



Grow the business with existing customers

Leverage:

- a) Renewals
- b) Reinstatements
- c) License self-check



What makes up IBM Software Subscription & Support?











Version Rights & Upgrades

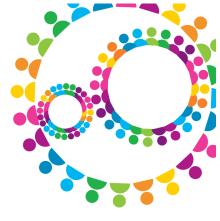


Technical Support



Total Solution with Optimized TCO

Our Message to our Clients



§ IBM Software Subscription & Support saves you time

Unlimited voice and where available, electronic access to IBM Software Support Centers worldwide. This means you and your IT department don't have to wait forever to get answers and assistance for your routine technical support questions and needs.

You get 24x7 emergency support for critical problems. This means your business can be back up and running quickly if the unthinkable happens.

§ IBM Software Subscription & Support saves you money

You get upgrade protection – no cost access to new releases and enhancements as they roll out. This means you always have the most up-to-date versions of the software you rely on everyday.

In the past customers were able to get minor releases for free. Now they need S&S to get that.

Challenges on ICS Renewals

- •No need for renewal low PMRs and Support Calls
- Competition is giving it free
- Moving to Competition
- No Budget
- Current Licenses not fully deployed
- •Will renew only Server side or say CEO Licenses



Some misconceptions

- With the economy in turmoil, clients may not want to renew because...
 - They've renewed for the last "x" year(s) and they never had to use support, it was a waste of money
 - They do not see value from the dollars they have spent on support. Their company is cutting back on everything
 - They see no business impact to renew

§ Your client may be unaware...

 How their organization uses IBM Subscription & Support, but your renewal rep can provide :

Download history Support history

Specifics on IBM's S&S business impact to their business
 They will remain on back level versions of their software
 They will remain at risk in the event of a mission critical application outage
 If their organization decides to renew at a later date, they will incur a very expensive cost to renew thereby spending much more money instead of saving money (as their choice to not renew intends)





Main Differences between IBM and Competitors when it comes to S&S

IBM

Complete subscription and support solution - not just "maintenance"

24x7 for severity 1 PMRs

Unlimited Callers

Unlimited Calls (phone support)

Discount on S&S allowed so long as we grow S&S by at least 10% per year

Competition

Subscription (access to new versions), but web support only

24x7 costs extra

Phone support costs extra

Oracle, Microsoft, CA do not discount S&S - TCO "sticker shock"

The CIO - New Sheriff in Town





- How many times in your accounts evaluation of the competition starts with the arrival of the new "sheriff".
- They want to reduce:
 - **►**Cost
 - **▶**Complexity
 - ► Provide productivity enhancements
 - ► Upgrade/eliminate legacy applications
 - ▶ Start focusing on "business transformation"
- They are not all coming from IT some even from procurement



Upgrade and lower TCO by 30% to raise the ROI of IT





Project Liberate – self funding of upgrade

We have helped more than 600 customers free up around \$3.5B in their IT budget over the last 4 years worldwide by advising them how to by differently from Microsoft

Customers with Microsoft Enterprise Agreements might be able to save up to **40% or more** on the cost of their renewal through this "no-charge" evaluation of their current Enterprise Agreement.





Opportunity to sell new licenses

Check the current version and propose upgrade

This is a constant opportunity to keep selling new licenses – Grow your current base

S&S Renewal is an excuse to revisit your customers – The door remains open

Identify what products are missing on customer's environment – 2 Quarters in advance



Our Clients Must Understand the Risk of Non-Renewal

- Re-instatement cost will be around <u>2x</u> the amount of their yearly renewal cost
- Loss of New Software Features & Functionalities
- Loss of Technical Resources
- Software Compliance Concerns
- Software Obsolescence
- Risk Management
- Employee Satisfaction & Productivity



Opportunity to sell Reinstatement and bring customers back

50% of any reinstatement is considered new licenses

Do not discount reinstatement... protect past S&S stream

There are tons of customers that may have decided to move to a competitor that is now looking for ways to come back to IBM

Utilize the Lock in Savings program and bring customers back with 15% discount and finance options



Lock in Savings Promo

Use the difference to upsell new licenses and combo with other promos

For example: customer has a 100k renewal/year, with this promo the total savings are 45k (3 years), put that towards a promo that relates to new licenses to maximize savings and retire quota

Spread the payments for new licenses/reinstatement and save

Receive a 15% discount off Entitled Price for new Lotus and WebSphere Portal license(*) plus 3 full years of Software Subscription and Support

Customer pays IBM Global Financing (IGF) 3 equal payments annually up front (Based on credit rating and subject to credit approval)

Rates as low as 0%

Proceeds thru special bid process

Minimum deal size is \$5,000 USD, maximum per IOT IGF Low Rate Financing deal size

Available in most countries

Renew for multiple years and save

Discount off of eligible Software Subscription and Support renewal price for Lotus and WebSphere Portal offerings

Receive 10% off renewal price for two years of Software Subscription and Support

Receive 15% off renewal price for three years of Software Subscription and Support

Customer pays full amount up front (or may leverage IBM Global Financing)

Rates as low as 0%

Proceeds thru special bid process

Available in most countries



License self check

- a) Are all license deployed help needed from CTP team
- b) License mismatch on Domino Notes
- c) Portal customers with less than 200 PVUs of licenses
- d) No Partial renewal leads to compliance situations

Recap....



Opportunity to sell and up-sell net new licenses and grow S&S



S&S renewals represent a compelling event with a clear deadline



Opportunity to sell reinstatement and bring customers back



Increase customer intimacy by understanding their plans and future direction



Sell Multi-year contracts thru "Lock in Savings" Play (margin up-front)





Information available

a) WW ICS Brand S&S Community links

b) Upcoming renewals list

c) Reinstatement opportunity list

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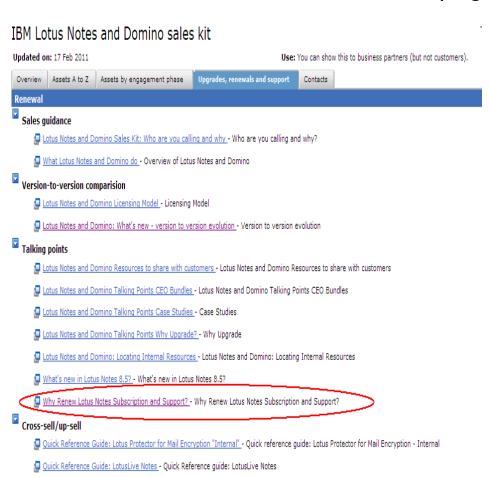
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Appendix

Lotus Notes 8.5 Sales Kit and One pager





Lotus Notes and Domino Cross Sell Suggestions - Cross Sell Suggestions

You can show this to business partners (but not customers).

Why renew Lotus Notes Subscription and Support?

Updated on: 05 Oct 2010

Why should your client renew their Lotus Notes and Domino Software Subscription and Support? Because they gain access to Lotes and Domino 8.5 software, which includes a wealth of new features that help minimize costs and optimize productivity. Use these resources to help show your clients the value of Lotus Notes Notes and Domino 8.5 software.

Show your clients how they can reach for significant cost savings with Lotus Notes and Domino 8.5

Learn how <u>other Lotus customers have achieved an ROI of up to 147%</u> on their upgrade to Lotus Notes/Domino 8.5. In this
Webinar, IBM executives and senior Forrester analysts explain how organizations are achieving economic benefits by
upgrading to Lotus Notes/Domino 8.5

Show your clients what the press is saying about Lotus Notes and Domino 8.5

- The ChannelWeb article "<u>Take A Message: It's Lotus Vs. Exchange</u>" details howLotus Notes 8.5 beat Microsoft Exchange 2010 in a side-by-side comparison.
- Computerworld: "U.S. Bank picks IBM's Lotus platform over Microsoft's SharePoint"
- ZDNet Australia chose Lotus Notes 8.5 as a 'Top Alternative' to Microsoft Outlook
- ZDNet China award its "Collaboration- The Most Effective Enterprise Collaboration Platform" Award to Lotus Notes and Domino 8



IBM Lotus Notes & Domino 8.5

IBM Lotus Notes and Domino 8.5 provides greater messaging and application scalability and functionality coupled with ease of administration while reducing the cost of ownership and increasing the tools and flexibility available to them. Lotus Notes and Domino 8.5 continues to offer integrated features such as Lotus® Sametime® instant messaging and office productivity tools via Lotus Symphony, providing a complete set of readily available solutions for businesses.

Renew/Upgrade Value Prop

Renew and upgrade to take advantage of:

- - > 50% I/O Bandwidth consumption reduced

Follow the link below for TEI tool: http://www-01.ibm.com/software/lotus/offer/forrester_webcast.ht ml?cm_sp=MTEI0324_

- Identity management through Shared Logon and ID Vault. The new ID Vault feature allows administrators to securely automate tasks such as recovering lost IDs and password resets, allowing administrators to focus on other important tasks.
- Reduce storage costs using the new Domino Attachment and Object Service (DAOS). DAOS reduces redundant storage of attachments and I/O use, resulting in significantly reduced storage costs, backup efforts, and optimized workflow operations.
- Improved quality of service features, such as Domino Configuration Tuner and dynamic group, policies provide administrators the ability to detect misconfigurations before problems arise and maintain consistent policies as members of organizations change.

way to easily update information across multiple applications, saving time and money.

- Calendar federation and flexibility allows end users the ability to incorporate public calendars (such as Google calendars) and view their complete schedule.
- Expanded platform support provides additional options for users who want the flexibility to choose the operating system and hardware that fits their needs in terms of factors such as cost, organizational expertise, physical size, scalability, and energy consumption.
- Lotus Enterprise Integrator® adds support for MySQL database, enhanced control for replication activities, and 64-bit editions for AIX® which improves the efficiency of data transfer between systems.
- New in IBM Lotus Notes Traveler 8.5 are security-rich features such as encrypted mail support, and remote security management (including multi-level wipe, local device lock, and policy compliance monitoring). This release also includes improved text formatting support with the ability to view rich text e-mail on Microsoft® Windows® Mobile 6 devices.
- IBM Lotus Notes Traveler adds client support for the Nokia S60 platform (third edition, or later) that builds on the existing Microsoft Windows Mobile support.
- Lotus Notes Traveler continues to provide realtime wireless delivery of the following Lotus Domino data with no additional server or thirdparty solution required:
 - E-mail
 - Calendar
 - Address book
 - Journal
 - o To do lists
 - Folder support
 - Lotus Notes-style addressing

V2V At-a-Glance

Provide talking points Reps can use to bait a hook and get a bite! Try to map to pains.

<u>Lotus Domino V8.5 Client V2V feature comparison.</u> [charts 12 – 19]

Renewal Benefits

- IBM Software Subscription & Support saves you time Unlimited voice and where available, electronic access to IBM Software Support Centers worldwide.
- You get 24x7 emergency support for critical problems.
- You get upgrade protection no cost access to new releases and enhancements as they roll out.
- You get trade-up options and pricing.

End of Life Info

Version I'm running works fine..

- If your customer is on 6.0 / 5.0 no support available.
- Support for 6.5 runs out 30 April 2010

Client Opts Not to Renew

Not worth the expense

- ■ Add up the time and storage savings in N/D 8.5,
- The new ID Vault feature allows administrators to securely automate tasks such as recovering lost IDs and password resets, allowing administrators to focus on other important tasks.
- Save disk space with compression disk space saving capabilities. Typical disk space savings range from 40% to 60% (your results will vary), which may help your business reduce energy consumption via physical disks, I/O, and may help reduce costs associated with managing data
- Domino Attachment and Object Service (DAOS), further optimization of information handling (I/O), and streamlined administrative based tasks such as Schedule and Design. DAOS provides a way to reduce redundancy of stored information, resulting in reduced storage costs, backup efforts, and optimized workflow operations.
- Domino Configuration Tuner is a utility that provides administrators the ability to detect misconfigurations before problems arise. Common use cases may be for mistaken configuration settings, and for best practice information. Domino Configuration Tuner allows administrators to detect



IBM WebSphere Portal IBM Software Subscription and Support

IBM WebSphere Portal

WebSphere Portal Version 6.1 and 6.1.5 are enterprise portal solutions that provide the complete portal services necessary to deliver a single point of personalized interaction with applications, content, business processes, and people. The unified user experience can help you improve overall productivity and customer satisfaction.

Renew/Upgrade Value Prop

Renew and upgrade to take advantage of 6.1 and 6.1.5 enhancements, including:

- Live Text tagging presents 'one-click' access to relevant supporting information that "pops up" on the page while executing a business process
- Portal REST services further opens the portal platform to composite "mashup" applications with services feeds from other Web applications
- Client Side Aggregation reduces server-side processing, and dramatically improves end-user performance
- Client Side Feed Consumption provides highly efficient integration of information through feeds (Atom and RSS)
- Portal 'Site Wizard' enables self-service creation of independent virtual portals
- Theme Customizer' portlet delivers wizard-driven branding and in-place customization
- Updated out-of-the-box Internet and intranet site jumpstart templates offer fast delivery and customization of virtual portal sites
- "One click' Site Management application simplifies control of staging to production capabilities with rollback and versioning
- Expanded Site Layout support (HTML/PHP), continues to open the platform to additional content sources
- Support for the very latest portlet open standards (JSR286, WSRP 2.0)
- Web Application Integrator provides a method to easily embed existing Web applications in WebSphere portal for greater value.
- WebSphere Portlet Factory release delivers an easier out-of-the-box experience combined with new Web 2.0 features and support for visual application development of desktop-like Web applications

- A Page Builder that simplifies page creation, making it easy for business users to create pages and add content to pages
- Portal "Lite" Mode, which helps improve cost-ofownership by dramatically reducing portal start-up time.
- Integrated Site Analytics support that helps to optimize portal applications via integration with popular 3rd party solutions
- A Template Page capability that speeds page creation by allowing portal pages to act as templates when creating other new portal pages
- Mashup Integration support, which provides rendering/creation of Mashups directly in portal as a portal page

V2V At-a-Glance

Need Link to complete V2V table with comparison of N

1, N-2 releases and latest release/version

Product Life Cycle & End of Life Info

	GA	End of support
€ V6.1.5	11 Dec 2009	
≤ V6.1	14 July 2008	Į.
≤ V6.0	24 Aug 2006	2007-0-WT 2007-0-WT
€ V5.1	20 Dec 2004	30 Sept 2008

Client Opts Not to Renew

Version I'm running works fine....

- If your customer is on V5 the product is no longer in market
- Migration to IBM WebSphere Portal Version 6.1.5 from Version 5.1 or 6.0 is not supported. If your portal installation is based on either version, you must first migrate to 6.1 and then apply fix pack 3. After confirming that you are satisfied with the migration results, you can enable the Version 6.1.5 feature pack to incorporate and enable new functionality.

Not worth the expense

WebSphere Portal helps to provide a quicker return on your investment with the following business benefits:

- Deliver exceptional Web experiences Take advantage of new, nimble Web 2.0 technologies and philosophies that put new business models in reach.
- Extend your business assets Create and deploy custom-branded, market-driven solutions comprised of existing and net-new business assets, and re-purpose and reuse as appropriate.
- Run your business efficiently Built on WebSphere software so that enterprise-class applications, processes and transactions can reside on a proven, reliable, scalable and highperformance foundation.
- ≦ Grow as you go "Snap on" businessspecific capabilities speed time to value and allow you to pursue new market opportunities – all while reducing the of cost of deploying portals.

Licensing & Pricing

Licensing Metrics vary based on edition

IBM Portal Enable & Extend are licensed based on

Processor value unit licensing.

IBM Portal Express offers users 3 licensing options:

- [1] Per Idle Standby Server;
- [2] Per VU [value unit];
- [3] Per 20 Authorized users

IBM Portal Server offers users 2 licensing options:

- Per Authorized Use;
- [2] Per VU [value unit]

License management

When reviewing annual renewal quotes, check # of licenses, servers, entitlements.

Links to licensing resources

≦ IBM License Information documents for WebSphere Portal

Pricing

To confirm current software pricing information, please check the <u>IBM distributed software price book</u>. For more information about Passport Advantage and Passport Advantage Express, visit the <u>Passport Advantage Intranet</u>.

Additional Resources [think links]

- ≤ 6.1.5 Announcement letter
- Web Portal software from WebSphere [www]

Last revision date:

Sametime 8.5 Sales Kit and One pager

to

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IBM Lotus Sametime 8.5 sales kit

Updated on: 27 Jan 2011 Use: You can show this to business partners (but n Overview Assets A to Z Assets by engagement phase Upgrades, renewals and support Contacts Renewal Sales guidance Version-to-version comparision Talking points 📮 IBM Lotus Sametime Renewals: Overcoming possible objections - Overcoming possible objections to renewing IBM Software Subscription and Support 📮 IBM Lotus Sametime Software Support Lifecycle - IBM Lotus Sametime Software Support Lifecycle 📮 Lotus Sametime Software Subscription - Support Pricing - Software subscription and support Lotus Sametime licensing and entitlements - IBM Lotus Sametime licensing and entitlements 📮 Lotus Sametime editions and tradeup path (renewals) - IBM Lotus Sametime editions: Entry 📮 Key capabilities to highlight for Microsoft Outlook customers - Key capabilities to highlight fo Kev capabilities to highlight for current Lotus Notes or Sametime customers - Kev capabilitie 📮 IBM Lotus Sametime Talking Points: New features and benefits - IBM Lotus Sametime: new 📮 IBM Sametime: IBM Software Subscription and Support Value prop - Why Sametime 8.5 pro Linux Server support Macintosh IM client and Cross-sell/up-sell Expanded administrative

Why Sametime 8.5 provides a compelling reason to renew and upgrade:

IBM Lotus Sametime 8.5 software is the most significant release in three years. It makes unified communications simple, with these significant enhancements:

- . A new online meeting experience, integrated into the Sametime Connect client. Online meetings can be more effective and easier to start. (For example, instant access means no time lost to sharing passcodes.)
- · Simplified and improved audio and video -- ours or yours
- Ours: New audio and video codecs provide higher-guality voice and video Sametime services for a more compelling experience
- o Yours: SIP-based audio/video interoperability makes it easier to incorporate desktop video into third-party video conferencing services.
- A new browser client, which includes browser chat support for Apple iPhone users.
- . New Web 2.0 APIs to help developers to embed Sametime capabilities into Web sites and applications, so users switch

Visit the What's New in Lotus Sametime 8.5 software Web page for more information you can share with your customers.

You can show this to business partners (but not customers). Lotus Sametime V2V Enhancements

Updated on: 24 Apr 2010

Macintosh participation

in Web conferences

policy control

Summary of V 7.5 - 8.5 enhancements				
Sametime 7.5.1	Lotus Sametime Standard 8	Lotus Sametime 8.5 Announcement letter		
What was new in Lotus Sametime 7.5.1:	What was new in Sametime 8:	IBM Lotus Sametime 8.5 software provides significant enhancements for users, developers and IT managers and administrators:		
 Integrated point-to-point video 	IBM Lotus Sametime Standard			
 Tabbed chat IM interface 		Boonla using Eamotime		
 Microsoft Office and Outlook Integration 		software will find it simple t		
Linux Server support		smarter with others.		

Enhanced Microsoft Office A new online meeting Integration experience, integrated into the Sametime Apple Macintosh: enhanced Lotus Sametime client

Connect client. Online meetings can be more



IBM Lotus Sametime IBM Software Subscription and Support

IBM Lotus Sametime

IBM Lotus Sametime is an enterprise instant messaging and web conferencing application sold by the Lotus Software division of IBM. Lotus Sametime provides enterprise instant messaging functionality, presence information, and web conferencing. It offers support for communications standards and standard protocols. Lotus Sametime 8.5 makes starting meetings virtually instantaneous, inviting others as easy as dragging names from your contact list and joining a meeting as simple as joining a chat. Meetings will be accessible through the Sametime Connect client as well as Web browsers and will be uniquely persistent.

Renew/Upgrade Value Prop

IBM Lotus Sametime 8.5 software makes unified communications simple, with these significant enhancements:

 ■ A new online meeting experience, integrated into the Sametime Connect client. Online meetings can be more effective and easier to start. (For example, instant access means no time lost to sharing passcodes.)

 Simplified and improved audio and video -ours or yours

 Ours: New audio and video codecs provide higher-quality voice and video Sametime services for a more compelling experience.

 Yours: SIP-based audio/video interoperability makes it easier to incorporate desktop video into third-party video conferencing services.

■ A new browser client, which includes browser chat support for Apple iPhone users.

New Web 2.0 APIs to help developers to embed Sametime capabilities into Web sites and applications, so users switch context less often.

You and your customers can visit the What's New in Lotus Sametime 8.5 software Web page.

V2V At-a-Glance

Need Link to complete V2V table with comparison of N 1, N-2 releases and latest release/version

Product Life Cycle & End of Life Info

	GA	End of support
≤ V8.5	15 Jan 2010	
≤ V8.0	08 Jan 2008	
≤ V7.5.1	18 May 2007	
€ V7.5	22 Sep 2006	
≤ V7.0	07 Oct 2005	

Client Opts Not to Renew

Version I'm running works fine....

If your customer is on V3 the product is no longer in market

Not worth the expense

The main points to emphasize with customers are:

Renew and cut travel and web conferencing costs. Most organizations are looking to reduce expenses and energy costs. Sametime 8.5 online meetings reduce the need to travel and can reduce Web conferencing services expenses. Sametime Unified Telephony software provides telephony features, like intelligent call routing and management, which can help reduce telephony expense.

Renew and upgrade for expanded capabilities: Lotus Sametime Standard 8.5 makes unified communications simple and effective, with major enhancements for users, developers and IT managers and administrators. Lotus Sametime Standard is the upgrade/entitlement path for customers who are entitled for previous releases of Lotus Sametime; visit the What's New in Lotus Sametime 8.5 software Web page.

Renew and trade up for less: Organizations with a qualifying license of Lotus Sametime Standard can trade up to Lotus Sametime Advanced at a discounted price. By trading up to Lotus Sametime Advanced, organizations will be able to take advantage of additional capabilities, such as persistent group chat, real-time broadcast tools, instant screen sharing, and advanced geographic location services.

Licensing & Pricing

Licensing Metrics vary based on edition

IBM Lotus Sametime is most commonly licensed on a 'Authorized user' [per-user] basis wherein customers pay a per user charge based on their total number of users.

IBM Lotus Sametime can be licensed with IBM Lotus Quickr and Lotus Connections via the IBM Lotus CEO Community Collaboration bundle. Including both IBM Lotus Sametime, Lotus Connections and IBM Lotus Quickr licenses, CEO Community Collaboration must be deployed across an entire organization, with a minimum of 100 users. It too is licensed on a per-user basis wherein the customers pay a per user charge based on their total number of users across the organization.

IBM Lotus Sametime is also available as an extranet licensing model. The IBM Lotus Sametime Extranet Processor helps customers extended their real-time capabilities out to customers, business partners, and suppliers on a per-CPU basis.

Entitlements:

Upgrade entitlement: While a customer is under an active Software Subscription and Service (SS&S) contract, they are entitled to all versions that are released, whether it is a Major Release (ex: 8.0), Feature Release (ex: 8.5), or a Maintenance Release (ex: 8.0.2). When a customer's maintenance has expired (and they do not renew), they are still entitled to Maintenance Releases for any code stream that was released while their contract was still valid, but not Feature Releases, or new Major Releases Lotus Sametime versus limited IM entitlement capabilities in Lotus Notes: Beginning with v6.5.x, qualified Lotus Notes customers are entitled to take advantage of a select set of integrated instant messaging and presence awareness capabilities within the context of the Notes/Domino 6.5X (and higher) environment. "Full" IBM Lotus Sametime and Web Conferencing licenses provide capabilities that add incremental value and are not included in the new limited entitlement. Customers should still consider a full solution to extend the value of their existing Domino infrastructure, particularly in the area of Web conferencing. See additional software entitlements with Lotus Notes and Domino

<u>Audio integration entitlement</u>: Customers interested in integrating audio with IBM Lotus Notes Software for

Last revision date: