

## **IBM Media Operating Procedures**

**Confidential – July 2022**

This document outlines key procedures that media companies are required to follow when doing business with IBM so that expectations are clear, campaigns can be successful, and relationships positive. It is important that anyone working on the IBM business is aware of and adheres to the following:

### **Confidentiality**

- Anyone doing business with IBM is required to maintain confidentiality of agreements, including but not limit to Insertion Order terms, rates, and agency proprietary tools.
- Media companies may not share internally or externally any IBM product, messaging or campaign information not yet public at any time with anyone outside EightBar or IBM Media. This includes anyone internally at the media company not expressly working on the related IBM project.
- Media companies may not issue any press releases on IBM campaigns, or conduct interviews with third parties regarding IBM campaigns, unless explicitly agreed to by IBM Media.

### **Selling Media Proposals**

- Only EightBar is authorized to negotiate pricing for and purchase media on IBM's behalf. IBM is not authorized to buy directly or commit funds. All media activity must be booked via an EightBar issued insertion order (I.O.). **No verbal orders.**
  - Please note there are some limited instances where an I.O. will be issued by a company other than EightBar. If you need any clarification, please email [nycentralops@eightbarcollective.com](mailto:nycentralops@eightbarcollective.com)
- Ideas and concepts can be discussed with IBM and the agency but at point they become a written proposal including pricing, they need to be submitted through EightBar.

### **Subsidiaries and Acquisitions**

- All existing and future IBM owned subsidiaries or affiliates are eligible for IBM rates and should follow IBM buying guidelines.
- If your company purchases a media property or company with which IBM currently conducts business, all agreements, and liabilities (including rates and incentives) previously contracted with this property/company on IBM's behalf will be honored for the stipulated contract period.

### **The IBM Logo Usage Requirements**

- Media companies should only use IBM logo artwork provided and as specified in the I.O.
- Logo usage should always be reviewed and approved by the agency team prior to running.
- Do not use IBM logo on any item not listed on the I.O.
- Always allow a "safe space" around the IBM logo type that is equal to or greater than the height of the logo in use.
- Do not place the logo on active backgrounds that may reduce legibility.
- The IBM logo must always link to [ibm.com](http://ibm.com).

For further information and resources about the IBM logo usage, please visit:  
<https://www.ibm.com/design/language/ibm-logos/8-bar/>

## **Digital Requirements** (Please see IBM Buying Guidelines for more details)

- **Tracking & Transaction on IBM Data:** Media companies are responsible for implementing IBM required tracking. IBM does not transact on partner data as standard practice.
- **Viewability:** For campaigns transacting on viewability, media companies are required to deliver 100% human viewable impressions as defined below:
  - Display - 100% of pixels in view for a minimum of 1 continuous second (oversized units of 242,500 pixels+ 50% in view for minimum of 1 continuous second).
  - Video - 100% of pixels in view, for 50% duration of the video, sound on, user-initiated. For native video, sound on is not required though all other requirements must be met.
- **No Invalid Traffic (Fraud/Sophisticated Invalid Traffic (SIVT)):** Media companies are required to implement blocking/filtering tags wherever possible to minimize exposure to invalid traffic. Any blocked/filtered or monitored Fraud/SIVT incidents will not count towards delivery.
- **Inventory Transparency:** IBM ads may only run on approved inventory that is owned and operated (O&O) directly by the media company, fully transparent to the agency, and confirmed by EightBar.
- **Brand Safety & Confirmation of Settings:** IBM supports the GARM Brand Safety Floor & Suitability framework and GroupM inventory quality standards. Media companies must have measures in place to ensure IBM ads do not run within content not suitable for the brand.

## **Additional Requirements**

- **Privacy Requirements:** IBM and its agency require all partners to demonstrate their compliance with applicable data privacy laws. Media companies can demonstrate compliance with data privacy laws by the signature and/or completion of the agency's privacy related documentation and assessments.
  - The acceptance of these documents is required for all partners **that collect, store, manage, and/or transfer Personal Information or Personal Data.**
  - In addition to attesting commitment to applicable privacy laws, lead generation tactics must also implement the IBM approved Notice & Choice language for all registration pages as noted below, including properly implemented check boxes (opt in/opt out for email, tele, postal) in accordance with local laws.
- **YourAdChoices:** IBM supports the online advertising and marketing self-regulatory program for Online Behavioral Advertising (OBA). For more information, visit [youradchoices.com](https://youradchoices.com).
- **FTC Requirements for Native Advertising & Endorsements/Testimonials:** IBM requires all media companies to comply with Section 5 of the FTC Act to ensure advertising is not deceptive or misleading in its nature or source.
- **No Special Advertising Sections for Print:** IBM does not support the use of Special Advertising Sections, also known as print advertorials.
- **No Sweepstakes or other Contests:** IBM does not support, partner, participate, or associate with sweepstakes or other contests.
- **No Telemarketing or Tele-Prospecting:** Media companies should not cold call any individual on behalf of IBM. Prospecting tele-services are not considered paid media.

## **Paid Media Tactics with Email Components**

Media companies executing eBlasts (emails with dedicated IBM messaging) on behalf of IBM are required to:

- Include IBM-specific opt-out language within the footer of the email
  - Email footer opt-out language differs from the language required for registration-based programs (Notice & Choice)
- Follow the IBM process to remove suppressions prior to sending emails to ensure that individuals who have previously opted out of IBM communications do not receive an eBlast with IBM content

The following types of email communications from media companies should NOT include IBM-specific opt-out footer language:

- eNewsletters (defined as containing publisher content and ads from IBM and other advertisers)
- Publisher-branded eBlasts
- Confirmation or follow-up emails (e.g., “thank you for downloading”)
- Reminder emails (e.g., “the event you registered for is coming up soon”)
- BANT related emails (if there is any email component)
- Emails promoting lead generation assets (e.g., webcasts, whitepapers)
- Any other email that is clearly coming from the publisher directly and not IBM

All email communications should clearly and obviously be from the media company/publisher as the sender and not appear to be from IBM.

## **Registration/Lead Gen**

All registration or lead generation programs must be booked under and are subject to the terms, policies, and definitions set out in the Lead Generation I.O. Addendum which can be found here: <https://www.groupm.com/ibmleadgenaddendum/>

The three schedules of the Addendum cover:

- IBM’s definition of a lead
- IBM’s Notice & Choice requirements
- IBM’s process for handling Data Subject Rights (DSR) requests and complaints

Acceptance of the I.O. indicates acceptance of Lead Generation Addendum

IBM does not accept responses from any purchased response activities that do not include a request from the user to receive future communications from IBM through at least one channel.

- As a result, leads/registrations will only be counted towards buy guarantees and be passed to IBM if they have volunteered permission to be contacted by IBM and are delivered within the contracted timeframe in accordance with IBM requirements.
- Consent must be freely & voluntarily given. Consent can’t be forced or made compulsory on the registration form.
- Registration to an event or access to promoted content should still be available to a prospect, irrespective of their consent preferences.

**Registration Form Required Fields & EightBar Approval:** The registration form must be approved by EightBar prior to going live and must capture the following registration fields: first name, last name, country, state (if US or Canada), company, job title, email, phone number, and company size. Forms must also include a valid version of the IBM Notice & Choice language.

**Tele-Outreach:** Outreach from media companies by telephone should only be made as a second-touch or subsequent follow-up only, after an individual shows initial interest and provides that particular media company consent to being contacted by telephone.

Initial consent for IBM-specific marketing may not be obtained verbally, but marketing consent which has been previously volunteered digitally may be reaffirmed or reconfirmed verbally, through a subsequent-touch telephone interaction, as described above. All calls with prospects should be recorded and reproduced upon IBM request in the event of a Data Subject Rights (DSR) request.

### **Content Syndication: Asset Promotion by Email**

Promotional emails should exclusively be sent in the capacity of the media company/publisher and not in the capacity of IBM. The email should not mislead or misconstrue to end-users who is sending this email. All promotional emails must adhere to local laws and regulations.

Any email promoting an IBM asset in an effort by media companies to meet their contractual obligations per the agreed terms of the I.O. must clearly be **from the media company/publisher** and not IBM.

- The “From/Sender” email address must clearly indicate publisher and not reference or include IBM
- No IBM branding should appear outside of the asset or written description/abstract
- Emails should not contain IBM standard email footer language
  - Footer language and opt-outs should be publisher specific only
  - Footer language should not imply that accessing content is equivalent to a declaration of consent (clicking on email or accessing content does not imply consent)
- It is recommended that a disclaimer at the top that states publisher is the author of email/sender

Sample disclaimer: *This email is from [Publisher Name]. You are receiving this email because you have indicated an interest in [insert topic, newsletter, etc.]*