The Lotus Direct Marketing Cookbook – Usage Guidelines for Business Partners

10/17/2002

The Lotus Direct Marketing Cookbook

This cookbook is a compendium of executional guidelines that can be implemented anywhere in the world Lotus software customers and prospects can be found. It is designed to provide templates and imagery for all of Lotus Direct Marketing communications throughout 2002.

It provides guidelines that will ensure that every Lotus Direct Marketing communication supports our unique brand image, while placing Lotus under the broader IBM umbrella in a logical and visually coherent fashion.

It also allows enough flexibility in imagery and copy length to ensure that specific communications can be customized and made relevant for different customers, different industries, different budgets and different geographical regions.

The Direct Marketing focus of Lotus will be to generate qualified leads/demand and cross-sell the current install base. One way Direct Marketing will be used is to drive prospects and customers to seminars and Webinars. This cookbook contains templates for the following tactics: envelope/invitations, postcards for Webinar invitations or reminders, and more comprehensive direct mail packages.

The Goal of Direct Marketing

The goal of Direct Marketing is to generate a response from a customer or prospect. Specifically, we are asking our target audience to take some kind of positive action, whether it is registering for a seminar, asking for more information, visiting a Web site, completing a survey, calling a salesperson, etc.

Of course, every communication that Lotus sends out must support the Software Group brand image. The language and benefits of the Direct Marketing pieces must be customer-focused. The graphics must be chosen for the strongest possible visual impact to break through mail clutter. Response rates will be maximized by incorporating an attractive, relevant offer with a compelling call-to-action.

The Lotus Marketing Communications Theme

Our value proposition is: "Lotus software provides collaborative e-business solutions that bridge people and knowledge, and maximize investments in existing technology. Lotus delivers a competitive advantage by securely bringing together people and information with its modular, standards-based collaboration, learning and knowledge-enabling software."

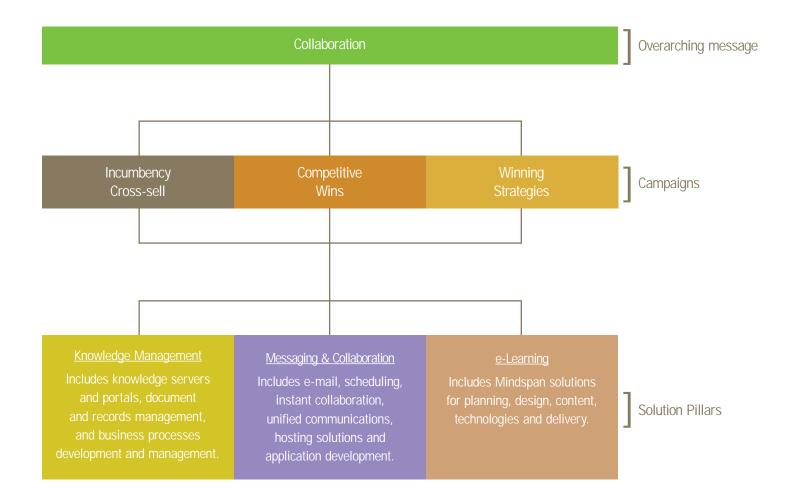
Every Lotus communication must support this statement in some way. But this does not mean that this statement must be incorporated word-for-word in every communication. The core benefits of "collaboration," "maximizing ROI" and "secure" should be included, supported and emphasized, wherever appropriate.

Business Partner Communications

Beginning on page 24 are the guidelines for Business Partner communications, which have a slightly different look froom IBM communications. (This is done primarily because of the possibility of audience crossover between the two types communications.) The main differentiator between the two looks is color—all Business Partner communications are duotone, which not only looks different, but costs less to print.

Lotus Campaigns

The three Lotus campaigns are Incumbency Cross-sell, Competitive Wins and Winning Strategies. Each of these three campaigns is supported by individual solutions pillars:



Creative Considerations

Overall: All elements shown (unless otherwise indicated) are based on U.S. production specifications (Imperial). Direct Marketing templates can be produced in Europe, Latin America, the Middle East, Africa and Asia Pacific, with minor adaptations dependent on geographic needs and standards.

Copy: First mention of Lotus should always be "Lotus" software from IBM." Subsequent mentions may be "Lotus software." Also, Lotus should always be used in the singular, non-possessive tense (i.e. always "Lotus," never "Lotus" "). Products should always be referred to by their full name.

Mosaic: Please refer to Mosaic executional guidelines below.

Photography: Please refer to Lotus Photo Library for approved images. Refer to Mosaic guidelines on page 10.

Icons: Please refer to Lotus Icon Library for approved icons. Refer to Mosaic guidelines on page 10.

Layout: Positioning of mosaic compositions, headlines, copy, etc. for each piece is fixed. This is done to maintain the integrity of the Lotus brand image, as well as to avoid added expense and delays to market. In some cases, there are both four-color and two-color versions of a piece, such as an envelope or letterhead. This is done to accommodate a range of budgets while maintaining the integrity of the Lotus brand image. <u>Please refer to the layout guidelines beginning on page 12</u>.

Also, the Lotus software brand mark should always appear as a brand mark and never in copy. The IBM logo should always be given more weight and prominence than the Lotus brand mark, as it is the corporate signature and is positioned as the voice of the piece. (Please refer to Chapter 1 of Lotus Brand Guidelines)

Executional Considerations

Copy Tone & Manner: Copy, in tone and manner as well as messaging, should express the core ideas of how Lotus software from IBM "helps businesses leverage know-how, allowing them to induce change, work faster and collaborate." Copy should also explain the aspects of a product, service or solution in the context of tangible customer benefits.

The voice should be human, approachable and informative. It should present information in a way that is relevant to customers and inspires their trust and confidence.

Additionally, postcards should only be used for thank-you/follow-up, event reminder, offer and drive-to-Webinar purposes. Postcards are not a recommended medium for seminar invitations. As an example in the Layout Guidelines, the postcards are used as thank-you/follow-up communications.

Mosaics:

The Lotus mosaic portrays a certain personality. Collectively, the elements represent what Lotus software is, as well as what it inspires. It is the foundation and means by which campaigns are reinforced. Prominent concepts this mosaic is designed to represent include:

- Collaboration
- Communication
- Learning
- Knowledge
- Innovation

The Lotus mosaic has been created and saved as a high-resolution graphics file. The individual images or icons in the mosaic will be referred to as elements, while the arrangement of four or more elements for use as a whole will be referred to as a composition. Every mosaic composition should always consist of at least one of each of the following:

- Portraits of people
- Metaphoric and/or symbolic images
- Icons and graphics

In addition to these elements, the following elements can also be added:

- Color fields
- Patterns

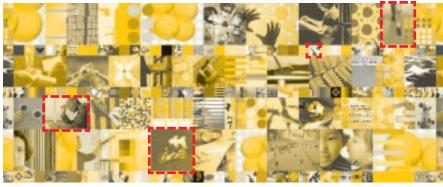
Elements from the existing mosaic must always be used. However, you can create your own composition from the existing elements. This is done to provide the maximum amount of impact and flexibility.

Mosaics:



IBM uses the Four-Color Mosaic





Business Partner uses the Two-Color Mosaic (duotone)



Business Partner Postcard

Mosaics:

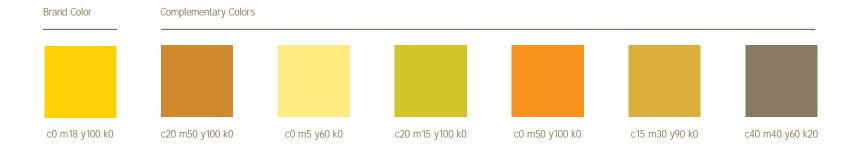
Photography: The Lotus Photo Library consists of headshots across a range of ethnicities. This is done to accommodate the needs of different geos. Geos may replace current imagery with headshots that will resonate best with their target audience.

In order to maximize impact with customers, the composition should always be new and interesting. This can easily be achieved by using different individual elements of the mosaic in the composition, as well as different images from the Lotus Photo Library.

Photos may be four-color, two-color, colorized or polarized to maintain overall integrity of the composition. A duotone image may only be used for two-color communications when production costs are a concern. All images may be cropped for effect. (See final page for explanation of color correcting)

Icons and Patterns: Icons and Patterns are to be used as secondary, supporting images only. They may be black, white, or one of the approved Lotus colors (see below). Note: On covers, the main icon must be used in conjunction with the mosaic exactly as it appears in the guidelines on pages 13-23.

Color: The coloration of elements and compositions may be either four-color, duotone, brand color monotone or black halftone. (Note: Business Partner versions are always duotone. This is done to differentiate Business Partner communications from IBM communications) Each piece should always contain a dominant Lotus brand color. The approved Lotus palette consists of the following:



Layout:

Envelope: A teaser/benefit-oriented headline on the Executive Invitation envelope is recommended, but not mandatory. Refer to guidelines on pages 13-14 for positioning. The same applies for the Direct Mail Package envelope (see pages 17-18).

Mosaic: For each piece, placement and size of the mosaic composition should be followed as closely as possible. Refer to specific guidelines on pages 13-23.

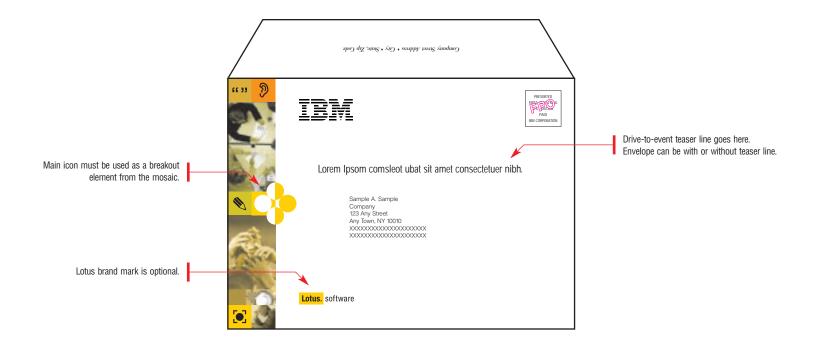
Headline & Subhead: This copy should always be positioned as it appears in the guidelines on pages 13-23.

Subject Line: Call-outs (i.e. "Special Seminar Invitation," "Special Seminar Offer," etc.) are recommended in drive-to-event and drive-to-Webinar communications, but are not mandatory. Refer to guidelines on pages 13-23 for positioning.

Logos: Guidelines for using IBM and Lotus logos must be followed. Refer to the IBM Software Brand Identity Guide for specifics on logo usage.

Lotus Layout Guidelines

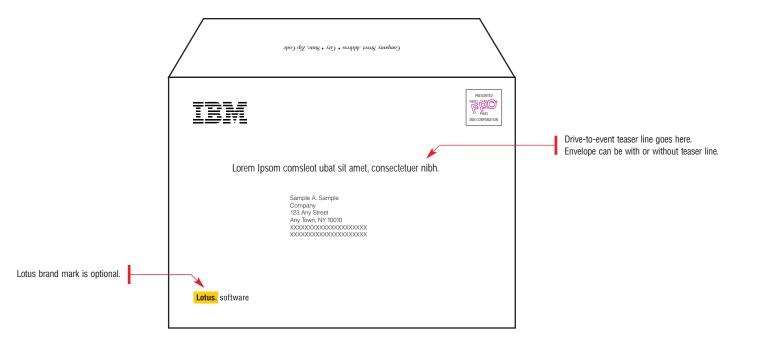
Executive Invitation > Envelope > Four-Color



Creative Recommendations/Considerations

Envelope: 5 1/4" x 7 1/4" (Announcement style A7) Paper stock, 2 Choices: First, (more cost-effective) Potlatch Northwest 80# Dull text—Second, (more expensive) Strathmore Writing 80# Recycled Wove Text in Bright White Color: 5/0: 4-cp + Spot Gloss Varnish the photography: no varnish if printing on Strathmore. Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

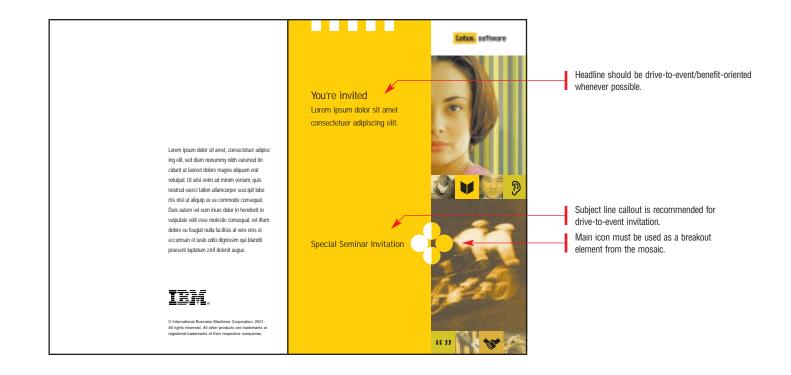
Executive Invitation > Envelope > No Mosaic > Two-Color



Creative Recommendations/Considerations

Envelope: 5 1/4" x 7 1/4" (Announcement style A7) Paper stock: Strathmore Writing 80# Recycled Wove Text in Bright White 2 Colors: Black + PMS 115 Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Executive Invitation > Outside > Four-Color



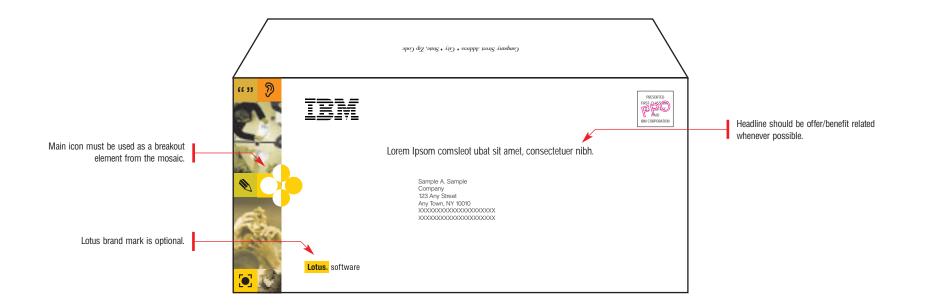
Creative Recommendations/Considerations

Invite: 5" x 7" (finished) Paper stock, 2 Choices: First, (more cost-effective) Potlatch Northwest 100# Dull cover—Second, (more expensive) Strathmore Writing 80# Recycled Wove Cover in Bright White Colors: 5/4 (if printing on Northwest): 4-Color Process + Spot Gloss Varnish (SGV) the photography OVER Y + M + K + SGV; no varnish if printing on Strathmore. Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Executive Invitation > Inside > Four-Color



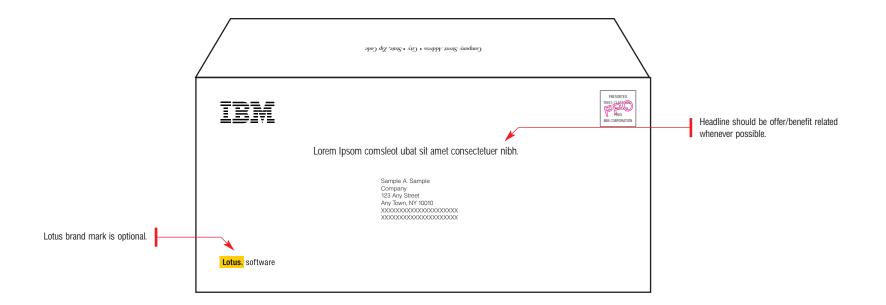
Direct Mail Package > Envelope > Four-Color



Creative Recommendations/Considerations

Envelope: 4 1/8" x 9 1/2" (#10) Paper stock: Potlatch Northwest 80# Dull text. Colors: 4-Color Process + Spot Gloss Varnish the photography) Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

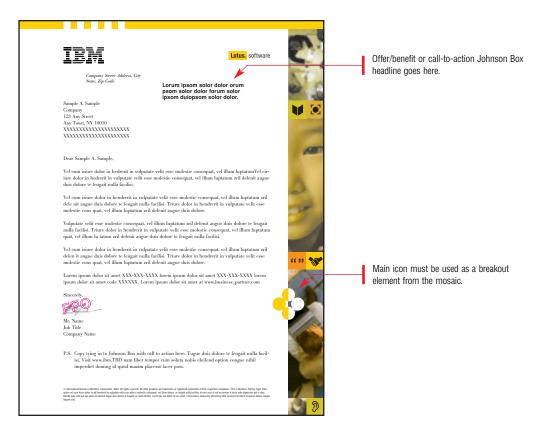
Direct Mail Package > Envelope > No Mosaic > Two-Color



Creative Recommendations/Considerations

Envelope: 4 1/8" x 9 1/2" (#10) Paper stock, 2 Choices: First, 70# Plainfield Opaque Britewhite Smooth Text—Second (if off-the-shelf envelopes aren't available in Plainfield) bright white 24# wove Colors: Black + PMS 115 Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

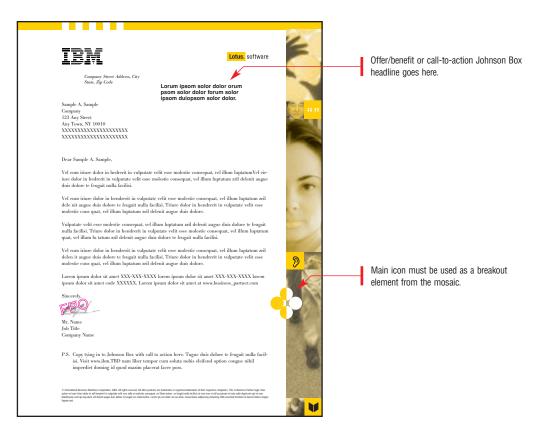
Direct Mail Package > Letterhead > Four-Color



Creative Recommendations/Considerations

Letterhead: 8 1/2" x 11" Paper stock: 70# Plainfield Opaque Britewhite Smooth Text—Laser compatible stock Colors: 4-Color Process Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Direct Mail Package > Letterhead > Two-Color



Creative Recommendations/Considerations

Letterhead: 8 1/2" x 11" Paper stock: 70# Plainfield Opaque BriteWhite Smooth Text—Laser compatible stock Colors: Black + PMS 115 Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Direct Mail Package > Slim Jim > Outside > Four-Color



Creative Recommendations/Considerations

Slim Jim: 4" x 9" (finished) Paper stock: 100# Northwest Dull Text Colors: 5/5 (4-Color Process + Spot Gloss Varnish the photography) Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Direct Mail Package > Slim Jim > Inside > Four-Color



Postcard > Front > Four Color Back > One-Color



Creative Recommendations/Considerations

Postcard: 5" x 7" (finished) Paper stock: 100# Northwest Dull Cover (must mic to .009 to meet U.S. postal regulations) Colors: 5/1 (4-Color Process + Spot Gloss Varnish the photography OVER Black; no varnish on back panel. Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Business Partner Layout Guidelines

Creative Considerations: Business Partner

All guideliness for Lotus communications noted on page 6 apply to Business Partner communications. However, there are additional considerations for this work that must be taken into account.

Note: All Business Partner communications are designed in two colors. This is done to differentiate Business Partner communications from IBM communications.

The IBM Business Partner emblems contains the IBM logo. The IBM logo is one of the most recognized logos in the world and enjoys legal trademark status. There is great equity for business partners to use the IBM Business Partner emblems since it gives them the added recognition value of the IBM logo. However, because the emblems contain the IBM logo, they must not be altered. Complete information on usage may be found on the IBM PartnerWorld[®] site.

IBM Business Partner Emblems: There are two emblems—a two-color blue and black emblem for authorized IBM Business Partners and a four-color red, white, blue and black emblem for IBM Business Partners Certified for e-business. The IBM Business Partner emblem may be used by authorized IBM Business Partners in compliance with the IBM Business Partner Agreement and by Advanced or Premier-level Business Partners in IBM PartnerWorld. The Certified for e-business emblem may be used only by IBM Business Partners who have obtained Certified for e-business status for their firms and have been authorized to use this emblem by IBM. When either emblem is used at 1.3 inches wide or greater, the "®" registration mark and "TM" trademark symbol must appear.

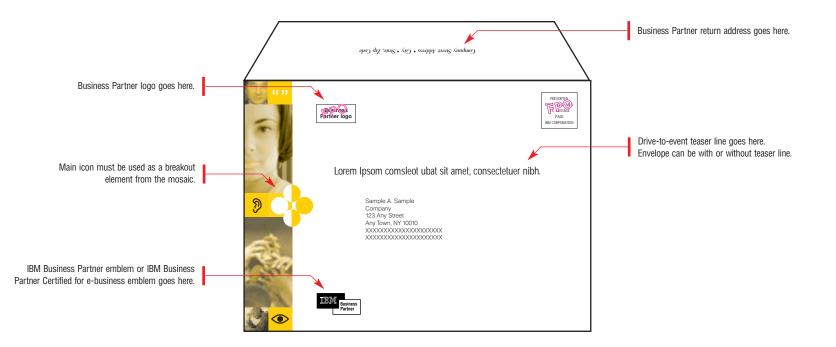
Placement of the Emblems and Logos: The placement of the emblems and logos in the layouts are fixed and not to be changed. They appear in the following order: first, the logo of the business partner; second the IBM Business Partner emblem, and third is the SWG Business Partner emblem (optional). These logos and emblems only appear on the back panel. Each appears with set copy. The order of the emblems/logos also determine the degree of prominence in terms of size.

Layout: Business Partner layouts are intended for Business Partner communications only. All other layout guidelines noted on page 6 apply.

Executional Considerations: Copy Tone & Manner

The IBM Business Partner communications, because they come from the Business Partner, should not speak in the IBM voice—should not be written as though they were from IBM. That said, the tone and manner should still be simple, direct, professional, approachable and informative. Because the copy is written from the Business Partner, the call to action is from the Business Partner.

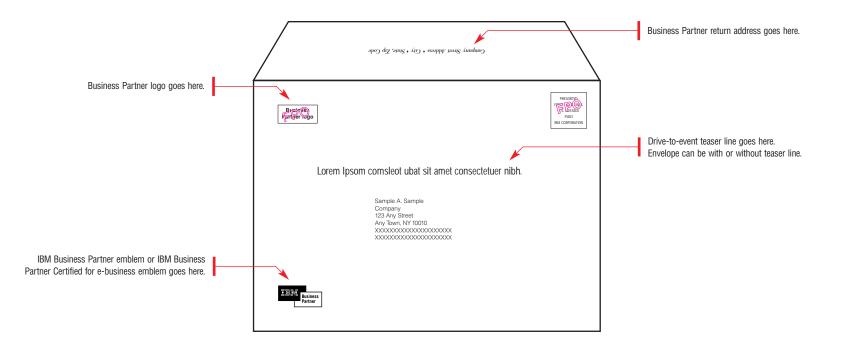
Executive Invitation > Business Partner > Envelope > Two-Color



Creative Recommendations/Considerations

Envelope: 5 1/4" x 7 1/4" (Announcement style A7) Paper stock, 2 Choices: First, (more cost-effective) Potlatch Northwest 80# Dull text—Second, (more expensive) Strathmore Writing 80# Recycled Wove Text in Bright White. Colors: 4/0 (if printing on Northwest): Black + PMS 116 + TBD PMS + Spot Gloss Varnish; the photography. <u>no varnish if printing on Strathmore</u>, and use PMS 115. Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

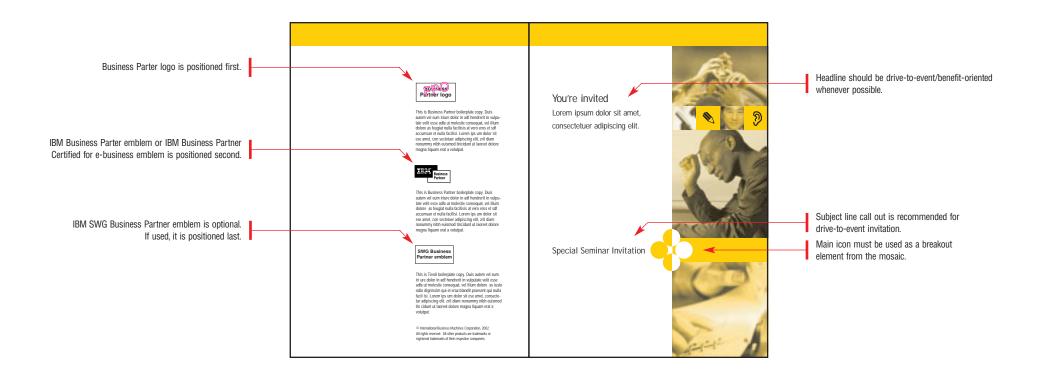
Executive Invitation > Business Partner > Envelope > No Mosaic > TBD-Colors



Creative Recommendations/Considerations

Envelope: 5 1/4" x 7 1/4" (Announcement style A7) Paper stock: Strathmore Writing 80# Recycled Wove Text in Bright White. Colors: Black + TBD PMS Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

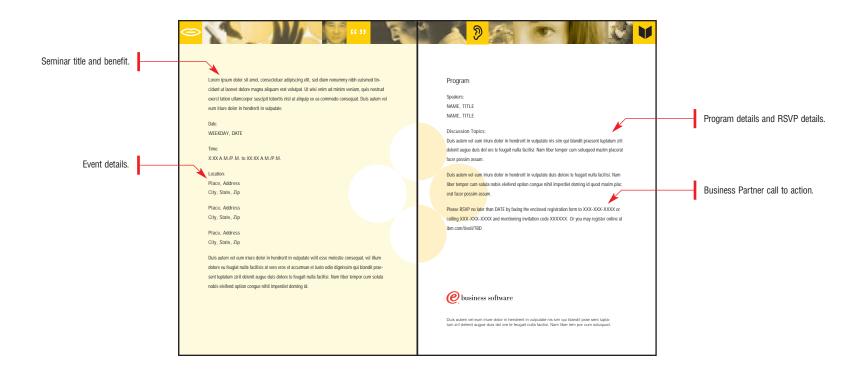
Executive Invitation > Business Partner > Outside > Two-Color



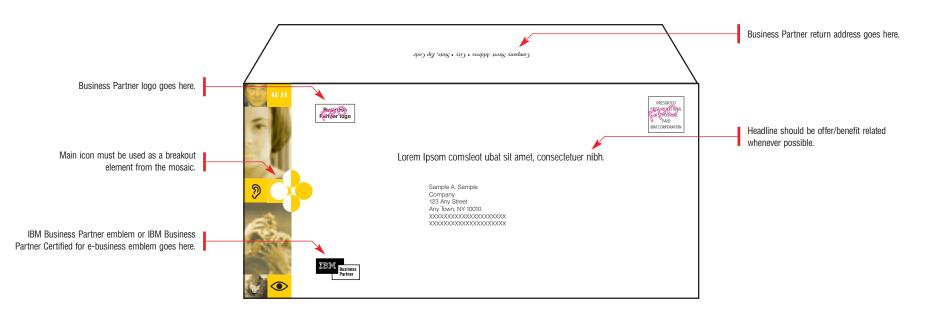
Creative Recommendations/Considerations

Invite: 5" x 7" (finished) Paper stock, 2 Choices: First, (more cost-effective) Potlatch Northwest 100# Dull cover—Second, (more expensive) Strathmore Writing 80# Recycled Wove Cover in Bright White Colors: 3/4 (If printing on Northwest); Black + PMS 116 + Spot Gloss Varnish (SGV) the photography OVER Black + PMS 116 + PMS 032 + SGV; if printing on Strathmore then no varnish and use PMS 115 Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Executive Invitation > Business Partner > Inside > Two-Color



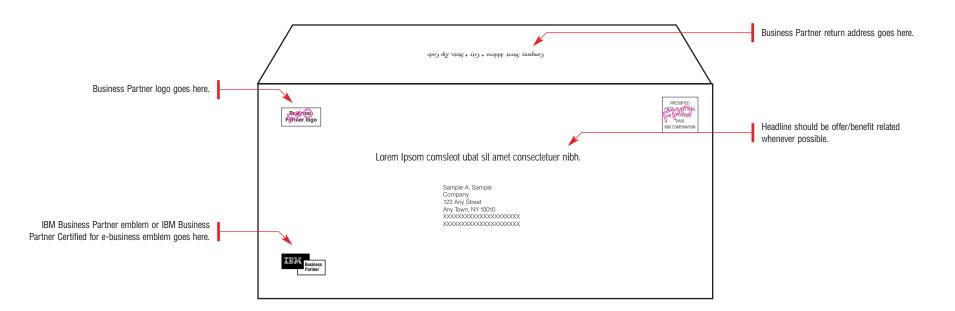
Direct Mail Package > Business Partner > Envelope > Two-Color



Creative Recommendations/Considerations

Envelope: 4 1/8" x 9 1/2" (#10) Paper stock: Potlatch Northwest 80# Dull text. Colors: 2/0: Black + PMS 116 Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

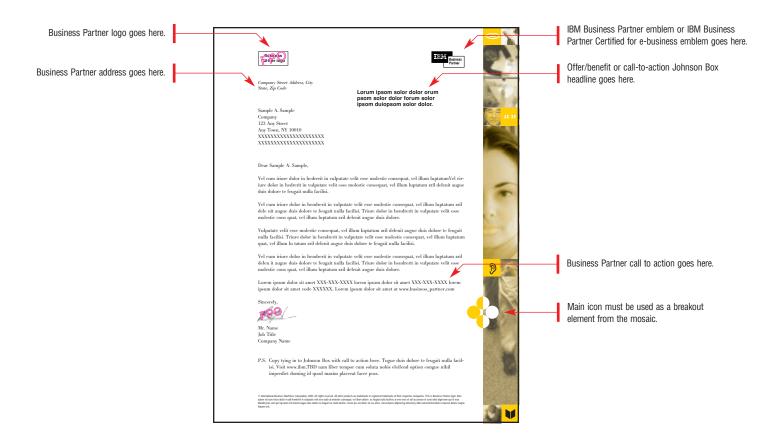
Direct Mail Package > Business Partner > Envelope > No Mosaic > TBD-Colors



Creative Recommendations/Considerations

Envelope: 4 1/8" x 9 1/2" (#10) Paper stock, 2 Choices: First, 70# Plainfield Opaque Britewhite Smooth Text—Second (if off-the-shelf envelopes aren't available in Plainfield) bright white 24# wove Colors: 2/0 colors Black + TBD PMS Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

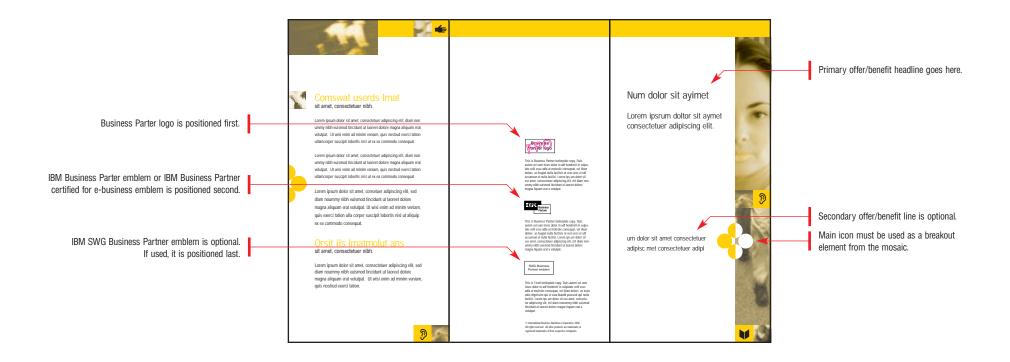
Direct Mail Package > Business Partner > Letterhead > Two-Color



Creative Recommendations/Considerations

Letterhead: 8 1/2" x 11" Paper stock: 70# Plainfield Opaque Britewhite Smooth Text—Laser compatible stock Colors: Black + PMS 115 Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Direct Mail Package > Business Partner > Slim Jim > Outside > Two-Color



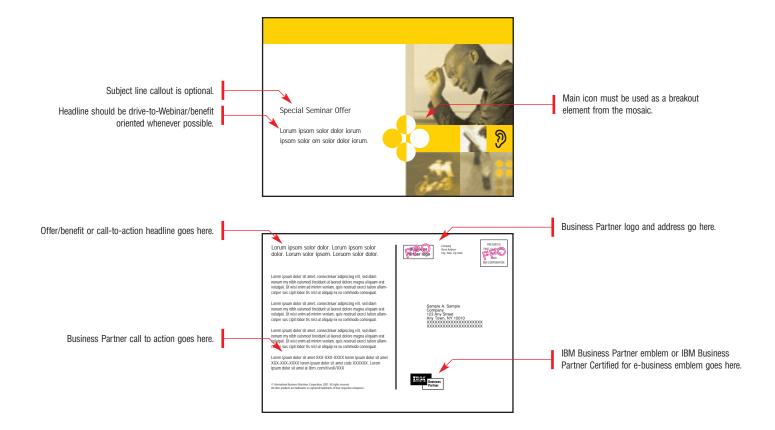
Creative Recommendations/Considerations

Slim Jim: 4" x 9" (finished) Paper stock: 100# Northwest Dull Text Colors: 4/3: Black + PMS 116 + TBD PMS + Spot Gloss Varnish (SGV) the photography OVER Black + PMS 116 + SGV the photography. Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

Direct Mail Package > Business Partner > Slim Jim > Inside > Two-Color



Postcard > Business Partners > Front > Two-Color Back > One-Color

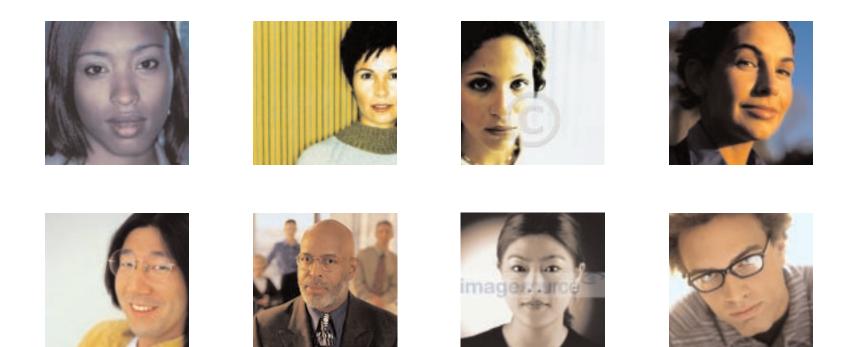


Creative Recommendations/Considerations

Postcard: 5" x 7" (finished) Paper stock: 100# Northwest Dull Cover (must mic to .009 to meet US postal regulations) Colors: 3/2: Black + PMS 116 + Spot Gloss Varnish the photography OVER Black + TBD PMS no varnish on back panel. Sizes: Are based on the Imperial System. Elements will need to be adapted for Europe, Middle East, Africa and Asia Pacific based on individual country size requirements.

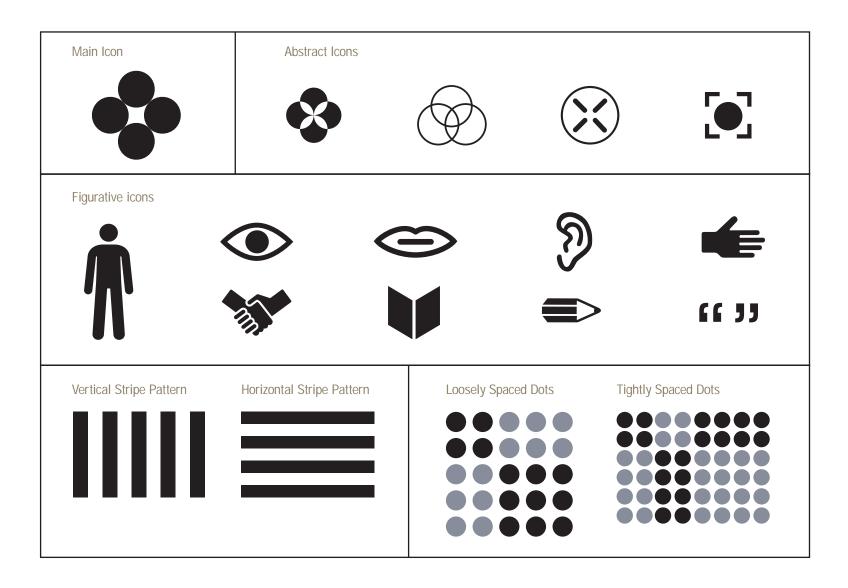
Lotus Mosaic Photography, Icons and Graphics Library

Lotus Mosaic Photography > People



All images of people may be used as primary and secondary images.

Lotus Mosaic > Icons > Graphics



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Artwork Retouching

Four-Color



Instructions: Convert RGB art to CMYK and adjust color to taste.

Posterized



<u>Instructions</u>: Convert document to grayscale.

Go to Image > Adjust > Threshold and adjust high contrast image to taste.

Convert image back to CMYK and select a color for the white areas. Select Edit > Fill. Make sure your color is in the foreground and select Darken for the mode.

Repeat for the blacks areas and in the FillI box select Lighten for the mode.

High Contrast



Instructions:

Convert RGB art to grayscale and adjust contrast to a curve similar to the one below, keeping some details in the mid-tones.

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- 82				
- 88		++		-
- 86				- 1
- 82		 -		-1
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- 11				
12.04	_	 -	_	-

Duotone



Instructions:

Add a new multichannel adjustment layer to photoshop and apply the following numbers into the proper fields.

Flatten the file and convert to multichannel color mode.

Remove the cyan and magenta plates and reassign the yellow plate to PMS 116.

Save the file out as a DCS 2.0 file.

