IBM Watson Campaign Automation

This Service Description describes the Cloud Service IBM provides to Client. Client means the contracting party and its authorized users and recipients of the Cloud Service. The applicable Quotation and Proof of Entitlement (PoE) are provided as separate Transaction Documents.

1. Cloud Service

IBM Watson Campaign Automation is a cloud-based digital marketing platform that leverages customer data, analytical insights, and automating relevant cross-channel interactions. IBM Watson Campaign Automation includes the following solution-based Editions and services that map to marketer needs to simplify the buying process:

- IBM Watson Campaign Automation – Essentials Edition
- IBM Watson Campaign Automation – Standard Edition
- IBM Watson Campaign Automation – Premium Edition
- IBM Watson Campaign Automation – Email Basics Edition

1.1 IBM Watson Campaign Automation – Essentials Edition

IBM Watson Campaign Automation – Essentials Edition provides marketers, with lower volume needs, the ability to deliver personalized digital interactions with higher conversion rates. IBM Watson Campaign Automation – Essentials Edition is available on a subscription and pay per use basis. This Cloud Service offering includes the following functionality:

- Email Messaging: Create, test, and send emails with dynamic content that provides specific messages to each customer.
- Mobile Push Messaging: Deliver personalized messages by combining mobile app data with rich consumer profile information.
- Customer Profiles: Collect comprehensive customer data in a marketing database and leverage that data to drive automated campaigns and personalized communications.
- Program Automation: Create omni-channel marketing campaigns through a visual canvas that automates the sending of individual messages and/or nurture campaigns based on behavioral actions.
- Segment Creation: Use behavioral, profile, preference data, and more, to query and narrow down Client's target audience. Optionally, integrate these segmentation queries with Client's marketing strategies to deliver highly engaging, personalized content to Client's target audience.
- Email Insights: Enables users to preview the look and feel of mailings across multiple different email clients, track email client usage across mailing lists helping to optimize email programs based on the specific devices and email clients that customers use. Email Insights includes technology components provided by Litmus.
- Journey Designer: Visual design tool that allows marketers to work together to map out a customer journey and share it across their team.
- Performance Insights: A reporting and analytics capability to help marketers define and measure their campaign performance across digital channels.
- Content Builder: An intuitive, web-based editor enables Client to create and edit content in the application, with point-and-click access to features, such as link tracking, personalization, dynamic content, and more.
- Dynamic Content: Create messages directly in the message body that are relevant and specific to each customer, using an intuitive point-and-click interface.
- **A/B Testing**: Send test emails to test subject line, from name or content elements; find out which element has the best response, and send the best performing emails to contacts.
- **Social Share**: Share email marketing messages on social networking sites and produce detailed report results.
- **Progressive Forms**: Reduce form abandonment and build a contact's profile, over time, with progressive web forms that show different questions each time a contact visits a website or landing page.
- **Digital Behavior Tracking**: Monitor how contacts interact with Client online by using calculators, live chats, social buttons, and more. Use these custom web tracking event behaviors to move a contact to a marketing program or a behavior scoring model.
- **Landing Page**: Point-and-click access to create campaign-specific pages and custom web forms. Custom domains for landing pages must be purchased separately.
- **Behavioral Analytics**: Manipulate mailing results to identify trends and target customer segments; define customer segments and select metrics to create cross-tab and table reports, and then manipulate reports by adding or removing fields, changing metrics, and sorting and ordering columns.
- **Campaign Reports**: Create aggregate and detailed reporting information about emails sent to customers. Reporting metrics include opens, conversions, rich media, forwards, and click-stream data access.

**IBM Watson Campaign Automation Orientation** is a foundation, education package for IBM Watson Campaign Automation. It provides a high-level description of Watson Campaign Automation features and capabilities, along with an introduction to the Customer Engagement Model. The orientation package is included with an initial subscription to Watson Campaign Automation, and should be completed prior to starting the required, onboarding service. It is delivered as a self-service offering, and includes video and web-based recordings.

Included in the subscription fees for this Cloud Service offering are the following:

a. Five (5) Authorized Users
b. Ten (10) active programs
c. 50 thousand Marketing Interactions per month for a total of 600 thousand Marketing Interactions that can be consumed annually.
d. Unlimited Database Records
e. One (1) organization
f. Ten (10) thousand Email Insights Opens monthly
g. Unlimited email previews. An 'email preview' is registered each time Client submits an email template to this feature for preview.
h. Five (5) sending domains
i. One (1) customer branded host domain
j. One (1) IP address for sending messages
k. Clients sending more than three (3) million email messages per year are eligible to receive a dedicated IP address; otherwise, a shared IP address will be assigned.
l. Technical support
m. Online training modules

Clients may also purchase additional volumes of Users, Marketing Interactions, and Email Insights Opens.
1.2 **IBM Watson Campaign Automation – B2B Essentials Edition**

IBM Watson Campaign Automation – B2B Essentials Edition provides marketers, with smaller databases, the ability to capture, qualify, and nurture leads. IBM Watson Campaign Automation – B2B Essentials Edition is available on a subscription and pay per use basis. This Cloud Service offering includes the following features:

- All features within the IBM Watson Campaign Automation – Essentials Edition offering
- Scoring: Score customers and prospects based on buying criteria, demographics, and behaviors such as website visits, form submissions, and message interaction, or on time-based components, including recency and frequency. Based on scores, marketing automation features route customers and prospects for appropriate follow-up.
- Customer Relationship Management (CRM) Integration: Integration with third-party CRM systems, including Salesforce.com, Microsoft Dynamics CRM, and Sugar CRM.

Included in the subscription fees for this Cloud Service offering are the following:

a. Five (5) Authorized Users  
b. Ten (10) active programs  
c. One (1) scoring model  
d. Unlimited Marketing Interactions  
e. 10,000 Database Records  
f. One (1) organization  
g. Ten (10) thousand Email Insights Opens monthly  
h. Unlimited email previews. An ‘email preview’ is registered each time Client submits an email template to this feature for preview.

i. Five (5) sending domains  
j. One (1) customer branded host domain  
k. One (1) IP address for sending messages  
l. Technical support  
m. Online training modules

Clients may also purchase additional volumes of Users, Database Records, and Email Insights Opens.

1.3 **IBM Watson Campaign Automation – Standard Edition**

IBM Watson Campaign Automation – Standard Edition helps marketers to better understand customer behavior and to deliver personalized interactions with higher conversion rates. An IBM Watson Campaign Automation – Standard Edition subscription builds on the capabilities offered in the Essentials Edition. Subscribers receive additional Authorized Users as well as increased usage volumes for program automation, scoring, and Email Insights. Subscribers also receive more Marketing Interactions as part of the Standard Edition. The Standard Edition includes all the capabilities of the Essentials, plus the following:

- Social Audiences: Social media marketing application that allows customers to send specific audiences and related ads to social media networks for marketing to the specific audience or to like audiences.
- Customer Relationship Management (CRM) Integration: Integration with third-party CRM systems, including Salesforce.com, Microsoft Dynamics CRM, and Sugar CRM.

Included in the subscription fees for this Cloud Service are the following:

a. Ten (10) Authorized Users per organization  
b. Five (5) organizations  
c. Twenty (20) active programs
d. One (1) scoring model

e. 250 thousand Marketing Interactions per month for a total of 3 million Marketing Interactions that can be consumed annually.

f. Unlimited Database Records

g. Five (5) thousand Social Audiences Contact Events monthly

h. 200 thousand Email Insights Opens monthly

i. Unlimited email previews. An ‘email preview’ is registered each time Client submits an email template to this feature for preview.

j. Five (5) sending domains

k. One (1) customer branded host domain

l. One (1) IP address for sending messages

m. Clients sending more than three (3) million email messages per year are eligible to receive a dedicated IP address; otherwise, a shared IP address will be assigned.

n. Technical support

O. Online training modules

Clients may also purchase additional volumes of Users, Marketing Interactions, Email Insights Opens, and Social Audiences Contact Events.


Included in the subscription fees for this Cloud Service are the following:

a. Ten (10) Authorized Users per organization

b. Five (5) organizations

c. Twenty (20) active programs

d. Five (5) scoring models

e. Unlimited Marketing Interactions

f. 50,000 Database Records

g. Five (5) thousand Social Audiences Contact Events monthly

h. 200 thousand Email Insights Opens monthly

i. Unlimited email previews. An ‘email preview’ is registered each time Client submits an email template to this feature for preview.

Clients may also purchase additional volumes of Users, Database Records, Email Insights opens, and Social Audiences Contact Events.

1.5 IBM Watson Campaign Automation – Premium Edition

Included in the subscription fee for this Cloud Service are the following:

a. Twenty (20) Authorized Users per organization
b. Ten (10) organizations
c. Unlimited active programs
d. Unlimited Database Records
e. 750 thousand Marketing Interactions per month for a total of 9 million Marketing Interactions that can be consumed annually.
f. 25 thousand Social Audiences Contact Events monthly
g. Unlimited Scoring Models
h. 400 thousand Email Insights opens monthly
i. Unlimited email previews. An ‘email preview’ is registered each time Client submits an email template to this feature for preview.
j. Five (5) sending domains
k. One (1) customer branded host domain
l. One (1) IP address for sending messages
m. Clients sending more than three (3) million email messages per year are eligible to receive a dedicated IP address; otherwise, a shared IP address will be assigned.

n. Technical support
o. Online training modules

Clients may also purchase additional volumes of Users, Marketing Interactions, Email Insights Opens, and Social Audiences Contact Events.

1.6 IBM Watson Campaign Automation – B2B Premium Edition


Included in the subscription fee for this Cloud Service are the following:

a. Twenty (20) Authorized Users
b. Ten (10) organizations
c. Unlimited active programs
d. Unlimited Marketing Interactions
e. 100,000 Database Records
f. 25 thousand Social Audiences Contact Events monthly
g. Unlimited Scoring Models
h. 400 thousand Email Insights Opens monthly
i. Unlimited email previews. An ‘email preview’ is registered each time Client submits an email template to this feature for preview.

Clients may also purchase additional volumes of Users, Database Records, Email Insights Opens, and Social Audiences Contact Events.
1.7 IBM Watson Campaign Automation – Email Basics Edition

IBM Watson Campaign Automation – Email Basics Edition provides marketers with early digital marketing programs the ability to create and send a large volume of email communications. The Email Basics Edition is available on a subscription basis. This Cloud Service includes the following features:

- **Email Messaging:** Create, test, and send emails with dynamic content that provides specific messages to each customer. A/B testing included.
- **Customer Profiles:** Collect comprehensive customer data in a marketing database and leverage that data to drive automated campaigns and personalized communications.
- **Segment Creation:** Use behavioral, profile, preference data, and more, to query and narrow down Client's target audience. Optionally, integrate these segmentation queries with Client's marketing strategies to deliver highly engaging, personalized content to Client's target audience.
- **Performance Insights:** A reporting and analytics capability to help marketers define and measure their campaign performance across digital channels.
- **Content builder:** An intuitive, web-based editor enables Client to create and edit content in the application, with point-and-click access to features, such as link tracking, personalization, dynamic content, and more.
- **Dynamic content:** Create messages directly in the message body that are relevant and specific to each customer, using an intuitive point-and-click interface.
- **A/B testing:** Send emails to test subject line, from name, or content elements; find out which element has the best response, and send the best performing emails to contacts.
- **Social share:** Share email marketing messages on social networking sites and produce detailed report results.
- **Landing page:** Point-and-click access to create campaign-specific pages and custom web forms.
- **Campaign reports:** Create aggregate and detailed reporting information about emails sent to customers. Reporting metrics include opens, conversions, rich media, forwards, and click-stream data access.

Included in the subscription fee for this Cloud Service offering are the following:

- a. Five (5) Users
- b. One (1) Organization
- c. Five (5) sending domains
- d. One (1) customer branded host domain
- e. One (1) IP address for sending messages
- f. Clients sending more than three (3) million email messages per year are eligible to receive a dedicated IP address; otherwise, a shared IP address will be assigned.
- g. Technical support
- h. Online training modules

1.8 Additional Offerings

1.8.1 IBM Watson Campaign Automation Social Audiences

IBM Watson Campaign Automation Social Audiences provides marketers with the ability to target their customers using paid social media. Clients who purchase the following Watson Campaign Automation Editions – Standard, B2B Standard, Premium or B2B Premium, are entitled to usage volumes of IBM Watson Campaign Automation Social Audiences. Social Audiences can also be purchased as a standalone product.
Included in the subscription fee for this Cloud Service are the following:

- For Clients who have purchased one of the IBM Watson Campaign Automation Standard Editions: 5,000 Contact Events per month.
- For Clients who have purchased one of the IBM Watson Campaign Automation Premium Editions: 25,000 Contact Events per month.
- Clients purchasing the Social Audiences offering independent of the IBM Watson Campaign Automation Edition subscription offerings have the option of purchasing in tiers of Five (5) Thousand, 25 Thousand, 100 Thousand, 250 Thousand, 500 Thousand, One (1) Million, Two (2) Million, and Five (5) Million Contact Events.

1.8.2 IBM Watson Campaign Automation Budget and Expense Planning


- Planning: Create and share plans to align corporate strategy, forecast return on investment and predict revenue impact.
- Budgeting: Create and manage global budgets in any currency without cumbersome, disconnected spreadsheets whether global, regional, or product centric.
- Performance: Visualize, analyze, and optimize spend; make smarter decisions when connecting plans and budgets to CRM, finance, and marketing data.

Included in the subscription fee for this Cloud Service are the following:

- Five (5) Authorized Users
- One (1) Connector

IBM Watson Campaign Automation Budget and Expense Planning Additional Users may be purchased if Client requires additional Authorized Users beyond what is provided with the base service. IBM Watson Campaign Automation Budget and Expense Planning Additional Connector may be purchased if Client requires additional Connectors to be used with the base service.

1.8.3 IBM Watson Campaign Automation Engage

IBM Watson Campaign Automation Engage is a cloud-based digital marketing platform that supports omni-channel marketing and lead management. The Cloud Services uses Client customer data and individual behaviors, collected from a variety of sources, to inform and drive personalized interactions in real time on behalf of the Client. Features include:

a. Message Creation and Delivery: a web-based editor enables users to create and edit message content, and provides point-and-click access to link tracking, personalization, and dynamic content.

b. Advanced Segmentation: segmentation capabilities allow users to target contacts based on their behavioral, profile or preference data.

c. Multi-Channel Messaging: send integrated campaign messaging across various channels, including email, social, web and mobile. Engage includes features that help ensure that Client touch points are kept integrated to convey a consistent and personalized experience.

d. Automated Campaigns: use a visual campaign builder to create marketing programs, from simple drip strategy campaigns to those with complex, multiple touch points. Send automated messages when a lead routes or performs a certain action using nurture campaigns based on the individual action of each lead.
e. Scoring: rank Client customers and prospects based on buying criteria, demographics and behaviors such as website visits, form submissions and message interaction or on time-based components including recency and frequency. When contacts reach a certain score, marketing automation features route them for the appropriate follow-up.

f. Web Tracking: monitor how contacts interact with Client online, for example using calculators, live chats, and social buttons, and then use these behaviors to move a contact into a marketing program or as part of Client’s behavioral scoring model.

g. Landing Pages and Web Forms: design and publish landing pages and web forms, which capture inquiry information that can be utilized to create custom pages.

h. Reporting: more than 80 customizable reports are available that span various marketing channels – including email campaigns, social and mobile.

i. Relational Tables: store multiple lines of data on purchases, event attendance, activities and map it to a single record, offering a holistic Client customer view. This data can be utilized in queries and segmentation, dynamic content and in personalization in messages.

j. B2B Lead Management: manage and score leads, use automation to nurture them through the pipeline and maximize Client's marketing efforts.

k. Social: organizations can share email marketing messages on social networking sites and produce detailed reports on the results, post or schedule posts that coincide with their email sends and insert a link to a forward-to-a-friend Web page or include a forward-to-a-friend form in the message body.

A Watson Campaign Automation Engage subscription includes five sending domains, one custom branded host domain, and up to ten environments.

1.8.4 IBM Watson Campaign Automation Engage Mobile

IBM Watson Campaign Automation Engage Mobile enables Clients to collect data from their smartphone applications and send push notifications (including but not limited to iPhone, iPad and Android). The functionality includes the ability to send personalized push notifications with actions that drive engagement with Client’s smartphone application. An SDK is provided that enables the application to send push notifications as well as register the device and send events to Watson Campaign Automation.

1.8.5 IBM Watson Campaign Automation WeatherFX


1.8.6 IBM Watson Campaign Automation Duplicate Message Send


1.8.7 IBM Watson Campaign Automation Additional Scoring

included in the Client's IBM Watson Campaign Automation Edition. Additional scoring models can be requested as needed through the IBM Watson Campaign Automation provisioning team. Additional models will be deployed in specific numbers based on the most efficient use of the scoring feature and as needed by the Client.

1.8.8 IBM Watson Campaign Automation Additional Programs

1.8.9 IBM Watson Campaign Automation Additional IP Address
This offering is the yearly fee for an additional IP address.

1.8.10 IBM Watson Campaign Automation Citrix Integration
This service provides IBM Watson Campaign Automation product functionality for use with one instance of the Citrix GoToWebinar, GoToMeeting, or GoToTraining products. This integration imports attendee session and profile data into a Engage Relational Table on a daily basis. The Client must purchase their Citrix license separately.

1.8.11 IBM Watson Campaign Automation CRM Integration
This service enables Client to establish a synchronization of data between certain commercially available Client relationship management (CRM) systems, such as Salesforce.com, Microsoft Dynamics CRM, and IBM Watson Campaign Automation. Integration is limited to one CRM system instance and one IBM Watson Campaign Automation marketing database. This offering does not include integration with Scribe. If that type of integration is needed, the IBM Watson Campaign Automation CRM Integration with Scribe offering should be used.

1.8.12 IBM Watson Campaign Automation CRM Integration with Scribe
This enables Client to establish a synchronization of data between certain commercially available relationship management (CRM) systems and IBM Watson Campaign Automation. Integration is limited to one CRM system instance and one IBM Watson Campaign Automation marketing database. IBM Watson Campaign Automation CRM Integration with Scribe relies on or incorporates third party technology provided by Scribe.

1.8.13 IBM Watson Campaign Automation Inbox Monitoring
This service allows Clients to measure general inbox delivery to large Internet Service Providers (ISPs) and Inbox Providers across multiple regions.

1.8.14 IBM Watson Campaign Automation Multi-Factor Authentication
This offering provides functionality to support the use of an authentication code as a secondary log-on requirement, in addition to a user's username/password combination, to grant access to an IBM Watson Campaign Automation account through a web browser.

1.8.15 IBM Watson Campaign Automation Transact Magento Integration
This service enables the routing of relevant transactional emails generated by a Magento instance through the IBM Watson Campaign Automation Transact transactional email service. A license for Magento is also required, which the Client must purchase separately from the vendor.

1.8.16 IBM Watson Campaign Automation Web Analytics Integrations
This service provides integration between IBM Watson Campaign Automation (one Org) and one of the following web analytics systems: IBM Digital Analytics or Adobe Omniture.
1.8.17 IBM Watson Campaign Automation WebEx Integration
This service provides IBM Watson Campaign Automation product functionality for use with one instance of Cisco WebEx. This integration imports attendee session and profile data into an IBM Watson Campaign Automation Relational Table on a daily basis. The Client must purchase their WebEx license separately.

1.8.18 IBM Watson Campaign Automation Transact
This service provides the ability to deliver real-time, custom branded, one-to-one transactional messages generated by triggers in emails, web forms, landing pages or tele-sales. IBM Watson Campaign Automation Transact is a dedicated sending architecture specifically designed for the unique needs of transactional or triggered messages such as receipts, notifications, alerts, itineraries, etc. It can be connected to an in-house system currently triggering messages. Provided with the product are an IP address and custom domain, link and message delivery tracking, bounce and reply management and tracking on message distribution, activity, and delivery metrics.


1.9 Set Up Service Offerings
- IBM Watson Campaign Automation Light Onboarding Services
This service is a combination of provisioning and training that is designed to enable users to configure and utilize offerings in the Watson Campaign Automation Standard and Essentials offerings. This remotely delivered service provides up to 15 hours and is required with an initial subscription to Watson Campaign Automation. An onboarding consultant is assigned to guide Clients through the onboarding process which is delivered through a series of remote meetings and recorded, web-based learning sessions. Onboarding services include provisioning, configuration and setup, training, and Q & A.

- IBM Watson Campaign Automation Budget and Expense Planning Services
This service is a training service designed to enable users to configure and utilize the IBM – Watson Campaign Automation Budget and Expense Planning offering. This remotely delivered service is required with the purchase of the IBM Watson Campaign Automation Budget and Expense Planning Additional Users offering. A training consultant is assigned to guide organizations in using enhanced report and dashboard customization through a series of remote meetings and recorded web-based learning sessions.

- IBM Watson Campaign Automation Onboarding Services
This service is a combination of provisioning and training that is designed to enable users to configure and utilize offerings in the Watson Campaign Automation – Premium Edition. This remotely delivered service offering provides up to 30 hours and is required with an initial subscription to IBM Watson Campaign Automation – Premium Edition. An onboarding consultant is assigned to guide Clients through the onboarding process which is delivered through a series of remote meetings and recorded, web-based learning sessions. Onboarding services include provisioning, configuration and setup, training, and Q & A.

- IBM Watson Campaign Automation Mobile Onboarding Services
This service is an optional service offering for IBM Watson Campaign Automation subscribers that choose to take advantage of the Mobile Push feature. This offering provides up to 35 hours of remote services that include activities such as setup, consulting, and initial push notification implementation and acceptance testing. This onboarding service is also available to Standard and B2B Standard Edition subscribers.

- IBM Watson Campaign Automation IP Reputation Warm Up
This service provides a one hour strategy call with a deliverability expert, up to 25 hours of remotely delivered managed services over a 30 day period to execute ramp up of a single IP address used by IBM Watson Campaign Automation, and a one hour debrief call with a deliverability expert. Up to two non-critical, non-time-sensitive emails are in scope for the
purpose of reputation building (self-sustained HTML ready mailing content required). This service does not guarantee white listing or IP ramp up success, as this is dependent upon many external factors.

- **IBM Watson Campaign Automation Add On Domain**
  This service updates the Cloud Service environment to use an additional Reputation Identity beyond the amount provided with IBM Watson Campaign Automation.

- **IBM Watson Campaign Automation Add On Organization**
  This service provides an additional IBM Watson Campaign Automation organization (an independent environment set up to usually add an additional company or division).

- **IBM Watson Campaign Automation Deliverability Consultation**
  This service helps Clients discover and implement email marketing and deliverability best practices with IBM Watson Campaign Automation. This remotely delivered service provides up to 22 consultation hours. A deliverability consultant is assigned to lead Clients and provide specific strategies that can be directly applied to active sending patterns.

- **IBM Watson Campaign Automation ISP Delivery Investigation**
  This service provides best practice recommendations specific to Client needs and tailor for the Client's identified ISP. This remotely deliver services provides up to five (5) hours and is limited to the research of no more than two dedicated IPs and one ISP.

- **IBM Watson Campaign Automation Product Consulting Bronze**
  This service provides up to 75 hours of remotely delivered product and technical consulting, best practices and guidance on recommended usage of the Cloud Service. This may include discovery, project plan and resource plan development, consultation, integration planning and design, documentation and project management as agreed to with the Client. This service must be consumed within 6 months of purchase.

- **IBM Watson Campaign Automation Product Consulting Silver**
  This service provides up to 175 hours of remotely delivered product and technical consulting, best practices and guidance on recommended usage of the Cloud Service. This may include discovery, project plan and resource plan development, consultation, integration planning and design, documentation and project management as agreed to with the Client. This service must be consumed within 12 months of purchase.

- **IBM Watson Campaign Automation Product Consulting Gold**
  This service provides up to 300 hours of remotely delivered product and technical consulting, best practices and guidance on recommended usage of the Cloud Service. This may include discovery, project plan and resource plan development, consultation, integration planning and design, documentation and project management as agreed to with the Client. This service must be consumed within 12 months of purchase.

- **IBM Watson Campaign Automation Managed Services Bronze**
  This service provides up to 50 hours of remotely delivered managed services, including list and mailing import, segmentation management, scoring model creation, asset preparation/configuration, campaign deployment, reporting and other in-product activities on behalf of the Client. Standard turnaround for managed services is 5 business days for standard single mailing events. Some activities may require longer production cycles. This service must be consumed within 6 months of purchase.

- **IBM Watson Campaign Automation Managed Services Silver**
  This service provides up to 150 hours of remotely delivered managed services, including list and mailing import, segmentation management, scoring model creation, asset preparation/configuration, campaign deployment, reporting and other in-product activities on behalf of Client. Standard turnaround for managed services is 5 business days for standard single mailing events. Some activities may require longer production cycles. This service must be consumed within 12 months of purchase.
• IBM Watson Campaign Automation Managed Services Gold
  This service provides up to 250 hours of remotely delivered managed services, including list
  and mailing import, segmentation management, scoring model creation, asset
  preparation/configuration, campaign deployment, reporting and other in-product activities on
  behalf of Client. Standard turnaround for managed services is 5 business days for standard
  single mailing events. Some activities may require longer production cycles. This service must
  be consumed within 12 months of purchase.

1.10 Ongoing Service Offerings
• IBM Watson Campaign Automation AVP OnePoint Premium Support
  This service is a remotely delivered subscription service. Each Engagement provides Clients
  with a designated technical support resource in increments of ten (10) hours per month. This
  technical support resource will work with Clients to handle issues, recommend preventative
  actions, and aid in issue resolution. Personalized support services include: proactive
  maintenance, guidance specific to a Client's industry and business, and maximizing productivity
  with the offering. This service runs concurrently with the Watson Campaign Automation
  subscription and unused hours do not roll over month to month.

• IBM Watson Campaign Automation Partner Standard Ongoing Services
  This service is intended for self-service Clients in emerging markets or mid-market who want to
  establish a solid fundamentals and practices. This offering is a 12-month program working with
  an IBM consultant. It is not intended for project-based work but for on-going structured guidance
  facilitated by an IBM consultant. The service will not exceed 4 hours per month.

• IBM Watson Campaign Automation Partner Premium Ongoing Services
  This service is intended for self-service Clients in emerging markets or mid-market who want to
  accelerate their email marketing capabilities and expertise. This offering is a 12-month program
  working with an IBM consultant. It is not intended for project-based work but for on-going structured guidance and learning facilitated by an IBM consultant. The service will not exceed 7
  hours per month.

• IBM Watson Campaign Automation Partner Ongoing Services
  This service will be delivered by an IBM consultant to enable partners. The intent is to provide
  product guidance that will accelerate the adoption of marketing automation capabilities and
  practices. This offering is a 12-month program that includes hours allocated to assist partners
  on Client projects. It is not intended for project-based work but for on-going structured guidance
  and learning facilitated by an IBM consultant. The service will not exceed 12 hours per year.

• IBM Watson Campaign Automation Engage Mobile Ongoing Advisory Services
  This service provides up to 15 hours (total per year) of questions and answers via email or
  phone.

• IBM Watson Campaign Automation Engage Mobile Ongoing Standard Services
  This service provides a combination of the following: up to 30 hours (total per year) of questions
  and answers via email or phone, up to two push notification implementation acceptance testing cycles per year, up to 5 hours (total per year) for guidance around usage of console and overall
  push strategy.

• IBM Watson Campaign Automation Engage Mobile Ongoing Standard Plus Services
  This service provides a combination of the following: up to 40 hours (total per year) of questions
  and answers via email or phone, up to four push notification implementation acceptance testing cycles per year, priority response for support tickets, up to two hours (total per year) of support
to advise on seasonal marketing, up to 10 hours (total per year) for guidance around usage of
  console and overall push strategy, optional weekly 30-minute meetings to address key
  performance indicator and short and long-term application/push notification goals.
2. **Security Description**

This Cloud Service follows IBM’s data security and privacy principles for IBM SaaS which are available at [http://www.ibm.com/cloud/data-security](http://www.ibm.com/cloud/data-security) and any additional terms provided in this section. Any change to IBM’s data security and privacy principals will not degrade the security of the Cloud Service.

This Cloud Service may be used to process content that contains personal data if Client, as the data controller, determines that the technical and organizational security measures are appropriate to the risks presented by the processing and the nature of the data to be protected. Client recognizes that this Cloud Service does not offer features for the protection of sensitive personal data or data subject to additional regulatory requirements. Client acknowledges that IBM has no knowledge of the types of data that have been included in the content, and cannot make an assessment as to the suitability of the Cloud Services or the security protections which are in place.

2.1 **Security Features and Responsibilities**

The Cloud Service implements the following security features:

The Cloud Service supports the encryption of data transmissions, through standard secure protocols, between the Cloud Service and Client’s Authorized Users. The Cloud Service encrypts data stored in the relational database, including contact lists and relational tables, while at rest (on disk).

This Cloud Service is included in IBM’s Privacy Shield certification and applies when Client chooses to have the Cloud Service hosted in a data center located in the United States, and is subject to IBM’s Privacy Shield Privacy Policy, which is available at [http://www.ibm.com/privacy/details/us/en/privacy_shield.html](http://www.ibm.com/privacy/details/us/en/privacy_shield.html).

3. **Service Level Agreement**

IBM provides the following availability service level agreement (“SLA”) for the Cloud Service as specified in a PoE. The SLA is not a warranty. The SLA is available only to Client and applies only to use in production environments.

3.1 **Availability Credits**

Client must log a Severity 1 support ticket with the IBM technical support help desk within 24 hours of first becoming aware that there is a critical business impact and the Cloud Service is not available. Client must reasonably assist IBM with any problem diagnosis and resolution.

A support ticket claim for failure to meet an SLA must be submitted within 3 business days after the end of the contracted month. Compensation for a valid SLA claim will be a credit against a future invoice for the Cloud Service based on the duration of time during which production system processing for the Cloud Service is not available (“Downtime”). Downtime is measured from the time Client reports the event until the time the Cloud Service is restored and does not include time related to a scheduled or announced maintenance outage; causes beyond IBM’s control; problems with Client or third party content or technology, designs or instructions; unsupported system configurations and platforms or other Client errors; or Client-caused security incident or Client security testing. IBM will apply the highest applicable compensation based on the cumulative availability of the Cloud Service during each contracted month, as shown in the table below. The total compensation with respect to any contracted month cannot exceed 20 percent of one twelfth (1/12th) of the annual charge for the Cloud Service.

3.2 **Service Levels**

<table>
<thead>
<tr>
<th>Availability during a contracted month</th>
<th>Compensation (% of monthly subscription fee* for contracted month that is the subject of a claim)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 99.95%</td>
<td>2%</td>
</tr>
<tr>
<td>Less than 99.00%</td>
<td>5%</td>
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<tr>
<td>Less than 98.00%</td>
<td>10%</td>
</tr>
<tr>
<td>Less than 97.00%</td>
<td>20%</td>
</tr>
</tbody>
</table>

* If the Cloud Service was acquired from an IBM Business Partner, the monthly subscription fee will be calculated on the then-current list price for the Cloud Service in effect for the contracted month which is the subject of a claim, discounted at a rate of 50%. IBM will make a rebate directly available to Client.
Availability, expressed as a percentage, is calculated as: the total number of minutes in a contracted month minus the total number of minutes of Downtime in a contracted month divided by the total number of minutes in the contracted month.

4. **Technical Support**

Technical support for the Cloud Service is provided via email, online support system, Live Chat, and by phone. IBM will make available the IBM Software as a Service Support Handbook which provides technical support contact information and other information and processes. Technical support is offered with the Cloud Service and is not available as a separate offering.

5. **Entitlement and Billing Information**

5.1 **Charge Metrics**

The Cloud Service is available under the charge metric specified in the Transaction Document:

- **Access** is a unit of measure by which the Cloud Service may be obtained. An Access is the rights to use the Cloud Service. Client must obtain a single Access entitlement in order to use the Cloud Service during the measurement period specified in Client's PoE or Transaction Document.

- **Addressable Device** is a unit of measure by which the Cloud Service can be obtained. An Addressable Device is a device upon which an application is installed that is addressable by the Cloud Service. Each application installation that is addressable by the Cloud Service counts as a separate Addressable Device. Sufficient entitlements must be obtained to cover the number of Addressable Devices reported by the Cloud Service during the measurement period specified in Client's PoE or Transaction Document.

- **Authorized User** is a unit of measure by which the Cloud Service can be obtained. Client must obtain separate, dedicated entitlements for each unique Authorized User given access to the Cloud Service in any manner directly or indirectly (for example, through a multiplexing program, device or application server) through any means. Sufficient entitlements must be obtained to cover the number of Authorized Users given access to the Cloud Service during the measurement period specified in Client's PoE or Transaction Document.

- **Connection** is a unit of measure by which the Cloud Service can be obtained. A Connection is a link or association of a database, application, server, or any other type of device to the Cloud Service. Sufficient entitlements must be obtained to cover the total number of Connections which have been or are made to the Cloud Service during the measurement period specified in Client's PoE or Transaction Document.

- **Database Record** is a unit of measure by which the Cloud Service can be obtained. A Database Record is the collection of fields in a database related to a single entity and accessible as a single unit. Each Thousand Database Record entitlement represents one Thousand Database Records. Sufficient Thousand Database Record entitlements must be obtained to cover the total number of Database Records available to be processed by the Cloud Service during the measurement period specified in Client's PoE or Transaction Document.

- **Digital Message** is a unit of measure by which the Cloud Service can be obtained. A Digital Message is an electronic communication managed or processed by the Cloud Service. Sufficient entitlements must be obtained to cover the total number of Digital Messages managed or processed by the Cloud Service during the measurement period specified in Client's PoE or Transaction Document.

- **Engagement** is a unit of measure by which the services can be obtained. An Engagement consists of professional and/or training services related to the Cloud Service. Sufficient entitlements must be obtained to cover each Engagement.

- **Event** is a unit of measure by which the Cloud Service can be obtained. Event entitlements are based on the number of occurrences of a specific event related to the use of the Cloud Service. Event entitlements are specific to the Cloud Service and the type of event may not be exchanged, interchanged, or aggregated with other Event entitlements of another Cloud Service or type of event. Sufficient entitlements must be obtained to cover every event that occurs during the measurement period specified in a PoE or Transaction Document.
When acquiring Event entitlements, the following are to be counted as an Event:

1. **Marketing Interaction:**
   A Marketing Interaction is an inbound or outbound touch point/communication. Examples of these communications are an email message, a mobile push, a device application message, transactional messages, content displayed in browsers, a social impression, and ad target. These can be related to anonymous or known visitors, or customers.

2. **Email Insights Opens:**
   An Email Insights Opens is registered each time an email recipient receives an email from Client and the email recipient opens the email.

3. **Contact:**
   Contact is the Event associated with sending a contact ID via Social Audiences feature to a corresponding social platform.

- **Instance** is a unit of measure by which the Cloud Service can be obtained. An Instance is access to a specific configuration of the Cloud Service. Sufficient entitlements must be obtained for each Instance of the Cloud Service made available to access and use during the measurement period specified in Client's PoE or Transaction Document.

- **Reputation Identity** is a unit of measure by which the Cloud Service can be obtained. A Reputation Identity is a combination of an IP address and/or Domain used to improve the deliverability of emails. Sufficient entitlements must be obtained to cover the number of Reputation Identities created for Client within the Cloud Service.

### 5.2 Set-Up Charges

An initial one-time setup fee will be specified at the rate and billing term specified in the Transaction Document. Based on the Cloud Service base offering chosen, the corresponding mandatory setup service will provision Client for use of the selected Cloud Service offering. Setup services available are as follows:

- IBM Watson Campaign Automation Light Onboarding Services
- IBM Watson Campaign Automation Onboarding Services
- IBM Watson Campaign Automation Mobile Onboarding Services

The following setup service will be charged at the rate and billing term specified in the Transaction Document when Authorized User entitlements to IBM Watson Campaign Automation Budget and Expense Additional Users are ordered:

- IBM Watson Campaign Automation Budget and Expense Planning Services

All setup services expire 90 days from the date Client is notified by IBM that access to the Cloud Service is available regardless of whether all hours have been used.

An on-demand set-up charge, if ordered, will be billed at the rate specified in the Transaction Document for each setup service.

### 5.3 Overage Charges

If actual usage of the Cloud Service during the measurement period exceeds the entitlement specified in the PoE, an overage charge will be billed at the rate specified in the Transaction Document in the month following such overage.

If actual usage of the Cloud Service during the measurement period exceeds the entitlement specified in the PoE, Client will be charged for the overage as specified in the Transaction Document.

Client will be invoiced in arrears for overage charges each month, at the overage rate specified in the PoE, once the total aggregate has been reached. Such overage charges are due in addition to the base monthly entitlement charge.

If the Subscription Period is greater than 12 months, the aggregate total number of entitlements will be based on 12 monthly measuring periods. The aggregate total will reset to zero after the 12th monthly measuring period. Overage charges for the next 12 monthly measuring periods will not be due until the actual interaction usage exceeds the total number of entitled interactions in aggregate for such 12 monthly measurement periods.
For Clients leveraging ramp periods, each period is treated in the same manner as the subscription period and the same principles apply.

If a Subscription Period is less than 12 months or less than 12 monthly periods remain in a Subscription Period, the number of monthly entitlements remaining in a subscription will be used for the total number of entitled interactions in aggregate.

a. Example 1:

Client has a 12 month Subscription Period and has acquired 10 additional Authorized Users under the IBM Watson Campaign Automation AddOn Authorized User entitlement. If Client enables more than 10 Authorized Users before the end of the 12 month Subscription Period, Client will be invoiced the following month for the quantity in excess and all usage in the coming months will be billed in arrears till the end of the Subscription Period.

b. Example 2:

Client has a three year Subscription Period and has acquired 10 additional Authorized Users under the IBM Watson Campaign Automation AddOn Authorized User entitlement. If Client enables more than 10 Authorized Users before the end of the first 12 months period, Client will be invoiced the following month for the quantity in excess and all usage until the end of the 12 months period. At the end of the each 12 months period, the usage count will reset. If Client enables more than 10 Authorized Users before the end of the next 12 months period, Client will be invoiced the following month for the quantity in excess and all usage in the coming months will be billed in arrears until either the usage count is reset or the end of the remaining Subscription Period.

5.4 Pay per Use Charges

A pay per use charge will be billed at the rate specified in the Transaction Document in the month following such use.


6. Term and Renewal Options

The term of the Cloud Service begins on the date IBM notifies Client of their access to the Cloud Service, as documented in the PoE. The PoE will specify whether the Cloud Service renews automatically, proceeds on a continuous use basis, or terminates at the end of the term.

For automatic renewal, unless Client provides written notice not to renew at least 90 days prior to the term expiration date, the Cloud Service will automatically renew for the term specified in the PoE.

For continuous use, the Cloud Service will continue to be available on a month to month basis until Client provides 90 days written notice of termination. The Cloud Service will remain available to the end of the calendar month after such 90 day period.

7. Enabling Software

This Cloud Service includes enabling software, which may be used only in connection with Client’s use of this Cloud Service and only for the Cloud Service term.

8. Additional Terms

8.1 General

Client agrees IBM may publicly refer to Client as a subscriber to the Cloud Services in a publicity or marketing communication.

8.2 Disaster Recovery

Data replication is performed for most hosting geographies to enable recovery from a disaster that prevents the delivery of the Cloud Service from the primary hosting environment.

8.3 Contact Lists

Client will not use any contact lists with the Cloud Service that include persons who have not given permission to be included on such list for the purpose of receiving communications specifically from the
Client, unless the Client has an existing business or personal relationship with such persons. Use of lists or data generated through affiliate marketing practices is expressly prohibited in all cases. Client is required to include a valid opt-out mechanism in each message.

8.4 No Resale

Client will not resell the Cloud Service or provide third parties (other than employees or contractors working on Client's behalf) with access to the Cloud Service without IBM's prior, written consent.

8.5 Mobile Push Notifications

Marketing Interactions Events related to mobile push notifications include simple push notifications, simple push in-app notifications, simple push data only notifications, and inbox notifications. Simple push notifications, simple push in-app notifications, and simple push only notifications are counted as one Marketing Interaction per device at the time of sending. Inbox notifications are counted as one Marketing Interaction for each appkey to which they are sent.

Calculation of Marketing Interactions related to mobile push notifications shall include the number of mobile push notifications sent to devices which have opted to suppress mobile push notifications and the number of mobile push notifications sent to devices after the application was uninstalled. IBM will regularly use Apple and Google feedback services and update push notifications sent based on uninstalls. Client is responsible for determining the subscription volume for Marketing Interactions, which includes push notifications.

8.6 Duplicate Message

Duplicate Message Send is an additional subscription feature enabled at the organization level. A subscribing Client can toggle the feature on and off. The email addresses entered by the Client to receive the duplicate message will be entered as Bcc addresses and will not be visible to the customer recipients of the email. The Client recipients of the duplicate message are changeable.

If the duplicate email is unable to be delivered to the Bcc email address, IBM will not be able to resend the duplicate email.

8.7 Data Retention

Specific data elements of the Cloud Service shall be available within the Cloud Service as follows (the "Data Retention Period"):  
- Databases (contact lists) and templates: 450 days from last use (actively used databases and templates are retained indefinitely while the service is active).
- Messages, collateral used in messages (e.g., graphics, pictures, documents, and templates), and email click-tracking data: 450 days from the date the message is sent.
- Web tracking for known or authenticated visitors: 180 days
- Web tracking for anonymous visitors: 30 days (records may be converted to "known" if the user's identity becomes known within the 30 days).
- Universal Behaviors: 180 days

These data elements may be removed from IBM's network and systems after the Data Retention Period has expired, and in any event, IBM may destroy all copies of these data elements, and any other related Client data, 30 days following termination or expiration of the Subscription Period. Client will retain back-up copies of all Content provided for use in connection with the Cloud Service.

8.8 Third Party Code Notices

This Cloud Service includes the following software which may not be used for Evil purposes: janrain4j_1.1.0, JSON, JSON-lib-2.3, JDK15, flexjson, and packtag.

8.9 Non-English Language Versions

Client understands and agrees that access to and use of any non-English language version of the Cloud Service may rely on the functionality of a third party technology provided by translations.com for purposes of translating the user interface. When using any non-English language version of the Cloud Service, the Cloud Service user interface may pass Client data and any Content accessible through the Cloud Service user interface unencrypted through the translations.com systems dedicated to the Cloud Service for purposes of translating the user interface at Client's request.