

Midmarket Marketing Communications & Messaging Guidance

July 2009



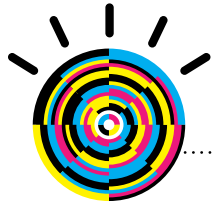


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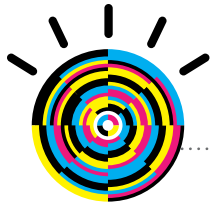


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How to use this guidance

This guidance is written for those of us responsible for shaping and sharing IBM's Smarter Planet midmarket vision, benefits, capabilities and unique points of differentiation: Demand Programs, Brand System, Marketing and Program Managers and IBM Agency Partners.

The purpose of this document is to guide the content of the marketing communications we put into the marketplace targeting the midmarket audience and IBM Business Partners.

1. Create a common understanding of the IBM Express Advantage™ value proposition.

- Provide an understanding of the challenges midsize companies face that drive their need for information technology solutions
- Explain what midsize companies think about IBM
- Provide an understanding of how our Express Advantage value proposition has evolved

2. Provide guidance that explains how to talk to our midmarket target about our solutions.

- Create a common understanding of IBM's Smarter Planet corporate agenda and how to position midsize companies as the "engines of a smarter planet"
- Provide instruction for how to build compelling customer success stories that illustrate our value proposition for midsize companies
- Explain how to "layer" messages from establishing the premise of "engines of a smarter planet" through promoting specific offerings

3. Provide guidance that explains how to talk to IBM Business Partners about IBM's Smarter Planet corporate agenda and what it means for them.

Consult this messaging guidance every time you need to develop marketing communications that support General Business Midmarket:

- to brief creative teams to develop creative assets
- to select search keywords or build Web content
- to seed blogs and other peer-to-peer vehicles
- to participate in or produce events
- to brief journalists or industry analysts

Our goal is to tell a consistent, compelling story to our midsize customers and prospects, and to our Business Partners. *This messaging is not, however, meant to be used as copy blocks and included "as is" in customer or BP facing advertising or DG deliverables.* It is meant as a reference guide that provides ideas and messages which you can use along with existing or yet to be developed Midmarket Program Framework (MMPF) flexible assets while developing customer and BP facing assets.

Please keep in mind that, as a worldwide-developed tool, this guidance contains examples of offerings and success stories that any countries can leverage as a starting point. However, countries will likely need to localize the offerings and customer references used in their messaging and secure local approvals as necessary.

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What has changed since Express Advantage messaging guidance was last published?

Express Advantage messaging guidance was last refreshed March 2009. Since then, IBM's executive leadership established a new corporate agenda, "Smarter Planet" (more on this later), and the Express Advantage value proposition has been updated to make it more differentiated.

To transition Express Advantage's messaging and creative platform from the Simple campaign to the Smarter Planet campaign, our preparation included extensive market research that informed the content of this guidance. This research enriched our knowledge of the challenges our midsize customers and prospects face, what they think about IBM, and how they prefer to be addressed. New research will also help us to position Smarter Planet to our Business Partners.

The studies conducted were:

- Corporate Smarter Planet Focus Groups (published April 2009)
- Midmarket-specific Smarter Planet and Express Advantage value proposition Focus Groups (published April 2009)
- Midmarket Dynamic Infrastructure Focus Groups (published May 2009)
- Business Partner Smarter Planet In-depth Interviews (published July 2009)

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All about our midsize customers and prospects

Who are they?

Midsize and small businesses are now responsible for nearly 65% of the global GDP. Globally, midsize companies represent more than 90% of all businesses and employ over 90% of the world's workforce. They produce more patents and more innovations per employee than large firms. When we think about systems like supply chains, healthcare delivery and food management, we're really talking about the interactions of thousands of smaller, nimbler, entrepreneurial companies that make up our systems of industries.

Midsize companies are often family-owned and privately held, i.e., their executives don't have to answer to the demands of shareholders. Therefore, midsize company executives tend to define success differently than their large enterprise counterparts. While large enterprise executives focus on quarterly earnings and stock price, midsize company executives may cite happy customers, satisfied employees, and their standing in the community equally as important as financial results. In fact, many midsize company executives relish their freedom from the bureaucracies found in large companies.

What do they think about themselves?

When asked to describe their businesses, midsize company executives do so within the context of the industries they are in – not the broad category, but the specific niche – wholesale electronics, medical supplies distribution, retail lumber. Therefore, we would ideally version our communications down to the niche-industry level. But that's not practical. While they don't generally refer to themselves as midsize, our research found that by referring to their size in our copy, our communications do signal to them that IBM has products and services that could meet their needs.

What are their challenges?

Though they operate in very diverse industries, one thing midsize company executives have in common is that they have business problems that are daunting to them, but they don't have an arsenal of resources to work through the challenges. Everyone in the company is overworked and there is always a project they haven't gotten to yet. And they don't tend to be risk takers. This means that when they spend their money, they probably feel more like they are spending their own money than the "company's money."

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All about our midsize customers and prospects (continued)

What help are they looking for?

Because they are so strapped for resources, midsize companies need IT solutions that address their reality. They need solutions that are affordable – not cheap, but they need to be a good value. In fact, midsize companies often seek proven best-in-class solutions that solve their problems, caring less about maintaining a single-vendor IT platform. Midsize companies need peer validation that the solution will work for them – they want to know what it does, how it works, and how it will affect everything else. They want something easy to implement and manage – they can't fiddle, tweak and baby-sit their IT. And they need whatever they buy to grow and evolve with them because they won't be able to replace it every time something in their business changes.

Who do they turn to for advice on IT processes and purchases?

Therefore, midsize business executives rely on the advice of their IT consultants and of their peers while making IT purchase decisions. While innovation is an

imperative and they're excited to do what it takes to keep up with customer expectations and ahead of the competition, they're anxious about finding the resources needed to do so. They like to be assured that another company – one like theirs – has already successfully deployed the solution. They need proof that their investment in innovation – better managing customer information, streamlining processes, automating connections to their suppliers, launching new distribution channels – will help them compete and pay-off quickly.

Recently, in the current economic environment, their need for a swift pay-off (in-period return on investment) is more critical than ever. Every investment is being scrutinized, and trade-offs evaluated. In fact, business owners or chief officers have been participating more than usual during the IT purchase process, resulting in less autonomy for the IT staff.

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How midsize companies view IBM

Midsize company executives, those involved in the IT purchase decision process, respect IBM and hold it in high regard. Overall, during research focus groups executives around the globe cited favorable aspects for IBM:

- IBM's experience and leadership position in the IT industry
- IBM's high quality/ reliable products, services, and solutions
- IBM's strong brand reputation

In particular, line of business (LOB) decision makers perceive IBM to be innovative and a provider of high quality customer service and support. IT Manager decision makers trust and have confidence in IBM, appreciate IBM's expertise/ knowledge, and recognize IBM's extensive resources.

So what's the problem? The problem is that though our midsize company executives admire IBM, they still have concerns about working with IBM, questioning if IBM has affordable offerings designed to meet their needs. Across the globe, they told us that they believe IBM is:

- too pricey/ expensive
- too big to care about midsize companies

In particular, LOB decision makers are concerned about IBM's accessibility, whereas IT Managers are concerned about IBM's customer service, and flexibility/ speed of response.

These concerns often inhibit inclusion of IBM in their consideration set. Further, IBM's own Business Partners often cite IBM as difficult to do business with.

In summary, though we have made progress during the past three years with our Simple campaign, we still have a gap to close in perceived relevance of IBM to midsize companies.

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Our challenge: building relevance with midsize companies.

Introduction to IBM's Smarter Planet agenda and themes

IBM's vision is to bring a new level of smart to how the world works – how every person, business, organization, government, natural system, and man-made system interacts. Each interaction represents a chance to do something better, more efficiently, more productively. But more than that, as the systems of the planet become smarter, we have a chance to open up meaningful new possibilities for progress. Launching our vision of a smarter planet is a chance to market IBM in its full depth to all the constituents who matter to the company – shareowners, clients, IBMers and alumni, partners, media and analysts, citizens and local communities, and government and civic leaders. The Smarter Planet agenda helps us to strengthen the IBM brand and create clarity about who we are and what we stand for as a corporation.

Something meaningful is happening ... every human being, company, organization, city, nation, natural system, and man-made system is becoming interconnected, instrumented, and intelligent. This is leading to new savings and efficiency – but perhaps as important, new possibilities for progress.

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IBM's Smarter Planet agenda has four themes, each of which has distinct business benefits.

How do we get smarter?	How do we create an infrastructure that drives down cost, is intelligent and secure, and is just as dynamic as today's business climate ?			How can we work smarter supported by flexible and dynamic processes modeled for the new way people buy, live & work?			How can we take advantage of the wealth of information available in real time from a multitude of sources to make more intelligent choices?			How do we drive greater efficiencies, compete more effectively, and respond more quickly by taking action now on energy, the environment, and sustainability?			
Theme	Dynamic Infrastructure			Smart Work			New Intelligence			Green & Beyond			
Benefits to business	Reduce Costs	Improve Service	Manage Risk	Agile Business Model	Connected Customers	Dynamic Business Processes	Information Mgmt	Predictive Capabilities	Engaging the Value Chain	Business Optimization	Finding Value in Green	Smart Systems	Societal Shifts/Corp Resp

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Dynamic Infrastructure

Amid accelerating costs, competitive pressures, increasing risk, and security and environmental concerns, midsize companies find themselves faced with a contradiction: they must drive down costs and increase profits with a limited IT staff and budget, while at the same time building an IT infrastructure development roadmap for the future. Keeping up with today's changing business climate calls for a dynamic infrastructure. One that addresses today's IT challenges such as server underutilization, server room space and power constraints and maintenance complexity, while supporting future business requirements such as new, more complex workloads, new regulations, or a change in company structure. A dynamic infrastructure is efficient, flexible and highly optimized to achieve greater results and to deliver superior business and IT services with agility and speed. This can help break down barriers for midsize companies, by integrating and transforming their IT infrastructure to better connect IT and business goals. The good news is that to make a dynamic infrastructure a reality, there is no need to "rip and replace." IBM believes that midsize companies can leverage the

smartest capabilities, technology and assets from within the existing infrastructure while also taking advantage of new technologies, solutions, and deployment options. A dynamic infrastructure can help midsize companies:

- *Reduce Costs* – Contain operational costs and complexity, and more importantly, achieve breakthrough productivity gains through virtualization, optimization and energy efficiency.
- *Improve Service* – Ensure the highest quality customer experience including access to information, collaboration tools, and new services that allow midsize companies to quickly respond to customers today and add new applications and technologies for future growth.
- *Manage Risk* – Not only address today's IT security, resiliency and compliance challenges, but also prepare for the new risks posed by an even more connected and collaborative world.

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Smart Work

It may be cliché, but true – in today's business environment, the only constant is change. This is particularly true for midsize companies in today's global economy. While they face increasing pressure from new competitors outside of their traditional trade region, they also have new opportunity to extend their products and services to customers in new markets. Yet today's customers' expectations are higher than ever, including swift service 24 hours a day through traditional and relatively new channels such as web-based and mobile applications. Reaching and servicing these "connected" customers requires personalization, collaboration, and co-creation. IBM suggests that midsize companies that want to seize the opportunity of global reach to connected customers embrace the change required to work smarter by transforming their organizations:

- from vertically focused business processes to integrated business processes;
- from reactive management based on historic information to pro-active management based on real-time information that enables faster and better decisions;
- from islands of individual/department expertise and knowledge to cross-team, cross-department collaboration;
- from rigid processes and technology to dynamic processes and technology that easily supports change.

IBM and its Business Partners can help midsize companies make the smart work transformation by leveraging IBM's suite of collaboration, e-commerce/web-based customer and employee service, and IT security and risk management solutions and services. Companies that work smart will benefit from:

- *Agile Business Models*: Seize revenue opportunities with a business model designed for change and optimized to serve people – customers and employees.
- *Connected Customers*: Lower costs and increase customer satisfaction by providing a rich user experience to customers, suppliers, employees and partners.
- *Designing Dynamic Business Processes*: Drive value by increasing the effectiveness of core processes such as Supply Chain Management, Product Line Management, or Customer Service.

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New Intelligence

The volume of data is exploding, its format becoming varied (e.g., images, audio, video, transactions, etc.), and its sources are increasingly "machines:" sensors, RFID, meter, global positioning systems, etc. Midsize companies struggle with their inability to transition data into real-time information that supports intelligent choices and decisions. IBM believes it is possible to capture and process data, then forecast and analyze information in a smarter way. IBM and its Business Partners can help midsize companies transform silos of information into trusted strategic assets. We have business intelligence and performance management software and services that enable executives to make better decisions.

Smart midsize companies that harness their own new intelligence benefit by:

- effective *information management* and associated information infrastructure designed for the explosive volume and variety of historical and real-time information;
- identifying and reacting to real opportunities and threats with *predictive analysis* in real-time;
- tapping the collective intelligence of the *entire value chain*, seizing the benefits of collaboration with partners, suppliers, customers, and employees;
- speeding time to value by delivering trusted, accurate, and timely information to the right decision makers so that they can *optimize business results*.

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Green & Beyond

Business has been at the center of the converging pressure to “go green.” Government regulation and laws are becoming stricter. Stakeholders (investors, employees, customers) are increasingly expecting operational consideration of the environment. Energy costs are rising. In many regions around the globe, the availability of energy, waste disposal, water and raw materials is uncertain. IBM believes that a *shift in societal thinking* will force a new code of conduct and demand corporate social responsibility. IBM suggests that “*smart systems*” are dramatically more efficient and reliable and therefore enabled to save energy and resources. Further, IBM suggests that midsize companies can *find value in going green* through costs savings resulting from decreased waste (e.g., energy, water, manufacturing materials, employee commuting time, business travel time, etc.), and/or by tapping new markets and consumer segments that demand environmentally preferred products. IBM and its Business Partners can help midsize companies assess their server room efficiency and carbon footprint to identify cost savings and other environmentally sensitive improvements.

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We integrated Smarter Planet theme messaging into the Midmarket Program Framework (MMPF) messaging

Our entry points for midmarket LOB and IT Managers audiences continues to be our Midmarket Program Framework, e.g., IT Optimization and Green IT, Retail, Maximize Business Performance and Value, Healthcare, etc., not the Smarter Planet themes. Therefore, you will find that we integrated Smarter Planet themes and benefits into our Infrastructure Solutions, Business Solutions, and Market-to Business Partner messaging guidance contained in this document. You should not lead with Smarter Planet theme level messaging alone.

	Solution			Program
Audience	Point Products	Infrastructure Solutions	Business Solutions	
CEO/CFO			Industry-specific and cross-industry Business Solutions	
LOB				
CIO/IT	Install Competitive	Infrastructure Solutions		
IT Buyer	Run Rate			
BP Influencers	Market-to BPs and Influencers			

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Driving relevance with midsize companies – “engines of a smarter planet”

Importantly, we know midsize company executives are interested in the Smarter Planet agenda – a point-of-view on the future from IBM. 97% of midmarket respondents from the midmarket-specific Smarter Planet focus groups (results published April 2009) said their interest in doing business with IBM had ‘increased considerably’ or ‘increased somewhat’ after exposure to our Smarter Planet message. This is a 17% increase over large enterprise results. While midsize companies acknowledge that the Smarter Planet agenda is relevant to their business, what they struggle with is just exactly how.

Remember what we said in the “All About” section of this guidance. 90% of all businesses across the globe are small and midsize firms. They employ over 90% of the world’s workforce. Globally, midsize companies are responsible for nearly 65% of the GDP. When we think about systems like supply chains, healthcare delivery and food management, we’re really talking about the interactions of thousands of smaller, nimbler, entrepreneurial companies that make up our systems of industries. Midsize companies are the tangible demonstrations of a smart planet in action. They are the innovators putting the capabilities of a smarter planet to previously unimagined possibilities – the thinkers, doers and cre-

ators of the new ideas that are driving progress. Not in theory, but in practice. That is why IBM’s Smarter Planet agenda is relevant to midsize companies.

“The opportunity to become smarter applies not just to large enterprises, but to smaller and midsize companies—the engines of economic growth everywhere. When we think about systems like supply chains, health-care delivery and food systems, we’re really talking about the interactions of hundreds, even thousands of companies, most of them small.”

Sam Palmisano, CEO IBM

The promise, opportunity, and possibility that a smarter planet offers is perhaps most relevant to our midmarket audience, one that comprises dynamic and entrepreneurial companies. Our “engines of a smarter planet” positioning demonstrates that on a smarter planet the playing field is leveled for midsize companies, making the game not one of resources, but one of ideas.

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Right now, IBM and its Business Partners are working with thousands of midsize companies around the world to build a smarter planet. We are giving them the tools to work more productively and profitably – powerful, affordable systems, software solutions, and services that can help them improve their efficiency, do more with less, and seize new opportunities faster. We're helping them apply IBM's breadth and depth of experience working with innovators of all sizes across every industry to address just about any size problem, task, or workload.

This is an extraordinary moment in time – a time of enormous challenges, but of even greater opportunities. As our planet becomes smarter, midsize companies will wield the weight that once belonged only to the largest. They are the engines of a smarter planet and IBM is providing the support and know-how they need to turn their vision into reality and their ideas into results.

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The evolution of our Midmarket Express Advantage value proposition

In place since 2006, our Express Advantage value proposition captures the three “pillars” behind what IBM offers, together with our Business Partners, to meet the needs of midsize companies. However, we had an opportunity to revisit our Express Advantage value proposition to ensure it aligns to IBM’s new Smarter Planet corporate agenda and better distinguishes IBM from its competitors.

Our competitors also offer what we claim as our key differentiators: comprehensive offerings, a network of Business Partners, and a way to navigate through their resources. Our refined Express Advantage value proposition shifts from fighting negative midmarket audience’s perceptions (a byproduct of our rich large enterprise legacy) to building upon positive perceptions of IBM’s 100-year record of innovation, reliability, and trust. In summary, our refined Express Advantage value proposition addresses the foundational elements customers and Business Partners have come to expect, as well as IBM’s unique differentiation.

Former Value Proposition Pillars	New Value Proposition Pillars
Offerings A comprehensive line of offerings, including hardware, software, and services, designed and priced for midsize companies for exceptional price performance, manageability, and ease of use and installation with superior financing options.	Capabilities The IBM midmarket portfolio of solutions is designed, sized and priced for midsize companies, and is built on a heritage of proven technology leadership and innovation. We leverage a rigorous process to ensure that only those offerings truly appropriate for midsize companies are included in that portfolio.
Customer Experience Enhanced capabilities to help midsize customers navigate the breadth of IBM to find the right IBM and IBM Business Partner resources.	Insights IBM addresses your business opportunities and challenges through insights, knowledge, and experience gained from helping thousands of midsize companies. We deliver proven results through innovative solutions that help companies like yours build a smarter planet.
Business Partner Ecosystem From IBM’s vast network of Business Partners, the broadest range of applications, combined with deep expertise with midsize companies in every industry, local presence, and the support and backing of IBM to deliver simple, affordable customized solutions built on IBM offerings.	Business Partners IBM’s Business Partners combine IBM’s insights and capabilities with their own products, locally provided services and expertise to build best-in-class solutions to meet the unique requirements of mid-size companies. IBM’s Business Partners are enabled to ensure that their customers can exploit the opportunities of a smarter planet.

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How to position the Express Advantage value proposition to customers and business partners through “engines of a smarter planet”

1. Our Express Advantage value proposition remains the “keystone” of IBM’s relevance to the midmarket. Our advertising and DG communications must continue to demonstrate IBM’s commitment and relevance to the midmarket in real/tangible ways (i.e., Express Advantage value proposition pillars – capabilities, access to insights, and local BPs).
2. We build all creative around the “engines of a smarter planet” premise, a premise that is unique to target our midmarket audience within IBM’s larger Smarter Planet agenda because it is designed to build IBM relevance with our midmarket audience. While “engines of smart” provides IBM with the platform to extend the Smarter Planet agenda into the mid-sized space, the work must continue to demonstrate in real/tangible ways IBM’s commitment and relevance to the midmarket.
3. As always, our headline and body copy should clearly speak to our midmarket audience. For example, a headline may promote the concepts of “leveling the playing field,” “equal opportunity,” or “doing more with less,”— concepts that convey the ability of technology to overcome the staff resource and budget limitations/ challenges that midsize company executives face vs. their larger competitors. And, as always, our copy must address our Express Advantage value proposition pillars: capabilities, insights, and local Business Partners. These three pillars provide tangible proof to our audience that IBM is committed and relevant to them.
4. In addition to our three value proposition pillars, our communications should include a signal that IBM is easy for midsize companies to access by including reference to IBM’s local Business Partners and/or a call-to-action that includes IBM’s Express Advantage Concierge.
5. In our premise-setting messaging layer (“Smart Rays”, more to follow), we highlight customer references that demonstrate how a midsize company has worked with IBM and one of its Business Partners to successfully solve a tough problem and deliver tangible benefit. (See more on how to craft a customer success story on page 24 of this guidance.)

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6. In offering-level advertising and DG creative, we reference our midmarket portfolio of offerings designed specifically for midsize companies, and the Express Advantage Concierge service which provides easy access to IBM's capabilities, insights, and Business Partners (our new value proposition pillars).
7. We follow Smarter Planet messaging guidelines regarding the use of the words "smart" and "smarter" (and equivalent in local language):
 - a. Not everything can or should be described as "smart" or "smarter." It is very tempting to add these words to all IBM things – solutions, offerings, client stories, internal programs, etc. However, it's important to remember that "smart" and "smarter" describe a very specific point of view of opportunities where the world could work better. We need to be very judicious about their use in order to preserve and protect their meaning.
 - b. There are three basic characteristics for what IBM defines as "smart" or "smarter:" instrumented, interconnected, intelligent. Therefore, to use "smart" or "smarter" as descriptions of an IBM solution, offering or case study, it must meet these criteria. Is it instrumented? Is it interconnected? Is it intelligent? If it does not meet these three basic characteristics, it cannot be described as "smart" or "smarter."
 - c. There is no need to mark the term "smarter planet" with a trademark symbol ("™"). However, smarter planet and the planet icon should be listed in the legal attribution statement as a trademark of IBM as indicated in the example below.

IBM, the IBM logo, ibm.com, smarter planet and the planet icon are trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM and other companies. A current list of IBM trademarks is available on the Web at www.ibm.com/legal/copytrade.shtml.
 - d. At this time, "Let's build a smarter planet" is not trademarked. Therefore, do not use a trademark™ symbol with it.

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Definitions of “smart”

Instrumented	Interconnected	Intelligent
<p>The health of any system or process you care about can now be measured, sensed and seen.</p> <p>How to tell if something is instrumented: Does it reference data capture or integration, possibly through the use of sensors, kiosks, meters, PDAs, appliances, cameras (still and video), smart phones, implanted medical devices or the web? Anything that captures reliable digital information and feeds into a system is eligible.</p> <p>Note that almost every solution will be instrumented in some way.</p>	<p>Instrumented systems work together in new ways.</p> <p>How to tell if something is interconnected: Does it integrate data laterally across an end-to-end process, system, organization, industry or value chain?</p> <p>Does it integrate data that exists in an unstructured way or “en-masse”, rather than data associated with a particular system? Examples: web 2.0 interconnectivity across people and communities</p> <p>Does it demonstrate IBM's industry expertise?</p> <p>Note that it may be supported by an open architecture.</p>	<p>Every insight results in action that creates new value.</p> <p>How to tell if something is intelligent: Does it yield new insights that drive actions that improve a business or societal outcome? Note that <i>outcomes must fundamentally change the end-user experience or eco-system</i>.</p> <p>The best examples will also have intelligence that is ‘real-time’, forward-looking, or predictive</p>

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“Engines of a smarter planet” messaging architecture

The “engines of a smarter planet” creative approach has two layers: the premise-setting layer and the solution layer. The premise-setting layer establishes *why* IBM’s Smarter Planet agenda is relevant to midsize companies. The solution layer establishes *how* IBM can help midsize companies become an “engine of a smarter planet”. Midsize companies must understand the premise/agenda of Smarter Planet before they are ready to accept communications about IBM solutions that can help them become an “engine of a smarter planet”. Be sure to set the premise of “engines of a smarter planet” in your market, via either advertising or DG, before initiating communications at the solution layer around specific IBM solutions or offerings.

	Communication objective	Engines of a smarter planet creative
The WHY premise-setting layer WHY is IBM Smarter Planet relevant to you?	<ul style="list-style-type: none"> Establish the premise of “engines of a smarter planet.” Demonstrate evidence of “smart” in midsize companies via customer references. 	See Smarter Planet creative guidance for examples of “engines of a smarter planet” WHY creative executions.
The HOW solution layer HOW can IBM help your company become an “engine of a smarter planet?”	<ul style="list-style-type: none"> Promote IBM offerings and solutions that enable midsize companies to become an engine of a smarter planet. 	See Smarter Planet creative guidance for examples of “engines of a smarter planet” HOW creative executions.

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How to identify and craft “engines of a smarter planet.” customer references for advertising and DG

1. Determine whether the midsize company is a true engine of a smarter planet

Is the midsize company:

- a visionary in their industry?
- a company founded on a great idea?
- a company that has found and exploited a great opportunity in their market?
- a demonstration of forward thinking?

2. Ensure the client’s story meets the definitions of “smart”: Instrumented, Interconnected, Intelligent

(See the “Definitions of Smart” in Chapter 1, How to Position the Express Advantage Value Proposition to Customers and Business Partners through “engines of a smarter planet”, for more detail.)

3. Look for stories that are practical

These stories need to make Smarter Planet tangible for midsize companies. For this reason, these stories should focus on more practical solutions that IBM and its Business Partners have implemented.

Why? Much of the non-midmarket Smarter Planet work (e.g., TV, op ads, etc.) targeting large enterprises has been and will be designed to convey IBM’s point of view on complex global issues including, traffic flows, electric power grid systems, and food supply chains. While research has shown that midsize company executives respond well to these messages, they struggle to see the connection to their business. The scope and scale of these issues is simply much larger than the ones our

midmarket target faces. By showcasing real examples of “engines of a smarter planet” in action, we can help midsize company executives understand how IBM’s Smarter Planet point of view pertains to managing their own businesses. Our midmarket “engines of a smarter planet” must be relevant to midsize companies to effectively market and sell offerings. Carefully crafted customer references will help build relevance.

While these stories should not be about large-scale innovations that have changed the world, they do need to demonstrate how a customer has driven some type of innovation (however big or small) for their business, their customers, and/or their industry. Yes, we really like the stories where IBM and its Business Partners have gotten in early to help create visionary companies (e.g., Implanet), but we also like the basic stories about how IBM and its Business Partners have helped bring innovation to a company to help them operate better (e.g., Ecotricity, Impire AG). Here are some examples:

- Leveraging data to better meet customer demands
- Adapting their infrastructure or business model to take advantage of new marketplace and growth opportunities
- Finding efficiencies within their company – allowing them to do more with less
- Increasing their competitive advantage by leveraging new technologies, such as RFID and Bluetooth

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4. Consider the profile of the customer

Recognizable brands are often times perceived as large, even when they're not. For example, a division of Lego in the U.S. can be classified as a midsize company. However, when people think of Lego, most just assume it's a large, global company. They don't assume it's a small or midsize company. For this reason, look for companies that are less well known. When telling their story, indicate their size in the copy (e.g., a midsize retailer, a start-up healthcare company, bank with 200 employees, etc.)

5. Check for IBM Business Partners' participation

Business Partners are an important part of the Express Advantage value proposition. Therefore, first consider stories in which an IBM Business Partner played a role. Are there any smart solutions the Business Partners provided that add extra depth to the story and helped a midsize company operate smarter? If a story involving an IBM Business Partner is used, the Business Partner must first approve the story and agree to participate before it can be used. However, Business Partner stories are not mandatory – if there is a story that does not include a Business Partner, it still can be considered.

6. Consider the location of the customer

Strive for a mix of local and regional/global stories.

- Why local? Research findings have demonstrated that midsize companies do want to hear/ see how Smarter Planet relates to their position in the world.
- Why regional/ global? The world today is smaller, flatter, and interconnected. As a result, businesses

of all sizes are thinking globally (e.g., global customers, global suppliers, global competition, etc.). Midsize companies are not only looking for examples of intelligence and innovation where they are physically located...they are looking everywhere.

7. Don't forget to obtain customer use permission

Please refer to your local customer reference team to ensure "engines of a smarter planet" cases you develop locally adhere to local laws and business practices. These may include:

- Ensuring there are no outstanding sales or support issues with customer.
- Ensuring customer representative has obtained approval from their legal counsel for any/ all formats in which you have chosen to produce the case, e.g., video, text, web page, animated text and still images (flash), etc.
- Ensuring customer representative has obtained approval from their legal counsel for IBM's intended distribution channels for the case study formats which may include:
 - Advertising (print, radio, web banners, out-of-home) for CA countries only
 - Face to face events
 - Virtual events such as webcasts and virtual trade shows
 - IBM and 3rd party web sites
 - IBM and IBM Business Partner printed sales collateral and/or sales presentations

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Additional Notes:

- Select stories from a variety of industries; don't feature customers from only one or two industries. If possible, find stories that align to the 2009 midmarket priority industries: retail, banking, wholesale, industrial, and healthcare, or from another priority industry in your local market.
- If possible, select stories that align with the offering/ solution areas you are covering in your offering-specific advertising and/or demand generation.
- Though not mandated, stories should come from the Smarter Planet section of the [customer reference database](#). And if a compelling story exists that is not currently in the database, ensure it is documented there.
- Stories should be "fresh"—avoid stories that are dated, i.e., older than two years.

Pre-approved customer references can be found [here](#). However, we encourage you to develop local customer references following the above guidance.

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How to build the “engines of a smarter planet” step-by-step solution layer communications

As illustrated in the “engines of a smarter planet” messaging architecture, the creative format for the “Solution Layer (The HOW)” of communications is “Step-by-Step.” The “Step-by-Step” format is designed to dispel our midmarket target’s perceptions of IBM as “too big, too expensive, too difficult to work with” by conveying approachability and by demonstrating IBM’s IT leadership in a very straightforward manner. It brings to life the “how” in “How can IBM help a midsize company become an ‘engine of a smarter planet’?” which builds IBM’s relevance with midsize companies.

The steps are meant to represent the actions a midsize company could take to resolve an IT pain point or challenge and operate in a smarter way. The steps can be sequential, describing the steps a midsize company could take to resolve one particular IT and/or business pain point or challenge.

See an example below for IT Optimization:

1. Assess the server room’s capacity
2. Virtualize and consolidate servers, storage, and software
- 3 Reduce energy consumption

The steps do not need to be sequential, however, and can introduce multiple ways to resolve a pain point, or multiple pain points in a single communication. This is particularly applicable for Business Solutions for which communications may introduce multiple pain points (i.e., point of sale, multi-channel retailing and supply chain) that all address the overall need of midsize retailers to have a smarter retail business.

See an example below for Retail:

1. Make better business decisions with business intelligence
2. Create a smarter supply chain
3. Offer purchase options informed by past searching/buying behavior and that of like customers
4. Deliver a superior customer experience across purchase channels

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Consider the following when developing “steps” for the solution (“HOW”) layer:

- **Establish the customer challenge or pain point.** If possible, the customer need should be portrayed within the context of what the need means to IBM's customer's ability to efficiently and effectively serve their own customers, e.g., improve customer experience using e-commerce for self-service, provide more flexible product or service offerings, faster new product or service time-to-market, etc.
- **Introduce the featured IBM solution that fills the customer's need.** The “Step-by-Step” approach introduces the featured IBM solution by highlighting how the featured solution's specific benefit fulfills the customer need.
- **Demonstrate that the featured IBM solution is smart using business benefits.** Addresses how the IBM solution makes the customer's company more instrumented (measurable), interconnected (integrated), or intelligent (insightful). Again, if possible the business benefit should be presented within the context of how being “smarter” improves their ability to efficiently and effectively serve their customers.
- **Demonstrate the ease of integrating IBM's solution into the customer's existing IT infrastructure, or how the IBM solution in the customer's infrastructure can be improved on an ongoing basis.** Demonstrate IBM's IT leadership in a straight-forward manner by recommending what the customer can do after IBM solution implementation, e.g. monitor performance then optimize; add more functionality to better serve customers, etc.

How to introduce “engines of a smarter planet” to current customers

Recommended entry into competitive accounts

2 Install/competitive: Talking to customers and prospects

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How to introduce “engines of a smarter planet” to the install base (current IBM customers)

While the midmarket segment represents IBM's greatest long-term growth opportunity, the fact is, today IBM's current midmarket market share is low. Despite low midmarket market share, a large percent of our General Business Midmarket revenue comes from our install base. So while we work to acquire new midmarket customers to increase our market share, we need to continue to retain and grow our existing install base to protect this very important revenue source.

When thinking about the install base, consider the two “types” of install base customers we have:

1. The “traditional” install base: those who chose an IBM solution from IBM or an IBM Business Partner, and
2. The install base of “acquired customers”: those who chose another vendor's solution, one that was subsequently acquired by IBM through a corporate acquisition, e.g., Informix, ISS, Cognos, and many more.

While we can assume that the first type of install customer, the “old” install customer, knows at least a little about IBM's commitment to the midmarket, we cannot make any assumptions about the second type of “new” install customer. In addition, the “new” install customer may have some of the common misperceptions about IBM, including the misperceptions cited in the “How Midsize Companies View IBM” section of this guidance. Of course, there is no harm in reminding the “old” install base of IBM's commitment to the midmarket, *particularly since we see declining spend with some of our existing customers.*

IBM's commitment to our midmarket customers

- Express Advantage in 45+ countries
 - Business Partner support via new PartnerWorld Express Advantage Web portals
 - Best-in-class customer portals
 - “One-contact” local support teams
- 150+ offerings designed specifically for Midmarket
- 1,600+ Built on Express Solutions
- More than 1,500 dedicated resources support Business Partners in the midmarket
- \$3B through IGF Financing

How to introduce “engines of a smarter planet” to the install base (current IBM customers) continued

1. Do not overlook the install base.

Don't assume that the install base is more likely to notice “engines of a smarter planet” communications, or that they will more easily understand the opportunities it represents for them. As existing customers of IBM's, and in many instances loyal ones, they will expect us to explain the Smarter Planet agenda and what it means for them. Therefore, include the install base in premise setting communications.

2. In communications that target the install base, acknowledge their existing relationship with IBM.

For example,

- As a valued IBM customer, we'd like you to learn how you can become an engine of a smarter planet.
- Learn about how your company can become an engine of a smarter planet by improving how you use your [IBM solution name here].
- IBM customers like you are learning how they can drive efficiency and cost savings to become an engine of today's smarter planet.

3. Know your customer.

- “Traditional” vs. “acquired customer” install bases:
 - Consider using more premise setting communications with the “acquired customer” install base.
 - Consider using “Welcome to IBM” events with the “acquired customer” install base. (Event guidance on MAM [here](#).)
- Software vs. hardware vs. services install bases: Segment your install database by installed IBM Brands, if you have the data required to do so. Communicate cross-sell and up-sell messages that are appropriate for their existing installed hardware and software.

4. Explain what differentiates IBM and its offerings from the competition.

As stated earlier in this guidance, most midsize companies seek best-in-class IT products and solutions to solve their problems. They are more concerned about solving the problem at hand than about maintaining a single-vendor IT platform. Our target install audience likely has a variety of vendors' products and solutions installed at any given time. Therefore, our communications – even to the install base – should explain exactly

How to introduce “engines of a smarter planet” to the install base (current IBM customers) continued

which offerings IBM has to help them become an efficient and cost-effective engine of a smarter planet. It is especially important to highlight points of differentiation for IBM and its products and solutions vs. that of the competition.

- a. Highlight our Express Advantage Value Proposition Pillars which differentiate IBM from its competitors: capabilities, access to insights, and a local ecosystem of IBM Business Partners.
- b. In the current recession economy, it is important to highlight the measurable benefits our offerings provide IBM's customers. Highlight measurable ROI information whenever possible, for example:
 - Investment payback within one year.
 - Can take backup and recovery time from hours to minutes.
 - 65% of midmarket IT managers say their company could not recover from a significant data loss.
- c. Demonstrate that IBM solutions do not require customers to “rip and replace”; they are complementary to IBM's and other vendors' offerings.

5. Do not imply in Smarter Planet communications that installed IBM solutions and offerings are “dumb.”

IBM's Smarter Planet agenda and its midmarket positioning thereof, “engines of a smarter planet,” were designed to reflect the opportunities that forward thinking midsize company executives can embrace today to make their companies smarter – more instrumented, interconnected, or intelligent – to deliver improved efficiency and/or cost savings. That does not mean that their existing installed IBM solutions are dumb. It simply means they may be able to do things better to level the playing field to stay ahead of the competition.

How to introduce “engines of a smarter planet” to current customers

Recommended entry into competitive accounts

Recommended entry into competitive accounts

The Competitive Program within the Midmarket Program Framework targets “white space,” i.e., midsize companies that have not bought IBM technology in the past 24 months. As noted in Chapter 2 of this guidance, IBM’s midmarket market share is relatively low, therefore significant white space opportunity exists for us to increase market share.

We recommend that you leverage the Infrastructure Program Profiles to gain entry into competitive accounts. More information regarding Infrastructure Program Profile messaging guidance is in Chapter 3 of this guidance. Yet in general, when targeting competitive white space, much of the guidance we provided regarding the install base in Chapter 2 remains true for competitive accounts.

1. Know your prospect.

Often it is possible to rent external lists based on competitive installation information, i.e. you can rent external lists based on installation of competitive solutions for which IBM has complementary offerings. You can use these lists for one-to-one tactics (e.g., email, outbound telemarketing, event invitation lists,

direct mail) to promote complementary IBM offerings – hardware, software, and services. Remember, midsize companies do not want to “rip-and-replace.” They want to know IBM solutions and offerings can build on their existing technology to improve efficiency and capture cost savings.

2. The Infrastructure Program Profiles are appropriate entry points into competitively installed accounts.

Other than a targeted competitive attack campaign, whereby IBM attacks a competitors’ perceived weakness in the market, the most likely entry point into midsize companies with competitively installed hardware and software is by the IT pain points experienced by most, if not all, midsize companies. The IBM solutions and offerings marketed through the Infrastructure Program Profiles are applicable cross-industry and are positioned to help solve those IT pain points. That said, competitive messaging has now been added to the Infrastructure chapter (Chapter 4) to help countries position IBM infrastructure solutions against the competition (or against midsize companies who have competitive solutions installed).

How to introduce “engines of a smarter planet” to current customers

Recommended entry into competitive accounts

Recommended entry into competitive accounts (continued)

3. Explain what differentiates IBM and its solutions from the competition.

Our target competitive audience likely has a variety of vendors' products and solutions installed at any given time. Therefore, our communications should explain exactly what offerings IBM has to help them become an efficient and cost-effective engine of a smarter planet. It is especially important to highlight points of differentiation for IBM and its products and solutions.

- a. Highlight our Express Advantage Value Proposition pillars which differentiate IBM from its competitors: capabilities, access to insights, and a locally accessible ecosystem of IBM Business Partners (See Chapter 1, The Evolution of the Express Advantage Value Proposition for more detail).

- b. In the current recession economy, it is important to highlight the measurable benefits our offerings provide IBM's customers. Highlight measurable ROI information whenever possible. Examples include:
 - Investment payback within one year.
 - Can take backup and recovery time from hours to minutes.
 - 65% of midmarket IT managers say their company could not recovery from a significant data loss.
- c. Demonstrate that IBM solutions do not require “rip and replace”; they are complementary to IBM's and other vendors' offerings

3 Infrastructure Solutions

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How the Infrastructure Solutions program profiles support IBM's Smarter Planet agenda

The Midmarket Infrastructure Solutions program is IBM's entry to the midmarket CIO/IT Manager audience. Our Infrastructure Solutions messaging architecture is flexible, allowing IMTs to select their messaging at the level which they'd like to approach their audience given local General Business priorities and budgets. For example, some IMTs prefer to message at the Infrastructure Solutions umbrella level, some at the Infrastructure Solutions program profile level, and others at the specific Infrastructure solutions level, or combination thereof in a single campaign or across discrete campaigns.

Infrastructure Solutions Umbrella Messaging		
Security & Business Continuity	IT Optimization	Maximize Business Performance & Value
Solutions <ul style="list-style-type: none"> IT Security Business Continuity 	Solutions <ul style="list-style-type: none"> IT Optimization Green IT 	Solutions <ul style="list-style-type: none"> Information Mgmt Flexible IT (SOA) Collaboration

All of the messaging that follows reflects the benefits that Infrastructure solutions deliver to midsize companies, the engines of a smarter planet. For your reference, following is a depiction of how Infrastructure Solutions' themes, profiles and solutions align to IBM's Smarter Planet agenda themes. Please refer to the first section of this guidance for messaging around the Smarter Planet themes.

Infrastructure profiles' alignment to Smarter Planet themes

		MM Benefits	Reduce Costs	Improve Service	Manage Risk	Agile Business Model	Connected Customers	Dynamic Business Processes	Business Intell & Prfrmnc Mgmt	Trusted Info Platform	Info Infra Solns	Finding Value in Green	Smart Systems	Societal Shifts/Corp Resp
		Theme	Dynamic Infrastructure			Smart Work			New Intelligence			Green & Beyond		
Infrastructure Solutions Umbrella Message	Profile	Solutions												
	Security & Business Continuity	IT Security	H											
		Business Continuity	H											
	IT Optimization	IT Optimization	H											
		Green IT	M									H		
	Maximize Business Performance & Value	Flexible IT	M			H								
		Collaboration				H			M					
		Information Mgmt				M			H					

Key: H = highly aligned; M = moderately aligned

Source: WW Infrastructure Program Management.

Midmarket Infrastructure Solutions umbrella message

IBM works with our network of locally accessible Business Partners to offer a comprehensive portfolio of proven and integrated solutions that are designed, priced and readily available to midsize companies and that provide those companies with an efficient, reliable, flexible, and security-rich IT environment that can support—not constrain—their business goals.

Security and business continuity

Many small and medium organizations in recent years have seen exponential growth in the amount of data and web applications required to do business, and along with this growth comes an increase in cost of data loss or system unavailability. Organizations that have had a recent system outage due to a security breach or major data loss can attest to the cost of downtime – 50% of companies that experience a disaster are out of business within 2 years if they did not have a business continuance plan. Properly managing risk is imperative to building a dynamic and resilient IT infrastructure, and companies have a financial responsibility to protect critical business assets, including data and systems. Investments in IT Security and Business Continuity solutions help companies to lower, and in many cases eliminate, the business impact costs of an IT outage or data loss.

It is common to market both IT Security and Business Continuity in the same campaign. However, we provided separate messaging for each for IMTs that want to lead with one or the other.

IT Security and Business Continuity profile messaging

IBM works with our local Business Partners to provide midsize companies preemptive, cost-effective, end-to-end IT security and business continuity solutions designed to help customers:

- Understand their security exposures and define the actions needed to minimize risk.
- Protect all types of critical data from internal and external threats before they impact the business, while meeting regulatory compliance requirements.
- Ensure that mission-critical IT systems, applications, and data are highly available, and easily and quickly recoverable, so business can continue in the event of an unanticipated data loss event or disaster (natural or man-made).

IT Security solution messaging

All companies, not just midsize companies, generate and store volumes of data—financial, business operations, customer, employee, and investor data, etc. and increasingly have been linking this key critical data to the internet through numerous web-based applications. Unfortunately, cyber crime—just like any other type of crime—rises during difficult economic times. Just as an interconnected smarter planet levels the playing field between midsize and large company competitors, it also opens opportunities for criminals who intend to exploit holes in companies' security to create virus-related havoc or steal data for financial gain. Every day systems and data security protection becomes more complex as threats become progressively intricate. Even the most well staffed and trained IT departments have been challenged by security breaches—we only hear in the news the most grievous. Yet each of us can recount a situation when a click on an innocent link or a seemingly innocent download caused company-wide disruption and lost productivity from a virus.

Many midsize companies believe they are protected using only firewall and anti-virus software to avoid attacks and solve threats. Yet their applications' data is being distributed more and more than ever before. In December 2008, IBM X-Force discovered 54.9% of all IT security vulnerabilities result from web applications, which are quickly becoming the biggest IT security concern for midsize companies. Hackers choose web applications as a prime vehicle because they are easy points of entry, and there is valuable data exchanged in the business processes run by these applications. Competitive and efficient business operations require midsize companies' constituents to have legitimate application data access across a variety of platforms, including remote access on mobile platforms through web-based applications. Often these IT service advancements are ahead of IT security policy and procedure. Therefore, most midsize companies do not even understand how vulnerable their systems and data are from access/attacks from disgruntled employees or from outside hackers.

(continued)



Smart is

midsize companies who proactively identify security risks, then employ comprehensive and cost-effective solutions to stop external and internal security threats before they impact productivity, customer retention, regulatory compliance, and IT staff focus.

Priority Solutions

Is Your IT Infrastructure Secure?

- IBM ISS Express penetration testing services
- IBM ISS Express multi-function security bundle
- IBM Express managed protection services for server
- IBM Tivoli Access Manager for Enterprise Single Sign-On
- IBM System Storage DS5020
- IBM System Storage TS3100 Express

Web Application Security

- IBM Rational AppScan Express
- IBM ISS Express penetration testing
- IBM ISS Express multi-function security bundle

Compliance

- IBM Express PCI assessment
- IBM Email Management Express
- IBM Rational AppScan Express

(continued from previous page)

It is not smart for midsize companies to overlook security risk that has not been assessed. What midsize companies don't know about their security risks can hurt them:

- Costs from a loss of staff productivity are growing and in many cases have not been assessed
- Decreased IT services equate to higher expenses and possible loss of revenue
- IT staff's focus on reactively resolving security threats means they are not focused on driving the business
- Fines from lack of compliance to regulations as a result of a security breach drive expenses

IBM and our Business Partners can build upon existing installed hardware and software to create a secure dynamic infrastructure that preemptively protects IT systems, data, networks and web applications from continually evolving threats while reducing the cost and complexity of security:

- Assess risk—identify points of entry (physical and remote access) and failure, and calculate potential cost of security breach
- Remedy points of failure—build on existing infrastructure, methodically closing gaps to secure systems, data, and network
- Establish preemptive warning thresholds—determine who gets notified when and for what type of risk and/or security software update
- Monitor—Adjust and maintain current protection against threats based on global conditions as well as company-specific business conditions (e.g., pending merger with another company, staff restructuring, new regulation, etc.)

It is smart for midsize companies to understand where their security vulnerabilities exist, then create a development roadmap to close them.

Case Studies

Wyeth (U.S.): Implemented IBM software to automate online compliance-related testing and application security testing, which increased productivity and improved customer confidence. [Learn more.](#)

ITWorx (Egypt): Used IBM software to automate security testing of its applications, which streamlined testing and automated manual tasks, improving staff productivity and application quality. [Learn more.](#)

Business Continuity solution messaging

Significant data loss can be caused by human error, corrupt software, a malicious security attack, or a natural/man-made disaster. Although every business in a given geography faces potential disaster risks (e.g., floods, hurricanes, tornadoes, wild fire, etc.), small and midsize companies, which often only have one location, will suffer more than their large company neighbors that can off-load workloads to locations outside of the disaster zone. In fact, 60 percent of companies that lose their data as a result of a disaster will shut down within six months of the disaster.¹

The enormity of damage a disaster can wreak on a midsize company should be reason enough to “insure” against such a loss using proper disaster recovery planning. Yet, a recent IBM study indicates that 65% of midsize companies’ IT managers acknowledge that they *do not have an adequate back-up strategy* for their critical data.² They simply hope a disaster won’t happen to them. This is not a smart way to manage business risk. With the explosion in the amount of key business data, not having a business continuity plan is like a ticking time bomb inside an organization. In fact, the leading causes of data loss are human error and hardware failure—far more mundane but equally damaging causes. Midsize companies are especially prone to human error because they often do not have skilled IT professionals and instead rely on workers who may simply forget to do the back-up, perform it incorrectly, or lose the back-up tapes/disks while attempting to store them off-site.³ Therefore, it’s not a matter of “*if*” organizations will have data loss, it’s a matter of “*when*,” and how quickly can they recover. It is not smart for midsize companies to expose themselves to this unnecessary operational risk.

(continued)

¹ National Archives & Records Administration in Washington.

² Source: IBM Dynamic Infrastructure Launch Deck.

³ Smith, David. “The Cost of Lost Data.”



Smart is

midsize companies that assess their data recoverability and eliminate exposure to unnecessary risks and costs using integrated business continuity solutions that ensure they can quickly and easily recover from unanticipated data loss events.

Priority Solutions

Highly Available IT Infrastructure

- IBM PowerHA (high availability)
- IBM System Storage Express
- Recovery Express
- IBM Websphere Application Server Express
- Tivoli Foundations Application Appliance

Data Backup and Recovery

- Comprehensive Data Protection Solution Express
- Remote Data Protection Express
- IBM Tivoli Storage Manager FastBack
- IBM Tivoli Continuous Data Protection for Files
- IBM System Storage TS3100 Express family
- IBM System Storage Express

Information Infrastructure

- IBM System Storage Express
- IBM System Storage TS3100 Express

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It also is not smart for midsize companies to continue “painful” back-up procedures (e.g., time consuming, labor intensive use of tape, etc.) that still leave gaping operational risk and quantifiable cost exposure associated with a data loss incident⁴:

- Cost of technical support in the recovery effort
- Lost productivity due to user downtime
- Possible cost associated with data that is permanently lost

It is smart for midsize companies to work with IBM and our Business Partners to mitigate risks and potential costs associated with data loss:

- Assess risk—identify critical systems and data that are essential to business operations
- Determine recovery time requirement—instant recovery time is not required in all cases, but it is often needed to prevent outage costs for some critical functions in almost every organization; we can help midsize companies quantify the cost benefit of different recovery scenarios
- Develop back-up strategy—determine back-up frequency, type, media, storage, aging, roles and responsibilities, etc.

It is smart to be one of the 35 percent of IT Managers who are confident that they have an adequate back-up/disaster recovery plan.

Case Studies

USGA (U.S.): Deployed IBM solutions to protect over 500GB of critical data on a daily basis, leaving data protected and available when needed with onsite daily backup and improved operational restore. [Learn more.](#)

London Metal Exchange (U.K.): IBM helped design a replica alternate trading site to prevent operational risks or trading outages from impacting operations, which could save millions of dollars in lost activity every hour. [Learn more.](#)

bioMerieux S.A. (France): Implemented a 24x7 remote dual-site solution with real-time data replication, hosted at an IBM business resilience center, providing significantly decreased recovery times. [Learn more.](#)

⁴ Smith, David. “The Cost of Lost Data.”

IT Optimization (including Green & Beyond)

While midsize companies' primary motivation to optimize their IT infrastructure is to reduce complexity and costs, recent research indicates that "green" concerns including energy consumption and carbon footprint are entering the IT decision consideration set. Further, in some parts of the world carbon emission regulations are becoming more stringent. Therefore, we've provided messaging at both the IT Optimization and Green IT solutions levels so IMTs may lead with Green IT messaging when desired.

IT Optimization (including Green & Beyond) profile messaging

IBM works with our local Business Partners to develop for midsize companies a dynamic infrastructure based on a secure, virtualized, and consolidated IT environment to reduce IT complexity, costs, and energy consumption, while improving up-time performance and better aligning IT with the strategic goals of the company.

IT Optimization solution messaging

In today's economic recession, IT purchase decisions that previously were left to the IT professionals are more and more being reviewed by C-level executives who are looking for quick cost reduction or productivity improvements. This level of scrutiny has arisen because a key challenge for midsize companies is reducing costs and maximizing return on investment for all IT spending. Upgrades, enhancements, and new IT resources—including hardware (servers and storage), software, and staff—are examined across the board.

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Smart is

midsize companies that assess IT resource (servers, storage, software, and staff) capacity and energy efficiency, then build a dynamic infrastructure based on a consolidated and/or virtualized IT environment to reduce IT complexity and costs.

Priority Solutions

STG

- IBM BladeCenter Express and System x with VMWare
- IBM Power VM Express Edition
- IBM System Storage SAN Volume Controller Entry Edition

SWG

- IBM Tivoli Provisioning for OS Deployment

GTS

- IBM Migration Services for data for open systems attached to System Storage disk systems
- IBM Express Remote Managed Infrastructure Services

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A means for IT managers to deliver real savings is by examining maintenance and operations costs—80% of midsize companies' IT budgets are spent on IT maintenance and operations instead of on new applications and business growth strategies. IT maintenance and operations costs get so high because while trying to manage an explosion of information that results from improving customer service, midsize companies simultaneously are experiencing diminishing computing power and space in their server rooms. Midsize company IT Managers need to take action to use their IT budgets to a better advantage. In summary, midsize company IT Managers need to:

- Reduce IT complexity and manage costs
- Improve the ability to manage the capacity of IT resources (servers, storage)
- Improve utilization of resources (hardware, software, staff)

It is not smart to simply add new servers and storage to manage capacity. This approach tends to increase server underutilization (server sprawl), increase energy costs (server room power and cooling), and increase administrator management complexity.

It is smart for midsize companies to tap IBM's and its Business Partners' expertise to address today's IT operational challenges to free up resources for new investments:

- Measure the capacity and efficiency of the current IT infrastructure
- Design a dynamic infrastructure development roadmap including strategies for consolidation and virtualization
- Choose IBM IT Optimization solutions that will help simplify, virtualize and consolidate IT environments, increasing performance and operational efficiencies, while reducing operational costs up to 50% and energy costs up to 40% per year

Case Studies

Nicholas & Company (U.S.): An independent food distributor worked with Sirius, an IBM Business Partner, to implement a new data center that increased efficiency, productivity and scalability that better positioned the company for growth. [Learn more.](#)

On Line do Brasil LTDA (Brazil): A service and hosting provider for small and midsize businesses expanded its data center with IBM solutions that improved system availability, reduced management time by 30 percent, and is energy efficient. [Learn more.](#)

Green IT solution messaging

Almost 25 percent of midsize companies' IT departments have finished some form of energy measurement project, and nearly 50 percent plan to in the coming year. On top of that, 56 percent of companies have either completed or are implementing hardware recycling programs.⁵ But midsize companies' executives are very pragmatic. Their primary motivation for deploying IT optimization and/or virtualization has been the cost savings they can realize by reducing the complexity and cost associated with underutilized IT resources (servers, storage, software, and staff).

However, recently their attitudes and reasons for adoption have begun to shift to include concerns about reducing their carbon footprint. One respondent's comment from a new primary world-wide research study⁶ characterized well this shift in midsize companies' executives' attitudes:

“It’s not that we’re tree huggers, but we’re interested in saving money as well as consumption and emissions.”

– Respondent from IBM/Info-Tech Research Group world-wide study

In other words, while cost savings is still the primary decision criteria (and over 70% of virtualization projects successfully realize important benefits to

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⁵ IBM/Info-Tech Research Group world-wide study

⁶ Study was commissioned by IBM and conducted by Info-Tech Research Group to explore how midsize organizations are embracing Green IT initiatives to create sustainable business practices that move beyond recognized benefits, such as better business performance and lowered costs, to a smarter set of new capabilities that can improve competitive advantage. Through surveys and interviews, respondents (1,047 decision-makers from companies with 100 to 1000 employees, representing 12 countries and 8 industries) were asked to describe their adoption state across 11 Green IT initiatives, as well as their organizations' outlook, attitudes, and reasons for adoption. They also answered questions about the state of environmental issues and action in their business and their region of the world.

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midsize companies), midsize companies' shift in reason for adoption of green IT initiatives probably reflects real business environment constraints and potential competitive differentiators including:

- **Local regulations require carbon footprint reporting.**

In some parts of the world, government carbon footprint regulations are mandating changes in how businesses operate.

- **Constrained access to electricity.**

In many parts of the world, IBM's midsize customers face power grid constraints which require an energy-efficient dynamic IT infrastructure. And, these constraints are not limited to developing countries. Even in the U.S., the power that additional servers require from a building's electricity source has been known to cause a power service disruption.

- **Consumers are buying green.**

Many consumers strive to buy from "green" companies. Therefore, an increasing percent of IBM's midsize customers' customers are integrating "green operations" into their own overall corporate positioning and operating policies and procedures which extend back to their choices in vendors, including IT vendors.



Smart is

midsize companies that integrate into

their IT landscape cost-effective, energy-efficient, environmentally responsible solutions so they can continue to increase IT capacity within the same energy footprint to support business growth.

Priority Solutions

STG

- IBM BladeCenter Express and System x
- IBM Power Systems
- IBM Systems Director Active Energy Manager

SWG

- LotusLive
- Lotus Forms Turbo

GTS

- IBM Server Consolidation Efficiency Study
- IBM Implementation Services for System x—ServicePac offering

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It is not smart to ignore the real business environment constraints and potential competitive differentiators that green IT can address. In time, there will be competitive and possibly regulatory consequences to avoiding “going green.”

It is smart for midsize companies to be forward-looking to recognize that good environmental policy is also good business, understanding the real business value in “green” as well as the cost savings green IT initiatives provide. IBM and its Business Partners can help midsize companies achieve a dynamic infrastructure that addresses critical energy and power costs. By combining IBM's and its Business Partners' hardware, software and services offerings, IBM can help midsize companies reduce overall energy costs by 15-40% by helping them:

- become more environmentally responsible
- implement an environmentally responsible protocol for disposal of outdated hardware and software assets
- address diminishing computing power and space in the server room
- gain control over the rising cost of running and cooling server rooms 24x7

Case Studies

Wesco Companies (U.S.): A family-based group of construction, property management and equipment rental companies in the United States reduces its management burden and power consumption by 70 percent when it consolidates 14 servers onto one IBM System x3850 platform. [Learn more.](#)

RackForce (Canada): A hosting service provider in Canada experienced a 300 percent performance and reliability increase and a 30 percent power-consumption reduction when it implemented IBM System x3550 servers. [Learn more.](#)

Maximize Business Performance and Value

Maximize Business Performance and Value profile messaging

IBM and its local Business Partners help midsize companies extract the most business value from their current systems, data, and people. They do so by designing flexible IT systems that enable and support—not constrain—agile business models and processes, optimize people's productivity, and provide access to trusted business intelligence and information. When a company has maximized its systems, data, and people, it can proactively and reactively exploit market conditions and customer requests, and work smarter together.

Flexible IT solution messaging

Over time, midsize companies acquire IT solutions that meet immediate short-term needs, but are not selected with a long-term IT infrastructure development roadmap in mind. As a result, midsize companies often find themselves with a collection of business applications, databases, and hardware that do not work together. This creates silos of applications and information that can only be integrated on an ad hoc basis, often using manual methods which are not only inefficient and prone to error, but must also be repeated every time new processes and information are needed. In turn, this situation constrains midsize companies from rapidly responding to new market opportunities or quickly addressing customer requests and/or competitors' promotions.

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Smart is

midsize companies
who will not allow the

IT infrastructure to constrain
their business; they deploy cost
effective IT systems that are agile
and business processes that are
dynamic, enabling them to react
quickly to business opportunities
and remain competitive.

Priority Solutions

SWG

- IBM WebSphere Application Server Express
- IBM WebSphere MQ

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Introduction	Install/ Competitive	Infrastructure Solutions	Business Solutions	Market to Business Partners	Financing	Appendix
Infrastructure Solutions program and the Smarter Planet agenda		Security and Business Continuity		IT Optimization	Maximize Business Performance and Value	

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IBM believes that midsize companies can fully/effectively use existing IT resources and investment to work smarter, creating IT systems that can change quickly to support always-evolving business processes, resulting in increased business flexibility. Flexibility and adaptability improve process efficiency and operational reliability, while simultaneously decreasing costs and errors.

It is not smart for midsize companies to make IT acquisition decisions without considerations of interoperability, scalability, capacity, and security to help their business and their IT work together.

Case Studies

Moosejaw Mountaineering (U.S.): Used IBM solutions to create an interactive community shopping experience to enhance customer loyalty and advocacy. Repeat business soared after implementation. [Learn more.](#)

Duro Bag (U.S.): Used solutions from IBM to maximize oversight of its IT operations and experienced IT utilization increases of 5% - 10% and projected payroll savings of \$75,000 - \$100,000 annually. [Learn more.](#)

Collaboration solution messaging

Fostering collaboration between employees, customers, suppliers and partners provides companies productivity and cost savings benefits. Seamless collaboration requires individuals to be able to work when, where, and how they choose, without sacrificing security. Many midsize companies struggle with securely improving access to information and people through email, instant messaging, videoconferencing, wireless connectivity, or virtual workspaces. Many companies use freeware which introduces security, interoperability, and possibly compliance issues.

IBM believes that collaboration is at the heart of working smart—enabling people to make more informed decisions, build deeper relationships, and work with more agile and efficient business processes. Collaboration can be achieved using solutions that are built on an open, fully integrated infrastructure that can be easily and securely accessed from inside or outside. IBM and its local Business Partners can help midsize companies streamline business operations by giving them an easier, faster, secure, and cost effective means to access information and people. Companies that use collaboration to work smart:

- reduce time-to-market for their products and services
- improve responsiveness to customers and improve service
- are able to take on more business without adding staff due to increases in productivity
- save bottom-line costs while simultaneously boosting revenue

It is not smart for midsize companies to expose their data and operations to IT security risks and interoperability constraints by patching together freeware workarounds to enable collaboration.

**Smart is**

midsize companies who work smarter by using fully integrated and secure collaboration and communications solutions that improve employee productivity and streamline business operations.

Case Studies

Celina Insurance (U.S.): Used IBM solutions and saw 50% fewer phone calls and costs due to instant messaging, a 40% reduction in head count, and turnaround times reduced from weeks to days. [Learn more.](#)

Max Bahr (Germany): Used IBM solutions to meet demand for 40,000 products in more than 80 outlets with low replenishment and storage costs—boosting customer service ratings to 99%. [Learn more.](#)

NutraFlo (U.S.): Used IBM solutions to increase accuracy and efficiency via centralized document libraries and version control, and to improve staff productivity by collecting applications in a single interface. [Learn more.](#)

Priority Solutions

SWG

- IBM Lotus Domino Express
- IBM Websphere Portal Express
- IBM Lotus Forms Turbo

Information Management solution messaging

The explosion of information in every organization is creating challenges for midsize companies:

- Gaining insights from data to stay ahead of the competition
- Keeping information current, accurate, and relevant
- Containing costs of storing, retrieving, and securing, and backing up volumes of data
- Reducing the time searching for the right information
- Integrating scattered information securely and without manual processes
- Remaining compliant with regulations

As a workaround, many midsize companies use free data management trial software, push the limits of spreadsheet applications, and/or rely on email applications' archiving capabilities. What they do not realize is that their piecemeal "fix" could wind up costing their company more in data storage costs, loss of employee productivity, embarrassing security exposures, bad decisions based on bad information, and in the worst case corruption or loss of data. And, they're unable to transform their information into a strategic asset, in order to gain new intelligence from business insight.

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**Smart is**

midsize companies that productively transform volumes of data to trusted sources of business insights that people can reliably and securely access whenever they need to.

Priority Solutions**SWG**

- IBM Cognos 8 BI Reporting Midmarket Packages
- IBM InfoSphere Balanced Warehouse C-Class

STG

- IBM Storage Solutions

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IBM and its Business Partners can design and deliver cost effective information management solutions for midsize companies that form the basis of a trusted information platform that protects information throughout its lifecycle. IBM believes that midsize companies can strategically use their information to gain a competitive edge by:

- managing business using timely, intuitive and graphical displays of key performance indicators (KPIs) against goals or targets
- spotting new business trends
- making faster and better-informed decisions
- providing superior customer service and response time
- improving product availability and inventory control

It is not smart to ignore the opportunity to turn your information into a critical strategic resource.

Case Studies

Impire AG (Germany): Used IBM solutions for data management, integration and analysis, leading to 15% annual revenue growth, 10% market share growth in Germany and 40% in Austria and Switzerland. [Learn more.](#)

Hallstar (U.S.): Increased revenue and reduced inventory by 25 percent by implementing an IBM Cognos business intelligence solution. [Learn more.](#)

Sainte-Justine Hospital (Canada): Used IBM solutions to create a continually updated reservoir of clinical and genomic information to accelerate research, while cutting administrative costs by 75%. [Learn more](#)