Team IBM Notice & Choice Policy Registration-Based Campaigns

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Alignment with IBM.com & Language

Team IBM at Neo@Ogilvy requires partners to mirror the Notice & Choice language used on IBM.com, including:

- A link to IBM's privacy policy (http://www.ibm.com/privacy)
- The statement "Please keep me informed of products, services and offerings from IBM companies worldwide."
  - Any deviation from the language above must include the words "marketing" or "products, services and offerings" <u>and</u> "IBM companies worldwide" in the text
- Provide the following a box in front of the "Please keep me informed…" statement
  - This is a change from the previous Notice & Choice requirement that also had three contact types to be listed
  - The three contact types are no longer required, and the simplified option with a single box is preferred

The user contact preferences for the one statement apply to email, phone, and postal mail.

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Opt-In vs. Opt-Out

- The opt-in and opt-out language is the same, it provides the standard statement with a box in front of it

- The difference between opt-in and opt-out is the default state of the box (pre-checked or blank), prior to any user interaction
  - For opt-in, the box would be blank, meaning a user would have to actively opt in to be contacted
  - For opt-out, the box is pre-checked, meaning a user would have to actively opt out of contact

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When to Use Opt-In vs. Opt-Out

- Team IBM Media Terms and Conditions indicate that partners are responsible for following all federal state and local laws, which includes any laws regarding data compliance

- Third-party partners are required to monitor whether the statement was shown as opt-in or opt-out

  - Partners indicate whether an opt-in or opt-out statement was used via the "Questionnum" fields in the Site-Serve/Unica upload

- An Opt-Out statement can only be used for placements that have a filter for a market that is completely opt-out (i.e. US)

  - Partners should reference an IBM IWM form to determine if box should be pre-checked or blank

    - If any of the boxes on the IWM form are blank, the one box in front of the "Please keep me informed…" statement should be blank

  - IBM to notify Neo if the logic behind the IWM form is revised

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Passing Contact Preferences to IBM

- Team IBM is responsible for training partners on how to accurately communicate contact preferences on a registration-by-registration basis

- To communicate preferences, Site Serve requires the language "CHECKED" or "NOT CHECKED"

- "CHECKED" means "clicked the box"

  - If the box was "pre-checked," "CHECKED" means the user clicked the box to remove the check mark
  - If the box was blank, "CHECKED" means the user clicked the box to add a check mark

Opt-Out Example 1				
Original Statement	User Choice	Does the user want to be contacted?	Did the user click the box?	Site Serve Data entry
☑ Please keep me informed […] IBM companies worldwide.	☐ Please keep me informed […] IBM companies worldwide.	No	Yes	Email: Checked
				Phone: Checked
				Postal Mail: Checked

Opt-In Example 1				
Original Statement	User Choice	Does the user want to be contacted?	Did the user click the box?	Site Serve Data entry
☐ Please keep me informed […] IBM companies worldwide.	☑ Please keep me informed […] IBM companies worldwide.	Yes	Yes	Email: Checked
				Phone: Checked
				Postal Mail: Checked

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Additional Contact Preferences Example

Opt-Out Example 2				
Original Statement	User Choice	Does the user want to be contacted?	Did the user click the box?	Site Serve & Unica Data entry
☑ Please keep me informed […] IBM companies worldwide.	☑ Please keep me informed […]IBM companies worldwide.	Yes	No	Email: Not Checked Phone: Not Checked Postal Mail: Not Checked

Opt-In Example 2				
Original Statement	User Choice	Does the user want to be contacted?	Did the user click the box?	Site Serve & Unica Data entry
☐ Please keep me informed […] IBM companies worldwide.	☐ Please keep me informed […] IBM companies worldwide.	No	No	Email: Not Checked Phone: Not Checked Postal Mail: Not Checked

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Long-Form Language Option

The simplified language outlined on slide 2 is preferred. However, partners are still able to use the long-form Notice & Choice language, as outlined below:

- A link to IBM's privacy policy (http://www.ibm.com/privacy)

- The statement "Please keep me informed of products, services and offerings from IBM companies worldwide."

  - Any deviation from the language above must include the words "marketing" or "products, services and offerings" <u>and</u> "IBM companies worldwide" in the text

- Provide the following contact options with boxes

  - by email

  - by phone

  - by postal mail

- The difference between opt-in and opt-out is the default state of the box (pre-checked or blank), prior to any user interaction

  - For opt-in, the box would be blank, meaning a user would have to actively opt in to be contacted

  - For opt-out, the box is pre-checked, meaning a user would have to actively opt out of contact

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Example Language on IBM.com

Email preference listed as "**opt-out**"

Country or Region*
United States

State or Province*
if not selectable, click arrow next to country selection
Select one

Postal Code*

Please keep me informed of products, services and offerings from IBM companies worldwide. Check the boxes below to receive more information about:
- ☑ Business Analytics
- ☑ Business Strategy
- ☑ Social Collaboration
- ☐ I would also like to receive information about other IBM products.

Please tell us how you would like to be contacted.
- ☑ by email.
- ☑ by telephone.
- ☑ by postal mail.

I accept IBM's Privacy statement.

Download Offer

Email contact box is "pre-checked"

Email preference listed as "**opt-in**"

Country or Region*
Canada

State or Province*
if not selectable, click arrow next to country selection
Select one

Postal Code*

Please keep me informed of products, services and offerings from IBM companies worldwide. Check the boxes below to receive more information about:
- ☐ Business Analytics
- ☐ Business Strategy
- ☐ Social Collaboration
- ☐ I would also like to receive information about other IBM products.

Please tell us how you would like to be contacted.
- ☐ by email.
- ☑ by telephone.
- ☑ by postal mail.

I accept IBM's Privacy statement.

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Email contact box is blank

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Passing Contact Preferences to IBM

- Team IBM is responsible for training partners on how to accurately communicate contact preferences on a registration-by-registration basis

- To communicate preferences, Unica requires the language "CHECKED" or "NOT CHECKED"

- "CHECKED" means "clicked the box"
  - If the box was "pre-checked," "CHECKED" means the user clicked the box to remove the check mark
  - If the box was blank, "CHECKED" means the user clicked the box to add a check mark

Opt-Out Example					Opt-In (Email) Example				
Original Boxes	User Choice	Does the user want to be contacted?	Did the user click the box?	Site Serve & Unica Data entry	Original Boxes	User Choice	Does the user want to be contacted?	Did the user click the box?	Site Serve & Unica Data entry
☑ by email	☑	Yes	No	Not Checked	☐ by email	☑	Yes	Yes	Checked
☑ by Phone	☐	No	Yes	Checked	☑ by Phone	☐	No	Yes	Checked
☑ by Postal Mail	☑	Yes	No	Not Checked	☑ by Postal Mail	☑	Yes	No	Not Checked

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Setting Up the Template – Potential Fields

- Columns AN-AP (API parameters questionnum1_ooemail, questionnum2_ootele, questionnum3_oopostal) are used to indicate whether the contact question was posed as an opt-in statement or an opt-out statement.
- If the single statement was used, "opt-in" or "opt-out" should be consistent across all contact types
- If the three contact types were listed with boxes in front of them, "opt-in" or "opt-out" should be specific to each box

Template Column/ Cell	Option to Indicate Opt-In Language was used	Option to Indicate Opt-Out Language was used
AN2:AN$	Q_XSYS:OIEMAIL	Q_XSYS:OOEMAIL
AO2:AO$	Q_XSYS:OITELE	Q_XSYS:OOTELE
AP2:AP$	Q_XSYS:OIPOSTAL	Q_XSYS:OOPOSTAL

	AN	AO	AP
1	QUESTIONNUM1_OOEMAIL	QUESTIONNUM2_OOTELE	QUESTIONNUM3_OOPOSTAL
2	Q_XSYS:OOEMAIL	Q_XSYS:OOTELE	Q_XSYS:OOPOSTAL
3	Q_XSYS:OOEMAIL	Q_XSYS:OOTELE	Q_XSYS:OOPOSTAL
4	Q_XSYS:OOEMAIL	Q_XSYS:OOTELE	Q_XSYS:OOPOSTAL
5	Q_XSYS:OOEMAIL	Q_XSYS:OOTELE	Q_XSYS:OOPOSTAL

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