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Lead Bullets

7-8 minutes

Yet our best trained, best educated, best equipped, best prepared troops refuse to fight.
As a matter of fact, it's safe to say that they would rather switch than fight.
—Public Enemy (sampled from Thomas Todd), [Fight the Power](#)

Public Enemy - Fight The Power



Early in my tenure as product manager for the web servers at Netscape, we faced a terrible crisis. We just got our hands on Microsoft's new web server, Internet Information Server (IIS), and benchmarked against our product. Microsoft's IIS had every feature that we had, was five times faster and we knew that they were going to give it away for free. This might not sound so bad, but we had just gone public three months earlier with a story to Wall Street that said, "Don't worry about Microsoft giving away the browser because we will make money selling servers." Oh snap.

I immediately went to work trying to move the playing field and pivot the server product line to something that we could sell for money. The late, great Mike Homer and I worked furiously on a set of partnerships and acquisitions that would broaden the product line and surround the web server with enough functionality that we would be able survive the attack.

As I excitedly reviewed the plan with my engineering counterpart, Bill Turpin, he looked at me as though I was a little kid who had much to learn. Bill was a long-time veteran of battling Microsoft from his time at Borland and understood what I was trying to do, but remained unconvinced. He said: "Ben, those silver bullets that you and Mike are looking for are fine and good, but our web server is five times slower. There is no silver bullet that's going to fix that. No, we are going to have to use a lot of lead bullets." Oh snap.

As a result of Bill's words, we focused our engineering team on fixing the performance issues while working the other things in the background. **We eventually beat Microsoft's performance and grew the server line to become a \$400M business and we would never have done it without those lead bullets.**

I carried that lesson with me for many years. Six years later, when I was CEO of Opsware, our toughest competitor Bladelogic started to consistently beat us in large deals. We were a public company and the

losses were all too visible. To make matters worse, we needed to win those deals in order to beat the Wall Street projections, so the company felt tremendous pressure. Many of the smartest people in my company came to me with ideas for avoiding the battle:

“Let’s build a light-weight version of the product and go down market.”

“Let’s acquire a company with a simpler architecture.”

“Let’s focus on service providers.”

The issue with their ideas was that we weren’t facing a market problem. The customers were buying; they just weren’t buying our product. This was not a time to pivot. So I said the same thing to every one of them: “There are no silver bullets for this, only lead bullets.” They did not want to hear that, but it made things clear: we had to build a better product. There was no other way out. No window, no hole, no escape hatch, no backdoor. We had to go through the front door and deal with the big, ugly guy blocking it. Lead bullets.

After nine months of hard work on an extremely rugged product cycle, we regained our product lead and eventually built a company that was worth \$1.6B. Without the lead bullets, I suspect we would have ended at about 1/10th that value.

There may be nothing scarier in business than facing an existential threat. So scary that many in the organization will do anything to avoid it. They will look for any alternative, any way out, any excuse not to live or die in a single battle. I see this often in start up pitches. The conversations go something like this:

Entrepreneur: “We have the best product in the market by far. All the customers love it and prefer it to competitor X.”

Me: “Why does competitor X have five times your revenue?”

Entrepreneur: “We are using partners and OEMs, because we can’t build a direct channel like competitor X.”

Me: “Why not? If you have the better product, why not knuckle up and go to war?”

Entrepreneur: “Ummm.”

Me: “Stop looking for the silver bullet.”

There comes a time in every company’s life where it must fight for its life. If you find yourself running when you should be fighting, you need to ask yourself: “If our company isn’t good enough to win, then do we need to exist at all?”

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