IBM

Smarter Analytics for pillars: Campaigns and Communications

Design guidelines for creating and designing communications

Business Analytics software

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** Portions of content in this guide are drawn from other sources, including IBM branding guides*

Introduction

The IBM brand is a mixture of what we are as a company, what we've created as a culture, our values, the people we employ and what impressions all this makes on our audiences. Our graphic identity is one of the ways that we express and uphold the IBM brand.

A graphic identity is experienced in many ways – through our advertising, website, packaging, promotions, collateral and other media. This document provides specific guidance on how to use the Smarter Analytics creative expression within the Business Analytics division to support the IBM graphic identity and, ultimately, the IBM brand.

Smarter Analytics is IBM's distinct and holistic approach to helping clients achieve better business outcomes through analytics. Smarter Analytics represents an integrated set of IBM hardware, software, services and research capabilities that enable clients to outperform their peers.

These capabilities empower clients to align their strategy with the flow of information, anticipate change and shape outcomes, and act confidently at the point of impact to optimize outcomes. Smarter Analytics solutions "learn" – and get smarter – from every interaction and help organizations transform processes for breakaway results. To download the latest messaging and presentations related to Smarter Analytics, visit the Smarter Analytics Global Community.

The depth of IBM offerings means that clients can choose the capabilities and support that best fits their individual business needs. Clients can choose from an array of software solutions for information management, enterprise content management, and business analytics, plus the hardware and systems that it can run on, as well as technology and consulting services that can bring it all together.

All communications that emphasize this integrated approach should use the Smarter Analytics creative expression. Because all capabilities within the Business Analytics division align with Smarter Analytics, all Business Analytics assets should use the Smarter Analytics "look." All other pillars should evaluate the content and if it aligns with the Smarter Analytics point of view then the templates may be used.

Note: The term Smarter Analytics is not a replacement for the term Business Analytics and Optimization (BAO). BAO is recognized as a market by industry analysts and the media; Smarter Analytics is IBM's way of addressing this market.

About the templates

The campaign-related templates have been created for global use primarily by the Business Analytics capability although they may be used by any pillar which is communicating content that aligns to the Smarter Analytics point of view. They are to be used as a starting point for your projects and can be adjusted as needed. The required elements for each deliverable are: The IBM logo, pillar type treatment, squares and the standard IBM typefaces.

The templates are available for use globally; however, it is not mandatory that you use them. If you choose to create your own assets we ask that you adhere to the style guidelines detailed in this document.

The IBM logo must be used in all materials. Please see the *IBM Smarter Analytics* style guide for logo usage guidelines. The photographs in each of these templates are for placement only. When you use images of people, choose business people in business settings (for commercial audience), academics or students (for higher education audiences), medical professionals in medical settings (for healthcare) and others. Images of people should be as natural and unposed as possible and should reflect diversity. Other types of imagery may be used. However, extremely whimsical or cartoonish imagery should be avoided.

When developing new assets, please include Stacey Balkansky or Sue Marino in the review cycle to ensure that the design adheres to the IBM and Smarter Analytics graphic identity guidelines.

Marks and logos: IBM

Business Analytics software

Enterprise Content Management

Global Business Services

Information Management

Systems and Technology Group

IBM logo

The IBM logo is the IBM look. It is our signature — the graphic expression of our company's personality. It is used to identify, authenticate, document and lend authority whenever and wherever it appears.

Created by legendary graphic designer Paul Rand in 1972, its basic design has remained unchanged over the past four decades, and it stands as one of the most recognized corporate trademarks in the world.

The IBM logo is among our most valuable assets. Its integrity must be maintained at all times.

Proper usage

The IBM logo must be used on all materials. See the Corporate Style Guide for additional usage guidelines. The consistent, visible use of the IBM logo reinforces our brand, makes it more memorable and authenticates our company. For this reason, we always use the logo artwork exactly as it is provided. We do not alter its shape in any way.

Specifically, we do not:

- Distort the proportion or shape.
- Separate the letters.
- Combine with another company's logo (unless granted co-marketing/co-branding permission).
- Draw on the logo or add characters.
- Pair with graphic elements of other IBM brands.
- Create new versions of logo artwork.
- Alter the logo with an outline, boldface, highlight or shape around it.
- Add text to the logo or use it within a headline, name or sentence.

Additional information can be found on the Copyright and trademark information page.

Type treatment for pillar names

In lieu of a pillar wordmark or "lockbox" logo, we ask that you use Helvetica Neue bold to typeset the name.

All pillars under the Smarter Analytics point of view (Business Analytics, Enterprise Content Management, Global Business Services, Information Management and Systems and Technology Group), should use their typeset name in the materials instead of the Smarter Analytics wordmark. For all external uses please use the entire pillar name with the word "software." It is permissible to use the pillar name without the word software in internal communications. The Smarter Analytics wordmark should be used only in Smarter Analytics campaigns and communications. Please see the *IBM Smarter Analytics* guide for more information.

All materials must use the IBM logo as the primary mark and the pillar mark as a secondary mark. No other marks (icons, logos, wordmarks) should be used unless you are a recent acquisition who has not yet reached transfer of business.

A space in the templates has been provided using Business Analytics software as the default in all templates detailed in this guide. Please adjust according to your marketing requirements as needed. All published materials which do not include the pillar marks do not need to be updated. However, all new or revised materials should include it.

Type treatments may use any of the colors in the Smarter Planet palette.

For questions about the status of a new acquisition and its marks please visit the IBM Software Acquisitions page.

Positive

Negative

Smarter Analytics square texture

The branded texture brings added versatility to the visual expression. This texture can be used as a background to add weight and emotion, or as a "fill" to imply meaning.

To help visually differentiate Smarter Analytics level materials from the pillars under its umbrella (Business Analytics, Enterprise Content Management, Global Business Services, Information Management and Systems and Technology Group), all templates for Smarter Analytics use the texture.

Whenever you use a bar or block of color, you can apply the texture over it to reinforce the style. The templates show the suggested application over blocks of color but you may interpret as needed.

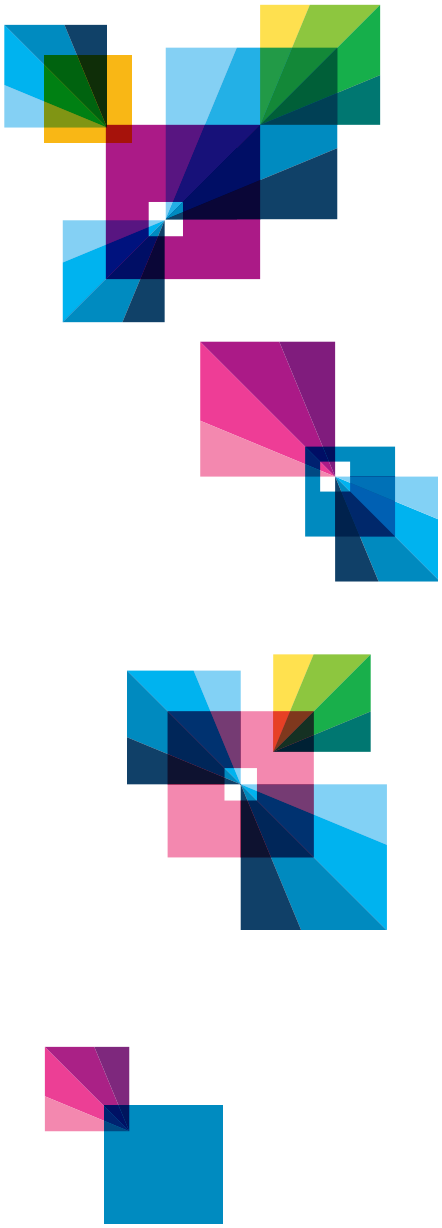
The texture pattern under copy can make the text difficult to read. You may adjust the opacity to enable the best contrast.

- Use only supplied artwork.
- The positive version is intended for white backgrounds only. The negative version should be used on color backgrounds.
- Do not edit, alter or distort the shapes, composition, orientation or colors in the provided asset.

These guidelines are to be applied for demand generation templates and assets and should be considered an interpretation of the core creative expression. You may access the core expression guidelines on our wiki here.

For further direction or clarification on these guidelines, please contact Stacey Balkansky.

Square configurations



The design structure uses squares over a white background to communicate visually the way our products connect, interact, fit and work together. The configurations should be used in all marketing assets to ensure that we present ourselves cohesively.

Library

A library of configurations has been created for simple global application. There are 4 main color schemes that you may use in your materials: Fuschia/blue, green/blue, orange/blue and navy blue/orange and blue. Please see the next page for more details.

How to adjust the configurations

It is preferred that you choose a configuration from the library that fits your space and needs. If the configurations provided are not created in a way that fits the space, please take one of the more complex versions and delete squares rather than recreate a new file. It is suggested that you use small clusters and position them according to your layout rather than use a complex version with a large quantity of squares. This ensures that we support the IBM style of open white space. This will place the focus on the content rather than the graphics. Please contact Stacey Balkansky for assistance or questions.

Usage rules

- Do not recreate artwork. If a unique configuration is needed please contact creative services for assistance.
- Select square colors may be adjusted to match the color family when needed. It is preferred, however, that you use the configurations from the library provided.
- Squares may be cropped or “bleed” off of the page. When cropping the squares off of a page you must show at least 25% of the square.
- Images like stock photos may be used in addition to the squares. Please remove the background so there are no hard edges of the photograph showing. Squares can be positioned in front of or behind the photo. If applying squares over the photo, please make sure some are using the transparency setting.

Formats

- EPS (Encapsulated PostScript): Used for high resolution printing or for large size materials. EPS files can be scaled as large as needed while retaining their quality. To create a vector file requiring PostScript language to draw its image, you must have a specific software application to create an EPS file, such as Adobe Photoshop, Adobe Illustrator and QuarkXpress. An EPS file is often used when exchanging vector graphics, such as logos that are only to be read but not edited by the receiver, such as sending the file to a print house.
- JPEG (Joint Photographic Experts Group): Supported by photographers around the world for its good image quality and compression, the JPEG format supports 24-bit images or up to 16 million colors through the RGB, CMYK, and grayscale color spaces. The use of JPEG images is supported in HTML and web applications. However, unlike a GIF file, all of the color information is stored in the file. There is no support for transparency in a JPEG file.
- GIF (Graphic Interchange Format): GIF is preferred for images with large areas of solid colors, such as logos and text as graphics. GIF does not compress your pictures, which means that they do not lose any image quality, but files are consequently large. GIF files can either be in grayscale or RGB color spaces. Two main advantages of GIF over the JPG format: It can be used for animation: a pseudo animation can be created by using an animation feature found in flipbook style cartoons. This “flipping” of images can be used to create the illusion of true animation. Also, GIF files can have transparent backgrounds ideal for presentations with color background.

Color palettes

There are four color families used in the templates. Please do not adjust the colors in the templates. These colors are to be used in headlines, subheads and accents. Configurations have been adjusted to work with the color palettes to ensure colors do not clash.

The Smarter Planet color palette was used to create these configurations. Smarter Planet colors should only be shown at 100 percent opacity, never screened.

Fuschia and blue palette
Fuschia: 241
Blue: 301

Green and blue palette
Green: 376
Blue: 301

Orange and blue palette
Orange: 144
Blue: 301

Navy blue and light blue palette
Navy: 2955
Blue: 301
Orange: 144

Fuschia configuration

Headlines, subhead and accent colors

C 0 M 100 Y 0 K 5	C 100 M 46 Y 5 K 18
PMS 241	PMS 301

Orange configuration

Headlines, subhead and accent colors

C 0 M 50 Y 95 K 2	C 100 M 46 Y 5 K 18
PMS 144	PMS 301

Green configuration

Headlines, subhead and accent colors

C 44 M 1 Y 0 K 0	C 100 M 46 Y 5 K 18
PMS 376	PMS 301

Navy blue configuration

Headlines, subhead and accent colors

C 6 M 100 Y 7 K 20	C 0 M 50 Y 95 K 2	C 100 M 46 Y 5 K 18
PMS 2955	PMS 144	PMS 301

- Helvetica Neue
  - 45 Light
  - *46 Light Italic*
  - 55 Roman
  - *56 Italic*
  - **65 Medium**
  - ***66 Medium Italic***
  - **75 Bold**
  - ***76 Bold Italic***
- Janson Text
  - 55 Roman
  - *56 Italic*
  - **75 Bold**
  - ***76 Bold Italic***
- ITC Lubalin
  - Extra Light
  - Extra Light Oblique
  - Book
  - *Book Oblique*
  - **Demi**
  - ***Demi Oblique***
- Berthold Bodoni
  - Light
  - *Light Italic*
  - Regular
  - *Italic*
  - **Medium**
  - ***Medium Italic***
- Arial (Arial is used only for digital applications like websites and presentations because of its universal compatibility and apparent similarity to Helvetica Neue.)
  - Regular
  - *Italic*
  - **Bold**
  - ***Bold Italic***

All font files are available for download on the Marketing Asset Manager: 217.28.164.25/IBM001/templates/login.html. You will need to register to gain access. Approval is required to use this system and typically takes 24 hours to process.

Typefaces

Core type families

Helvetica is best suited for headlines and body copy
It is the font of science and the information age, with a precision and a purposeful neutrality that command respect. When objectivity is the goal, we lean on Helvetica to do the hard work of conveying information, specifications and the basics. It does the job—and never attempts to outshine the content.

Its clean confidence makes it ideal for headlines and signage. It is also very approachable and, therefore, a useful typeface for body copy. Used incorrectly, however, its industrial qualities become pronounced, and because of its universality the typeface does not immediately signify IBM.

Janson is best suited for body copy and pull quotes
Janson is the most human typeface we use. It is ideal for communications that seek to build a case and persuade an audience. Janson is easy on the eyes and carries the conversation well over several pages or just a few words. Its warm elegance helps to convey IBM's intelligence and thoughtfulness.

Janson is extremely effective as body copy and to represent the voice of an individual—for example, in pull quotes. However, it does not read well at larger scales, such as on signage.

Lubalin is best suited for numbers, facts and statistics
Lubalin is the most technical typeface we use. Born in 1974, its stable friendliness is reminiscent of textbooks. Lubalin presents facts, figures and ideas with clarity. It is best when used large and judiciously.

It excels when used for page numbering, statistics, hard facts or any other bit of verbiage meant to immediately convey meticulousness and accuracy. However, when used at length—as body copy, for example—Lubalin becomes cluttered and difficult to read.

Bodoni is best suited for headlines and signage
Bodoni is the most classic typeface we use. Designed more than 200 years ago by Italian printer Giambattista Bodoni, this is the typeface of the established—used for decrees, formal invitations, books and official announcements. It is the face of a company that is enduring, a company that has something to say.

Bodoni is characterized by its distinctive combination of thin and thick strokes, and has been in use at IBM since 1956. Because of its drastic variation in line weights, it is ideal for larger-scale applications, such as headings and signage, but loses legibility when used in large blocks of copy.

Arial is best suited for digital applications and live text
Arial is a font that is similar in appearance to Helvetica. It is almost universally available across platforms and systems, and we use it for its on-screen compatibility, whether in PowerPoint, on the web or on other digital platforms. We do not use Arial in printed material.

Applications

To combine these faces intelligently, we always give careful consideration to the types of conversations we intend to have with our audiences.

Official and authoritative:
Lead with Bodoni for headlines and subheads and support with Helvetica and Janson for call-outs, pull quotes and body copy.

Educational:
Lead with Lubalin for headlines and subheads and support with Helvetica and Janson for call-outs, pull quotes and body copy.

Factual:
Lead with Helvetica for headlines and subheads and support with Helvetica and Janson for call-outs, pull quotes and body copy.

General naming and copyright

Full product names should be used on the first or most prominent mention of a product in any piece or on any web page.

Remember to include the proper trademarks on the first mention of a product name.

EXCEPTION: Never use a trademark in a headline.

IBM company name

When referring to the company, use only the IBM name.

Example: Feel free to contact IBM with questions about your software licensing.

General naming guidelines

In some materials, when products or applications are listed or described, the master brand (IBM) and family name (e.g., Cognos) should always precede the product name.

Write out the full product name the first time it occurs. "IBM" may be dropped from the product name after the first occurrence. An approved short form of the official name can be used for subsequent references.

Product names

Full product names should be used on the first or most prominent mention of a product in any piece or on any web page.

Many product names are registered trademarks and because each name is trademarked, the ® mark should be used at the first or most prominent mention. But do not use the symbol in headlines.

On later mentions, you may refer to a product by a shortened name; IBM SPSS Modeler may be referred to simply as SPSS Modeler, and IBM Cognos TM1 simply as Cognos TM1. This usage is optional and the goal should always be to make it easy for readers/viewers to understand our communications. If using a shorter name would cause any ambiguity, use the full product name. Also use the full product name in the following places: in headlines and subheads (when character count allows), in sidebars or callouts, in captions and when quoting a customer or an IBM Business Partner.

If you are unsure of an IBM product's correct name, here are some helpful resources:

- The IBM Copyright and trademark information page is the authoritative source for all company trademarks.
- Information about IBM General Business Services can be found here.
- Information about IBM Systems can be found here.
- On the IBM Software home page, there is a Product Finder that points to all our software products by capability.

For more information, see: IBM Corporate Naming Guidelines.

Version numbers

Do not use a product's version number in marketing materials except to announce a new version or to describe features in a specific version. When used, the version number appears at the end of the product name, preceded by the word "version" or an uppercase "V."

The copyright notice

Materials created by IBM, including emails and web pages, are considered copyrighted and should carry the © symbol. There is a special copyright notice that should be included in any piece of collateral material. On other pieces, the phrasing is simply:

© Copyright IBM Corporation [current year]

Trademarks

IBM product families such as SPSS and Cognos are registered trademarks. Business Analytics, however, is not a trademarked term.

Trademarks – the IBM logo

- The IBM logo must appear on all IBM communications, accompanied by the registration mark (or the appropriate mark for your geographical area.)
- Because the IBM logo is always marked with ® on the back cover of printed literature, there is no need to mark IBM in body copy.
- When the logo appears on both the front and back covers of a printed communication, the registration mark should appear only on the back cover logo.

Other IBM trademarks

- Trademarked IBM subsidiaries, product families, products and services should be marked with ® or ™ as appropriate.
- Trademark symbols should be used the first time an item appears on the page. Thereafter they may be omitted.
- In promotional items, banners or websites, registration marks should appear on the front or at the beginning of the piece.
- On websites, place a registration mark after the first occurrence of a name on each page.
- For style purposes, do not mark the first occurrence if it occurs in a headline or title, either in print material or on the web.
- It is not necessary to use registration marks in the following:
  - Titles, headings, covers, or citations to book titles
  - Tables of contents
  - Figure lists or table lists
  - Captions of figures or tables
  - Examples and example phrases
  - Glossaries
  - Index entries
  - Cover letters
- Check with local Intellectual Property counsel regarding the use of trademark symbols outside the US.

Trademark usage

- Trademarks should be used as adjectives that qualify nouns, instead of as nouns.
- Do not use trademarks in the possessive form.
- Do not combine a trademark with other words or with prefixes, suffixes, symbols or numbers, either as one word or with a hyphen. (Examples of incorrect usage: POWER5-based systems; AIX/UNIX, Cognos-based applications)

See the Copyright and trademark information page for the complete list of IBM trademarks. This site also contains information on how to treat trademarks of IBM subsidiaries and recent acquisitions, as well as trademarks of non-IBM companies.

Products or services of non-IBM companies

With few exceptions, it is not necessary to mark the products of services of non-IBM companies. However, the following statement should appear on the trademark attribution page: “Other company, product and service names may be trademarks or service marks of others.”

Exceptions: IBM has contracts with five other companies requiring IBM to acknowledge their trademarks. Refer to the IBM Trademark Web page regarding these contracts. You need only mark and attribute those marks that you actually use. For these companies:

- Do not mark first occurrence in text, with ® or ™; instead list the trademarks in the attribution statement.
- Put the non-IBM trademark attribution text immediately after the appropriate boilerplate text for the IBM trademarks.
- Arrange the attribution statements in alphabetic order by company name.
- Use a separate paragraph for each special non-IBM company unless space does not permit.

Trademark guidelines, return addresses, vanity URLs and stock photography

1 New Orchard Road
Armonk, NY 10504

For other non-IBM products, carefully spell and capitalize names as the other companies do.

- Those names might be trademarks.
- Even though we are not required to mark or attribute them explicitly, try to precede the first occurrence with the name of the product owner.

In summary, only IBM trademarks are noted in our collateral. However, in the attribution statement we do call out “special non-IBM trademarks.”

Return addresses

The standard generic return address should reflect the Armonk corporate office location. You may customize the return address for your region; however, for the Business Analytics capability, the Business Analytics home page URL should be used (www.ibm.com/business-analytics) if your product family does not have a vanity URL. You do not need to use a URL in the return address.

Vanity URLs

If you’d like a vanity URL created for your segment, you may do so at your expense. Please note, the vanity URL must go through an approval process and there is no guarantee it will be created. You can use other existing vanity URLs for your promotion if a subfolder is available. For more information, contact Dave McDuff.

SPSS has vanity URLs for their product family. All SPSS North American direct marketing materials must include the IBM logo with the Armonk or local office address and the URL: www.ibm.com/spss for its main URL in marketing materials.

For SPSS materials produced in other geographic regions, geo specific URLs may be used along with the appropriate office address. The following list consists of examples used globally for SPSS countries.

Australia: www.ibm.com/spss/au
Belgium: www.ibm.com/spss/be
Germany: www.ibm.com/spss/de
Denmark: www.ibm.com/spss/dk
Spain: www.ibm.com/spss/es
France: www.ibm.com/spss/fr
Netherlands: www.ibm.com/spss/nl
Sweden: www.ibm.com/spss/se
United Kingdom: www.ibm.com/spss/uk

Stock photography

There are various resources you may use for imagery. Royalty-free stock images can be found on the Marketing Asset Manager (MAM), through the creative services group’s Thinkstock Images license or you may access Image Resources Across IBM Community.

Contact Stacey Balkansky with any questions or for more information.

Content development best practices

Always have footnotes to back up figures or statistics, and verify sources early in the writing process.

Before writing a white paper, create an outline that can be reviewed and approved by your project sponsor and/or SME(s). This outline will guide your writing process and help to minimize edits or rewrites once the draft enters the review process. The outline could include:

- Title options
- Key messaging points for each section
- Customer examples
- Sourced facts from analyst reports or third-party research
- Specific capabilities/benefits of IBM solutions

Always have footnotes to back up figures or statistics, and verify sources early in the writing process. PowerPoint presentations that we use as background material sometimes include impressive-sounding statistics, but the source may be an online blog that's quoting an out-of-date or questionable source.

When updating a document, look for phrases like "a recent study by Ventana" and delete the "recent" if the source is more than one year old. Good white papers may get updated several times, and they sometimes include references that are several years old.

When updating an older document, look for customer quotes and make sure you can still use them. Be sure to ask:

- Is the company/organization still a customer?
- Is the customer still happy?
- Is the person being quoted still with the company? Still in the same position? Still have the same job title?

Be careful of statements that presume that the reader believes or accepts what we're advocating. For example, if claiming that a product will help a company "transform" its processes, first ask if the hypothetical company needs or wants its processes transformed. Transformed into what? Prepare a counter argument for "if it ain't broke, don't fix it."

Assume that the reader is open-minded, but skeptical.

Use a dictionary frequently: even familiar words may have slightly different meanings than you think.

- Know your audience.
- Imagine your audience asking "What's in it for me?" Why should your audience care about what you are writing? Understand their pain points and make sure your piece addresses them.
- Write simply and clearly; keep long sentences to a minimum.
- Find the balance between using terms your audience is familiar with and using too much biz speak.

Imagine that you are a visitor to ibm.com who wants to learn more about our analytics products. Make sure that anything you write is something that a customer can understand based on his or her own vocabulary of business terms. That helps you use words that are popular for search engine optimization (SEO), such as reporting, analysis, dashboards and so forth.

This helps you remember that the main mission is to get prospects and customers excited about what we can offer them (and consider buying them) and it helps keep internal IBM jargon at a minimum.

Content development best practices

"Don't use a five-dollar word when a fifty-cent word will do."

- Mark Twain

- Understand and articulate your target audience's needs. What are their pains and what will make those pains go away?
- Define your product's or solution's ability to meet those needs. What do you have that potential customers might want, and how does that compare to the competition?
- Avoid jargon, marketing-speak and highly technical language (unless it is relevant to the audience and medium.)
- Try to develop benefits that are unique to the product. Don't just say that it's "faster, easier and more affordable," or that it helps people be more productive, because those can be used to describe just about any software product.
- Have a clear call to action. What is it we want people to do in response to reading a particular piece of collateral or web content?
- Use lists such as "Three approaches to BI" or "Five steps to a successful threat and risk strategy" to give people an action item to take away.

Today, most people read the way they speak. Keep sentences short. Read any long sentence aloud to see if it is easy to follow. If not, either break up it into multiple sentences, or use commas or dashes to make the sentence easier to follow.

The definitive IBM Style Guide can be accessed through a Lotus Notes database or online. Please note the "Marketing exceptions" section of that guide. What follows is a summary of practices drawn from that guide, to be used when developing marketing materials.

1. Abbreviations and acronyms

- Spell on first occurrence.
- Avoid abbreviations in headings and titles; abbreviated product names; Latin abbreviations (use *for example*, *that is*, *and so on* instead of *e.g.*, *i.e*, and *etc.*); possessive forms; double periods at the end of a sentence (a.m..).

2. Capitalization

- Sentence-style capitalization for headings.
- Headline-style capitalization for titles of books, CDs, films, plays and so on.
- Lowercase following a colon, em-dash or ellipsis.
- Capitalization in lists – see Lists.

3. Captions and legends

- Sentence-style capitalization for a caption: no period
- Period at the end of a legend (a legend is one or more complete sentences.)
- Sentence-style capitalization for a combined caption and legend (period after the caption and after each sentence).

4. Colons

- Lowercase following a colon, but uppercase when the following text is an item in a vertical list, a proper noun or a quotation.

5. Commas

- Between clauses separated by a coordinating conjunction.
- After most introductory words, clauses and phrases.
- To separate items in a series of three or more (but see next item).
- Before a "which" clause.

Do not use commas:

- Between independent and dependent clauses separated by a coordinating conjunction.
- Before a conjunction that precedes the final item in a series, unless needed for clarity.
- Before a "that" clause.

6. Contractions

- Use only in text that will not be translated. (for example, Don't, wouldn't etc.)

Content development best practices

Avoid jargon, marketing-speak and highly technical language (unless it is relevant to the audience and medium).

7. Copyright and trademarks

See copyright and trademark guidance section on page 9.

8. Dashes

- Use en-dash (Ctrl+– on the number pad) with spaces either side in web content and em-dashes (Ctrl+shift+– on the number pad) in "printed" materials (white papers, data sheets, etc.).

9. Dates and times

- Spell out names of months. Example: 13 August 1946; Monday, 24 May. or August 13 1946; Monday May 24.
- Example: 9:30 a.m.
- No forward slash or abbreviations.

Date ranges

- If using a hyphen, add spaces before and after.
- Do not mix styles.

10. Ellipses

- Add a space on either side.

11. Hyphenation

- To distinguish the word from a homonym (co-op, re-cover, re-create, re-sign).
- When the root word is capitalized or a number (non-English-speaking, pre-2000).
- Where letters re-occur (anti-intellectual, bell-like, co-opt, de-emphasize).
- When the prefix is self-, all-, or ex- (meaning formerly).
- Between vowels (for example, re-assign).
- To spell out fractions and numbers 21 through 99 (five-eighths, sixty-four).
- Hyphenate compound adjectives and adverbs (state-of-the-art software).
- No hyphen after an adverb or adjective that ends in -ly.

12. Italics

- Use italics for titles of books, CDs, films and plays
- Italics, not quotation marks, for emphasis.

13. Lists (bulleted, numbered)

Bulleted lists

- At least two items, no more than nine.
- Should be parallel grammatical structure.
- Capitalize the first word of each item.
- Either all items are complete sentences or none of them are.
- Period after each complete sentence.
- If the item begins with a sentence fragment, put a period after the fragment, followed by one or more complete sentences.
- A sentence or sentence fragment introduces the list, with a colon at the end.
- Lead-in sentence should not continue after the list.
- No conjunction at the beginning or end of a list item.

Nested lists

- First-level item begins with an Arabic numeral, followed by a period.
- Second-level items begin with a lowercase letter, followed by a period.
- Avoid nesting numbered lists beyond two levels; never nest more than three levels.

14. Numbers

- Use billion, trillion only in US-only documents.
- Commas divide thousands (for example, 1,000,000.)
- Use words for numbers less than ten; use numerals for larger numbers.

15. Page elements in collateral

- Left eyebrow: "IBM Software" above, "Pillar name" below).
- Right eyebrow: industry or product name (no version number, no trademarks) if appropriate: otherwise leave blank.
- End notes: endnotes, not footnotes. Use superscript numbers in the text but not in the endnotes.

Content development best practices

Do not use the possessive form of IBM unless referring to only the company itself.

16. Parentheses

- Parentheses can identify abbreviations, symbols and measurements.
- Do not use (s) to indicate that a noun can be singular or plural.
- If the parenthetical text is not a complete sentence, it should be in the sentence to which it pertains.
- No initial uppercase letter on the first word unless a proper noun.
- No period inside the parentheses.

17. Possessives

- Avoid possessives with inanimate objects, abbreviations, brand or product names.
- Do not use the possessive form of IBM unless referring to only the company itself.

18. Percentages

- Write out percent, do not use percent sign (%)

19. Position, department and job titles

- When referring to a person, job titles take an initial capital (for example, Mychelle Mollot, Vice President, Worldwide Marketing: but "The vice president said…").
- Departmental names and "department" take initial caps (for example, Marketing Department; but "The department easily met its target for the year.").

20. Product names

Use the full product name in:

- Eyebrows, captions. headlines and subheads
- On first mention (short-form name on subsequent mentions)
- At the start of a sentence.
- Avoid possessive forms.

21. Quotation marks

Double quotation marks for:

- Quoted speech ("Now is the winter of our discontent," said Richard.)
- Words used in a special sense (The "enhanced" version actually has fewer features than the standard product.)
- References to online information (Check out our recorded webcast "Text Analysis for Beginners.")

Single quotation marks for:

- Quoted speech inside double quotation marks ("When Richard said 'Now is the winter of our discontent,' he really meant it.")

Generally, commas and periods fall inside the closing quotation marks ("It's all over, man," said Richard, King of England.)

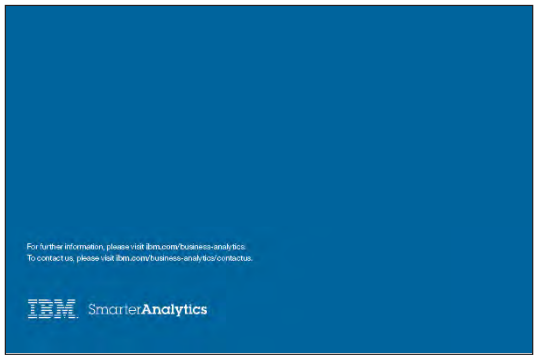
22. Telephone numbers

- If material is to be used only in the country from which the telephone number originates, use the national form of the number. Group the numerals according to the format that is normally used in the area or country.
- For an international audience, use the format +cc (where cc is the country code) followed by the area code and the telephone number. The plus sign (+) indicates that the country code is preceded by additional numbers that vary from country to country.

23. Web addresses, protocols, and IP addresses

- The protocol (http://) is not required.
- Use web address, website, or web page rather than URL.
- All IBM web addresses should use the format ibm.com/sitename, without appended characters "-3" or "-4."
- The address should not be highlighted.
- When the address or link text is at the end of a sentence, follow it with a period.
- No forward slash at the end of a web address.

Front cover



Back cover

2 panel Inside spreads

3 panel Inside spreads

Smarter Analytics direct marketing brochures

Brochure templates have been created for all four color families. There are multiple cover and interior options that you may mix and match within the color family. The texture should be applied where applicable over large blocks of color.

Brochures should adhere to the suggested text column width and length to keep the copy and imagery as light as possible. Please add pages rather than forcing content to fit. The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

The IBM logo and Smarter Analytics wordmark must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. The photographs in each of these source files are for placement only. Images should be natural, unposed and diverse, and show people in the appropriate settings. Other types of imagery may also be used; however, whimsical or cartoonish imagery should be avoided. *Please note, no IBM Expressions may be used in demand marketing materials.*

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Cover headline: 7
Cover subhead: 13
Cover call to action: 6
Inside spread headline: 8
Inside spread body copy per page: 250

US 6X9 envelope

EMEA C5 envelope

US #10 envelope

Smarter Analytics envelopes

Various envelope templates are available. Each one has an area for ink jet messages and graphics in one- and four-color (CMYK) formats for both North America and EMEA. The envelope designs at left are to be used in direct marketing campaigns only. See your local office manager for the standard stationary which should be used for typical business mailings and communications.

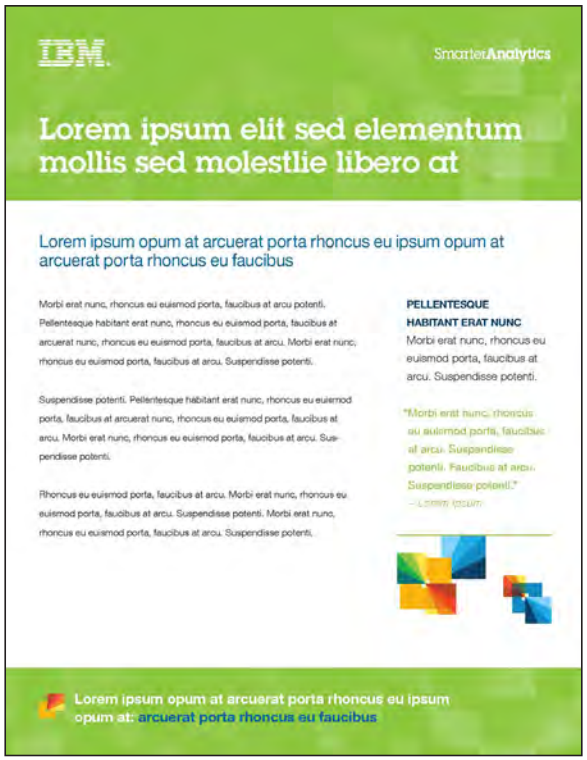
The appearance of the Smarter Analytics designs complements the IBM style which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

The IBM logo must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. There is no word mark for Smarter Analytics or type treatment for the pillars on the envelopes. This is intentional. Capability level marks are used in the materials inside. If you have no offer for the ink jet area please use Smarter Analytics as the headline and content to reinforce the materials you are sending for the subhead.

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Headline: 5
Cover subhead: 8



Smarter Analytics handouts/flyers

Templates have been created for all four color families. There are two template options available for use. Each option includes different text layouts. Handouts should adhere to the suggested text column width and length to keep the copy and imagery as light as possible. The texture should be applied where applicable over large blocks of color.

The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

The IBM logo and Smarter Analytics wordmark must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. The photographs in each of these source files are for placement only. Images should be natural, unposed and diverse, and show people in the appropriate settings. Other types of imagery may also be used; however, whimsical or cartoonish imagery should be avoided. *Please note, no IBM Expressions may be used in demand marketing materials.*

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Cover headline: 7
Cover subhead: 16
Cover call to action: 14
Body copy per side: 125

Smarter Analytics HTML emails

HTML email

HTML email

HTML email

HTML email

There are multiple options available for HTML emails in all four color families. The texture should be applied where applicable over large blocks of color.

The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

The IBM logo and Smarter Analytics wordmark must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines.

The HTML email templates for Eloqua do not include a footer area. The appropriate footers will be created automatically when files are uploaded to Eloqua, the marketing automation system that is used to deploy email campaigns for SPSS products. Unica templates have been created with a footer.

3rd-party email

It is permissible to use the email templates to promote third-party events or webinars which feature pillar content and products. Please see page 33 for further information regarding third-party emails.

Headline: 5
Subhead: 15
Cover call to action: 10
Body copy: 105

Front

Front

US Back

Smarter Analytics postcards

Two options for postcard fronts and one for postcard backs are available in each of the color families. Each option features different text areas for your content needs. You may mix and match the fronts and backs within the color family as you wish. The texture should be applied where applicable over large blocks of color.

Postcards should adhere to the suggested text column width and length to keep the copy and imagery as light as possible. The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read. Please contact your postal representative for any local requirements for the mailing panel.

The IBM logo and Smarter Analytics wordmark must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines.

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Front headline: 7
Front subhead: 10
Front call to action: 15
Back headline: 7
Body copy: 95

SmarterAnalytics
WinFlash

March 2, 2012 | Cross-IBM Sales Momentum

IBM INTERNAL USE ONLY

BNY Mellon - financial services giant curbs information volume growth and dramatically reduces risk

Financial Services Win with Smarter Analytics Capabilities

Congratulations to the following people and many others who contributed to this win:

The Winning Team:

Anthony Amalfitano, IM Client Technical Specialist

Peter Baldwin, Client Representative, Financial Services

Fred Booker, InfoSphere Optim ITS Solution Specialist, IM Governance

Hal Burdick, ECM Sales

Malcolm Corben, GBS BAO Sales

Brian Cox, IM Sales

Aliye Erguven, ECM Program Director

Rose Fearing, Information Agenda Sales Consultant

Client: Bank of New York Mellon Corp

Smarter Analytics Revenue: $28M USD

Industry: Financial Services

Country: United States

Solution: IBM Smarter Analytics
InfoSphere software, Enterprise Content Management software, Global Business Services

BNY MELLON

Client Business Challenge:

Bank of New York Mellon Corporation's (BNY) information volume (which doubles every 20 months) and storage costs (which double every 30 months) not only overwhelmed the IT budget, but impacted governance processes for legal holds, eDiscovery and records retention - making disposal of unnecessary information virtually impossible and increasing risks substantially. BNY needed to reduce costs and automate its governance processes.

BNY, like many financial services firms, has an IT Transformation initiative to dramatically reduce IT spend. "Data storage is the single fastest-growing component of a technology organization's spend, because of the insatiable appetite our customers have for data and information," said John Fiore, CIO BNY Mellon in a recent interview with Bank Systems & Technology.

IBM Win:

BNY Mellon had been considering deploying Oracle's records management system and they favored Informatica for structured archiving in a siloed approach across legal, records and IT. IBM was initially considered, but not a preferred vendor.

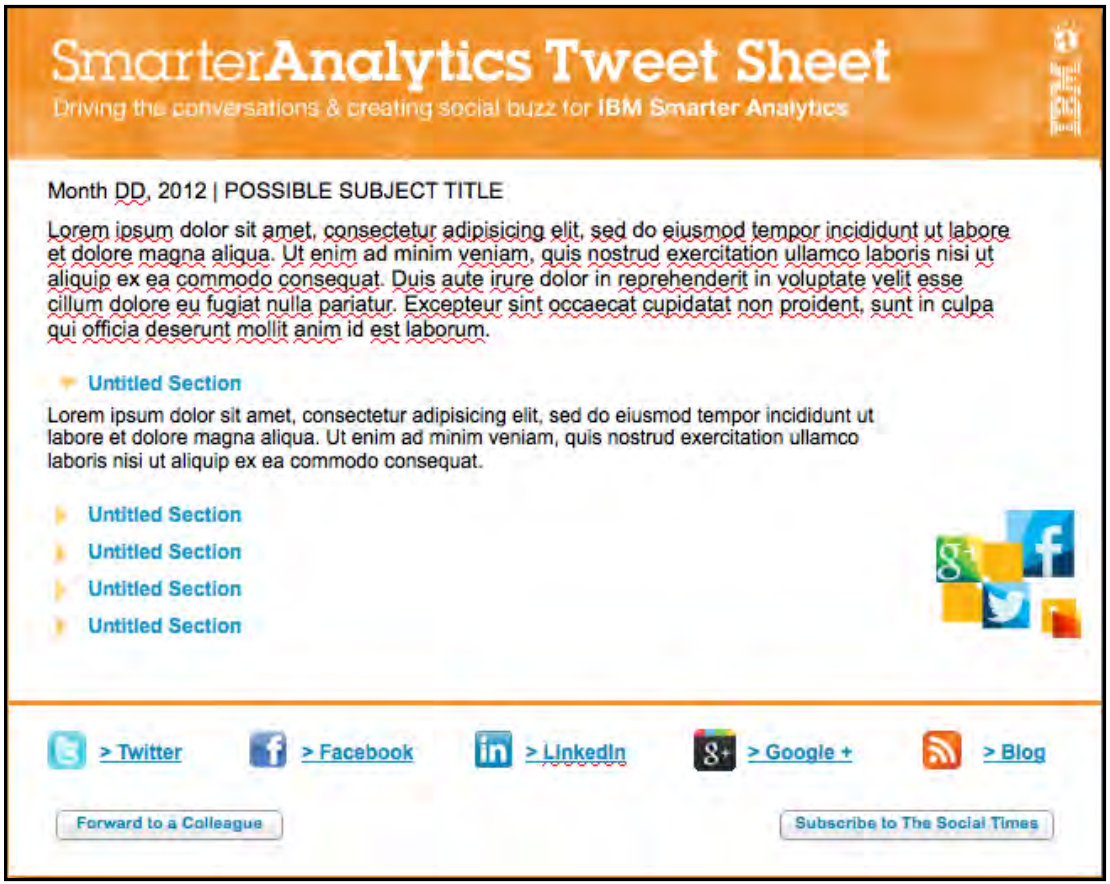
To win the deal, IBM asserted to the CIO that a disparate approach would generate minimal IT savings, and make data growth a permanent problem. By enabling defensible disposal of unnecessary data rather than archiving it indefinitely, IBM could drive 10x greater savings than any competitive alternative with an integrated solution.

Smarter Analytics WinFlash

Sales enablement

Field announcements are integral in helping drive global field productivity and performance by providing information and direction. A WinFlash template has been created to communicate Smarter Analytics wins. They are to be considered a trusted, central source of information with official "field-ready" Smarter Analytics news and messaging.

For more information about using this announcement, please contact Sue Marino, Michele Shaw or Kim Evans.



Smarter Analytics Tweet Sheet

The Business Analytics "Social Times" and the Smarter Analytics "Tweet Sheet" have been created to help everyone easily share information related to IBM marketing programs, announcements, news articles, analyst commentary, customer success stories and videos through your social circles.

This newsletter contains ready-to-use posts that you can use on Twitter, Google+, Facebook and LinkedIn. Just copy, paste and send! While the posts can be cut and pasted, we also encourage everyone to personalize them so they fit your voice, and also to create different perspectives on the same topic. However, please use the special hyperlinks provided within each post as they allow us to track traffic and social referrals.

While written specifically for Twitter, most posts can also be used as Google+, Facebook or LinkedIn status updates. However, we recommend you delete any hashtags (words or phrases preceded by the pound or hash symbol; e.g. #ibmanalytics) from tweets first so they don't confuse your non-Twitter followers.

Everything listed in this newsletter is for use with external audiences so please pass along to your colleagues and ask them to share via their social networks as well.

For more information about executive memos, contact Tim Powers or David Pittman.

Print advertising

Web banner

Landing page

Advertising

Smarter Planet global advertising campaigns

All forms of IBM advertising production and paid media placement – print, digital, out-of-home, paid media sponsorships – are managed by the IBM Consolidated Advertising team. This team is responsible for the outputs and accountability of our global advertising agency partner, Ogilvy. Contact Susan Marino to develop any advertising for IBM Smarter Analytics.

Local Tactical Advertising templates

The Local Tactical Advertising program enables you to develop high-quality, on-brand ads quickly and cost effectively for sales, marketing and community outreach purposes. For ad space in broader sponsorship packages (e.g., trade shows or technical events, program guides, community events, etc.) you may use the Local Tactical Advertising templates. These templates cover major industries, market development constituencies and Corporate Citizenship and Corporate Affairs initiatives. Each ad template includes pre-approved choices of imagery, headlines and copy, allowing users to customize the ad for their specific event. The ad development cost is just $550 USD. It's charged to your internal accounting codes (division and department) with no purchase orders or Corporate American Express cards required. Click here for details.

Front cover

Back cover

2 panel Inside spreads

3 panel Inside spreads

Smarter Analytics for pillars: direct marketing brochures

Brochure templates have been created for all four color families. There are multiple cover and interior options that you may mix and match within the color family.

Brochures should adhere to the suggested text column width and length to keep the copy and imagery as light as possible. Please add pages rather than forcing content to fit. The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

The IBM logo and pillar text treatment (Business Analytics software, Information Management etc.) must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. The photographs in each of these source files are for placement only. Images should be natural, unposed and diverse, and show people in the appropriate settings. Other types of imagery may also be used; however, whimsical or cartoonish imagery should be avoided. *Please note, no IBM Expressions may be used in demand marketing materials.*

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Cover headline: 7
Cover subhead: 13
Cover call to action: 6
Inside spread headline: 8
Inside spread body copy per page: 250

Size shown for a US 6X9 envelope

Size shown for a US #10 envelope

Smarter Analytics for pillars: buckslips

Buckslips and complement slips are typically used in letter package projects or as handouts. Templates have been created for all four color families.

Buckslips should adhere to the suggested text column width and length to keep the copy and imagery as light as possible. The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

The IBM logo and pillar text treatment (Business Analytics software, Information Management etc.) must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. The photographs in each of these source files are for placement only. Images should be natural, unposed and diverse, and show people in the appropriate settings. Other types of imagery may also be used; however, whimsical or cartoonish imagery should be avoided. *Please note, no IBM Expressions may be used in demand marketing materials.*

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Headline: 7
Subhead: 10
Call to action: 10
Body copy: 115

Smarter Analytics for pillars: Campaign in a Box (CIB)

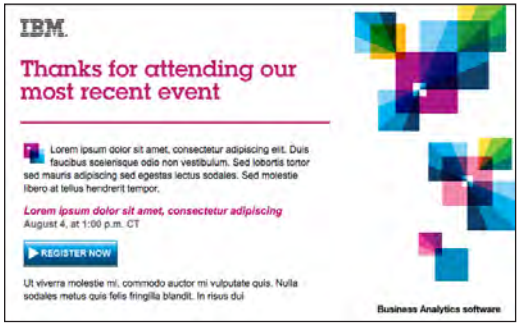
A set of editable templates has been created for your use when you are unable to use the creative services team or an agency. The assets in this system have been created with the SPSS marketing volume team in mind. The files in the kit are the standard pieces that have been requested the most often.

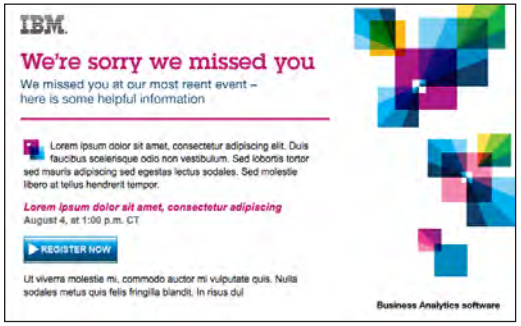
This kit was not created with the intention of eliminating the need for agencies or creative services. You should continue to work with the internal and external vendors as you do today. However, for last minute campaign activity they are yours to use as needed.

The kit includes the following assets:

- Stock photo image library
- HTML email with editable banner
- HTML graphic email banner: Thank you for viewing
- HTML graphic email banner: Webinar invite
- HTML graphic email banner: Webinar reminder
- HTML graphic email banner: Attended EOC
- HTML graphic email banner: Non-attended EOC
- Agenda
  - Bag drop for booth promotion

The IBM logo and pillar text treatment (BA software, Information Management etc.) must be used on all materials. See the *IBM Smarter Analytics* guide for usage guidelines. *Please note, no IBM Expressions may be used in demand marketing materials.*

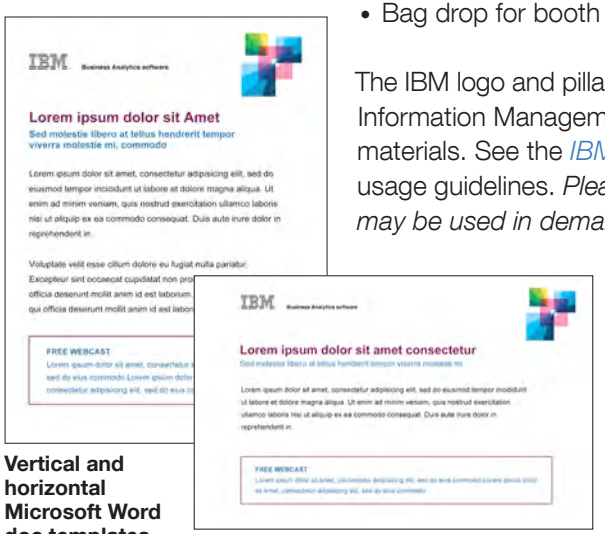




Generic graphic HTML banners

Editable HTML banners

Microsoft Word agenda



Vertical and horizontal Microsoft Word doc templates

HTML email photo library

US 6X9 envelope

EMEA C5 envelope

US #10 envelope

Smarter Analytics for pillars: envelopes

Various envelope templates are available. Each one has an area for ink jet messages and graphics in one- and four-color (CMYK) formats for both North America and EMEA. The envelope designs at left are to be used in direct marketing campaigns only. See your local office manager for the standard stationary which should be used for typical business mailings and communications.

The appearance of the Smarter Analytics designs complements the IBM style which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

The IBM logo must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. There is no word mark for Smarter Analytics or type treatment for the pillars on the envelopes. This is intentional. Capability level marks are used in the materials inside. If you have no offer for the ink jet area please use Smarter Analytics software as the headline and content to reinforce the materials you are sending for the subhead.

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Headline: 5
Cover subhead: 8

Signage

Smarter Analytics for pillars: events

Event signage at IBM conferences and meetings

All event signage and visual identity supporting IBM sponsored events must be created in partnership with our global events agency, George P. Johnson Company (GPJ).

Event signage at meetings, industry events and tradeshows

When IBM has a presence at non-IBM events, meetings or tradeshows and the content is based on IBM Smarter Analytics messaging and/or products from the IBM Smarter Analytics software portfolio, the square design can be used under creative guidance from Stacey Balkansky.

Smarter Analytics for pillars: handouts/flyers

Templates have been created for all four color families. There are three template options available for use. Each option includes different text layouts. Handouts should adhere to the suggested text column width and length to keep the copy and imagery as light as possible.

The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read.

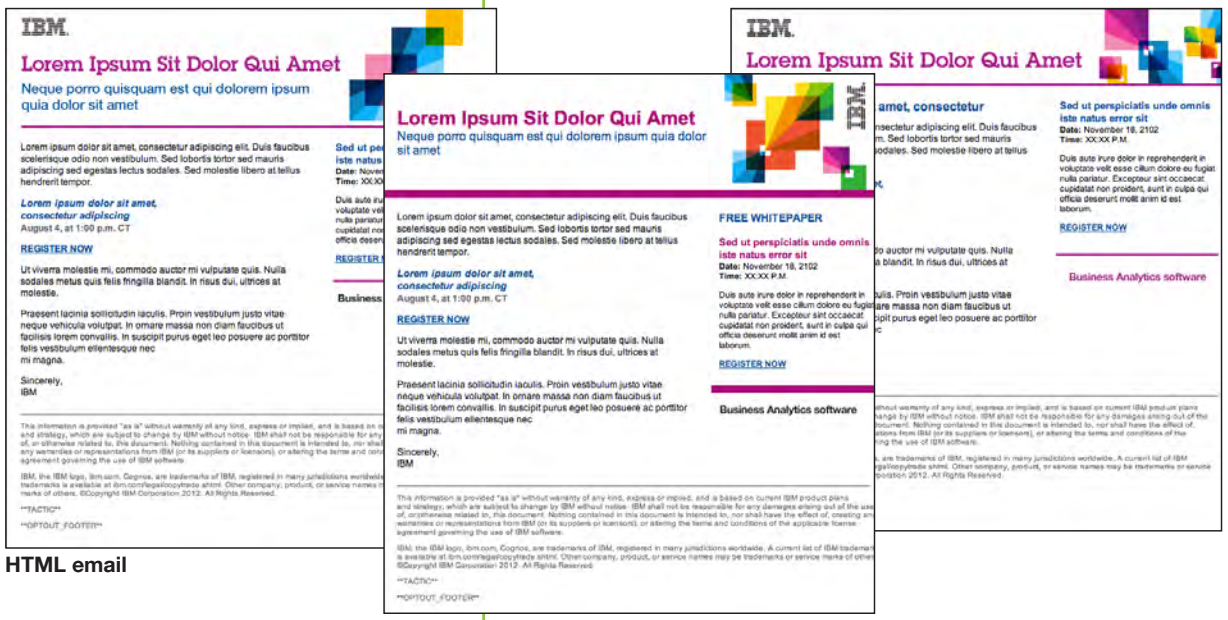
The IBM logo and pillar text treatment (Business Analytics software, Information Management etc.) must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. The photographs in each of these source files are for placement only. Images should be natural, unposed and diverse, and show people in the appropriate settings. Other types of imagery may also be used; however, whimsical or cartoonish imagery should be avoided. *Please note, no IBM Expressions may be used in demand marketing materials.*

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Cover headline: 7
Cover subhead: 16
Cover call to action: 14
Body copy per side: 125

Smarter Analytics for pillars: HTML emails



HTML email

HTML email with photo

HTML eCards and mobile versions

There are multiple options available for HTML emails in all four color families. Templates are available with editable and non-editable banner options.

Please adhere to the following personalization policy, implemented for SPSS, which requires the following: if you use a salutation you must also use a closing; that is, Sincerely, XXXXX. “Dear Colleague” is never to be used as a salutation. If you do not have the recipient’s name do not include a salutation or a closing.

The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we’d like them to read.

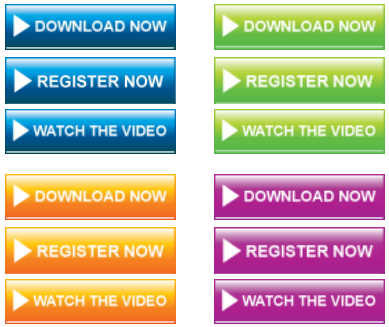
The IBM logo and pillar text treatment (Business Analytics software, Information Management etc.) must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines. The photographs in each of these source files are for placement only. Images should be natural, unposed and diverse, and show people in the appropriate settings. Other types of imagery may also be used; however, whimsical or cartoonish imagery should be avoided. *Please note, no IBM Expressions may be used in demand marketing materials.*

The HTML email templates for Eloqua do not include a footer area. The appropriate footers will be created automatically when files are uploaded to Eloqua, the marketing automation system that is used to deploy email campaigns. Unica templates have been created with a footer.

Please note: All external communications to the SPSS customer base must mention “IBM SPSS software” in the email banner or in the headline as long as it’s prominent. SPSS received an exception to the general IBM opt-out policy.

Smarter Analytics for pillars: HTML emails, image and button library

3rd-party logo application



Button Library

HTML email photo library

Third-party email

It is permissible to use the email templates to promote third-party events or webinars which feature pillar content and products. When including a third-party logo, please place it at the end of the sidebar content similar to the example highlighted in red at left.

OPTIONS for third-party email footers

1. If the third party requires opt-out info and return address info, we need to add the full legal disclaimer, exactly as follows (outside of the email box):

This information is provided “as is” without warranty of any kind, express or implied, and is based on current IBM product plans and strategy, which are subject to change by IBM without notice. IBM shall not be responsible for any damages arising out of the use of, or otherwise related to, this document. Nothing contained in this document is intended to, nor shall have the effect of, creating any warranties or representations from IBM (or its suppliers or licensors), or altering the terms and conditions of the applicable license agreement governing the use of IBM software.

SPSS product family copyright example: IBM, the IBM logo, ibm.com, and SPSS are trademarks of IBM, registered in many jurisdictions worldwide. A current list of IBM trademarks is available at ibm.com/legal/copy-trade.shtml. Other company, product, or service names may be trademarks or service marks of others. © Copyright IBM Corporation 2012. All Rights Reserved.

IBM, 1 New Orchard Road, Armonk, NY, 10504 Find us on Facebook and Twitter. www.ibm.com/XXXX

2. If the third party is capturing the opt-out data, then IBM does not need to add any footer of our own. But if the third party is asking for an address line, then we can add the following (outside of the email box):

Email was sent by: IBM
1 New Orchard Road, Armonk, NY, 10504
Find us on Facebook and Twitter. www.ibm.com/XXXX

Button library

A button library has been created for your use in HTML emails for each color family. If you need a custom button created please contact creative services.

Image library

A library of general stock photography images has been created for your use in HTML emails for each color family.

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Headline: 5
Subhead: 15
Cover call to action: 10
Body copy: 105

Smarter Analytics for pillars: postcards

Front

Front

Front

US Back

US Back

EMEA Back

There are three options for postcard fronts and two for postcard backs available in each of the color families. Each option features different text areas for your content needs. You may mix and match the fronts and backs within the color family as you wish.

Postcards should adhere to the suggested text column width and length to keep the copy and imagery as light as possible. The appearance of the Smarter Analytics designs complements the IBM style, which makes generous use of white space, and we encourage you to apply this as often as possible. This assists in keeping the materials approachable and helps direct the customer to the content we'd like them to read. Please contact your postal representative for any local requirements for the mailing panel.

The IBM logo and pillar text treatment (Business Analytics software, Information Management etc.) must be used on all materials. Please see the *IBM Smarter Analytics* guide for usage guidelines.

Word counts

The following word counts are recommendations; however, we ask that you do what you can to adhere to them. It is understood that each project is unique, so templates have been built for flexibility to work with your content. The following word counts are to be considered the maximum amount of copy recommended.

Front headline: 7
Front subhead: 10
Front call to action: 15
Back headline: 7
Body copy: 95

Internal Communications: How to work with Lotus Notes-based emails

Accessibility

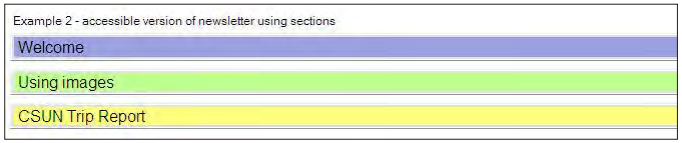
Tabbed tables are not usable by those who are visually impaired and other individuals who use screen readers. Screen reader users cannot navigate to the individual tabs and hear that individual content. Everything is presented in a long list with no indication of separation.

Because of this problem, it is highly recommended that you use another format, so that your email is accessible to all readers.

How do you solve the accessibility problems of tabbed tables and have a similar look?

An alternative is to use sections. Sections can be styled to look very similar to the tabbed table. Sections are accessible to both keyboard users and screen reader users. Without JAWS (screen reading software from Freedom Scientific™), tab to the section you want to open and press the spacebar to open the section. Pressing the space bar again will toggle the section closed. You can also go to View-Expand all sections (or Shift +) to expand all sections in the document. View-Collapse all sections or Shift – will close all sections. Using JAWS, use Shift spacebar to toggle the sections open or closed.

Example 1 - Inaccessible newsletter using tabbed tables



Example 2 - Accessible version of newsletter using sections

Examples

Example 1 shows a newsletter using tabbed tables. It is not accessible. Example 2 shows the equivalent newsletter using sections. This is accessible.

Editing Lotus formats

How to create a Table:

BASIC TABLE

- Menu> Create> Table> Choose column/rows – Fixed width – Table type: Basic
- Add rows and columns needed (You can always merge or delete columns not needed. Note: When you add columns to an existing table, it expands the overall width of the table, so you might have to adjust it.)

TABBED TABLE

- Menu> Create> Table> Choose column/rows – Fixed width – Table type: Tabs
- Tabs show as empty tags. To add text, go to:

How to style text in a Table:

(Within a table that you want to keep a set width)

- Select all the text, go to Menu> "Text Properties"
- Tab 1, Choose Arial for font, and under Tab 3 Margins are defined: Left - 0.25" or 0.05"/ Absolute Right – 7.25"/Absolute

(Note: Absolute defines by inches, while Relative defines by percentage. The right side margin is the space from the left to the right margin. Example: If you want to indent .25 inch from the right and the total width is 7 inches, then the right margin = 6.75 inches.)

How to create tabs:

- Click on Menu> "Table Properties", and choose the 6th property tab, "Table rows"
- Click "Show only one row at a time" (This will turn all the rows of the table you have selected into tabs.)

How to edit tabs:

- Click on tab needing change, and go to Menu> "Table Properties"
- Choose the 6th icon that has brackets
- Edit "For selected row" to retype tab heading (You can also change font type, color, size and style here.)

Add or delete a tab:

- Add: Click in main text body area of the tab, and go to Menu> Table> "Insert Row"
- Subtract: Click in main text body area of the tab you want deleted, and go to Menu> Table> "Delete Selected Row"

How to embed a link (for image or text:)

TEXT LINK

- Select text, go to Menu> Create > "Hyperlink" or Menu> Create> Hotspot> "Link Hotspot"
- Add the http://www full website address, or to use an email address add mailto:email@ibm.com

IMAGE HOTSPOT

- Select the graphic you want to be clickable and go to Menu> Create> Hotspot> "Link Hotspot"
- Tab 1, Select Content/Type-URL, and enter web-site into Value area

CUSTOM BUTTON

- Click where you want the button, go to Menu> Create> Hotspot> "Button"
- Button Properties window will open: Tab 1, Add text for button Tab 2: Style text for button (Standard we use is Arial or Verdana, Bold, Size 9pt or 10pt.)
- Go to Menu> Button> "Edit Button" below email. A pane will appear to add action (Please refer to the help links for options.)

Internal and executive communications

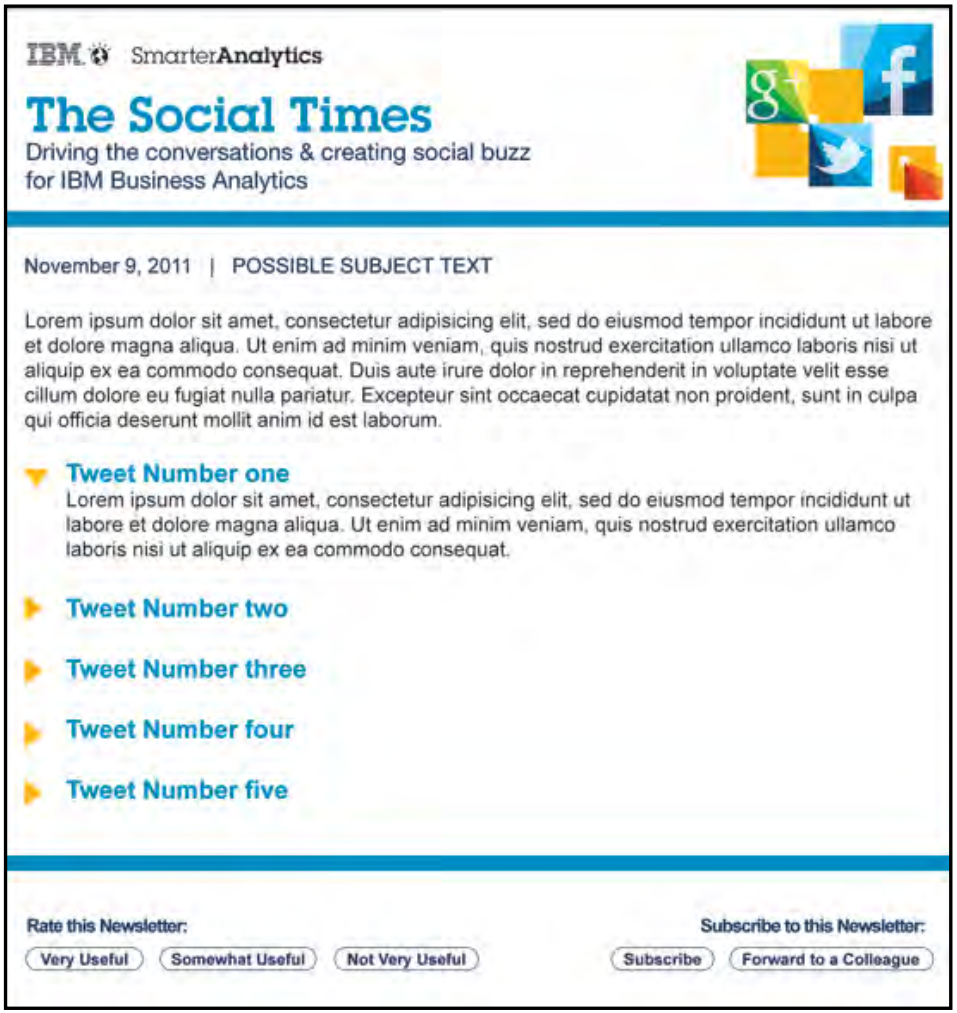
Internal communications

Business Analytics software internal eNewsletters are managed by the Business Analytics Global Marketing Communications team. The newsletter is to be considered a trusted, central source of information with official Business Analytics news and messaging. This templates may only be used by the Business Analytics Global Marketing Communications team. For information about proposing content for the newsletter, please contact Nancy Odom.

eCards are used to deliver high impact strategic messages with an explicit call-to-action. To have your unique communication needs evaluated for eCard use, please contact Sue Marino.

Executive communications

IBM leaders regularly share important information and provide strategic insights to their teams. Standard executive communications email banner templates have been created to bring uniformity to messages from the IBM Business Analytics software senior leadership team. These templates are limited to select members of the global IBM Business Analytics software leadership team. For more information about executive memos or to create versions for your pillar, contact Sue Marino.



Smarter Analytics for pillars: Social Times

The Business Analytics "Social Times" and the Smarter Analytics "Tweet Sheet" have been created to help everyone easily share information related to IBM marketing programs, announcements, news articles, analyst commentary, customer success stories and videos through your social circles.

While similar, the Social Times is more brand/product specific to IBM Business Analytics, and the Tweet Sheet often carries higher level information, is geared toward a more general audience (e.g., line of business, vertical industry) and will not contain product information.

These newsletters contain ready-to-use posts that you can use on Twitter, Google+, Facebook and LinkedIn. Just copy, paste and send! While the posts can be cut and pasted, we also encourage everyone to personalize them so they fit your voice, and also to create different perspectives on the same topic. However, please use the special hyperlinks provided within each post as they allow us to track traffic and social referrals.

While written specifically for Twitter, most posts can also be used as Google+, Facebook or LinkedIn status updates. However, we recommend you delete any hashtags (words or phrases preceded by the pound or hash symbol; e.g. #ibmanalytics) from tweets first so they don't confuse your non-Twitter followers.

Everything listed in these newsletters is for use with external audiences so please pass along to your colleagues and ask them to share via their social networks as well.

For more information about executive memos, contact Tim Powers.

Smarter Analytics for pillars: program announcement and sales enablement templates

Program announcement

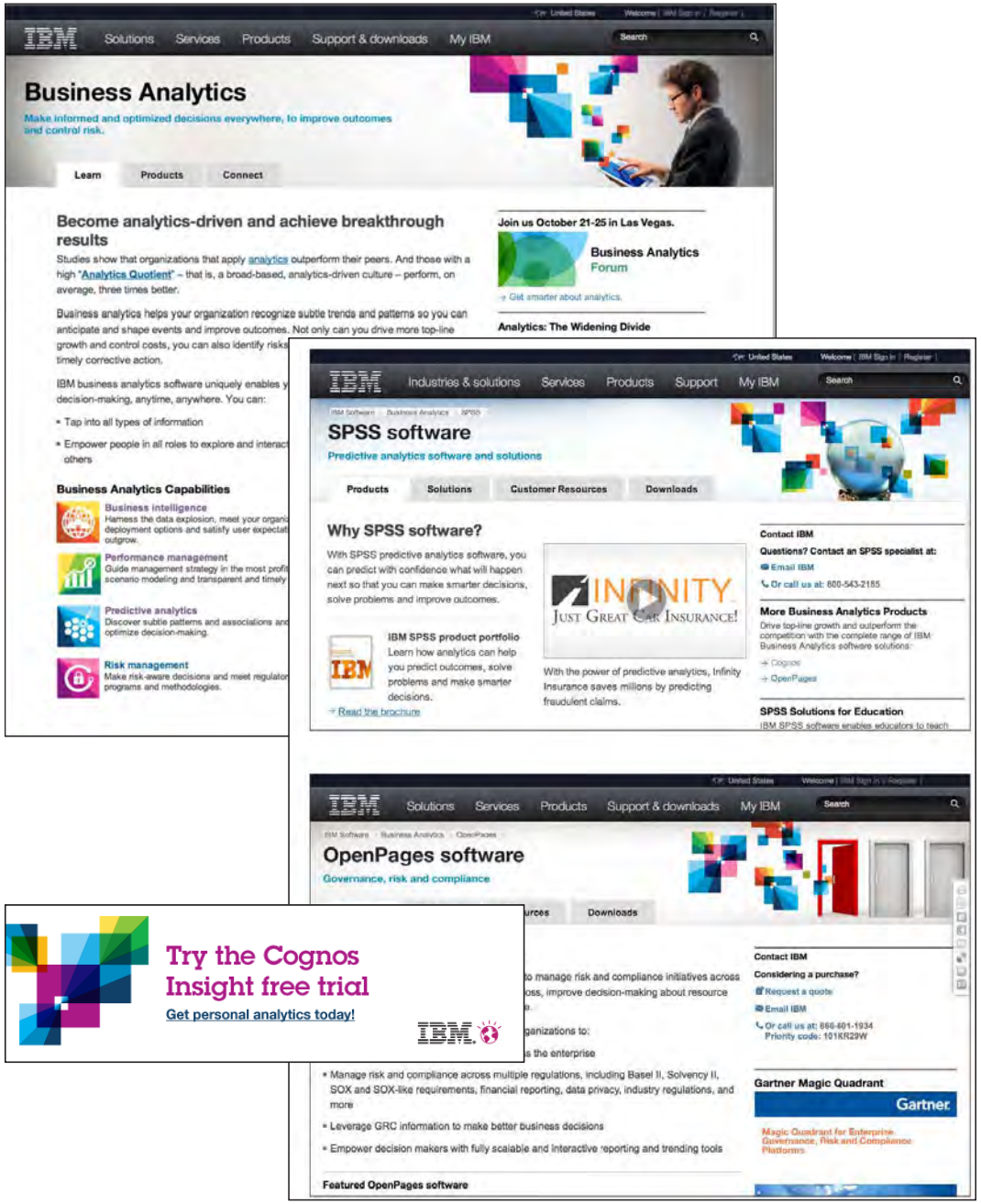
Templates have been created so that marketers can share campaign activity with others in the organization. These are intended for internal use only. For more information about using this announcement, please contact Scott Thorburn.

Sales enablement

Field announcements are integral in helping drive global field productivity and performance by providing information and direction relative to training, products and field resources. They are to be considered a trusted, central source of information with official “field-ready” news and messaging.

Templates for various sales enablement communications have been created and may only be used by the Business Analytics Sales Strategy and Enablement organization. For more information about using this announcement, please contact Ruth Charron.

- Email templates:
  - Product announcement template
  - WinFlash / ValueFlash
  - Program announcement template
  - Technical enablement template
  - Partner enablement template
  - Messages from David Marmer template



Smarter Analytics for pillars: web/digital graphics

To ensure that graphics for the web have a connection to the Smarter Analytics square design, it is recommended that at least five squares appear in each web graphic to connect visually our customers to the Smarter Analytics point of view and the materials we use to market our products. The ideal application uses elements in the imagery to introduce the squares.

Using only squares as the visual is not required, but you may do so if you wish. You may continue to build graphics based on stock photography and other standard imagery. Please contact creative services for further information about combining the visual elements.

Business Analytics software

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