

# Microsoft® Direct Marketing Communications Guidelines

**Microsoft**



# Why direct marketing for Microsoft?



Realizing Potential, our core promise to our customers, ties together everything we do at Microsoft, including direct communications, which are a vital component of Microsoft marketing strategies.

Every interaction with our brand sends a message. Expertly conceived and executed direct marketing projects help customers understand our motivation as a company because customers who understand our motivation and product benefits are five times more likely to acquire Microsoft® software, hardware, and services.<sup>1</sup>

Direct communications target our specific customers, encourage a dialogue, identify their needs through response, and inform them of new products and services. Direct marketing is the fastest way to find out what's working—and what isn't—so we can better understand how Microsoft fits within our customers' lives and develop innovative products to meet our customers' needs.

Strong direct marketing can also gauge overall customer satisfaction, extend the Microsoft brand image, and stimulate customer loyalty. By exposing customers to communications that are familiar and trustworthy, we can positively influence their impression of Microsoft so they will continue to embrace our innovations, tools, and technologies in their homes and businesses.

If you have questions about the direct marketing process after reading this guide, visit <http://infoweb/dm/> or send an e-mail to [askdm@microsoft.com](mailto:askdm@microsoft.com) for more information.

## What's inside?

Think of this introduction as a starting point for creating Microsoft direct marketing materials. It is an overview best used in conjunction with the examples and resources detailed in other parts of the Microsoft Brand Tools Web site. Prior to focusing on the strategy and guidelines for a specific brand, consult these principles, which apply to all direct marketing campaigns:

- How to begin
- Audiences
- Copy guidelines
- Legal, privacy, and security messaging
- Direct marketing communications best practices
- Helpful resources
- Direct marketing templates

<sup>1</sup>Microsoft IT Pro Perceptions Research (U.S.), 2003.

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First, make sure you have the right strategy. This will assist you in developing materials that are focused and true to the brand. You want your message to the customer to come through loud and clear.

Start your direct marketing assignment by following these three steps:

1

**Identify** your lead brand. Before you begin developing concepts, determine which brand you're working with. For example, a direct marketing campaign for Microsoft Office Outlook® 2003 should follow the Microsoft Office brand guidelines. In the case of go-to-market (GTM) campaigns, your piece might reference multiple brands, but your materials should follow the brand identity of the "lead brand." For example, the lead brand of the Communication and Collaboration GTM is Microsoft Office, so all materials should have the look, feel, and tone of Microsoft Office communications.

2

**Consult** the specific section for your chosen brand on the Brand Tools site. There you will find specific executional information on messaging and tone, in addition to a comprehensive online catalog of visual assets. Be sure to note which elements from the brand's visual identity system are *mandatory*, and thus required in your materials.

3

**Apply** the Brand Tools guidelines to your direct marketing creative. Then use the templates, best practices, and examples presented on the following pages to extend the brand across your direct marketing communications.

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A brand may target a number of key audiences. Each individual brand site on Brand Tools discusses how that brand's audience or audiences should be addressed. Here are some of the main audiences that many Microsoft communications target:

## Business decision maker (BDM)

Develops a company's overall marketplace strategy. Determines a company's long-term goals and financial plan. This audience is not necessarily well versed in technology but knows that it must embrace technology to succeed. Business value and benefit are the most important factors to this audience in IT expenditures. Official job titles include CEO, CFO, VP, and director.

## IT Professional (IT Pro)

A broad category responsible for either setting IT strategy, policy, and goals for an organization (ITDM) or managing or working with others to implement technology solutions (ITI).

IT Pros are generally divided into six groups, though, as detailed below, in many organizations functions may overlap among different segments:

- 1) The **executive or manager** sets IT strategy, policy, or goals for the organization. Official job titles include CIO, CTO, IT, or MIS manager or director, operations manager, and systems manager.
- 2) The **administrator or trainer** oversees desktop administration, call-center or end-user support or training. Official job titles include help desk support engineer, call center technician, desktop configuration administrator, technology trainer, and teacher.
- 3) The **deployment manager** plans, deploys, and maintains servers or network infrastructure systems, including security, print, e-mail, and storage. Official job titles include network administrator, system administrator, and infrastructure architect.
- 4–6) IT Pros exhibiting these three capabilities can have wide-ranging expertise and responsibilities that may be identical to those of other groups. Their duties may be roughly divided among the three areas of **server systems and network infrastructure**, **multiuser line-of-business applications**, and **databases and desktop or end-user support or training**. These may be individuals whose primary job function is not IT-related, but who, because of the absence of dedicated IT personnel, assume responsibility for their IT systems. Official job titles include database administrator, applications architect, Web master, and solutions project manager.

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## Information worker (IW)

This is a broad group that is characterized by their personal computing attitudes and behaviors and use both at work and at home. There are seven core dimensions that make up this target audience:

**Super Engaged** are individuals who are early adopters and more likely to be in a technical profession (that is IT, Engineering). They are able to influence others and love technology.

**Enthused Personals** are passionate about technology but only for personal purposes. They will tell friends if they like something.

**Enthused Practicals** are less enthusiastic about technology — are more likely to be an executives or professionals in a strategic role. Friends will ask for input from them on what technology to buy.

**Uninspired Personals** are not that into technology but are a little excited about the potential of PCs for personal purposes only. They are not at all influential in technology decisions and typically look to others for advice.

**Uninspired Practicals** do a lot with the PC but are not emotionally involved. They work in construction or administration and accounting, not in technical or knowledge-focused areas, not influencers, and need to be inspired about technology.

**Uninspired Basics** are intimidated by technology, both at work and at home. Half of this audience share a PC at work. Many don't use a PC for work at all. There are a high concentration in hospitality and food services and retail trade.

**Reluctant Personals** finds technology changes too quickly for them to keep up. Most use a PC for personal purposes only. They are late to becoming aware of new technology.

## Professional developer

Creates software applications, builds complex macros, writes computer code, or develops Web sites for his or her own use, or others' use, at work. They are intensely dedicated and always striving for perfection. These professionals view themselves and their work as highly creative. They often work alone, but have a group mentality and are responsible to the team. Professional developers include architects, ISVs, VARs, and MIS developers.

## Nonprofessional developer

This developer audience also wants products for delivering information to the outside world more effectively. Hobbyist developers create software applications, build complex macros, write computer code, or develop Web sites for nonwork purposes. Part-time or full-time student developers conduct similar activities in academic settings. And end-user developers do the same for "others only" or "self and others" in nonwork or work settings.

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Now more than ever, people are wary of unwanted marketing messages and critical of misdirected marketing efforts. They are protective of their privacy and of their time. But they will react positively to messages that they perceive as relevant and products that will yield some tangible benefit for them.

Subtle changes in tone can have a dramatic impact on response. To make sure your Microsoft direct marketing copy is on target, remember to consult the Brand Tools site for detailed brand information. On that brand site, you will find important background information about the brand's promise, personality, copy guidelines, and messaging guidelines.

The messaging and tone guidelines below will help you write effective copy for Microsoft direct marketing communications.

## Engage your audience.

Use language that is compelling and sparks curiosity. Create a reason to open an envelope or e-mail message. Lead with a benefit or possibly an offer.

Work with your direct marketing agency to develop an offer that is desirable, relevant, and easy to understand and use, one that your customer will view as valuable.

*Most companies find migrating disruptive. But one found \$156,000.*

## Start a conversation.

Use a friendly tone, but don't be too presumptuous; be respectful. Write as if you're starting or continuing a dialogue, not giving a lecture.

A key differentiator in your lead will be whether you are addressing an existing customer or a prospect.

*I'd like to introduce you to the Microsoft® Office System—a set of familiar tools that work together to address a broad array of information work problems.*

## Be empathetic.

It's not just what you say, but also how you say it. Persuasive copy should be reassuring, not condescending or boastful. It should be understanding of customers' needs and show an interest in their goals. It should be optimistic and inspirational.

Place yourself in the audience's mindset rather than the Microsoft mindset.

*The amount of information your employees manage on a daily basis is increasing, and it's essential that they have the latest tools to help them work intelligently and efficiently so that your business will thrive.*

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## Focus on the benefits.

Make the customer the hero. Focus on what the product will do for a customer, not on the product's features. Explain what will be gained in simple, practical terms. Avoid claims of exclusivity. Be realistic about what a product can do for the audience.

A direct marketing message should always answer for the reader "What's in it for me?"

*Your teams will be able to communicate and collaborate more easily, so they can work more effectively. The Microsoft® Office System also features increased document security, in addition to support for the latest industry technical standards.*

## Be clear.

Don't leave room for confusion. Use language that is clear and direct. Write in a manner that is straightforward and devoid of clichés that customers may find insulting. Avoid verbosity and tedious detail.

The reader should finish with a strong takeaway of why the message was written and what to do next.

*With Microsoft® Operations Manager 2005, you can automatically update hundreds of desktops from a remote location.*

## Include a call-to-action.

Specifically detail what the customer should do next and identify the path to fulfillment. Create an intuitive, prominent call-to-action that may include a URL, a phone number, or an e-mail address.

Prepare a tracking and reporting system so you can compare response rates and conversion rates in different media, and measure many other factors that may influence a communication's success.

*To learn more about how the Microsoft® Office System can enhance your organization, visit [www.microsoft.com/greatmoments](http://www.microsoft.com/greatmoments), or call (800) XXX-XXXX.*

## Think globally to write diplomatically.

When you develop Microsoft direct marketing communications, consider your specific target audience, and take into account potential linguistic and cultural differences. Often language translations lose subtle nuances that are important in conveying your idea. Be sure that the phrases and images you want to use will not be lost in translation, or worse, offend your intended audience. If you need additional guidance, please review the Geopolitical Strategy Handbook at <http://gpsweb/>.

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Microsoft is committed to safeguarding customer privacy and security, while at the same time protecting Microsoft interests legally. Comprehensive guidelines for legal, privacy, and security are available on Brand Tools, the Microsoft intranet and extranet sites. Here are some of the main legal, privacy, and security decisions that figure into direct marketing communications.

## Legal

The following are general disclaimers for use in postal mail and e-mail marketing materials. Discuss specific concerns with your business paralegal contact, and who will help you write an appropriate disclaimer. For more legal information in copy preparation go to: <https://brandtools.partners.extranet.microsoft.com/Branding+at+Microsoft/Guidelines/Copy+Guidelines/Legal+Issues+in+Copy+Preparation.htm>.

- Bug Microsoft trademarks as appropriate. Bug third-party trademarks only if Microsoft is required by contract to do so.
- Included copyright notice: © 200x Microsoft Corporation. All rights reserved.
- Trademark footnote listing all Microsoft trademarks referenced in the document. "Microsoft" always appears first; others follow alphabetically. Example: "Microsoft and (other trademarks as appropriate) are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries."
- Trademark footnote for third-party trademarks only if Microsoft is required by contract to include one. If other third-party trademarks are mentioned, include generic footnote: "All other trademarks are property of their respective owners."
- If the piece is for an OEM product: "Microsoft OEM software and hardware are licensed to system builders by Microsoft Licensing, Inc., a wholly owned subsidiary of Microsoft Corporation."
- For postal mail or e-mail with an offer: Include the expiration date, countries in which the offer is available, and make sure other terms of the offer are correctly listed in the legalese if they don't appear in the body copy. Consult your promotions paralegal, who will help you write an appropriate disclaimer or full rules, if applicable.

## Privacy

In general, whether communicating by postal mail or e-mail, give the recipient a clear way to opt in or out, in addition to clear disclosure of any appropriate disclaimers. Go to <http://privus/rulesandguides/rulesandguidesdoc.asp> for current U.S. verbiage or for outside the U.S., go to <http://lcaweb/Privacy/Statements/Guidelines.htm>.

### Promotional direct mail

- Include unsubscribe language.

### Promotional e-mail

- Include unsubscribe language if the piece is promotional.
- Include a disclaimer if the campaign can support only U.S. responses.
- Include the postal address of Microsoft
- Additionally, if a list is a third-party rented list, also include:
  - Third-party permission statement
  - Third-party unsubscribe language
  - Third-party postal address

## Security

Microsoft helps customers face the increasingly complex security issues that are part of everyday use of computers and the Internet for work or play. Security messaging is not always appropriate for certain direct mail communications, but the "Protect Your PC" copy below is recommended at the bottom of promotional emails, although it is not required. Learn more about security at: <http://www.microsoft.com/security/default.mspx>.

### Short version (12 words)

*Help protect your PC from viruses, spyware, and future threats at [www.microsoft.com/protect](http://www.microsoft.com/protect).*

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Although each Microsoft project will vary according to the brand, audience, and medium, applying direct marketing best practices can help you achieve positive results. The following are some questions that you should ask yourself as you develop a concept and create direct marketing communications for any brand:

- Is the “lead brand” prominent in copy, style, and design?
- Is the creative concept effectively expressed in the copy and design of the materials?
- Does the piece capture the reader’s attention?
- Is the copy written in language that the target audience can understand?
- Is this piece easy to scan—logically flows from point to point—and understand?
- Is the copy complete? Does it describe and demonstrate how a product or service can solve a relevant problem?
- Does the piece make use of facts to counter skepticism?
- Have options, such as a headline, Johnson box, subhead, PS, envelope teaser, or subject line, been used to their full advantage?
- Is the offer clear and enticing?
- Is the piece designed to sell or to move the reader along to take action? In other words, is there a strong call-to-action with a physical and provocative presence in the piece?
- Does the communication include the appropriate registration or trademarks for Microsoft products and services, and any required copyright, legal, privacy, or security language?

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We have tried to make this introduction to direct marketing as comprehensive as possible, but it isn't designed to stand on its own. It is most effective when used in conjunction with the following resources:

## [Microsoft Brand Tools Web site brand sections](#)

The Microsoft Brand Tools Web site is your detailed resource for all Microsoft brand strategy, guidelines, and assets for all Microsoft brands. It's updated regularly and provides contact information, fonts, logos, and much more. View the complete menu of Brand Tools at <http://brandtools.partners.extranet.microsoft.com/>.

## [Microsoft.com Publishing guidelines](#)

For the most up-to-date guidelines covering the design of pages on Microsoft.com, visit <https://members.microsoft.com/vendorsguide/> and <http://customerweb/>.

## [Microsoft Direct Marketing](#)

If you have questions regarding this guide or the Microsoft direct marketing process, visit <http://infoweb/dm/> or contact [askdm@microsoft.com](mailto:askdm@microsoft.com).

## [The Direct Marketing Association](#)

For all you need to know about direct marketing regulations, news, and trends, please visit the Direct Marketing Association at <http://www.the-dma.org/>.

## [Legal](#)

For more legal information in copy preparation, visit <https://brandtools.partners.extranet.microsoft.com/Branding+at+Microsoft/Guidelines/Copy+Guidelines/Legal+Issues+in+Copy+Preparation.htm>.

## [Privacy](#)

Always give the recipient a clear way to opt in or out, in addition to clear disclosure of any appropriate disclaimers. Go to <http://privus/rulesandguides/rulesandguidesdoc.asp> for current U.S. verbiage or for outside the U.S., visit <http://lcaweb/Privacy/Statements/Guidelines.htm>.

## [United States Postal Service \(USPS\)](#)

The USPS Web site has tools and resources for designing, packaging, and sending direct mail communications to both U.S. and international audiences. Visit <http://www.usps.com/directmail/>.

Questions? <http://infoweb/dm/> or send an e-mail to [askdm@microsoft.com](mailto:askdm@microsoft.com)

Microsoft customers have come to expect expressive, compelling direct marketing in a wide variety of formats. First, consider what your primary goal is for the communication. Then work with your team, other experts at Microsoft, and your agency contacts to decide what type of message and which medium, whether by postal mail, online, or broadcast, best fits your message.

This section provides templates for some of the most frequently used kinds of direct mail communications, including:

Outer envelope

Letter

Business reply mail specifications

Postcard

Self-mailer

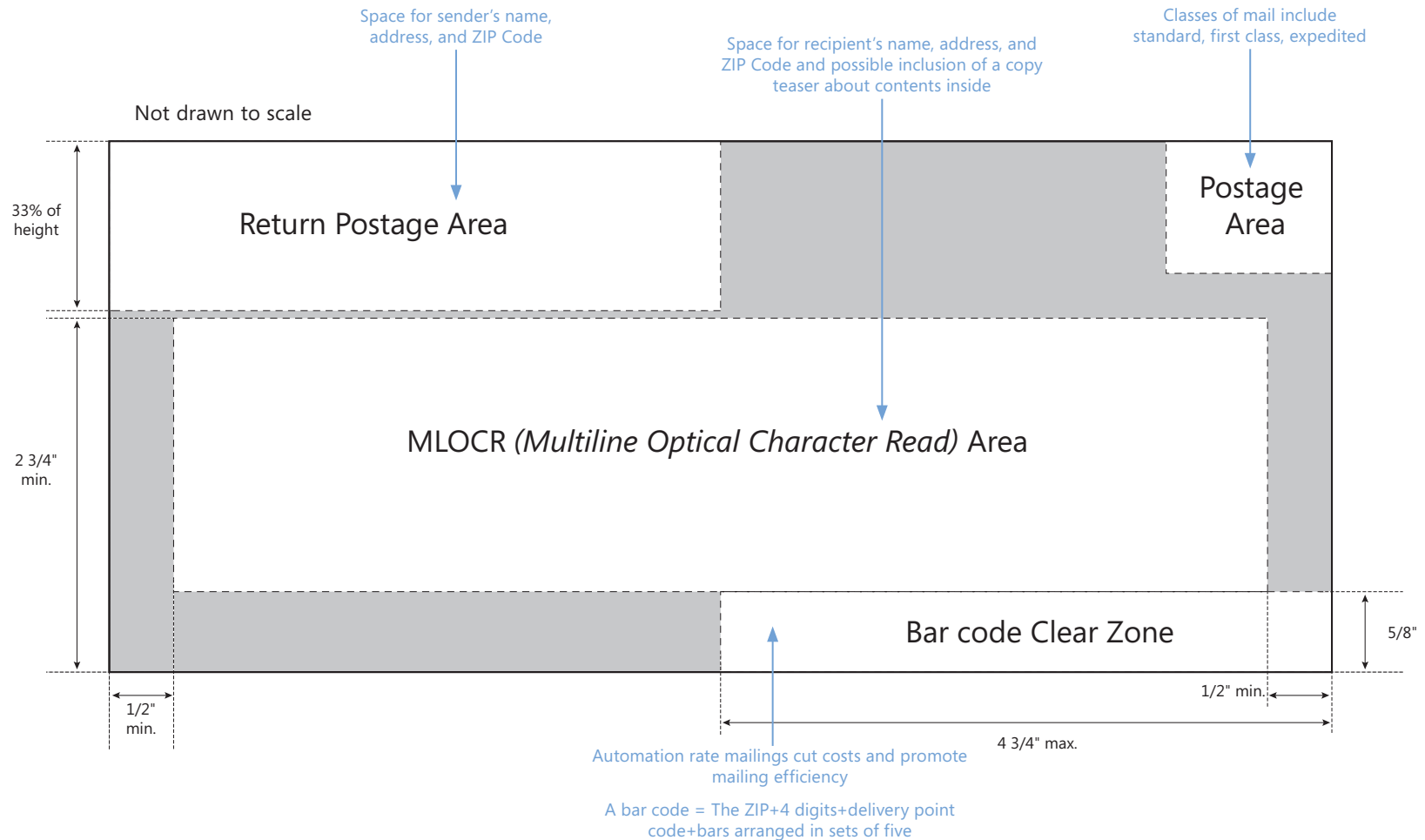
E-mail

Banner

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# Outer envelope template

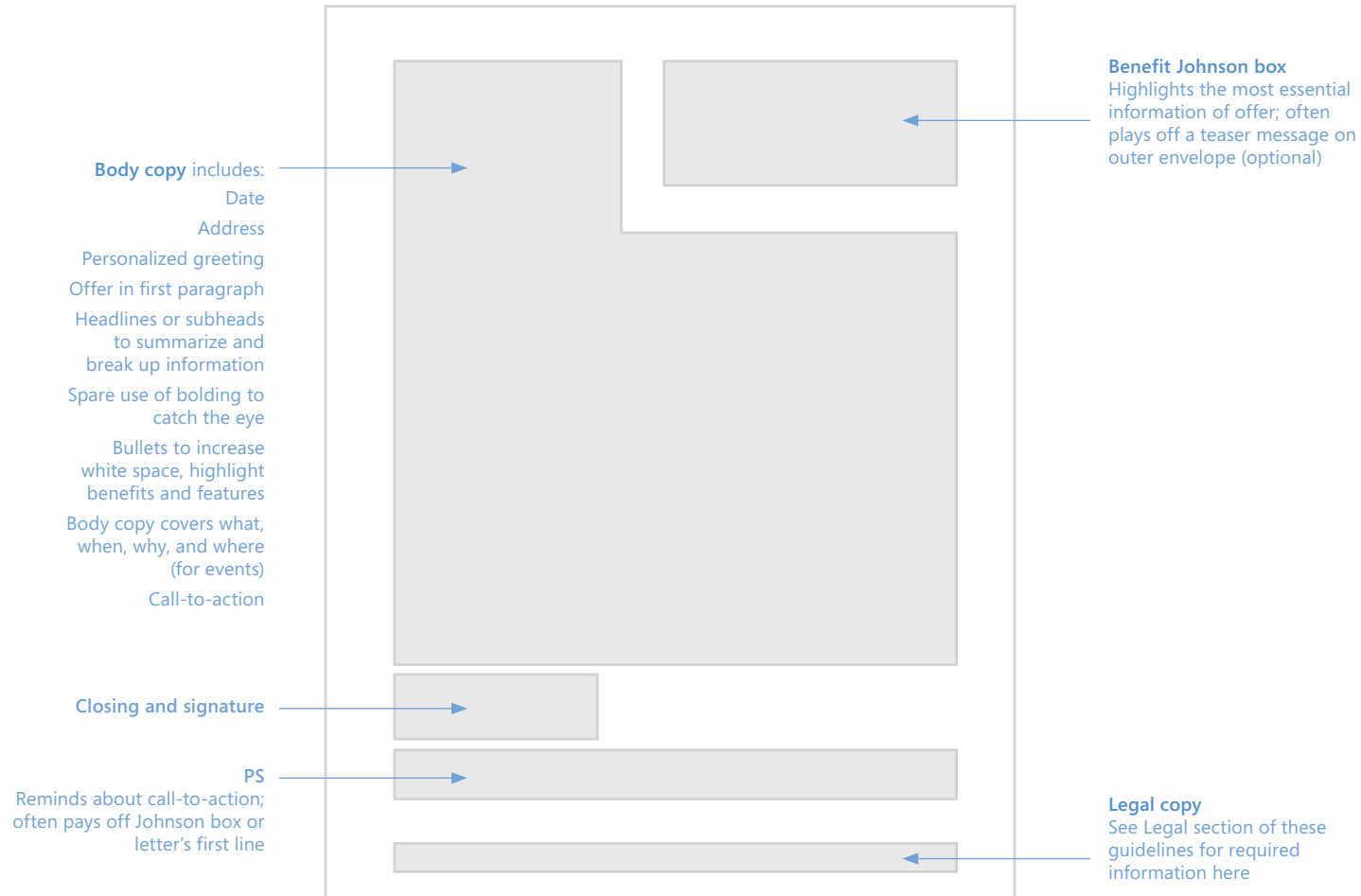
The outer envelope makes a first, crucial impression on the audience. Many prospects and even those already customers will discard the mailing without opening unless they sense that it contains relevant information. A brief, enticing offer message, envelope size and shape, and whether or not to use graphics, are all creative considerations. Here are the standard components of an outer envelope.



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# Letter template

A business letter can simultaneously alert an audience to an offer, describe features and benefits of a Microsoft product or service, drive home brand messaging, and provide a clear call-to-action. Here are the standard components of a direct mail letter.

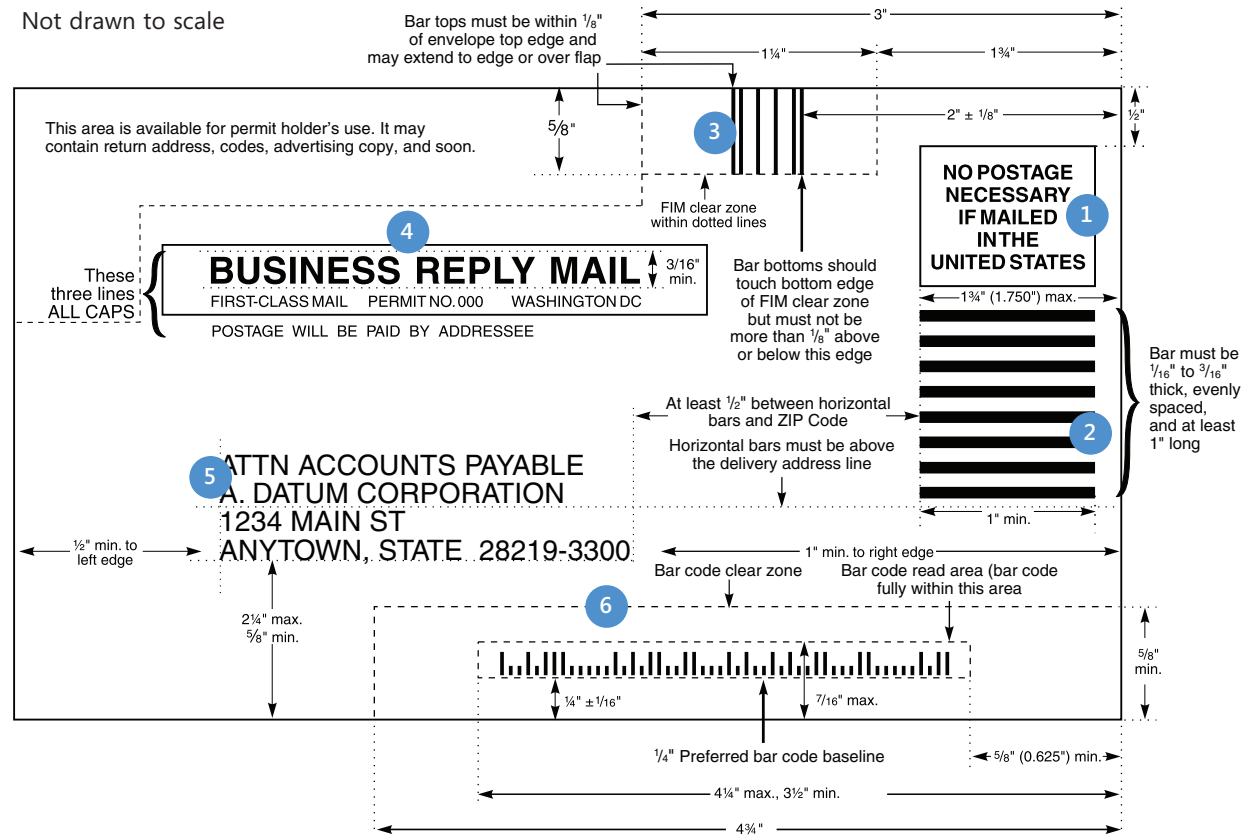


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# Business reply mail specifications template

Business reply mail (BRM) makes it easy and free for a customer to respond to a direct mail communication, and for a marketer to capture data efficiently. The emphasis here is not on creative messaging but following strict USPS guidelines for design. The USPS sets up a BRM account by annual fee. Here are the standard components of BRMI.

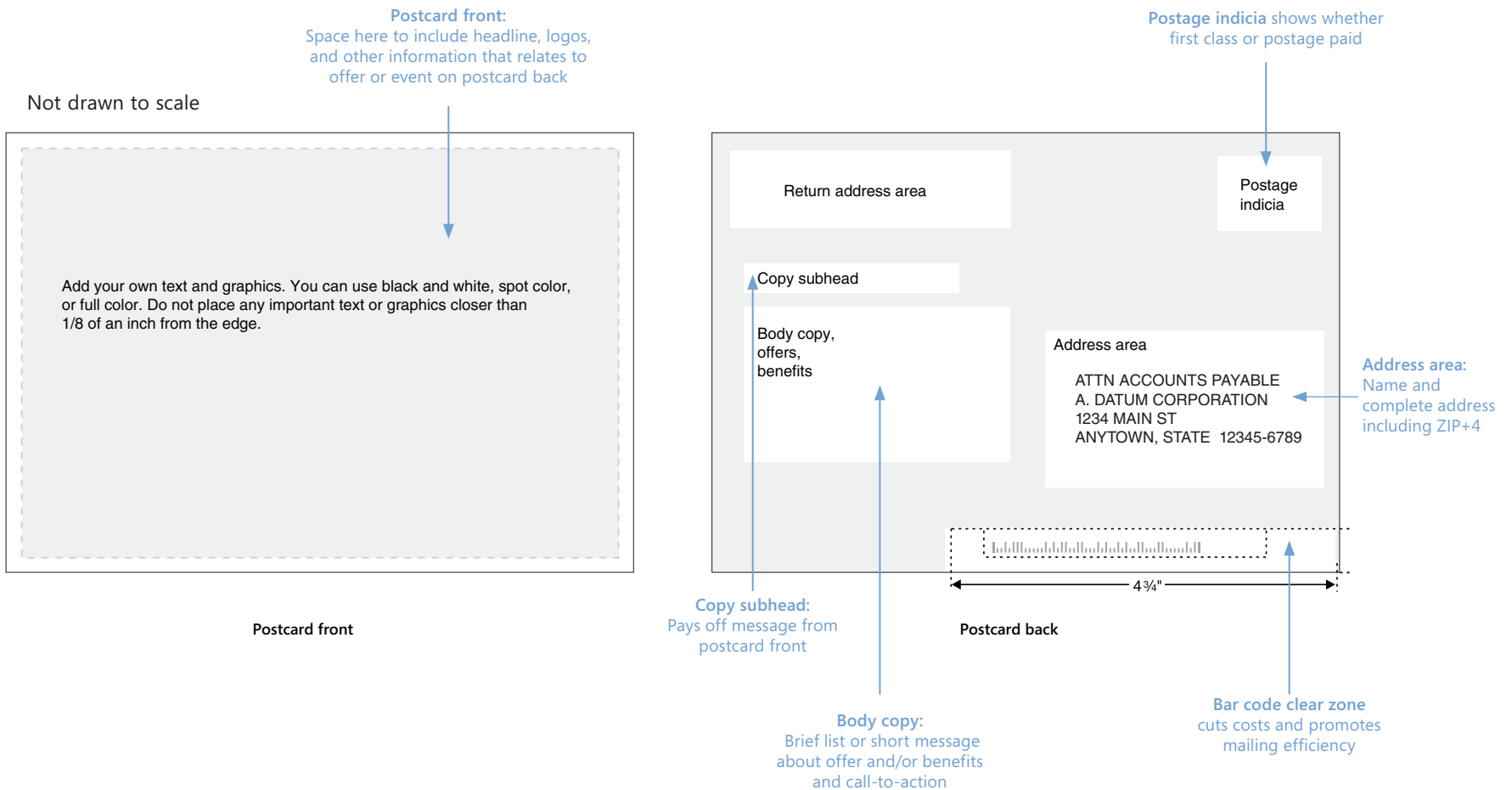
- 1 Endorsement that reply is free
- 2 Horizontal bars help mail clerks know that postage is due from sender
- 3 Facing identification mark (FIM) helps piece speed through canceller machine
- 4 Business reply legend, permit number, and postage endorsement indicate permit holder's responsibility for all charges
- 5 Complete delivery address printed here
- 6 Bar code clear zone cuts costs and promotes mailing efficiency



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# Postcard template

A postcard is ideal for a direct marketing message that involves brief copy, for instance, a reminder following a previous letter or e-mail about an offer or event. Here are the standard components of a postcard.

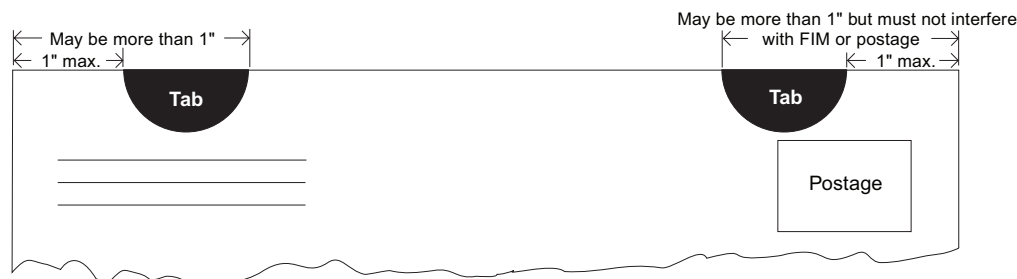


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# Self-mailer template



There are multiple variations of this kind of direct marketing communication, such as folded, double postcard, and folded booklet. Many use perforation for customer convenience. They must all meet the standards for USPS automation. A booklet self-mailer, illustrated below, is folded in half and sealed along the top edge with two adhesive tabs. Here are the standard components for this kind of self-mailer.



## Specifications for automation-compatible letter-size mail pieces

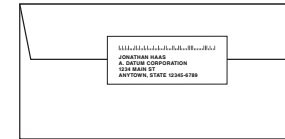
### Double postcard size

Tabs 1 (middle)  
 Folded edge Top or bottom  
 Sheets Single  
 Basis weigh 75 lb.



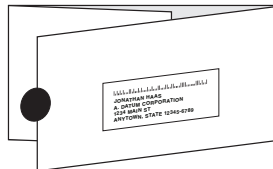
### Folded self-mailer (invitation fold)

Tab Address Label  
 Folds Top and Bottom  
 Sheets Multiple or Single  
 Basis weight 20 lb.



### Folded self-mailer

Tabs 1 (middle)  
 Folded edge Right  
 Sheets Single  
 Basis weigh 75 lb.



### Booklet

Tabs 2 (start  $\leq$  1 inch from top and bottom edges)  
 Spine Right  
 Sheets Multiple with cover  
 Basis weight 24 lb. (Cover)



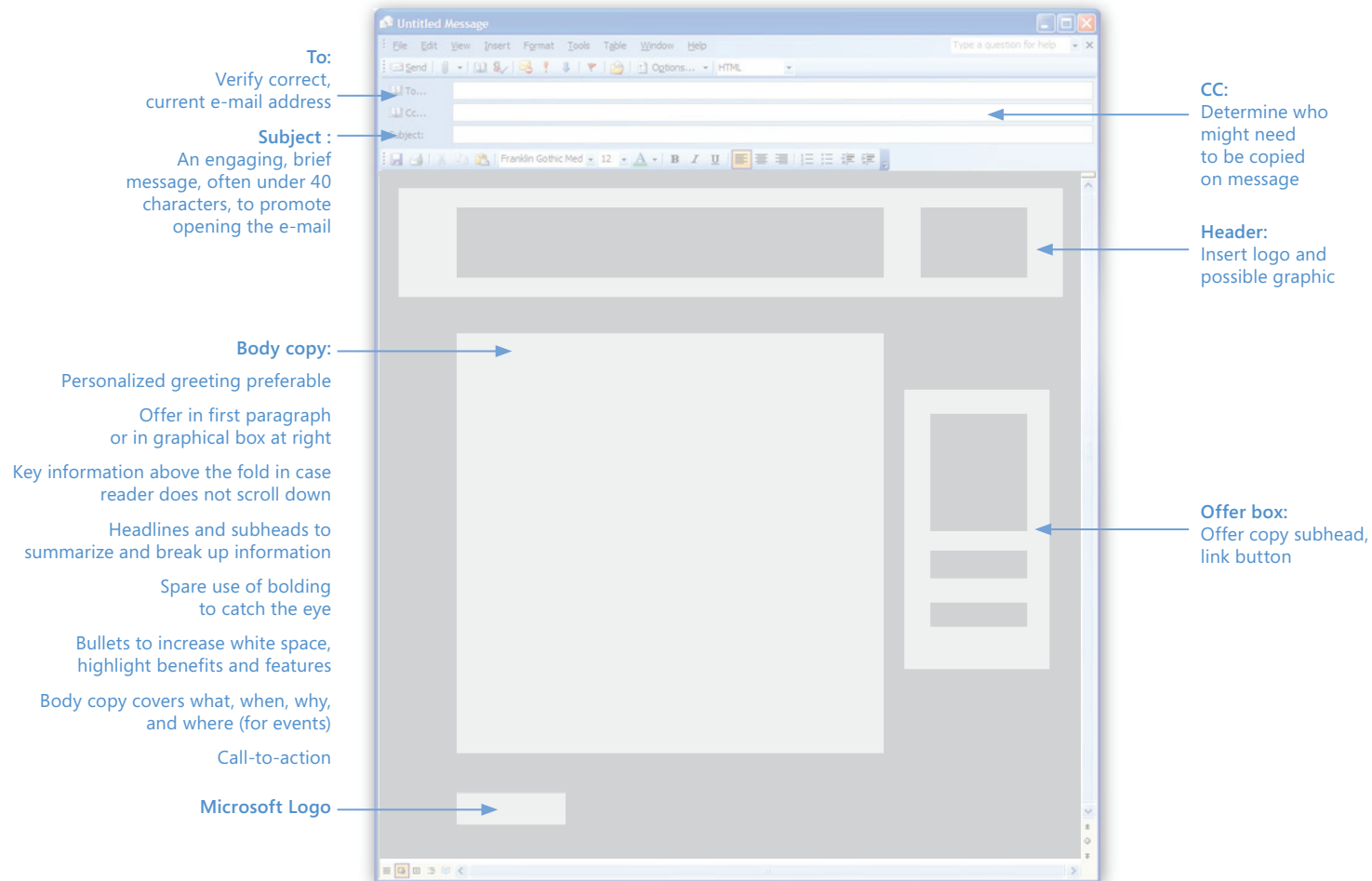
Questions? <http://infoweb/dm/> or send an e-mail to [askdm@microsoft.com](mailto:askdm@microsoft.com)



# E-mail template

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An e-mail message reaches customers or prospects at a time that is convenient for them and when they are most receptive to thinking about business from technology solutions. Work closely with your partner agency to determine whether a print mail letter or e-mail is the best course of action for your goals (often a combined campaign of online, print, and broadcast). For more detailed e-mail publishing guidelines, visit <http://customerweb/marketing/email> or the vendor toolkit. Here is a standard format for an e-mail message.



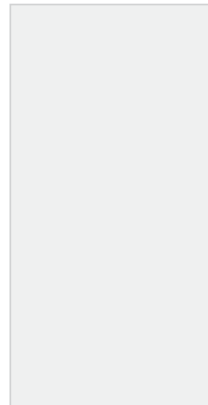
Questions? <http://infoweb/dm/> or send an e-mail to [askdm@microsoft.com](mailto:askdm@microsoft.com)

# Banner size templates

A banner is a brief, colorful image with minimal copy placed online to entice customers to click for more information on a Microsoft product or service. A banner leads to a landing page or Web site for more information about an offer. Banner copy and graphics should be enticing and quickly cover the brand, the offer, and the call-to-action. Logo and product trademark attribution is required in the copy. The following examples are specific to the Microsoft.com style of banner. Visit <https://members.microsoft.com/vendorsguide/> or <http://customerweb/> for more information.

Not drawn to scale

120 x 240 Banner



**Standard Creative:**

- Width: 120
- Height: 240
- Text Length: n/a
- Recommended File Weight: 10k
- Max File Weight: 15k
- MSCOM Served File Types: GIF & JPEG

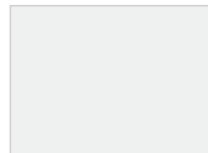
**Flash Creative:**

- Width: 120
- Height: 240
- Text Length: n/a
- Recommended File Weight: 16k
- Max File Weight: 20k
- MSCOM Served File Types: Flash

**Additional Specifications:**

- HTML, DHTML and Javascript/jscript may be accepted. Testing & approval prior to submission is required.
- All DHTML & Flash creative submissions need to have an accompanying default graphic that is shown to users that do not have IE 4.0 or higher.
- Animation is limited to first 15 seconds; continuous looping animation not accepted.
- Flash files require that an FSCommand is embedded in the file. For detailed Flash guidelines, visit [advertising.msn.com](http://advertising.msn.com).
- Creative must feature a 1 pixel border #999999, and have a specific corner style – please see network programming specifications.

120 x 90 Banner



**Standard Creative:**

- Width: 120
- Height: 90
- Text Length: n/a
- File Weight: 5k
- MSCOM Served File Types: GIF & JPEG

**Flash Creative:**

- Width: 120
- Height: 90
- Text Length: n/a
- File Weight: 8k
- MSCOM Served File Types: Flash

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