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	Marketing & Communication Guidelines		

REVISION HISTORY			
REV	Description of Change	Author	Effective Date
V.1.0	MARCOM Guidelines	Mahua Ray	4-September-14

REFERENCE DOCUMENTS	
Document Number	Document Title

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1. POLICY STATEMENT:

Good communications is central to the smooth running of any large organization and it is the job of the promotions or marketing communication section to facilitate and support this. This policy is intended to help employees make appropriate decisions about the use of all sorts of communication material used for internal as well as external communication by various customer interfacing sections.

This document provides guidelines to assist all sales, presales, promotions and delivery section member in getting the right kind of data for all marketing and communication purposes. The data in the Promotions folder will store the latest and most authentic information on CSM's products, solutions and services and all other associated communication materials.

This policy outlines the standards we require employees to observe when communicating on behalf of CSM and defines the method of preparing, reviewing, approving, maintaining, tracking, and changing documents, presentations and sales materials identified.

This policy supplements our Internet, Email, Social Media and General Code of Conduct Policies.

This policy does not form part of any contract of employment and it may be amended at any time.

2. SCOPE:


The scope of this document is to educate all sales, presales, delivery and promotions section members regarding all sorts of external and internal communication, be it Customer education, communication, public relations, marketing and advertising, or any other types of communication activity undertaken on behalf of CSM's Company brands, products, solutions or services.

This also encompasses storing and managing all communications in the forms of paid advertising (in any media, including but not limited to television, radio, newspapers, periodicals, billboards, or the internet), news releases, public service announcements, public relations campaigns, brochures, books, booklets, videos and films, Web sites, on-pack promotions, interactive software, sweepstakes and premiums.

3. RESPONSIBILITY FOR IMPLEMENTATION OF THE POLICY:

The Promotions Team has overall responsibility for the effective operation of this policy.

The Promotions Team is responsible for monitoring and reviewing the operation of this policy and making recommendations for changes to minimize risks to our operations.

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All employees are responsible for their own compliance with this policy and for ensuring that it is consistently applied. All employees should ensure that they take the time to read and understand it. Any breach of this policy should be reported to the Promotions section (promotions@csmpl.com).

The primary point of contact for answering all such queries lies with Ms. Mahua Ray (mahua.ray@csmpl.com)

4. DEFINITIONS:


Administrator	Person(s) who keeps track of the changes/reviews a document and stores it after giving proper nomenclature. It also includes any clerical change to a document or data which does not impact its basic intent (i.e. grammatical, template formatting, typo-fixes, etc.). Ensure marketing material information is disclosed in a timely, consistent, and appropriate manner. Provide guidelines for the broad dissemination of material information pursuant to all applicable legal requirements.
Reviewer	A person who will review the content prepared by the Author
Users	Sales, Presales, Delivery and Promotions section members.
Author	This is the person who translates requirement to a marketing communication material.
Document	Corporate Profiles, Flyers & Inserts, White Papers, Case Studies, Presentations, Events, Logos, IT Awards, Concept Notes, News Items, Videos, Resources, References.

5. COMMUNICATION REQUIREMENTS:

This policy includes the release of marketing and communication/information about the Company to the general public, media, customers, bondholders, potential investors, and other stakeholders.

All communications we make using CSM brand which promote our services, solutions or applications can only be made by Sales, Presales, Delivery and Promotions section and must have been through our formal approval process.

No employee must make any communication without adhering to this policy document.

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If you are in any doubt as to what you can and cannot send on behalf of the company, then please contact for answering all such queries lies with **Ms. Mahua Ray** (mahua.ray@csmpl.com).

6. ROLES & RESPONSIBILITIES:

The policy defines various roles and responsibilities to adhere to the document control process.

6.1 Administrator


- 6.1.1 Identify need for new or revision of document
- 6.1.2 Initiate document change request (DCR) to start the same
- 6.1.3 Designate Authors
- 6.1.4 Review document as prepared/revised by the Author
- 6.1.5 Store finished document maintaining proper versioning and seek for approval to Committee members
- 6.1.6 Name and Store finished document in appropriate location, and inform all.

6.2 Users

- 6.2.1 Identify the need for preparing a new document or the revision of an existing one
- 6.2.2 Designate auditors responsible for review and approval of the revised/new documents
- 6.2.3 Ensure the effective implementation of a document control system within the company
- 6.2.4 Review and approve DCR package prior to submitting it to the author
- 6.2.5 Make final review and changes if any to the finished document, its nomenclature and its location, and
- 6.2.6 Ensure documents are made and completed in time.

6.3 Author:

- 6.3.1 Prepare/revise the document as per requirement.
- 6.3.2 Evaluate document change requests and prepare a list of changes
- 6.3.3 Communicate the changes and revised documents with the reviewer.

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7. STORE AND CONTROL OF DOCUMENTS:

We recognize the importance of the proper communication, be it internal or external, the information we send out must be latest and authentic. To this effect, we need to have proper control over document revisions and store them at the proper location for easy availability.

7.1 Document Control Process:

This process applies to all marketing communication documents. The documents shall be used by any user in the company with mail communication from the Promotions Team.

There will be three levels of document change requests and approvals.

7.1.1 Requisition for a new document creation

The request to create a new document can come from any employee of the company. However, it needs to be approved by the respective Head of the Department/section, before coming to the promotions section.

- 7.1.1.1 The requirement has to be properly evaluated and the document structure, type and flow need to be finalized.
- 7.1.1.2 An author is assigned to take up the task of writing, compiling or designing the document.
- 7.1.1.3 The document draft is then sent to the reviewer.
- 7.1.1.4 The reviewer finalizes the content and incorporates changes, if any and sends it to the administrator to be uploaded to the Promotions Repository.

7.1.2 Requisition for an existing document

Request for providing documents can come from any employee of the company.

- 7.1.2.1 The concerned user can mail the promotions section with the document specifications and sharing relevant information so as to allow the promotions section to assess and provide the specific document to that effect.
- 7.1.2.2 The promotions section can then mail or provide the location details of the specific files/folders placed in the Promotions repository.

7.1.3 Requisition for Change in an existing document

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- 7.1.3.1 The document change request may come from any employee of the company. However, it needs to be approved by the respective Head of the Department/section, before coming to the promotions section.
- 7.1.3.2 The change requests must be properly evaluated and a list of changes should be created by the author.
- 7.1.3.3 The author then incorporates the required changes to the document and sends it for review.
- 7.1.3.4 The reviewer must review the change request list as well as the revised document to ensure all changed have been carried out.
- 7.1.3.5 If further review is required before deciding to approve or reject the proposed document, the Auditor shall identify relevant resources who can provide expert opinion and then finalize the document.
- 7.1.3.6 Once the review process is over, the document is handed over the administrator to be uploaded to the specific folder/repository.
- 7.1.3.7 The change in the document is then communicated to all stakeholders involved in the document making process.

7.2 Location of files and folders

The following table provides the path of the Promotions repository placed in [\\server9\](#).

- [\\server9\14.PROMOTION](#) can be used to locate required files by following the folder structure to get the latest files.
- [\\server9\14.PROMOTION\Reference](#) can be used to place new documents to be evaluated and validated.

7.3 Nomenclature

7.3.1 Ideal Naming convention for files

7.3.1.1 For Generic Files

1. Organization
2. Subject
3. Activity Name
4. Document Type/Parts
5. Date (ddmmyyyy)
6. Version No.

For Ex: CSM_Internal_Events_Awardceremony_P1_07032014_V1.0

7.3.1.2 For Project Specific Files

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1. Organization
2. Project
3. Module Name
4. Document Type/Parts
5. Date (ddmmyyyy)
6. Version No.

For Ex: CSM_SAMs_Module_Casestudy_07032014_V1.0

7.4 Before using marketing communication material you must

- 7.4.1 Have read and understood this policy, social media and the Internet Policy.
- 7.4.2 Have sought and gained prior written approval to do so from the Promotions section for any further specific changes to the final documents (promotions@csmpl.com).

8. MONITORING USE OF MARCOM GUIDELINES

CSM Technologies reserves the right to restrict or prevent access to certain marketing communication material if we consider the use to be not required or redundant. The promotions section will review the Promotions repository in a timely manner and make updates regularly.

These changes and revisions will then be communicated to other sections within the organization.

9. DO'S AND DON'TS

9.1 Don't

- 9.1.1 Do not share proprietary information. Proprietary information can include secret formulas, processes, and methods used in production. It can also include a company's business and marketing plans, financial information including, salary structure, expenses and profits. Other sensitive information includes customer lists, contracts, and details of its computer systems.
- 9.1.2 Do not share private information. Do not discuss financial information or contact information unless the contact details refer to the responsible authority unless notified by the proper authority.
- 9.1.3 Do not share wrong, old, unevaluated content to clients and stakeholders.
- 9.1.4 Do not update content without proper information to the reviewer and administrator of Promotions Folder.

9.2 Do's

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- 9.2.1 Share authentic and correct information with the both external and internal stakeholders.
- 9.2.2 Request for changes as required following the processes.
- 9.2.3 Use company marketing literature for branding and marketing purposes.
- 9.2.4 Share knowledge within the organization to make the promotions repository information rich and relevant.
- 9.2.5 Access and share information from the repository.
- 9.2.6 Verify documents before sending out to clients.

10. CONTENT CATEGORIZATION

Here is how content has been categorized to make communication simpler and easier.

Sl. No.	Folder Names		
1	Brochures		
		CSM Company Profile	
			e-Gov
			Brief Profile
			Detailed Profile
			Outsourcing
			Partnership
			Web Development
			Consulting
		Project Specific	
		Product Specific	
			ENCOR
			Health-e
			Kwantify
			GetITrite
		Service & Consulting Specific	
2	Corporate Profiles		
		CEO	
			Profile
			Images

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3	Flyers & Inserts			
		E-Gov		
		Corporate		
		General		
4	White Papers			
		Technical		
		Project/Product specific		
		Work/Life		
		Domain		
5	Case Studies			
		E-Gov		
		Corporate		
		Products		
		Projects		
6	Presentations			
		CSM Profile		
			e-Gov	
			Brief Profile	
			Detailed Profile	
			Outsourcing	
			Partnership	
			Web Development	
			Consulting	
		Project Specific		
		Product Specific		
7	Events			
		Flyers & Inserts		
			E-Gov	
			Corporate	
			General	
		Posters		
		Internal Events		
		Exhibitions/Tech Fairs		
		Seminars/Workshops		
		CSR		
8	Logos			
		Images		
9	IT Awards			

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		Nominations	
			Additional Resources
			Award Name wise List
			Project wise Awards List
			Year wise Awards List
		Award Received	
10	Concept Notes		
11	News Items		
		Press Releases	
		Advertisements	
12	Videos		
		Corporate	
		Project	
13	Templates		
14	Advertisements		
15	References		

Table 10.1. Promotions Folder Structure

10.1 Process of sending communication materials

Mails can be posted in the Reference Folder in the Promotions repository and a mail communication can be sent stating the same

11. STANDARD FORMAT FOR ALL DOCUMENTS AND PRESENTATIONS

Good document standardization is needed to increase the communication efficiency. Documentation control brings in good communication and information dissemination practices and helps to achieve consistency in our day-to-day operations. Proper document standardization improves management procedure while it also saves time and reduces the conflict among employees and gives an overall idea on how documents should be managed.

Document standardization holds prime importance in practicing good communication and helps us maintain uniformity and consistency in all our internal and external communication. Therefore all documents generated for and by any employee of CSM technologies, will be published through a proper document review and approval process. It is of important that all documents adhere to the following rules. All pages must conform to formatting requirements for margins, page size, font size, color, legibility and attachments.


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11.1 Formatting guidelines that need to be met while preparing a document¹

Sl. No.	Document format	
1	Font type	Garamond (Small), Heading (Full Caps)
2	Font color	Black (Body Text), Heading (White, with Background shade in blue) Heading structure, ex. 1. Main heading 1.1. Sub heading 1.2. Sub Heading 1.2.1. Sub Heading
3	Font size	Body text 11, Heading 12
4	Bullets & Numbering	Image List, ex. <ul style="list-style-type: none"> • Main List <ul style="list-style-type: none"> ○ Sub list <ul style="list-style-type: none"> ▪ Sub list Numbered List, ex. 1. Mail List <ul style="list-style-type: none"> a. Sub list <ul style="list-style-type: none"> i. Sub list
5	Margins Spacing and	Margin 1" on both sides, Line spacing 1 cm
6	Headers	Header is a must and it should carry title of the document in short; Logo, if needed; and Year.
7	Footers	Footer is a must and must carry Copyright, Confidentiality statement, Page Number
8	Figures	Figures should carry the respective section number, Title, and in Garamond 11 font size. Ex. <i>Figure 11.1. Promotions Folder Structure</i>
9	Illustrations/Pictures	Pictures should carry the respective section number. Ex. 11.1. Promotions Folder Structure
10	Tables	Tables should carry the respective section number and title of the table. Ex. <i>Table 11.1. Promotions Folder Structure</i>

Table 11.1. Document formatting

¹ **Subject to change as per client or quality standard requirements.**

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11.2 Guidelines for preparing presentations

All Presentations should be prepared on the new CSM template. A sample PPT can be found with all the required formatting standard at <\\server9\14.PROMOTION\Templates>

Sl. No.	Document format	
1	Font type	<ul style="list-style-type: none"> • Heading Font is Andalus (Front Page and Inner Page) • Subtitle Heading font is Vijaya • Footer font is Arial
2	Font color	Black (Body Text), Heading (White, with Background shade in blue) Heading structure, ex. 2. Main heading 1. 1. Sub heading 1.2. Sub Heading 1.2.1. Sub Heading
3	Font size	Body text 11, Heading 12
4	Bullet style	The bullet style till the first level should be the CSM logo (the 3 strikes). You may access the logo at \\server9\14.PROMOTION\Logos
4	Headers	Header is a must and it should carry title of the page and Logo.
5	Footers	Footer is a must and must carry Copyright, Confidentiality statement, Slide Number

Table 11.2. Presentation Formatting

12. BREACH AND VIOLATIONS

Any breach of these restrictions will amount to gross misconduct. In case of breach or violation of this policy, the concerned employee may be dealt with under our Disciplinary Procedure and, in serious cases, may be treated as gross misconduct leading to summary dismissal.

13. MONITORING AND REVIEW OF THESE GUIDELINES

The Promotions section (promotions@csmpl.com) shall be responsible for reviewing this policy (annually) to ensure that it meets legal requirements and reflects best practice. It shall be updated regularly adhering to internet policy changes.

14. ACKNOWLEDGEMENTS

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This Marketing communication guidelines/policy has been prepared for CSM Technologies. It is provided for information purposes only and requires strict adherence.

For further advice on how to access right information on marketing content or policies, please contact:

Email: promotions@csmpl.com.
