



CO-MARKETING/ CO-BRANDING

Policies + process

What is co-marketing + co-branding

Co-marketing:

When two or more companies collaborate on promotional, marketing or sales efforts that benefit both companies such as jointly executing marketing or sales programs.

Co-branding:

When one brand leverages another to burnish or enhance their own brand position – testimonials, public client lists, corporate sponsorships.

IDEXX co-marketing/co-branding approach

1. IDEXX brand name and reputation are our highest value assets.
2. We vigorously protect our premium position in our categories.
3. We understand that associating our brand name with other companies or organizations poses risks as we do not control the ethics, actions, results or reputations of those entities.
4. For all above reasons, IDEXX only enters into co-marketing or co-branding activities to achieve clear, measurable objectives related to our highest strategic priorities that will drive brand preference among customers or investors in ways we cannot achieve effectively in other more direct ways.
5. Co-branding and co-marketing commitments require serious evaluation and approval by our Chief Marketing Officer, the VP of Global Commercial Counsel and the GM of the relevant business group.

DO: IDEXX co-marketing/co-branding

IDEXX enters into co-marketing or co-branding activities to achieve clear, measurable objectives such as those enumerated below.

1. **To fill a real or perceived gap in customer service.**
 - a. UPS – Press release announcing vendor partnership provided reason to believe for customers that IDEXX could go direct.
2. **To provide a proof point for investors.**
 - a. UPS – Press release announcing vendor partnership provided reason to believe for investors that IDEXX could go direct successfully.
3. **To build credibility via 3rd party validation.**
 - a. Catster for pet owners, IRIS guidelines for SDMA, CAPC, AAHA, AAFP, JAVMA.
4. **To enhance our brand position in an area of weakness.**
 - a. Very rare, almost never as we are clear premium brand and market leader in category.
 - b. Show compassion and hit customers emotionally via non-profit sponsorship.
5. **To access new customers or to increase # of customer touchpoints.**
 - a. Hill's and SDMA.
6. **To support a marketing priority set by the Executive Management Committee.**
 - a. UPS – to support go-direct execution/implementation
 - b. Hill's – SDMA 10-point plan
 - c. Catster – SDMA 10-point plan
7. **To demonstrate thought leadership.**

Examples of co-marketing + co-branding

Requests for official/public endorsement by IDEXX by vendor, customer or partner.

Any story in any format talking about IDEXX product and services or how IDEXX uses a product/service or work.

1. Testimonial:

- a. Quote
- b. Video

2. Case study:

- a. Video
- b. Podcast
- c. Print
- d. Online

3. Appearance at vendor conference:

- a. Panel discussion
- b. Presentation

4. Press release: 40 day process – CEO approval

- a. Vendor release with quote from IDEXX
- b. Joint release
- c. IDEXX release

Litmus test. Ask yourself:

1. Does IDEXX want CEO or CFO to be asked a question about this by an investor?
2. Does IDEXX want to prepare VDCs to respond to questions from customers on this topic and spend time discussing with customers rather than their sales goals?
3. Is this the message that will drive sales or stock price?
4. Is the primary benefit tied to the company's highest level business and marketing priorities as established by senior executives?
5. Do we want this message broadcast globally online?
6. What is the operational cost – time required v. reward/benefit?

Non-marketing reasons for requests

Evaluating a few common assumptions

- 1. ASSUMPTION: It's free. We get an asset for 'free' and free exposure.**
 - 1. Reality: Nothing is free.**

The organizational + operational costs are very high for these projects and risk moving teams off of higher priority work tied to strategic objectives. Time and energy is required from senior executives, marketing leaders and the chief legal counsel that should be focused on only the highest strategic business initiatives.
 - 2. Reality: Not all exposure is good or manageable.**

Public co-branding includes avoidable risk to our market & competitive positions. We cannot control the reputations of other brands or how they work with our competition.
- 2. ASSUMPTION: It will help build a relationship with important vendor.**
 - 1. Reality: Most do not help in a significant or measurable way tied to concessions.**

Very rarely does it help drive a high level business strategy or major concessions.
 - 2. Reality: We fear saying no to a trusted partner will hurt the relationship or be uncomfortable.**

We have developed a process to make this easier when asked and no big upside.
- 3. ASSUMPTION: We need it for leverage in contract negotiations.**
 - 1. Reality: These activities seldom if ever give us significant leverage in negotiation.**

Our position as the premium brand and market leader is our best leverage.
- 4. ASSUMPTION: We need this exposure or co-branding to drive talent acquisition.**
 - 1. Reality: As a \$1 billion company on the S&P 500, we should proactively develop strategies where this is a priority and invest in campaigns and formal co-branding partnerships.**

We are actively working with the CIO, Chief Software Engineering Officer and VP of VSS on funded PR strategy to build IDEXX reputation as a tech company to attract talent. We hope to launch this in 2018. Should it make sense, it may include co-branding.



Incoming request process

What to do when asked to participate in a co-branding or co-marketing activity.

1. Evaluate whether doing it is in line with the IDEXX approach on slide 3.
2. Ask yourself the questions on slide 5.
3. If yes to both, email the request to cobranding-request@idexx.com. The following people will be automatically be copied:
 1. Robin Woodcock (RW) – Leader Public Relations
 2. Elizabeth Hunt (EH) – Leader Media Strategy + Marketing Communications
 3. Thomas Blass (TB) – Leader Global Procurement
 4. Matt Forsyth (MF) – Chief Commercial Counsel

General decision-making process

The leader of PR + Earned Media is **A**ccountable for the company's reputation and garnering non-paid media coverage. As such, they are **R**esponsible for both shepherding these requests through the decision making process outlined below and as your primary point of contact for the decision.

1. Within 48 hours of your email, Robin Woodcock (RW) will reply with a timeline, next steps and boilerplate for you to incorporate in your response.
2. Within 72 hours of your first email, RW will evaluate request against criteria on slide 3 and move it on to the Yes or No next steps:

1. YES NEXT STEPS

1. If it meets baseline criteria, Robin will move to review with EH, TB, MF
2. If still yes, it will be fast tracked for review with CMO and CEO
3. If still yes, Marketing Communications will develop a high level strategic approach with RACI, campaign architecture, key messages, rollout, KPIs.
4. Marketing Communications will set up a call with requesting entity to begin collaborating

2. NO NEXT STEPS

1. Response with explanation for vendor, copying EH, TB, MF, CMO

Quick requests/decisions - non-endorsements

- Some requests do not involve an explicit endorsement. If a vendor is seeking to publicly include IDEXX on their client list or show an image of the product in their annual report, the process would be as follows:
 1. Evaluate whether doing it is in line with the IDEXX approach slide 3.
 2. Email the request to cobranding-request@idexx.com and copy your manager and the Director in your organization.
 3. Within 72 hours of your email, RW will evaluate the request against our criteria, verify with your Director and send you a response that grants permission.

Sample boilerplate responses

IMMEDIATE RESPONSE TO REQUEST

Thank you for considering IDEXX for [insert opportunity description]. We value our relationship with [insert organization name]. In response to all co-branding and co-marketing activity requests, IDEXX initiates a 30-day review process to ensure we are best prepared to maximize the positive outcome for all participating organizations. Once a decision has been made, you will receive a follow-up email from me.

NO RESPONSE

Thank you again for considering IDEXX for [insert opportunity description]. Because we value our relationship with [insert organization name], we gave this careful consideration. After a thorough analysis, we have determined [insert opportunity] does not fit into our current marketing priorities. We look forward to continuously to explore ways to enhance our relationship with [insert organization name].

YES RESPONSE

Great news. IDEXX is interested in learning more about [insert opportunity description] with [insert organization name]. As a next step, a phone or in-person meeting will be set up. You will receive an email or call shortly from [insert Responsible MarComm team name] copied here. This person will be your single point of contact going forward on this project and will outline the process moving forward. Thank you again for thinking of IDEXX.

Common vendor requests

CO-BRANDING

- Using IDEXX name/logo in their list of customers - published in company presentations or on website
- Using pictures/names of IDEXX products - in their company presentations or on website
- Using IDEXX name/logo/product references in their press releases or other marketing announcements
- Mentioning IDEXX/IDEXX products or services in other publications e.g. annual reports, 10K or internal literature
- Request to get approval to either display a specific part, component or assembly at a trade show
- Use of IDEXX name/logo when IDEXX (i.e., VSS) requests that we 'white-label' a solution such as Weby web hosting – which is to our customer base
- IDEXX Suppliers or Customers prominently posting “WELCOME IDEXX LABORATORIES”, along with IDEXX branding logo, on a sign/screen in their lobby when IDEXX guests are expected to visit their site

CO-MARKETING

- Press release – joint press release; quote by IDEXX person in press release
- Video, podcast featuring IDEXX employees giving testimonial or use case endorsement at IDEXX or another venue
- Asking an IDEXX team member to be available as a reference for a potential new customer
- Inviting an IDEXX team member as a presenter/speaker at one of their events
- Supplier showing manufacturing equipment/setup (being used to produce IDEXX products) to other companies during their on-site visits
- Case studies, or some other industry-related information sharing (e.g., Microsoft, SAP or Oracle)
- Suppliers using IDEXX as a customer case study (e.g. Big Machines)
- Suppliers referencing not only the IDEXX name and logo, but also employee names who are not approved spokespeople and IDEXX corporate information,
- Use of IDEXX logo in temporary hire postings. The IDEXX brand carries a lot of weight in the local market. Typically, we do not allow temporary staffing agencies to use our logo when they run adds on our behalf.



APPENDIX

IDEXX spokespeople

Training + branding conference speakers

IDEXX spokespeople

Only approved employees for quotes, testimonials, video, podcasts, interviews, etc.

- **Investor, Corporate, News, Innovation, Leadership, Technology**
 - Jonathan Ayers
 - Jay Mazelsky
 - Pat Venters
 - Brian McKeon (investor)
 - Kerry Bennett (investor)
- **Crisis**
 - Elizabeth Hunt
- **Human Resources**
 - Giovanni Twigge
- **Commercial**
 - Jim Polewaczyk
 - George Fennell
- **Reference Labs Business**
 - Mike Lane
 - Leif Lorentzen – BioAnalytics
 - Dana Belisle – Operations
 - Tony Caola – Strategic Innovation
- **Reference Labs Tests**
 - Dr. Roberta Relford
- **Rapid Assay - Parasites & VBD**
 - Dr. Missy Beall
 - Dr. Sarah Sweet
- **SDMA + SediVue**
 - Dr. Jenn Ogeer
- **Chemistry + Hematology**
 - Dr. Graham Bilbrough
- **RealPCR Tests**
 - Dr. Alexis Seguin
- **Software Products & Services**
 - Mike Erickson
 - Rachel Houlihan
- **Digital Imaging**
 - Dr Michael Bailey (DR50)
- **Water**
 - Darren Alcock
 - Kristin Majeska (Legiolert)
- **Livestock, Poultry & Dairy**
 - Oliver te Boekhorst
 - Frank Winslow
- **International**
 - Kathy Turner
 - Cleveland Ngan

IDEXX IT conference speakers

To build capabilities and hone the IDEXX IT story, the earned media team is partnering with IT leadership to identify a roster of speaking talent that can be deployed to the most influential technology conferences to position IDEXX IT as thought leaders, a great place to work and thereby attract top IT talent to IDEXX.

○ NEXT STEPS

- Create the IDEXX IT story
- Develop earned media strategy – PR, Social, Viral
- Create a deck that:
 - Tells IDEXX Story + IT story
 - Can be customized to be relevant to conference and topic
 - Serves as a the foundation for IDEXX IT conference presentations
- Train IT Conference Speakers
 - General public speaking training
 - IDEXX talking points training
 - Training on the IDEXX IT deck