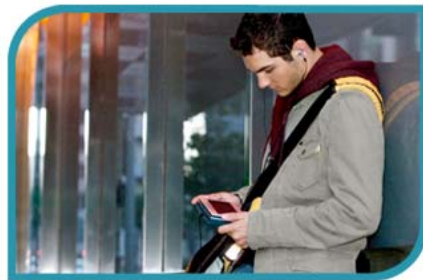




A Harte-Hanks White Paper

Social CRM^x Methodology

Bringing Social into Multichannel Marketing Strategy



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Social CRM^x Methodology: Bringing Social into Multichannel Marketing Strategy

Most companies are thinking today about how social fits into their communications and different groups within the company are taking on responsibility. But social is about relationships, which means that it must tie into Customer Relationship Marketing (CRM) strategies. This white paper provides a view into how marketers can integrate social media into a multichannel marketing strategy, with guidance for the best approach to do this, as well as best practices for the social components to include.

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Introduction

Online consumer behavior is changing rapidly as more people are adapting social media, and it has never been more vital for marketers to keep up with the changing trends. Brands are being discussed openly like never before, and organizations that are not part of the discussion may well be missing opportunities to contribute or unaware of their brand's online reputation. Social networks are a moving target, as people move to the latest trend.

The past few years have brought about changes not only in social sites themselves, but also in the way that consumers are using the Internet. User-generated content began with Internet users creating their own content through message boards and then with blogs, and that was just the beginning. As technology has advanced, users now have many more options to post and share their perceptions and opinions.

Today's social space is quite different from even a year ago, and it will continue to evolve. Trying to make sense of it all, from a marketer's perspective, is a challenge even for someone who is involved routinely in social media. Yet social is here to stay, and will only become a stronger force, which makes it all the more vital to learn and include social media relevantly in marketing programs.

This white paper provides insight into the Social Web, outlines some of the most popular social sites, and shows how marketers can take advantage of the elements within the community, understanding how and when to be part of the discussion. It also provides best practices for engaging in the social space consistently and effectively – a methodology that Harte-Hanks calls Social CRM^X.

Understanding Social

Before considering a marketing strategy that includes social media, marketers must first understand and participate in social media. Social can be found on the Internet, within handheld devices such as mobile phones, gaming systems, and in many new electronic forms of media. Social is a concept that

centers on user-generated content, and further, the ability to post and share that content with others. It also facilitates conversation and engagement.

Concerns have been raised that the Web has somehow replaced the need for human interaction; however, the very nature of social applications allows the interaction to take place and supplement, rather than replace, interactions with others. Many people are connected with their friends and family online, even though they see them frequently. Granted, it is true that people may be connected to others they will never meet, but it is a relationship nonetheless.

To really understand social, marketers must take some steps to participate. Social means different things to different people. For example, one person may participate heavily in the “blogosphere” (a term used to describe the blog universe online) and not ever become a member of a social network. Another may spend hours every day on Facebook, but have never written a blog entry. Anyone who participates in the conversation, using whichever technology best suits them, is part of the social Web.

Social Web

Some marketers feel that social does not need to be part of their marketing strategy. They feel that others are doing it for them (their customers), don't have the resources or are too busy managing the challenges they already have. Not only are they missing the opportunity that social can provide; they are missing the point. The social Web reflects cultural norms, and provides channels to communicate thoughts, ideas and opinions on virtually every topic. Those topics include companies and their business models. There is information that companies need to hear, so one form of social strategy could only include “listening” to the social Web to gain that perspective.

Another common misconception is that social is strictly relevant to a consumer-based strategy. But business-to-business (B2B) marketers have the same challenges and concerns as consumer marketers; their buyers are out on the social Web, making inquiries and learning about products in the same way

that consumers do. And there is no evidence to suggest that B2B buyers behave differently when it comes to research. Everyone uses search engines, which display user-generated content in their search results consistently. In fact, communities are a mainstay of B2B marketing, offering customer support forums and other communities that support marketing and sales.

In this section are some of today's leading social networks and user-generated content technologies, with examples of how they could become part of a marketer's social strategy.

Message Boards

The earliest forms of user-generated content started years ago and continue today, with online communities built on message boards. Message board software offers organization and monitoring tools that make communities easier to manage and more effective for users. Most new users will be able to post their content and participate without learning new technologies.

Message boards are used extensively for customer service-oriented communities, as well as user forums across the Internet. The health of the community is an important metric, as well as timeliness of response.

Companies should be considering these types of communities as part of their customer service and find ways to motivate super users or subject matter experts who participate in the community as they are important resources for the company and the community.

Blogs

Blogs (Web logs) are a mainstay online. Blogs are an influential form of media, allowing the author to create unlimited content on their topics of interest. Blogs are not as community-oriented as message boards. They are more of a way to publish content and get other users' comments or viewpoints.

It is important to understand how blogs fit into the digital experience by reviewing a few statistics. Technorati has indexed more than 133 million blogs¹ since 2002. Approximately 1 million new entries appear across those blogs each day. An engaging topic will keep blog visitors loyal readers over time, while a current event or personal diatribe may only enliven an audience for a short time.

Blogs allow companies to publish content easily on their sites – content that search engines will index quickly, and that potentially will prompt user feedback. Many companies use blogs to post their financial results, or to provide related content that is beneficial to their customers. Some users may provide negative feedback, which the company will need to manage in a positive way. Blog entries now populate search results for nearly any search performed – no matter what the subject matter, someone is talking about it online. To the uninformed, blogs can appear in search results as factual information that can be taken as reliable content.

Social Networks

Social networks are online and mobile destinations that enable conversations and sharing of content. Below several networks are described for their uses and intended audiences, although it is important to note that social network popularity changes frequently, and this is not meant to provide an exhaustive list.

Facebook

It is hard to imagine that only a short time ago, Facebook was only used by college students and wasn't a consideration for a marketer at all. In 2007, nearly 62% of Facebook users were 18-24 years old, with a total of 19 million users in the US.

In January of 2009, total US users had increased to 42 million (60% growth in six months). The 18-24 year olds dropped to 40%; 25-34 years

¹ Technorati, *State of the Blogosphere*, 2009

increased to 26% and an amazing 16% of users were in the 35-54 year old range. By March of 2009, Facebook reported that the users in the 35-54 range had increased to 23%, dropping down the 18-24 year old users to 35%.² And now in 2010, users in the 35-54 age range have increased to over 30%.

So what is causing this surge? Many people feel that mass media coverage of social networking has created some of this effect; it is also a viral and word-of-mouth effort. With more than 460 million users worldwide³, Facebook is a force. If Facebook was a country, it would be the third largest in the world. It is also an opportunity for marketers who are ready to step into the world of the social Web.

Facebook pages allow companies to distribute content to their fans (people who opt-in by "liking" the brand). One of the most important aspects of this content is the context. Sending purely promotional messages to fans is not the point of social media. In contrast to one-way broadcast messages, social media on social networks is about encouraging participation. Marketers will need to find the balance of marketing and engagement; and that balance will vary by company based on its products and services, and its customer demographic.

MySpace

MySpace launched in 2004, and acquired more than 1 million members in its first year. By December 2006, the site had more than 135 million members. MySpace and Google reached an agreement in 2006, in which Google provides the search technology and displays its paid search ads on MySpace, a deal which will be up for renewal in 2010. In 2010, MySpace reports 113 million active users, 70 million of which are US unique users⁴.

² Inside Facebook, Number of Facebook users over 35 doubles in 60 days, April 2009

³ Facebook.com Press Room, June 2010

⁴ MySpace Pressroom Face Sheet, June 2010

Some not so well-known facts about MySpace: more than 8 million artists have been discovered through MySpace Records (now MySpace Music) and YouTube was launched as a widget on MySpace. MySpace made some recent changes, defining itself as a media platform; a place where users can express themselves. It sees Facebook as a place for two-way conversations.⁵ The audience demographic of MySpace has shifted over the years, but has settled toward a younger audience, with its new focus on music and gaming.

If a company is focusing on the current MySpace typical user, it might make sense to explore creating a page on MySpace, but MySpace no longer offers corporate pages through MySpace developers, which may reduce some of the engagement or interactivity that users of previous company pages enjoyed.

YouTube

YouTube has come a long way since its widget days on *MySpace*. The *YouTube* network was founded in February 2005. The site was purchased by Google in 2006. Today, YouTube reports that over 24 hours of video are uploaded each minute of the day. YouTube has 71 million unique users each month and has the 6th largest audience on the Internet.⁶

YouTube provides the ability to post and share video content online. Users have to register to upload video content, although it can be viewed without registration or login. One of the best reasons to post video content, from a marketer's perspective, is the added opportunity that a brand will get from a potential lift in natural search results. Properly optimized video content will appear in Google search results, offering additional listings for a brand. Not all companies have content that is video-friendly, but an imaginative marketing staff may be able to come up with some ideas.

⁵ David Bank, Analyst RBC Capital Markets, reported to the New York Times, 5/09

⁶ YouTube.com Advertisers Channel

YouTube has offered marketers the ability to create their own Channel for several years. The Channel offering includes creation of a customized page, unavailable on free Channel pages, and an online media buy using video advertising across the YouTube network.

LinkedIn

One of the few business-to-business (B2B) social sites, LinkedIn has more than 70 million members in 200 countries.⁷ LinkedIn is a network of professionals, representing 170 industries. The site was launched in 2003, and reached more than 5 million members by 2006. The site had more than 33 million members by the end of 2008, and has more than doubled as of June 2010.

While many people think of LinkedIn primarily as a Human Resources site – one that professionals can use to display their resumé to the world – new aspects of the site seem to indicate a change in its model. The site has recently incorporated social aspects, where users can post their status through “Network Updates”. LinkedIn Groups provide the opportunity for group members to communicate with each other and to start dialogue around topics of interest.

B2B marketers should be considering LinkedIn as part of their social strategy, building community through groups and company pages. LinkedIn also has marketing programs which can be highly effective for B2B marketers, given its reach and targeting opportunities such as banners and pay per click advertising.

Twitter

Twitter is a changing social experience that was created around the concept of “What Are You Doing” and has gone from there. Initial skeptics would have to agree that Twitter has gone mainstream and beyond. Recent

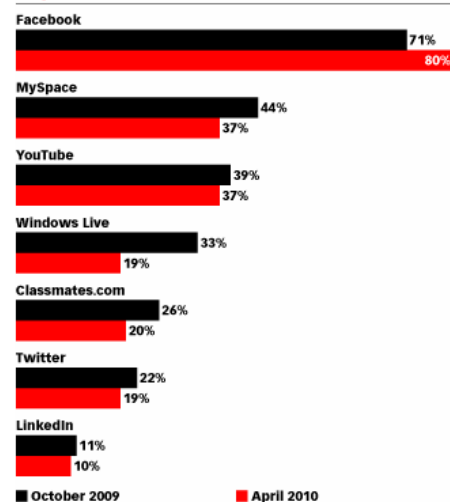
⁷ LinkedIn.com About page, 6/10

reports from eMarketer indicated 19 million Twitter accounts in April 2010 (a drop from 22 million in 2009).⁸

When looking at 19 million people on Twitter as opposed to 460 million on Facebook, also note that Nielsen recently reported that 60% of users fail to return to their Twitter accounts in the first month, probably one of the reasons for the drop in usage.⁹

Twitter uses “micro-blogging”, a short message that is generally less than 140 characters so that it can be distributed as a text message on a mobile phone. The micro blog sometimes uses URLs – Twitter has addressed the length of many URLs by offering “short” URLs that link out to content online. The concept of following people has created new vocabulary as well as new opportunities for marketers. Today’s Twitter is described as a real-time search engine – one that allows people to find the pulse of commentary as it happens.

Social Media Sites on Which US Social Media Users Have an Account, October 2009 & April 2010 (% of respondents)



Note: n=3,011 (October 2009); n=3,000 (April 2010); ages 13+
Source: ROI Research, “S-Net: A Study in Consumers’ Use of Social Media (Wave II)” commissioned by Performics, provided to eMarketer, June 8, 2010
116159 www.eMarketer.com

The Social CRM^x Methodology

Social media is a “game changer” that cannot be ignored. Consumers have the ability to connect with companies and with each other in ways that can be extremely beneficial or detrimental. Whether or not a company plans to use social media to promote its brand, drive sales or accomplish other goals, marketers have to take social into consideration when they launch new campaigns, provide customer service or even send out news releases.



⁸ eMarketer, June 2010, Social Media Sites Where Social Media Users Have Accounts 10/09 & 4/10

⁹ Nielsen, September 2009, Twitter Quitters Post Roadblock to Long-Term Growth

As the rules and definitions of social media change, companies must be light on their feet, willing to make changes and allow the influence of the crowds to infiltrate their marketing messages. Social CRM^X provides marketers with a roadmap – an approach to social and direct marketing – that integrates social into direct marketing and vice versa, with an eye toward customer experience (the X in Social CRM^X).

Social CRM^X also provides insight into customers that has never been available before. Companies can mine social data, revealing lifestyle information that they can use to provide relevant offers or content. They can also identify advocates and nurture them through reputation monitoring. Understanding what to do with this insight is just one of the new challenges facing marketers today.

In short, Social CRM^X provides the data and insight that will help define a social strategy that can be incorporated into marketing efforts.

Below are descriptions of the contributing elements of Social CRM^X that will shape and guide a company's social and marketing strategy:

Social Data

Social data is defined in two ways: reputation/social media monitoring, and social data collection.

Reputation monitoring is used to monitor online conversations and determine positive and negative impact from those conversations. Using technology, companies perform a sweep of the Internet based on Web sites and/or keywords, and then capture the results for evaluation. Some of these services are paid, some are available for free through alert technologies, but all are monitoring online conversations. Marketers gain insight from these conversations by understanding what people are saying about a company, its industry, its products, its competitors, etc.

Many companies today use reputation monitoring or listening as a way to identify advocates. A brand advocate may be blogging about a company or

posting frequently on Facebook. Their content may be praise, but the advocate may also be assisting others by providing recommendations or helping to solve problems. Advocates may wish to engage further with the brand as spokespeople or may be able to assist with a social strategy. Marketers may also view the identification of advocates as a way to start customer referral and loyalty programs, or improve market research activities.

Most monitoring services bring their data into a dashboard that allows marketers to evaluate the daily mood easily through positive/negative status. The technology that collects the information is important in that it needs to look at the right places, allow flexibility in keywords, and flow the data back in formats that can be easily understood. But more important is the usage of the data.

One possible use is to determine if social media is having an impact on active marketing campaigns, or those that are planned. By gauging the positive/negative factors, marketers can set a course of action. Importantly, these campaigns could be online or offline, lead generation or brand awareness, or PR efforts by the company. In other words, even if a campaign is not a “social” campaign by design, social media may have a powerful impact on its performance before or during its run. Social media monitoring helps to capture this impact and use it.

Social data collection is new to many marketers, and is subject to availability and privacy policies. Using this technique, marketers are able to gain useful data about their customers through public profile information available on social sites. Existing customer or prospect e-mail addresses can be used to tap this source of information or an aggregate view of data can be collected through customer names and locations.

Marketers can then append the data available to customer files or use it as a separate data set that they keep apart from customer files. They can look at the data based on customer segments, and gain useful information on how the segments use the social Web as well as how they interact with each

other. Typically, the data will reveal what social sites people use, and their social connectivity.

Both forms of social data – social media monitoring and social data collection – provide insight that companies can use to shape marketing strategy, as well as form a social strategy. Some companies may stay at the listening and collection stage until they are ready to move forward; others may move more quickly to apply social insights to their marketing programs. In either case, gathering the data is a required step to gain a deep understanding of customers in a way that has never been available before.

Competitive Analysis

While social is comparatively new and many companies are nervous about taking the big steps, some companies are taking social head-on.

Looking at competitors can often provide an idea of how customers might behave or interact with each other, although each company will have a different experience based on its unique qualities. Companies with offline locations for customers to visit will have different customer experiences to manage than strictly online ones. Reputation and customer service experiences may well shape the company's strategy.

Don't be afraid to look at related industries, and take advantage of the ability to research some of the more successful companies out there. But remember that it is not all about who has the most fans on Facebook – it is about the customer engagement on those sites. Is the company getting value from its investment and has it integrated social into its other marketing tactics, or is social being left in its own silo?

Social Tactics

Once a company has established its road map, it can develop its tactics. Social networks have their own unique criteria, and it is important to know and understand if the customers use a network and if they are open to a commercial presence.

Most companies might like to provide a pure social outlet for their customers that allows them to create a community, but when investing resources the need to show some type of return on investment (ROI) and marketing impact often comes into play. In today's economic environment, marketers may not have the luxury of a purely social campaign or brand awareness through fun tactics. The social strategy that is right for a company will determine the best usage of the tactics.

Here are some key considerations for each of the most popular types of social media:

- **Social networks:** Determine by demographics which social networks make sense, and define a strategy for each one
- **Blogs:** Inter-company or external facing, the strategy should include who is providing the viewpoints and what are the rules of engagement
- **Microblogging:** Twitter requires time and effort, and a content strategy. Who is doing the talking, and what are they going to say on a daily, if not hourly, basis?
- **Viral content:** Placing video and audio content in shareable environments
- **Widgets:** Whether online or mobile, widgets can enhance social communications
- **Community sites:** Internal or external community sites create social opportunity and require a strong and engaging strategy

Widgets are small and lightweight programs that have a single purpose, and do it very well: for example, a weather forecast or a stock quote tool.

Setting Expectations

Companies must understand the type of resources that they should allocate to social media as well as ensure that company stakeholders understand what to expect. Some of the roles which can be within the company or agencies include:

- The primary stakeholder sets strategy and manages resources

- The manager, who might be internal or an agency, takes care of the day-to-day activities
- The community moderator sets the rules and makes sure users follow them
- Subject matter experts in the company may answer questions, and/or community advocates who can answer questions accurately

Expectations should be expressed to senior management, and best practices should be shared with the entire company. All employees should understand their role and whether they should participate or not.

Ongoing Content Creation

Once the tactics are in place, the content strategy must come next.

Social content is different for every form of social tactic. Twitter content is quick, contains short URLs and often repurposes other content (retweeting). Facebook content plays to the community, looking for the common ground that will engage fans. Blogs could be prose or business technical content. Whatever the tactic is, social content takes work. It is a full-time job for one or more people and is defined by the strategy for the tactic.

Determining how often to post and what the content should be is one of the most important considerations for any social tactic. Balancing between community content and marketing content is an art in itself.

The best way to judge the content strategy is to put it into place, and start to test on the live audience. On Facebook, fans will indicate they “like” a post, or make comments back. This type of engagement is critical to the success of a page, but it is also important to understand that these interactions are taking place on the fan’s Wall (home) page, not on the brand’s page. Marketers are used to driving people to Web sites, but in some social sites that fan may never come to the company’s page again after becoming a fan, and yet still remain engaged and active advocates.

When considering a content strategy, look at marketing campaigns, corporate social responsibility efforts, public relations, human resources, customer service, loyalty programs and other entities within the company. Many of these groups will have something to say, and determining where their content fits in depends on the community strategy. Some pages or sites are based entirely on customer service; others are more for marketing; and some are purely community without any brand intervention at all.

Monitoring and Participation

Monitoring each social tactic is critical. Participants will likely ask questions that must be answered, if this is truly a two-way engagement. Postings with negative content will need to be addressed. Brands that invest in pages and then do not monitor them may end up with problems.

Companies must be willing to communicate back and must pay attention to the comments. A brand that does not participate is worse than one with no page at all. Failure by the brand to tackle problems, especially when asked by its fans to participate, could be disastrous. Policies should be put into place to help manage this aspect of social media. Brands should not respond immediately unless it is a customer service question that can only be answered by the brand. Allow advocates and other participants the opportunity to answer first, and only step in when needed.

Another potential pitfall is the likelihood of management to want to remove content that reflects poorly on the brand. This is a classic mistake usually made at the beginning of one of these projects. While companies should remove venomous or profane content, they should not remove comments from people who are speaking freely. The community of fans will respond independent of the company – probably in defense of the brand – which is the best scenario.

Integration of Marketing

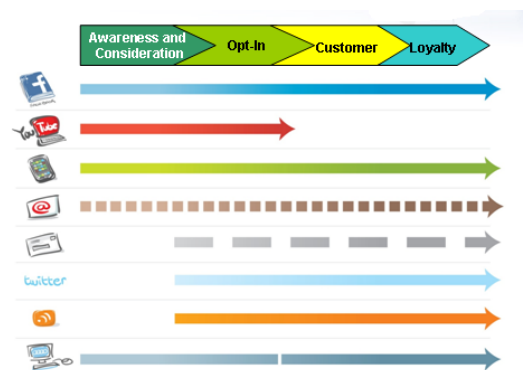
Finally, the integration of social into the marketing mix is critical to success. The level of integration depends on the brand and its strategy, but for most marketers looking to use social networks to drive marketing, an integrated approach is the best bet.

First, considering how to drive acquisition into the social channels, a marketer might want to use engagement ads (see Facebook section) or social media advertising networks. The highly successful campaigns of Starbucks® are an example of Facebook advertising – driving fans into their pages as well as driving store traffic through free coffee and Danish offers.

Adding social mechanisms to e-mails can encourage social “sharing” – allowing customers to post the content of the e-mail on social sites of their choice. (However, the content of the e-mail is critical in determining whether it will be shared.) Many marketers are putting links to their Facebook or Twitter pages in their e-mail footers or as call-outs on e-mails and other customer communications. Direct mail can provide marketers with a way to reach their customers in another channel, but still drive their social behavior.

Companies can also add social sharing mechanisms to Web sites, to allow readers to post the content on their sites or send it to friends easily.

Social data, through data collection or monitoring, can be added to a customer database to gain further insight on customer behavior and lifestyle information. Marketers can use the information in all multichannel campaigns and media sources.



Brands can support campaigns that are happening in local stores or on the Web through social connections. Many retailers are enhancing campaigns through social sites, offering YouTube sweepstakes or Facebook applications to keep their customers engaged in their campaigns.

Campaigns and offline events, as well as corporate PR efforts, news, customer service and many other aspects of a company will drive content strategy. But it is most important to remember that social media is an ongoing effort, one that stretches across the entire customer lifecycle, and should be incorporated into all communications.

Social Technology Changes

It is likely that by the time this white paper is finalized, the social sphere will have shifted. Not only is social technology changing, the social landscape will change as well. Users will shift between social networks, and consolidations of various social networks and technologies may occur.

For marketers, this means that vigilance is necessary to keep up with all of the changes. Social strategy must be fluid, and continually reviewed and changed if it is going to continue to be effective.

Return on Engagement

Marketers may be wondering a few things by now, beyond the definitions of social and how to use it. As with all marketing activities, we have to ask ourselves – what is our return on investment and how do we measure social activity?

In some situations, companies may tie social network campaigns directly to purchases – the Facebook Starbucks® coupons are measurable and the company can link them to additional purchases in their stores. Firms that generate coupons through mobile or social marketing can tie them to purchases

through coupon codes or data capture. Web analytics may provide some of the answers by tracking visitor behavior from social to brand sites.

But a new definition seems to be in order; one that includes the measurement of how customers engage with the brand on various social networks, and within that, each network will have its own definition.

Each social network will have its own measurement, based on how users engage with the brand on each one. On Facebook, marketers measure fans and their participation; on YouTube, views of videos and search engine positioning; on Twitter, retweeting and followers. Other social elements such as blogs and message boards will be evaluated based on views, links and comments.

This may be a soft metric, but what is important is:

- *The number of customers that engage with a brand and converse with others*
- *The advocates that a brand can identify and foster*
- *The potential marketing opportunity if the community strategy is appropriate*

And finally, since people are creating content about a brand, or even entire pages on social networks about that brand, participation by the brand's marketers ensures that the brand is being represented in the way that best serves its interests, and that it is not leaving it up to others to speak on its behalf.

Every site will have metrics that can be looked at for different reasons but the consistent thread is "engagement," and what the overall impact will be.

Best Practices for Social

Elements of social media will continue to unfold as new technologies become available. Understanding best practices is a requirement, in that social brings new definitions and rules of engagement. A separate white paper for best practices is available from Harte-Hanks. Some high level best practices are.

1. **Be Transparent:** Everything is visible on the social Web, and easily tracked.
2. **Ownership:** The company is the host, but the community belongs to the community.
3. **Get Engaged:** Marketers can't really understand social media if they don't participate. Join Facebook, Twitter, write some blogs and get engaged.
4. **Keep it Under Control:** Follow your content strategy and measure responses before adding more content or elements to your social networks.
5. **Plan for Resources:** This is not a part-time job, so be sure to plan who is going to manage, monitor, measure and create content.
6. **Let Content Stand:** Allow the community to respond, and consider carefully before deleting any negative posts.

Going Forward

As the social Web evolves, it will require close attention by marketers to make sure that they are using it properly and taking advantage of it. Social is clearly the “game-changer” – it changes the definition of interacting and engaging with a customer and gives marketers access at a level never available before.

One thing is exceptionally clear – every company needs a strategy for social media, and they need to understand how social integrates and influences the marketing they are doing. Our Social CRM^x methodology will help companies use the social space to its fullest advantage.

Key Takeaways:

- *The social Web is here – and all marketers need a strategy to move forward*

- *There are rules of engagement and best practices that should be understood*
- *Marketers and brands will need help navigating this, and may need additional resources*
- *Data is out there that can be collected and used to drive better marketing across more than the social Web*
- *The key is an integrated strategy – social is not a standalone program*

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