

January 11, 2011  
(1/11/11)

## **iYear One (2010 Being The “Zero Index” Into the i-Time Array)**

I'm going to wear the CTO “hat” here at MLD for a minute. Mainly so I can look back at this a few years from now and review myself. In the technology division I'll call this a “Technology Discussion” - and see if somehow without leveraged speculation this “knowledge” (tech) can't be used by “management” to capitalize – somehow.

January 7, 2011

A couple of observations are of note for the 7<sup>th</sup>.

- In visiting the local hospital I saw all of the doctors, nurses and staff carrying around big, fat stacks of paper (charts, inserts, notes, prescriptions). No iPad, no Tablet-PC, no PDAs or Palms, no iPhone or Droid, no laptop – mountains of paper and everyone looking for pens. In 2011. \*\*\*
- Visiting the patient of the above hospital after the paper-mountain and surgery: Something I haven't seen in... well, maybe 15 years: An 80 year old, a 40-something, a 50-something, a 5-1/2 year old all gathered around a “light box” telling stories and looking at pictures – an iPad. (Off to the side was a 30-something fingering the nonsense out of a droid/android phone, but since not “social” the droid-isolationist only gets parenthetical mention for now.)

\*\*\* RE: first bullet – paper hospital. I am, after 30 years in the digi-computer industry, shocked endlessly that we are back (devolved) to the redundant, wasteful, un-green, error prone, risky (loss, theft, HIPAA?) practice of the “one copy” of medicine being scribbled illegibly by the “initialed” people; then transported, cared for (sort of) and transcribed by the “almost minimum wage non-initialed clerical” people. Note to self: dig out some backup of 1994's “MedWare” and see if google or iFund will pay for an update? Paper?

2<sup>nd</sup> Bullet: I tried to think of when was the last time(s) I saw generations of people gathered around a computer and interacting socially with the “whatever” was on that screen being the passable-catalyst for the interaction.

- First time was somewhere around 1986 or '87: Zork.
- Second time early 90s: “MPC” brought us Wolfenstein and “Mixed Media” encyclopedia's (text, audio, video all on “CDROM”).
- Last time: 1995 or '96: “The Web” and DOOM. (Not as “family gathering” as the previous two, more like everyone under 30 crowded around the glowbox.)

By the 9<sup>th</sup> of January I had decided “why” this happened – great-grand-parents/children co-piloting a device and being happy/excited about it: apple. And I decided that “why” now (1<sup>st</sup> week of 2011) is: 2010 was **iYear** (zero).

In 2010, even though in my tiny sphere (small town America) iPhones began to drop out of site – I blame AT&T, everybody that I know that ditched their iPhone blamed only AT&T's service, they loved their iPhone, iTunes etc., but dropped calls and no-G around here meant: bye i – apple did the following:

- released iPhone 4 (4<sup>th</sup> generation comp-device in 3 years, computer-years (like dog-years) are now 20/25-to-One, from '80-'10 I always said “10-to-One” re computer years).
- iPad: Besides the blackberry, the only “e/net-pliance” I've seen an “old people” (75+) use. And, really use, not just look at a single photo (berry), or read their email (after careful one-click setup and instruction by children/grand-children) (PC), or look at one “homepage” (PC) – they use it (even the left-handed “old people”) to view many pages, read email, play games, “do puzzles,” and on and on.
- iPod Touch (2010 “iPhone without the Phone” version)
- iPhoneOS/iOS for all devices.
- Announced late in the year that Verizon iPhones were coming soon. (I don't know how this makes the market in large, metropolitan areas, but in my small town the announcement put a “hold” on the “dump iPhone, get droid for Verizon” trend – the mentality (though late) became “hold iPhone 3, buy 4 when Verizon-fied.”)

I'm not sure of the “global economy” term for all the things that apple did in the iMarket in 2010 - “conglomerate” or “amalgamate” maybe. What they accomplished was a form of interest and “speculation” in the digital world that has been dormant, or stagnant, for quite a few years.

(And what the heck happened at the hospital? Paper? All paper? Last year ('09) they had comps-on-carts?)

In 2010 I saw the migration away from the “old” (PC, Mac, Berry (RIM), Palm(PDA)) digi to the “new”: iStuff.

- Executives **love** the iPad. Pinchy-Charts (and graphics) and back-lit stock reports.
- Developers (me) like the write once publish many model (iOs) – with controlled revenue (appStore).
- Big Companies (JPMorgan) announced migration to iPad/iPhone integrated systems; id (DOOM) moved titles to the iPhone; epic (Unreal) moved titles and development to iOs.
- Medium & Small Companies were inspired to innovate for the iPad (down-sizing the screen to iPhone/iPod is just an “extra” when discussing sales [like getting a huge amount of iron out of your gold mine]) – the “garage” software designer is enjoying a resurgence thanks to the iMarket.
- “Regular People” - everybody has “apple fever” again (not since the '80s has there been so much chatter about apple)

Now, I don't mean to belittle the legacy of MS (winCE, WinMobile, etc.), Palm/HP (I remember all the video of “the floor” of the NYSE with 1000s of traders tapping away with angry stylus), Blackberry/RIM (the shift to “hand-held multifunction compy-phones would never have happened without the Berry); but:

- By luck or skill or timewarp: apple brought it all together in '10 and broke out to a 4-furlong lead (that's about the same as “lapping” to you race-car folks).

“What about the droid?” I ask me. “Isn't google the monster-elephantitis-elephant in the room?”

- Does anyone besides me remember in “the old days” when there was “IBM-PCs” and “Clones” and “Compatibles?” (Nevermind for now the old-religious argument about PC or Mac).
- When I think of all these android (google) devices – I think: “Clone.” (more like “iClone”) It is basically what “any other computer” (Kaypro, Compaq, HP, Digital Research, Dell) was to IBM in the 1980s-1990s.
- “It does everything that iPhone does, just a little different!” is the pitch for \*droid devices. Or, “better” the google-guard will tell you.
- This does not “relegate” or “belittle” this “iClone” market – in 1992 “not IBM” was fightin' words – and look where Sony, HP/Compaq, Dell are now (global market share) compared to IBM. (Never mind PackardBell, that ship was pushed ashore in a storm.) google “licensed” devices may – on the “look back” - outpace, outsell, outmarket apple, but for now, and the next few years: I believe “they follow” (in the horse-race analogy used earlier). And, never forget, IBM is still there (@\$20 stock price 20 years ago, >\$140 today).

There's the CTO discussion. Here's the ideas for management to consider during 2011 (aka iYear 1):

- iOs development (continued, much was done in 2010), get it done, get it published, get capitalized
- pass a few ideas around the investment pool (see IRS for a confidential hint, cheaply encoded here for reminder)
- with time/\$ investors see if “iFund”-ing is still an option
- get “Confidential” app idea/design docs ready for solicitation
- come back to this around June/July and review it – see if iYear 1 still finds apple leading easily (and if the Verizon connection “fixes” the rural AT&T complaint)
- Dig all over the planet and find out why the Hospital is back to the stone tablet and chisel? Where are the “risk officers” of the big medical corporations? Don't you know that if a R.N. set that chart down and the patient spilled their water on it “all would be lost?” How does that 100lb tome (in duplicate?) fit into the i-e-Cloud-cluster era of super-conducting and cost reduction?

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