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Quarterly Content Management Business Partner Call

October 9, 2002

Welcome!

- Replay number:

1-888-203-1112 and enter the passcode 699799

Contact:

Shawn K James
email: skjames@us.ibm.com
direct: 415-545-4251

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Agenda

Bruce Weed, Content Management Channels Manager

Cathy Billingsley, Content Management Channels Sales Manager

Ted Lewis, WW Channel Campaign Manager for Content Manager and EIP

Razy Martin & William Snow, Global Marketing Manager IBM SW & SVC Financing

Shawn James, Channel Marketing Manager, Data

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Bruce Weed

Content Manager Channels Manager

Bruce Weed

IBM Content Manager Hands-On Lab Workshop

- For those who didn't have a chance to take the Content Manager Version 8 Hands-On Test Drive at CMTC
  - Location: IBM Solution Partnership Center in Waltham, Massachusetts
  - Date: October 30-31
  - Cost: free
  - Seats are filling up fast
- More seminars are planned for 1Q 2003
- To sign up, visit the website: http://www.developer.ibm.com/spc/events/index.htm
- Questions? Call Brenda Brown (408) 463-3311

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Bruce Weed

Content Management Certification Exams

- 440 Content Manager OnDemand for Multiplatforms - Now Available
- 441 Content Manager OnDemand for Iseries - Now Available
- 442 Content Manager Version 8.1 for Multiplatforms - Now Available
- For more information, visit the website: www.ibm.com/software/certify
- Exam cost is reimbursable though Partner World for Software, You Pass, We Pay Program
- Partners who successfully pass a certification exam will receive a IBM Content Manager Certified Jacket (while supplies last)
- A Study Guide has been developed to help people prepare for the 442 exam
    - Available for download in PDF format the week of October 15
    - Ask your partner representative, or visit the CM Business Partner newsletter website to download a copy

Content Management Business Partner Newsletter

For up to date information about Content Management Business Partner Activities, visit: www.ibm.com/software/cmnews

Special Announcement

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Cathy Billingsley

CM Channels Sales Manager

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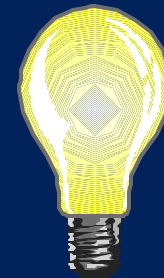
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CM BP Sales Tips for Success

C. Billingsley

Mgr., IBM CM Channel Sales

cbillin@us.ibm.com

10/9/02

Current CM Business Environment

- Size of CM BP pipeline size growing
  - Quality of CM pipeline ??????
- Everyones working hard, but not necessarily focused on right deals
  - Allow others to set their priorities, agendas and activities
- Some CM leads come from within IBM
  - Get "brought to deals" rather than "create opportunities"
  - Customer contacts are usually IT folks/technologists
    - Want to talk technology rather than solutions
    - Don't fully understand business pain much less how to quantify value of solving business problems
  - Don't consistently use SSM or ask basic "qualifying" questions
    - Don't follow up with "So what" question

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Key CM Qualification Questions/Issues

- Qualifying questions/issues
  - ► What is the business pain/problem
    - – How important/valuable is solving the problem to the customer
  - ► Are we dealing with someone in the account who has a vested interest in solving the business pain.
    - – Job, pay, career advancement at stake
  - ► Is the project funded
    - – How much
    - – Whose budget
  - ► What is decision process
    - – Decision criteria
    - – Individuals/organizations involved
    - – RFI/RFP required

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Key CM Qualification Questions/Issues

- Do we have competition
  - ► Who/how long have they been engaged/why are they engaged
  - ► Any current installs of competitor in account
  - ► Is there anyone in the account who has competitive leanings
- What's the potential size of this deal
  - ► Initially and long-term
- Is opportunity being driven by IT or end user organization
  - ► Why is that group driving deal

Opportunity "Roadsigns"

- Nature of customer/IBM relationship
  - ► Views IBM as valued partner, vendor or adversary
- Strength of client rep (and SAM) relationships
  - ► Breadth & depth of customer contacts
    - – IT, end user, and/or executive contacts
    - – Willingness to engage in qualification efforts/sales activities
- What is customer's financial/business health
  - ► Poor customers must have SPECIFIC reasons and quantifiable ROI to spend money
- Portfolio of installed strategic IBM software
  - ► DB2, Websphere, LOTUS, Tivoli
- History of customer SW evaluation process
  - ► "Surfing" for technology or evaluating business solutions
  - ► Kicks tires or makes purchases

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2 CM Fundamental Truths

- Closing any large CM deal requires a well-qualified opportunity and a well thought-out, precisely executed sales strategy

- As a team working together, we have the best chance to win the solution sale and showcase our partners' knowledge, skills, and experience to perform services.

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Ted Lewis

WW Channel Campaign Manager for Content Manager

IBM and Lotus Beacon Awards Overview

- Recognition of PWSW & PWD Business Partners worldwide who have excelled in providing quality e-business solutions and services to customers
- IBM's most significant way to recognize the breadth of Business Partner expertise, their reach to extended markets, and the value they bring to our customers
- Awards are judged by a team of leading industry press and analysts along with IBM and Lotus Executives.
- IBM and Lotus are separate award programs for 2003, link to the nomination databases from homepage of: www.ibm.com/partnerwold/software
- Nominations open Monday, Sept. 9th to Thursday, Oct. 31st
- Lotus Award winners announced at Lotusphere (BD Day) , January 26th, 2003 in Orlando
- IBM Award winners/finalists announced at PartnerWorld 2003 in February 2003, New Orleans

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IBM and Lotus Beacon Awards Eligibility and Recognition

- Eligibility
  - ►IBM Awards - must be PWSW or PWD Business Partners to be eligible
  - ►Lotus Awards - must be PWSW or PWD Business Partners to be eligible
  - ►IBMers/Business Partners/Customers can enter a nomination
  - ►Lotus Beacon Awards are specific to Lotus technologies
  - ►IBM Beacon Awards include all brands plus developers: DB2, Lotus, Tivoli and WebSphere, however Lotus specific/Lotus 'only' solutions should be entered in Lotus Beacon Awards Program
  - ►Nominations require one mandatory customer reference

- Recognition
  - ►Winners featured on PWSW Web site
  - ►Winners receive coveted 'crystal trophy' at Beacon Gala
  - ►Winners promoted in advertising and PR, use of Beacon logo
  - ►Winners/Finalists featured in success stories
  - ►Winners names on hanging banners at PW and future SWG events

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IBM Beacon Award Categories

- Nominated Award Categories
  - ▶ Greatest Midmarket Success
  - ▶ Greatest Innovation in e-business
  - ▶ Best WebSphere e-business Solution
  - ▶ Best Managing Technology Tivoli Solution
  - ▶ Best Data Management Solution
  - ▶ Hot Linux Solution
  - ▶ Safe & Secure Developer Solution
  - ▶ Lotus Software: Enabling the Minds of e-business Award
- Category Winners Selected by Geo Sales Execs for PWSW & by Developer Relations Execs for PWD
  - ▶ Four Geographic Distinguished Achievement Awards
  - ▶ AP, EMEA, LA and NA

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Lotus Beacon Award Categories

- Nominated Award Categories
  - ► Best Knowledge Discovery Solution
  - ► Best Learning Solution
  - ► Best Collaborative Solution
  - ► Best Mobile/Wireless Solution
  - ► New! Best Portal Solution
  - ► Best Industry Solution
  - ► Best Messaging Migration Solution
  - ► Best Philanthropic Solution
  - ► Best Tool/Utility Solution
  - ► Excellence in Partnering
  - ► Rising Star Award
  - ► Best in Lotusphere Showcase
- Category winners selected by Geography Sales Executives
  - ► Four Geographic Distinguished Achievement Awards
  - ► AP, EMEA, LA and NA

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Beacon Award Call to Action

- Visit www.ibm.com/partnerworld/software and review the Lotus and IBM Beacon nomination databases
- Promote the Beacon Awards to your Partners
- Communicate the recognition your Partner will receive if they are a Beacon Award winner or finalist
- Help your Partner select a solution to nominate
- Help your Partner choose the best category for their nomination
- Help your Partner enter their nomination
- IBM Beacon Awards contact - Ed Walzer - ewalzer@us.ibm.com or 919-486-1627 tl 526
- Lotus Beacon Awards contact - Kada Sigl - kada_sigl@us.ibm.com or 617-693-1070 tl 474-9956

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Razy Martin & William Snow

Global Marketing Manager IBM SW & SVC Financing

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WHO WE ARE

- IBM Global Financing is the world's premier single-source provider for multi-vendor I/T financing solutions

- Our financing solutions include:
    - Hardware, software, services (including installation, maintenance, training) financing - IBM, Non-IBM and BP Services
    - Commercial financing for working capital

- Operate In 42 countries

- $42 billion in worldwide assets

- Over 125,000 customers

- Provider of leasing and financing to businesses selling or acquiring I/T and I/T related products and services

www.ibm.com/financing/partners

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Software Financing Programs

- SuccessLease TM - Targeted for Small Business (managed by 3rd party)
  - ► Available to end-customers with 1-99 employees
  - ► Rapid credit decisions offering flexible payment options

- ValuePlan Lease - Targeted for Medium Business
  - ► Available to end-customers with 100 - 999 employees
  - ► Competitive monthly payments with flexible payment options

- TLMA (Term Lease Master Agreement) - Targeted for Large Enterprise
  - ► Available to end-customers with 1000+ employees
  - ► Customized contract terms and conditions
  - ► One contract, one invoice for simplicity

Our Financing Solutions include HW, SW, BP Services (IBM and Non-IBM)

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Software Financing -- Business Partner Benefits

- Sales
  - ► Sell more product up front - Increase customer buying power
  - ► Close bigger deals faster - Translate large up-front capital costs into monthly billing
  - ► Close more follow on business
  - ► Influence customer behavior via promotions
  - ► Financing helps to protect the street price by minimizing discounting
  - ► Portfolio Management - financed accounts grow faster then accounts that purchase

- Business Operations
  - ► Cash flow management through reduced A/R
  - ► Minimize credit risk
  - ► Greater revenue stream

www.ibm.com/financing/partners

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4Q SMB Low Rate Financing Offer

- Low Rate financing for Deals $25K to $50K
  - ► Targeted for Customers with 100 to 1000 employees
  - ► Low Rates for terms 24 to 36 months
  - ► Standard competitive rates for 12 month term
  - ► Available for all SWG OTC products
  - ► Offered via IBM.Com, FTF and BPs

- Low Rate financing for Deals $50K to $1M
  - ► Targeted for customers with over 100 employees
  - ► Offers low rate for higher deal size
  - ► Available for all OTC SWG products in the
  - ► Standard Competitive rates for 12 month term
  - ► Offered via IBM.Com, FTF and BPs

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How to Get Your BP Qualified

- Please send or have your BP send individual transactions to our Customer Support Center(CSC):

  - ▶ e-mail at CSC@us.ibm.com
  - ▶ Fax at 1-800-426-9299
  - ▶ Call 1-800-426-3889

- CSC will check to see if the BP is a registered IBM BP and is listed in DMS (Dealer Management System):
  - ▶ If BP is in DMS, the transaction will be processed BAU
  - ▶ IF BP is not in DMS, CSC will notify BP and IBM rep. that BP must be placed in DMS prior to going any further

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IGF HQ Contacts

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  dtoledo@aul.ibm.com

- www.ibm.com/financing/partners

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Channel Marketing

Shawn K James, Channel Marketing Manager, Data

Channel Marketing

Sales Mastery Skills Assessment test on the web

For details: Contact Bonnie Endicott

bme1@us.ibm.com

Subject: CM Sales Mastery Assessment test - How do I?

Co-Marketing Funds - Revenue

5 applications for co funded lead generation activity remain

Must execute in October, invoice by mid November

Direct Mail, telemarketing, Seminar, Custom Proposal

Must utilize Harte-Hanks CRM web application to enter and manage leads to closure. (sale or no sale)

Call Shawn James at 415-545-4251 or email skjames@us.ibm.com for details

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Thank You!

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