

Big Blues

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Already the subject of Silicon Valley gossip, Paul Carroll's first book is a sensational account of IBM's corporate fortunes, paralleling the success and failure of IBM's personal computer. Much of that history, according to Big Blues is the story of the technical and business acumen of William H. Gates III and the bureaucratic failings of IBM.

Carroll's style is to take no prisoners. He is devastating in his characterizations and criticism. One frequent object of his approach is Bill Lowe, once the head of IBM's Entry Systems Division, the group responsible for the PC and the PS/2 and later an executive at Xerox Corporation. He is first presented as one "whose stony manner and slicked-back graying hair reminded people of waiters in German restaurants" and later referred to as "the Gerald Ford of the computer industry".

Other senior IBM executives like Jack Kuelher or Jim Cannavino get off little better. When Carroll attacks IBM's former CEO, John Akers, and his infallibility and arrogance, both barrels are blazing. He alludes to an apocryphal song circulating within IBM entitled "Big Bad John" and quotes the lyrics:

*Every morning at Armonk you could see him arrive
In a big fancy car that a chauffeur would drive.
Kind of big in the wallet and narrow in the mind,
And every VP knew how to kiss the behind of Big John.*

Big John, Big John, Big bad John.

This insider trashing of IBM reads as fast and as colorfully as a good novel as Carroll dishes out anecdote after racy incident. Unfortunately, in some parts the book is as fictional. Because IBM never "cooperated" with his writing to the extent of providing primary documentation or even verifying information, Carroll pieced together his story mainly from interviews and industry lore.

Given the controversy and reputations riding on the facts, the author had to rely mainly on accounts by outsiders or ex-IBMers that were one-sided, and in many cases, disingenuous, misinformed, or forgetful. The book has an overall "iffy" quality with quoteless quotes, minimum footnotes, leaving most assertions unsubstantiated, and only a dozen books in its bibliography.

Carroll does get most of his facts right, but surprisingly misses some of the more interesting events in his saga. He omits the story of why OS/2 was written in 16-bit code. He neglects most of the international dimensions of IBM or its PC business. He ignores IBM's overall business plans, as he equates the PC business, which represents about a tenth of IBM's revenue, to the success of the entire business. And he never mentions the impact of Warren Buffett or McKinsey & Co. and other outsiders and consulting companies on shaping IBM's actions.

Most importantly, he offers little understanding as to the lessons to be learned from his close observations of IBM over the best part of a decade. The effect is akin to biting a sizzling steak and finding it to be only ground IBM round and Gates hamburger helper.