even after InnoTech reopened, they didn’t want to process small-batch orders. So I changed the banner to a generic “Temporarily closed for business.”

As of this writing, the StarCharm site is still live, but I have no ability to fulfill any orders. So it’s dead in the water, at least for now.

My pride was wounded but I was ready to throw in the towel on StarCharm. Since it was a fully developed business I thought maybe I could at least recoup my investment by selling it to an entity better positioned to realize whatever potential it had. So I scoured the internet for other businesses that were selling some form of personalized jewelry, figuring they’d be good prospects to approach. My prospect list included picturesongold.com, mypets.gift, jewelrykeepsakes.com, planetjill.com and a good handful of others. Who I thought was the most promising prospect was an Israeli company, TenenGroup. They seemed to have several brands, such as mynamenecklace.com (now myka.com), in the personalized jewelry space.

In my pitch to these companies I pointed them to a *New York Times* article³⁶ headlined “Venture capital is putting its money into astrology.” It talked about a “\$2.1 billion ‘mystical services market’” that I hoped suggested good potential for StarCharm.

I’m sad to say that my attempts to reach out to these companies didn’t produce much in the way of interest. The best nibble I got was from Soufeel, a Hong Kong company, where the CEO at first seemed interested, but he shut down after learning we’d only made 13 sales.

My last attempt to find a buyer is listing StarCharm on the business brokerage site flippa.com. We’ll see how that goes. In the process of filling out their questionnaire, they asked about competitors. To see if any had emerged, I Googled “birth chart necklace”.

³⁶ <https://www.nytimes.com/2019/04/15/style/astrology-apps-venture-capital.html>

Ads · Shop birth chart necklace

 <p>Ephemaris Birth Chart \$79.00 Ephemaris Free shipping</p>	 <p>The Birthdate Book – Birth ... \$95.00 Birthdate Ca... ★★★★☆ (14)</p>	 <p>Custom Natal Chart \$29.95 Etsy Free shipping</p>	 <p>Ephemaris Birth Chart \$79.00 Ephemaris Free shipping</p>	 <p>Ephemaris Birth Chart \$89.00 Ephemaris Free shipping</p>
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Some results from Googling “birth chart necklace” in late 2021

When I first launched StarCharm there were no relevant results for this query. Now there are a half dozen or so, some with quite slick websites, like ephemeris.com. So my window of opportunity may already have closed.

Damn. Yet one more time... No cigar!

* * *

The other big project I began working on after leaving Kiva was preparing to move house.

Back in 2013, Eve’s knees were giving her a lot of trouble. It was becoming very difficult and painful for her to navigate the 54 steps up from the street into our condo. After a variety of treatments—including injection of corticosteroids into her knees—had failed to help, her doctors had recommended “total knee replacement.” Replacing both her knee joints with artificial metal joints, they said, was the one treatment that would give her relief. But Eve didn’t want to do this.

It became clear something would have to change. If it wasn’t Eve’s knees, it might have to be where we lived. Maybe we needed to move someplace that didn’t require an arduous climb to get in the door.

We got in touch with our dear friend Nancy Meyer, a real estate broker, to help us look for someplace to move. We also started scrutinizing real estate listings. We limited our search to either places at ground level or in a building with an elevator.

We looked at a lot of places, but nothing we saw really suited us. This was complicated, of course, by Eve and I having markedly different tastes and rankings of what was important to us. There were some places Eve liked but I didn't, and others vice versa. But none where we both said, "This is it!"

Somewhere along the way, Eve changed her mind about getting knee replacements. She got one knee done and then, a couple of months later, the other. After getting through the recovery and follow-on physical therapy, Eve could walk again pain-free.

This development ended any urgency about moving. But we did say to ourselves, "OK, this crisis is over. But eventually, a day will arrive when 54 steps are not going to be manageable for at least one of us." So we decided to keep looking, figuring with the pressure off we'd sooner or later stumble across the right place for our later years.

Then, in the summer of 2014, Gabe graduated with his bachelor's degree from Arizona State and moved back home with us. In December of that year, we came across a listing for a three-bedroom place in a high-rise condo building that was priced significantly below market because it was a fixer-upper. Since Gabe was handy with tools (for example he'd helped us redo our kitchen floor the previous year) and he had worked in property management while he was in college, we asked him if he'd be interested in moving into it and fixing it up if we bought it. He said he was. So we went to look at it.

It turned out to be in a building where Eve and I had gone to check out an open house a couple of years previously. On that occasion, we never got past the front lobby. The ambiance of the building made Eve feel like it was a "senior housing" facility. But this time we made it past the lobby and checked out the condo that was for sale.

It obviously did need a fair amount of upgrading, but we felt it was nothing that Gabe, with me helping out, couldn't handle. Also, having

gotten past the vibe of the lobby, Eve actually liked the bones of the condo itself. It had floor-to-ceiling window walls in the living/dining room and all three bedrooms, and she loved how light-filled it was.

While we were in the building, Nancy, our agent, suggested we drop in on another open house on a different floor to get an idea of what a similar unit looked like after it had been upgraded. It was quite a contrast. The second unit had hardwood floors, granite counters in kitchen and baths, high-end appliances and plumbing fixtures, etc. It also had an asking price a couple hundred thousand dollars more than the fixer we'd just looked at.

We decided to put in an offer on the fixer unit. A few days later Nancy told us we'd been outbid, and asked if we wanted to put in a higher offer. But we were only interested in that unit if it was a bargain, so we told her we'd pass. She called back a few days later to propose another option. The second, fixed-up unit we'd looked at had accepted an offer but then fell out of escrow. The sellers were looking for a quick replacement. Did we want to make an offer, she asked.

At first, we didn't. We weren't keen on spending more, and this unit lacked the advantage of providing Gabe something productive to work on. (At that point, he was driving for Lyft while looking for his first post-college "real" job.) But Nancy exercised her powers of persuasion, reminding us how nice the place was, and it was move-in ready with no work. Eve and I didn't want to move right away, but Gabe liked the idea of living there and renting out the other two bedrooms. We took another look at the numbers, decided it was a reasonable place to lock in for a "someday" move, and pulled the trigger. Because building rules required the unit to be owner occupied, we put in our offer with Gabe as a co-owner. Several weeks later we got the title and keys.

Our new condo was in the Cathedral Hill neighborhood of San Francisco, just across the street from St. Mary's Cathedral, which gave the area its name. It was a south-facing unit on the 3rd floor of a 15 story, plus garage, high rise from the mid-1960s. The builder was Joseph Eichler, a developer famous around these parts for his midcen-

ture suburban houses with lots of glass and airy, open plans³⁷. Our building was one of his few urban high-rises but reflected a design philosophy similar to what influenced his suburban homes.



66 Cleary Court, San Francisco

The one thing the new place needed was an upgrade to the window treatments. We looked into having the existing drapes cleaned and were told they were beyond salvage. HOA rules limited the window options to either white vertical blinds or drapes with a white lining. We went with the vertical blinds, ordered them online, and Gabe and I installed them ourselves. Gabe and I also made an Ikea run and bought an inexpensive dining table and chairs and other basic furnishings for the place. Scrounged items from friends' basements filled out the furnishings.

I put out the word at Kiva, which had a lot of young staff, that we had an apartment that was looking for a couple of roommates. It

³⁷ Some history of at the building and neighborhood is at <https://www.eichler-network.com/article/city-hill>

turned out that the boyfriend of a colleague, along with a friend of his, was in the market. We showed them the place and they signed on.

Over the next five years, Gabe had a couple of turnovers in roommate tenants. But when the third set of them gave their notice, Gabe decided he was done. None of his friends who might be potential roommates wanted to pay what we were asking in rent, and Gabe no longer wanted to deal with “rando” roommates. So Gabe told Eve and me that it was time for us either to make the move, find all-new tenants not including him, or sell the unit. (The building allowed 20% of units to be rented to non-owners. We had put ours on the waiting list, and had finally come to the top of the list, giving us the option to rent.)

This choice occasioned a lot of soul-searching. Eve, who doesn't love change, wasn't really ready to move. Frankly, it was unlikely she ever would be, until some circumstance made a move unavoidable. The alternative of being a landlord in San Francisco, a very tenant-friendly city, is fraught with potential pitfalls that made the rental option unappealing. And, having found a place we liked, we were reluctant to just walk away from our someday-when-we-need-it option by selling, even though it had appreciated nicely in the five years we'd owned it.

After an extended period of agonizing, we made the choice. We were going to move.

Between deciding this and doing it lay a boatload of work. Eve and I had lived together in our Waller St. place for 30 years; Eve had been in it for 35. We were deeply embedded in the place. Also, moving meant downsizing from over 1,600 square feet, plus a capacious basement, to 1,100 square feet with no additional storage. Our Waller St. basement was stacked floor to ceiling with who knew what, and that was only one area to deal with. The process was further complicated because Eve, as noted earlier, hates change. She tends to be very attached to her acquisitions of all types—furniture, artworks, household goods, tchotchkes, et al.

To help facilitate what threatened to be a daunting process we retained a specialist organizer, Debra. She came to the house and worked with us over the course of many days, helping us triage. Under Debra's encouragement and facilitation, we filled carload after carload of stuff to go to Goodwill, the Library, organizations that took donations of art materials and building materials, and—if no better option was available—the dump. Debra's role was as much a therapist as an organizer.

We consigned a billboard-sized poster of a tattooed lady, acquired when Chicago's Riverview amusement park closed down, then stored unseen in a trunk for decades, to an auction house. Various artworks, including a huge portrait of Eve's Uncle Lothar, an atomic scientist, were shipped off to relatives who were persuaded to take them.

We had a couple of months after Gabe and his roommates had decamped from the condo to recivilize it from the frat house ambiance it had taken on.

We had it freshly painted, and we re-carpeted the bedrooms, which had ratty old carpet instead of hardwood. To accommodate the too-much-stuff we'd be bringing with us we had a closet system installed in the primary bedroom's walk-in and had pull-out shelves built to transform a hall closet into a pantry.

Tom McCarthy, a mover Eve knew from his volunteer work at Suicide Prevention, was signed up to handle the physical move. At his direction, we went around the house tagging each item to be moved with a strip of yellow tape and marking where it would go in the new place. Things not to be moved were grouped in one corner of one room that was marked off with tape.

On the appointed day, McCarthy's crew of muscled Irish lads were a tornado of packing, boxing up everything we hadn't pre-packed. Then they hauled everything on their backs down the 54 steps and loaded up a pair of vans. On the receiving end, they had the blessing of an elevator. When they were done, in addition to our furniture, we had 140 brown cardboard cartons stacked in the new place.

It took about three weeks to work our way through the cartons. As each carton was emptied, it was flattened and stacked outside on the balcony. Finally we were settled in. The two extra bedrooms became studies for Eve and for me. Mine is where I am writing this tome.

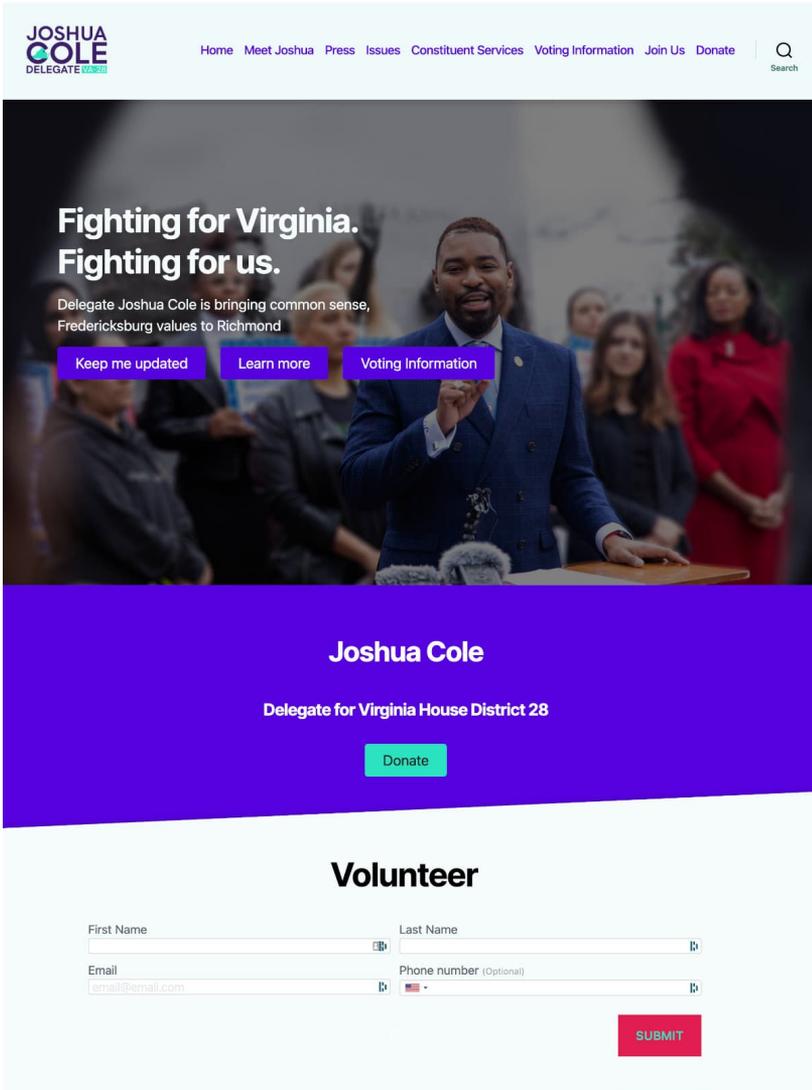


With StarCharm launched and the move done, Eve and I started putting together more pieces of our post-retirement lives. Eve, who had long been salting her training sessions and fundraising pitches with humor, and had experimentally done a few standup comedy gigs, decided she was going to take up standup comedy more seriously (if that's not an oxymoron). She also began volunteering in the office of a member of San Francisco's Board of Supervisors.

Writing this memoir was one of my retirement projects. But I also wanted to do something, other than StarCharm, that was more in line with my previous work but with a social good dimension. I explored volunteering with the Code for America project, but that didn't seem like quite the right fit. Then I started volunteering with Tech for Campaigns, whose mission is to build "a lasting and permanent tech and digital arm for Democrats."

While well-funded, high-profile campaigns, such as those for Senate seats, can afford the pricey services of political digital agencies such as Blue State Digital, such support is often beyond the resources of campaigns for state legislature seats and the like. Tech for Campaigns seeks to fill this gap with work from volunteers who contribute the skills they normally put to use in their for-profit day jobs. These volunteers build websites and create and conduct email, social media, and texting campaigns for candidates who aren't in a position to go with high-end digital agencies. TfC puts together ad-hoc teams of volunteers, almost always working remotely, to execute digital projects for the candidates it works with.

My work with TfC began with helping build a website for 2019 Virginia House of Delegates candidate Joshua Cole. The team TfC brought



An example of the Tech for Campaigns websites I volunteered to work on

together consisted of me as the web developer along with a designer, a writer, and a project manager. Tfc also provided access to a staff member to be liaison between our team and Cole’s campaign staff.

Starting with a template that Tfc created for candidate websites, over the course of five weeks our team designed, wrote, built and launched a site for Cole, whose District 28 incorporated Fredericksburg and environs. Cole had been a candidate for Delegate in the previous election and lost by fewer than 100 votes. Our goal was to help him flip that result in 2019. And we were pleased to see that Cole won election in 2019 by over 1,000 votes, getting 51.8% of votes cast.

I went on to work with Tfc teams developing a handful of other candidate websites in 2019. Then, toward the end of that summer, I was invited to be join a “website SWAT Team” Tfc was creating to fix emergent problems and make late-breaking revisions on candidate websites after the original Tfc teams for those websites had moved on. In this role I laid hands on several other websites. In the 2020 campaign season I once again volunteered to work on a handful of new websites, as well as continuing in my SWAT Team role.

Then, after the 2020 elections, I was invited to be on a team updating Tfc’s candidate website template and process in response to learnings from the just-ended campaign season. I participated in this work through spring of 2021. Then I once again volunteered on creating or updating a few websites, including for Josh Cole’s reelection campaign. Periodic SWAT projects also continued to come in.

I expect to continue my volunteer work with Tech for Campaigns as the 2022 campaign season gears up.

Epilogue

At this point, I have to ask myself: Have I just churned out 400+ pages of “woulda, shoulda, coulda?”

Eve is convinced that I fall somewhere on the autism spectrum. She tells me I display indications of Asperger’s syndrome—that I’m likely a “high-functioning aspie.” Eve believes neurodiversity may be a major factor in why so many of my initiatives have ended sans “cigar.” While I’ve never been evaluated for neurodiversity or officially been diagnosed, indisputably I have behaviors—like rocking when engaged in conversation, especially with someone new—that are often associated with Asperger’s. Eve’s unofficial diagnosis may well be right.

Neurodiversity may be an explanation for some of the outcomes, but regardless, is this volume mostly a protracted whine?

Honestly, there are parts that feel uncomfortably close.

But, contemplating my life as of this writing, I feel it’s come out pretty OK.

Despite all the things that didn’t go how I would have wanted, I’m well aware that so many times, in so many ways, things could have gone so much worse. I freely acknowledge the very many helpings of good fortune that have benefitted me.

Good fortune that started with parents who embraced me lovingly, quirks and all, and who jumped through numerous hoops and did all sorts of backflips to smooth my oft-bumpy way through my youth.

Good fortune that continued with Woodstock Country School, which coped with ever-so-problematic me and gave me a nurturing place to grow.

There’s whatever watchful spirit got me through a heartstopping spinout at speed on the Florida Turnpike in my dad’s Lincoln Conti-

mental, without a scratch to either me or the car. And I was spared again a couple of years later when I nodded off behind the wheel and went off the road while stupidly trying to drive straight through from Miami to East Lansing.

I'm also grateful to have benefitted from the cardiology and cardiothoracic surgery skills of Dr. Sheryl Garrett and Dr. Nora Burgess at Kaiser Permanente, who together got me through a triple coronary artery bypass to emerge healthy enough to continue living a normal, active life for more than 22 years, as of this writing.

My good fortune includes Michigan State, and a caring collection of professors and administrators there, who gave me an enriching college experience and bachelors degree despite my haphazard route to getting there.

I also was blessed by MSU's random housing algorithm that made me roommates with Mark Estrin at freshman orientation. That kindled a friendship that sustained me for many years, until Mark's untimely death. It also brought me into the Estrin family, which became like a second one for me.

I owe gratitude to Illinois Bell, and specifically Hal D'Orazio of its college employment department, who plucked me out of a queue applying to be phone installers and got me launched into the first phase of my post-college working life.

Then there's my fortuitous connection with David Bunnell, which helped veer my work life onto the path it has roller-coastered along for the last forty-plus years. David's friendship also hugely supported my transition from Chicago to San Francisco.

Immensely, there is the good fortune that brought Eve Meyer into my life, ever so improbably after my first clumsy attempt at connection got crumpled and tossed into a trash can. That missive's rescue from the waste bin led to a relationship and friendship and marriage that has sustained me for over four decades, and has given me an extended family I love being a part of.

Another set of improbabilities brought our son Gabe into our lives and has allowed me to experience the satisfactions of fatherhood.

I've had more opportunities than most to try realizing multiple entrepreneurial visions.

And the folks of Tides and Kiva gave me both joy in collaboration and opportunities to do good in the world in the last phase of my work life.

So, ultimately, not many sour grapes here. I may not have achieved the Bill Gates level of impact and riches I once thought I might have a shot at. Still, I well know I'm in a far better place than I might have ended up.

I titled this recollection *No Cigar*. And it's true that in my ride through life so far, I haven't managed to grab myself a Gurhka Royal Courtesan³⁸ or some similarly grand prize.

But at a couple of months short of age 74, I have a family that I love, a nice home to live in, decent health, and resources to support us comfortably for whatever's yet to come.

And I acknowledge here and now that these constitute something deeply to be grateful for. Hey, you could even call it a "cigar."



San Francisco, California

December, 2021

³⁸ Reportedly the world's most expensive cigar, at \$1 million each (<https://financesonline.com/the-most-expensive-cigars-in-the-world-from-cuban-smoke-to-ancient-mayans/#courtesan>)

About the Author

This entire book is an extended disquisition “about the author,” so it seems redundant to have a little mini-bio here. Nevertheless, it is conventional to have a section like this at the back of a book, so here it is:

Jim Edlin is a veteran web and personal computing entrepreneur, developer, architect and experience designer. A native Chicagoan, he has lived in the San Francisco Bay area for over forty years. He came to the tech world after starting out in broadcasting and advertising. Among other accomplishments, he was a co-founder and first editor of *PC* magazine, one of the most successful magazine launches of the 1980s. In later years he made a turn into the nonprofit world, working with organizations including Kiva.org.