

january 21, 2010

the analyst briefing

For many quarters, we've wanted to provide a briefing for analysts before Apple's quarterly results, talking about topics they should avoid (because Apple executives won't answer them anyway) and more obscure topics they should. Today we make that dream come true with **MDJ's first analyst briefing**, providing a welcome lapse in our busy schedule of non-publication while we rebuilt the house that the *Attitudinal* built.

After an effort to get everyone back on the same page about why Apple is not a typical company, we go through the multiple "third rails," the topics that Apple simply will not address – including the rainbow unicorn touchy fun-pad. We then suggest some tough questions on security, real estate, international operations, and the dreaded App Store that Apple's executives should have to answer. We've arranged for this to show up in public later this week where analysts might see it, hopefully resulting in a more meaningful conference call for investors, analysts, reporters, and interested Apple followers everywhere. Join us Monday as part of *Macworld's* live blogging of the event to see how that goes! [The do's and don'ts, page 1.](#)

oh, hai!

Everything takes longer than it should, and with time as a finite resource, we have to make work go faster. That's why we're rebuilding both our "back end" (the systems that collect source material and connect the dots so we can present them to you sanely, with hope that soon it will actually create source material of shorter content) and our "front end" (the systems that take what we create and transform it into PDF and setext) from scratch.

The back end has been overworked and overrun with too much data for years; the front end needs to produce not just better PDF, but include expandability for exciting new formats (HTML? Kindle? Touchy fun-pad? Dirigible!). Even so, during the process, we have to crank up the old systems every now and then to be sure we see all the flaws and plan for their demise. As the process progresses, you'll see more and more issues, until one day they'll look very different and you'll know we're close to the end.

The challenge has been to produce a journal twice this good in half the time. The amazing thing is that now, we think we know how to build the systems to do it. Say a prayer to the Gods of XML on our behalf.

analyst briefing

apple's first FY2010 quarter

the questions they should (and shouldn't) ask

For Apple Inc., 2010 – the fiscal year – began on 2009.09.27. The first quarter of "2010" ended on or about 2009.12.26, and it's now time for Apple to report its results. That happens on Monday, 2010.01.25 at around 1:30 PM PST (2030 UTC), followed at the top of the hour by the [regular conference call](#) between Apple's executives and Wall Street financial analysts.

You can listen to the conference call live on the Internet via the magic of QuickTime. Better yet, join us as part of *Macworld's* live blogging coverage (they

have the infrastructure set up so we're joining forces). The QuickTime stream is obviously a listen-only experience, but as far as the press is concerned, so is the "conference call." Reporters can call and listen live without fighting the Internet's myriad bad moods, but Apple hasn't taken a question from reporters during a quarterly conference call in well over a decade. Only financial analysts are allowed to query the company's executives.

That can be a darned shame, because a few times each year, well-meaning analysts let loose **2** ▶