IHS Markit Accomplishments Review

Q1 2022

demandlab

Today's **Agenda**

demandlab

IHS Markit 2021 Review
Strategy, Projects, and EOY Goals

IHS Markit 2022 Progress
Q1 Accomplishments

Activation Plan
Visualization & Process Map

Our Partnership
Goals Review & Forward Strategy

IHS Markit 2021 Review

Strategy, Projects, and EOY Goals

2021 Summary of Strategic Approach

Most Strategic Content:

- PRC & IS&GI+ECR
  - 9 combined strategic messaging projects

Most Awareness-Focused:

- Solutions & Info. Services
  - 17 combined thought leadership assets and cross-collaborative strategic messaging docs

Most Customer-Centric:

- IS&GI+ECR & PRC
  - 16 combined educational and journey-nurture campaign projects
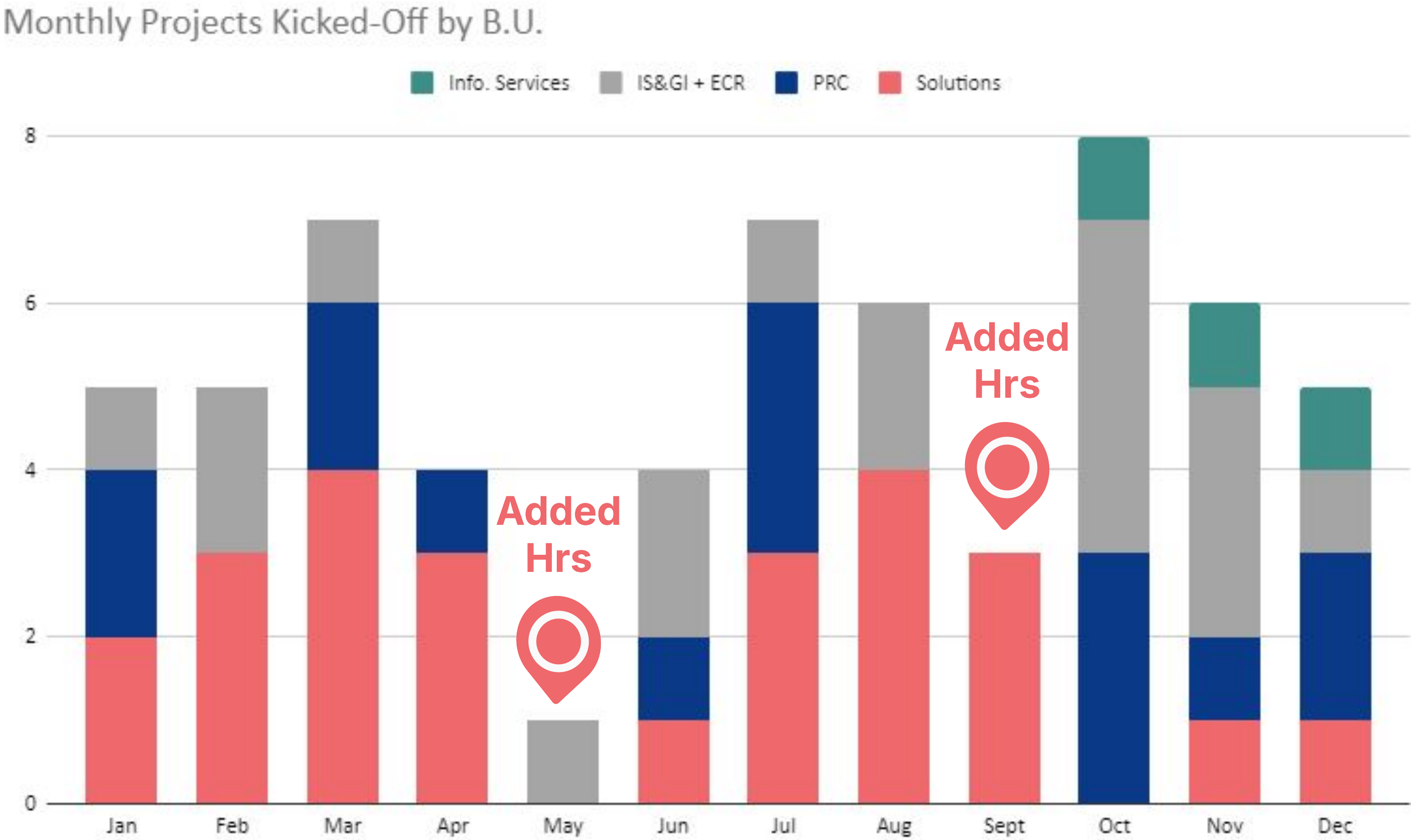
16% Strategic Messaging

37% Thought Leadership Awareness

33% Education, Engagement & Nurture

14% Sales Enablement

63 Content Projects Total

2021 Content **Projects Started Monthly**

Monthly Projects Kicked-Off by B.U.

Info. Services · IS&GI + ECR · PRC · Solutions

Added Hrs

Added Hrs

Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec

2021 Content **Projects INDEX**

demandlab

Solutions

ESG - Private Markets
1. ESG Data Management blog
2. SuperTechnology ESG blog
3. Private Markets ESG blog #1: How ESG is impacting alternative asset investing
4. Private Markets ESG blog #2: Creating and reporting on ESG impact in private markets
5. Private Markets **Connectivity Video Script**
6. Private Markets **ROI Study** blog
7. Private Markets - Hedge Fund Private Assets blog

EDM
1. EDM - Maritime/Build-or-Buy blog
2. OSDU blog (EDM for Energy) blog
3. EDM professional services blog
4. EDM business case blog
5. EDM Business case and change management blog
6. EDM SaaS **white paper**

OTHER
1. Solutions **case study**
2. Transcription: Tullow case study
3. Women in Data & Tech Awards blog
4. SuperTechnology LP Tech blog
5. SuperReturn private debt blog
6. Loan Platform blog - 2
7. PEStack blog
8. iLEVEL **ROI study**
9. Allianz transcription
10. thinkFolio/Cloud Attribution partnership news
11. Port State Control (PSC) interview

PRC

Securities Processing
1. Securities Processing email drip **campaign**
2. Securities Processing factsheet

KY3P CPO
1. KY3P/CPO **messaging**
2. KY3P CPO sell-sheet
3. CPO advertising for Haymarket
4. CPO - TPRM blog
5. CPO - email drip **campaign**

New PRC Tax Reconciliation Solution
1. Product **messaging**
2. Fact Sheet
3. Blog

OTHER
1. PRC Managed Services blog
2. AVS factsheet
3. Tax webinar takeaways blog
4. Counterparty Manager/Product Certificate Compliance **messaging** and collateral
5. Custodian **messaging** & assets

Issuer Solutions +ECR

Capital Access
1. **Messaging**
2. Landing page
3. Video script
4. Brochure

POLI
1. POLI - blog1 (continuation of planned work)
2. POLI - blog 2
3. POLI - blog 3
4. POLI - email nurture **campaign**
5. POLI social media **campaign** content to complement

Supply Chain
1. Supply Chain - **campaign** emails and blurbs
2. Supply Chain video + graphics
3. Supply Chain **messaging**

Foresight
1. Foresight email nurture **campaign**
2. Landing pages
3. Foresight Q1 **messaging**

OTHER CONTENT PROJECTS
1. Geopolitics Conference naming
2. New Market Entry - brochure
3. Issuer Solutions **pitch deck**
4. Investment Manager Index - Financial Svc. webpage
5. Cities **messaging**
6. ESG **messaging** development - Issuer Solutions

Information Services

Q4
1. Initial Margin **Campaign**
2. Cryptocurrency **Messaging**
3. Global Markets Group blogs

2022 **Goals** *(as of EOY 2021)*

Customer-Focused Messaging

Create core messaging and content that is more customer-centric and outcome-focused, shifting from historical product-focus. Content should reflect common themes based on customers' desired outcomes and move away from siloed, product-specific messaging.
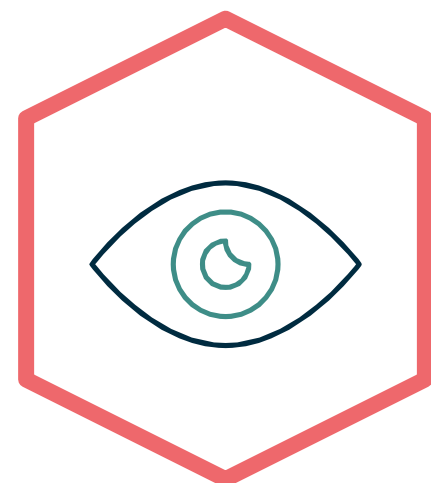
Content Mapping & Activation

Map and create campaign content based on segmented messaging themes to improve in-market efficacy and production efficiency. We can partner with you to analyze data sets and engagement trends to identify motivators and increase audience engagement through strategic messaging.

SPG Migration Support

Prepare to dynamically complement to your team's resources where specialized support is needed, whether improving past content or consolidating brand voices to create new messaging going forward.

2022 Q1 **Summary**

demandlab

Strategy:

- Strategic messaging - cohesive customer journey
- Improved campaign processes - Activation Plan process template & visualization map

Customer-Centricity:

- Cohesive messaging across BUs -
  - Cross-business-line collaboration
  - Outcome-focused messaging & approach (shifted from product-focus)

Activation:

- Effective campaigns & assets -
  - Aligning tactics to the customer journey and business goals
  - Sales enablement

19 Projects COMPLETE

51 Projects Started
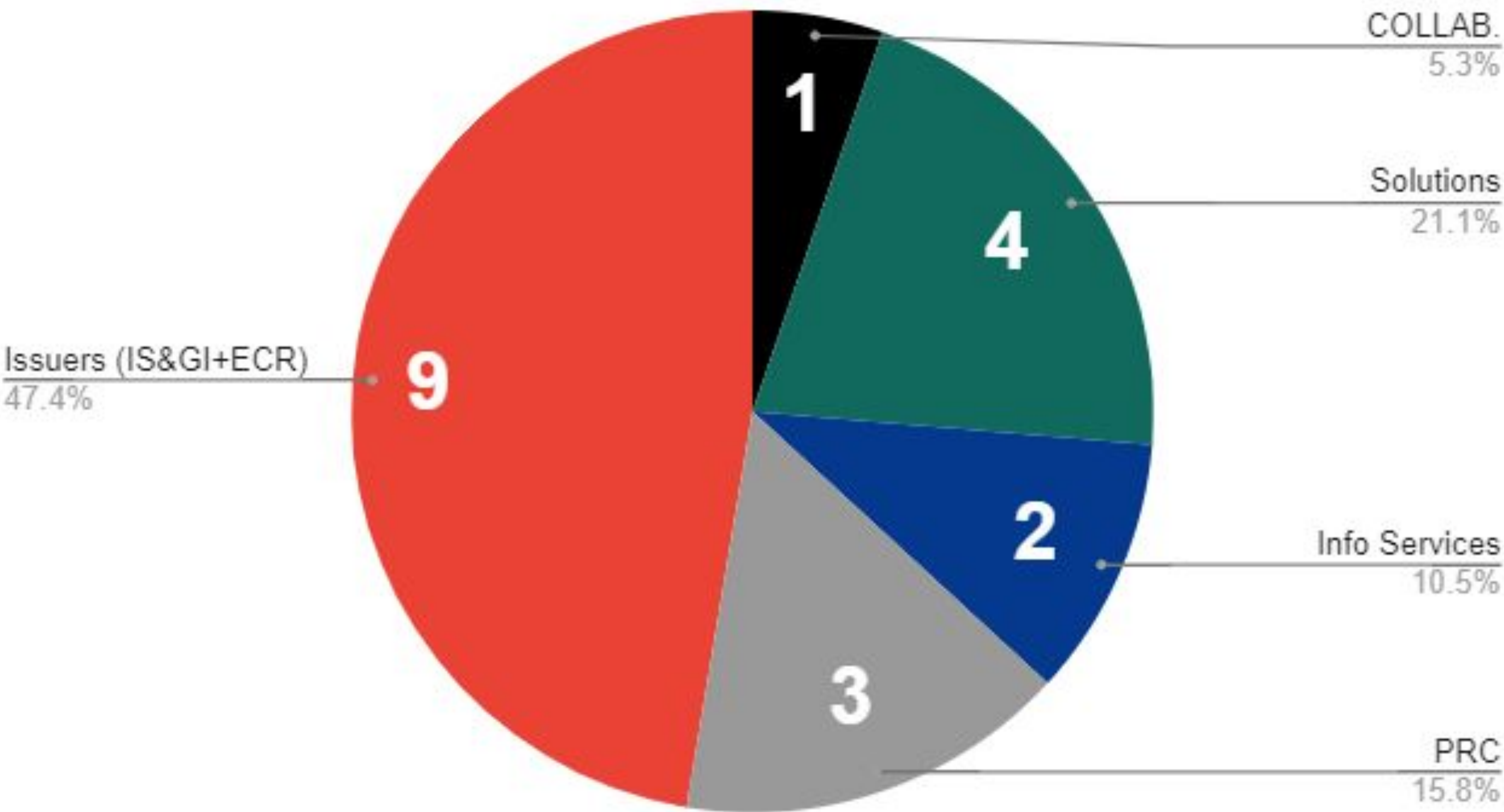
32 Active Projects

4 Collaborative Projects across BUs

3x Projects Started as Q1 2021

Pacing to achieve more than double '21 projects in '22
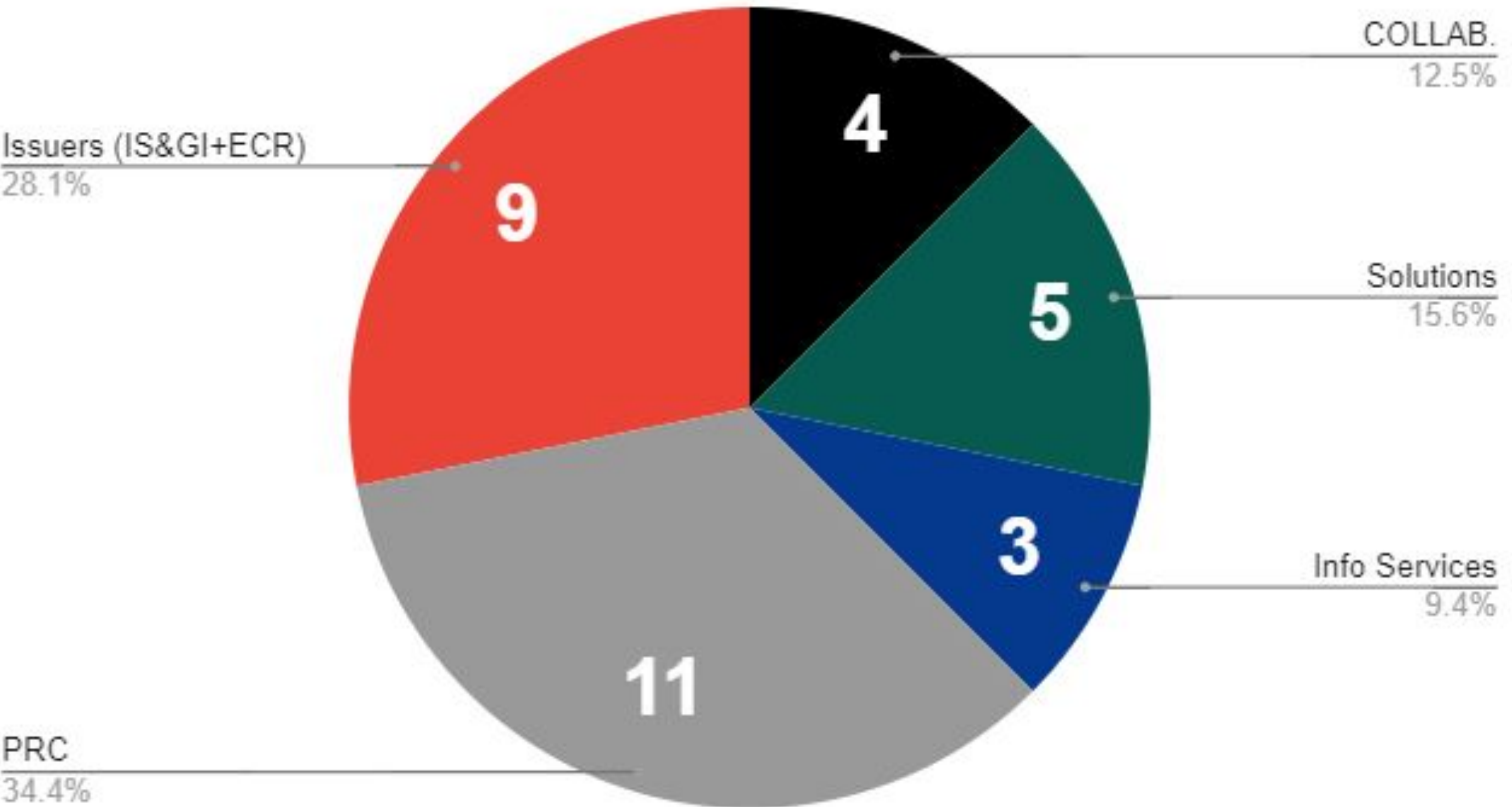
Q1 Content COMPLETED Projects by BU

Q1 Completed Projects (19)

COLLAB.
5.3%

Solutions
21.1%

Issuers (IS&GI+ECR)
47.4%

Info Services
10.5%

PRC
15.8%

Q1 Content Active Projects by BU

Q1 Active Projects by BU (32)

- COLLAB. 12.5% — 4
- Solutions 15.6% — 5
- Info Services 9.4% — 3
- PRC 34.4% — 11
- Issuers (IS&GI+ECR) 28.1% — 9

demandlab

Active Projects

Q1 Accomplishments by Business Unit

demandlab

Solutions Projects

Completed

1. Tax Reconciliation Tool - Master Deck
2. Irradiant Partners Case Study
3. Solutions - thinkFolio - Blog
4. Solutions - Private Markets - Small Firm Data Challenges - Blog Post

Active

1. Solutions - EDM - Case Study
2. Private Equity Tech Adoption - Blog #1
3. Private Equity Tech Adoption - Blog #2
4. Redwood Capital Press Release
5. (Whitepaper placeholder)

PRC **Projects**

demandlab

Completed

1. Product Certificate Compliance Update - Fact Sheet
2. Product Certificate Compliance Master Deck
3. PRC - KY3P - Email

Active

1. Corporate Actions / Securities Processing FY22 Key Themes and USP's Exercise
2. 2022 Award Nomination Submissions for Corporate Actions and Securities Processing
3. Product Certificate Compliance Update - Video Ad Script
4. CA/SP Case Studies
5. Custodian Email Drip Campaign
6. Custodian Brochure
7. Corporate Actions Email Drip
8. Global Custodian Awards Submission for IHS Securities Processing Custody Solution
9. Key Takeaways Blog Post - SIFMA/FIA Asset Management Derivatives Forum 2022
10. MI-NRS-Brochure
11. Tax Utility - MTU Integration Video Script

Issuer Solutions + ECR Projects

Completed

1. IS&GI strategy session + 2022 content mapping
2. ESG ETF Investment Pulse - Email + Ads
3. ESG ETF Investment Pulse - Webpage
4. Capital Access - Social Media Ads
5. Capital Access - Email
6. ESG Messaging Development (Issuer Solutions)

ECR

7. Supply Chain - Promotion of New Dan Yergin Report (Email Drip, Social Ads & Lumen5 Video Copy)
8. Geostrategy 2022 Campaign + Webinars
9. ECR - Top-10 Economic Predictions for 2022

Active

1. Issuer Solutions - Investment Manager Index - Financial Services - Email
2. Issuer Solutions - Investment Manager Index - Financial Services - Social Ads
3. S&P RASS Messaging Framework
4. Perception Analytics

ECR

5. ECR - Stress Testing - Campaign
6. Stress Testing Scenarios - Case Study
7. Regional Explorer Components
8. Free Trial Emails (2) & Social Copy (2)
9. Supply Chain Report & Assets

Information Services **Projects**

demandlab

Completed

1. Initial Margin Campaign Blog 2 - Prepare for Backtesting
2. Cryptocurrency Webpage

Active

1. Cryptocurrency Brochure
2. Cryptocurrency Infographic
3. Global Markets Group Blogs (3)
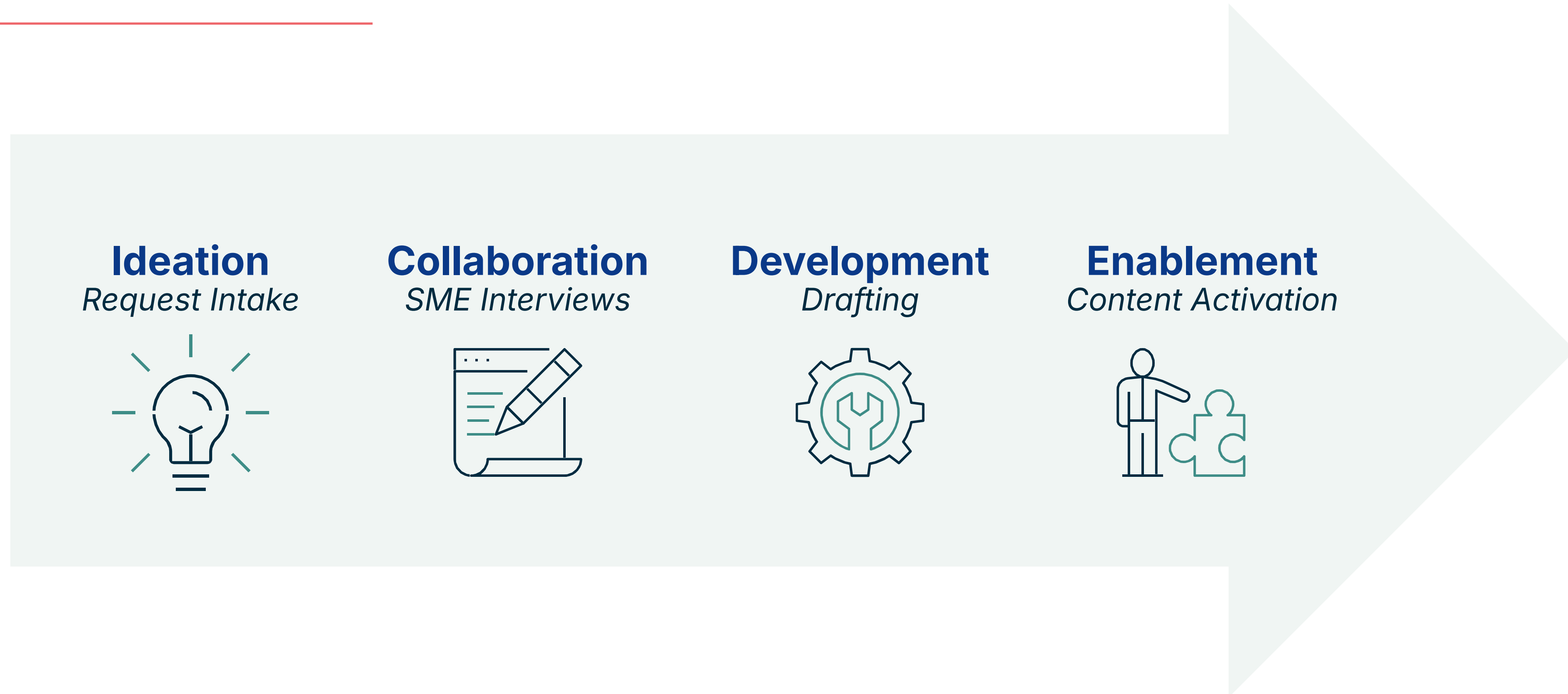
Financial Services Q1 Collab. Projects

demandlab

Completed *(All BUs)*

1. Cryptocurrency Messaging

Active *(All BUs)*

1. Activation Plan – Visual Process Map
2. CTA Best Practices
3. Benchmarking Data/Report Template
4. Cryptocurrency Assets

Our **Process**

Ideation
Request Intake

Collaboration
SME Interviews

Development
Drafting

Enablement
Content Activation

We have designed a process unique to IHS Markit for methodically developing **foundational messaging** to create consistent language and **cohesive customer journeys** across content and campaign assets.

(See full Activation Plan map HERE)
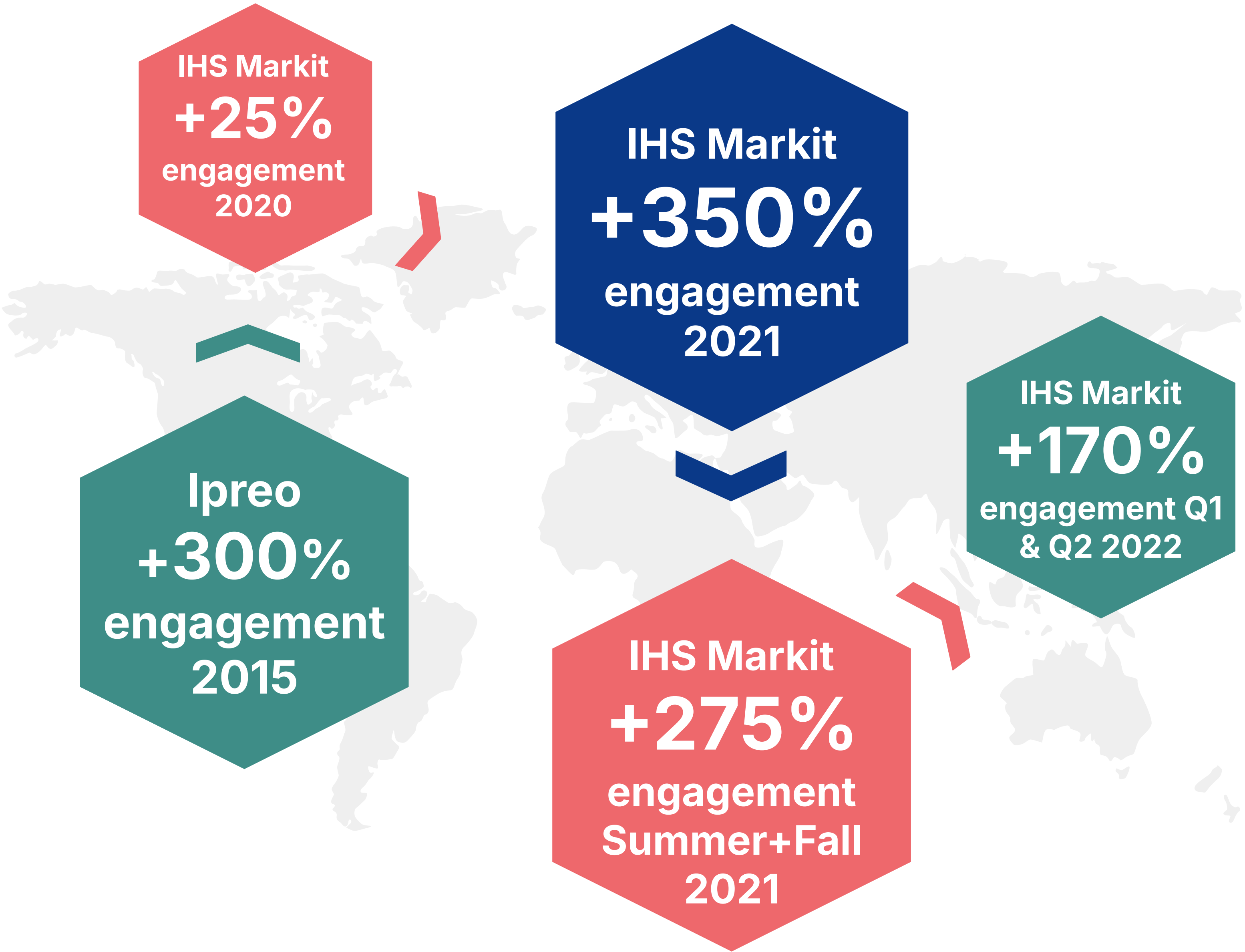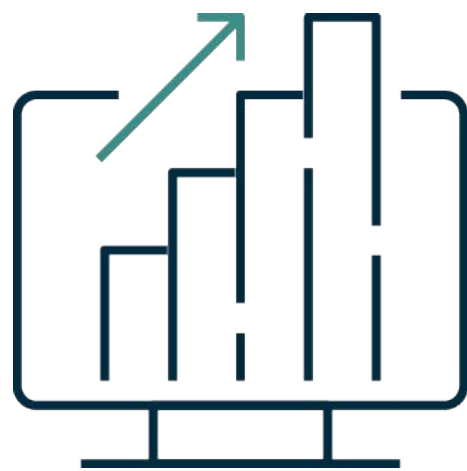
Our
Partnership

Goals Review & Forward Strategy

Service **History**

demandlab

2014 | iLevel

Martech & Content Services

- Marketo Deployment & SalesForce Integration
- Reporting+Analytics
- Managed Services & Ongoing Support
- **Award-Winning Content**
- DemandLab-iLevel Case Study

2019 - **Present** | IHS Markit

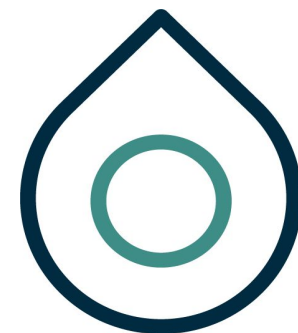**Martech & Content Services**

- Migration from Marketo to Eloqua
- Marketing Performance Reporting
- Managed Services & Content Strategy
- Advisory Services & Project+Account Mgmt.
- Strategic Messaging Development & Concepting
- Campaign Strategy & Sales Enablement
- DemandLab-IHS Markit Case Study *(in progress)*

### 2015 - 2019 | Ipreo

Martech & Content Services

- iLevel Brand Migration to Ipreo Website
  - & Customer User-Experience Integration
- Marketo & Salesforce Instances (2 ea.)
- Content Projects & Sales Enablement
- Managed Services & Reporting+Analytics
- **Award-Winning Content**
- DemandLab-Ipreo Case Study-Dormant Leads Opp.
- DemandLab-Ipreo Case Study - Navigating Acquisition

2022 | IHS Markit - SPG

Martech & Content Services

- Content Assets Brand Migration
- Content Activation Planning
- Customer Outcomes & Journey Mapping
- Campaign Strategy & Sales Enablement
- Advisory Services & Project+Account Mgmt.
- Migration from Eloqua to Marketo**?**
- DemandLab - IHS Markit/SPG follow-up case study *(discussed)*
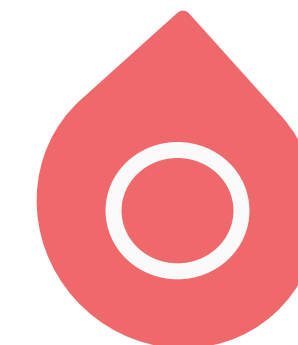
Team & SLA's Review

Working together: What's working?

demandlab

Core Team Roles & Responsibilities

demandlab

Your Dedicated DemandLab Content Team

DemandLab	Role	Responsibilities
Lerin Madole Client Success Strategist lerin@demandlab.com	Account and Relationship Management	Client satisfaction, big-picture strategic vision, primary point of contact for account-level concerns or strategic communication
Kimberly Yanni Manager, Project Services kimberly@demandlab.com	Project Management	Project management, including resourcing, scope management, progress-tracking, priorities mgmt., and scheduling
Rebecca Silverman Director of Content Services rebecca@demandlab.com	Content Services Mgmt. & Oversight	Oversight of client content projects, matching content resources to content request. Escalation point as needed
Jennifer Miranda Senior Content Writer jennifer@demandlab.com	Content Development	Lead writer and dedicated specialist for SME interviews and drafting requests

Service Levels **Review**

demandlab

■ **Response time**
  ▪ Business Hours: 9am - 5pm EST
  ▪ Email: same day or next business day
  ▪ Request-forms submission: same day auto-confirmation, next steps follow-up same day or next business day

■ **Service levels - Content projects:**
  ▪ Projects scheduled to reflect reasonable turnaround times
    ▪ Determined upon receipt of request
    ▪ Dependent upon current workload & complexity/length of request and assets provided
    ▪ 50% rush charges may apply for high urgency requests with written notice/prior approval
  ▪ Upper-/mid-funnel assets (e.g., blog posts, case studies, video scripts, etc.): **~8 working days to 1st draft***
  ▪ Low-funnel assets (e.g., white papers, brochure content, materials 1,000 words+): **~15 working days to 1st draft***

*Timeline starts once all source materials are made available, and depends on SME availability, etc.*

Resources & Info. **Requests**

Changes to note?:

- H2 marketing goals, strategies?
- Internal Org. Structure?
- Brand voice, presentation?

Helpful materials:

- Up-to-date style guide and brand guidelines
- 2022 marketing strategies or plans
- Content/editorial calendars/teams
- Personas/known journey outcomes
- Market research/analyses
- Key competitor list/analyses
- Products/services list and key messages
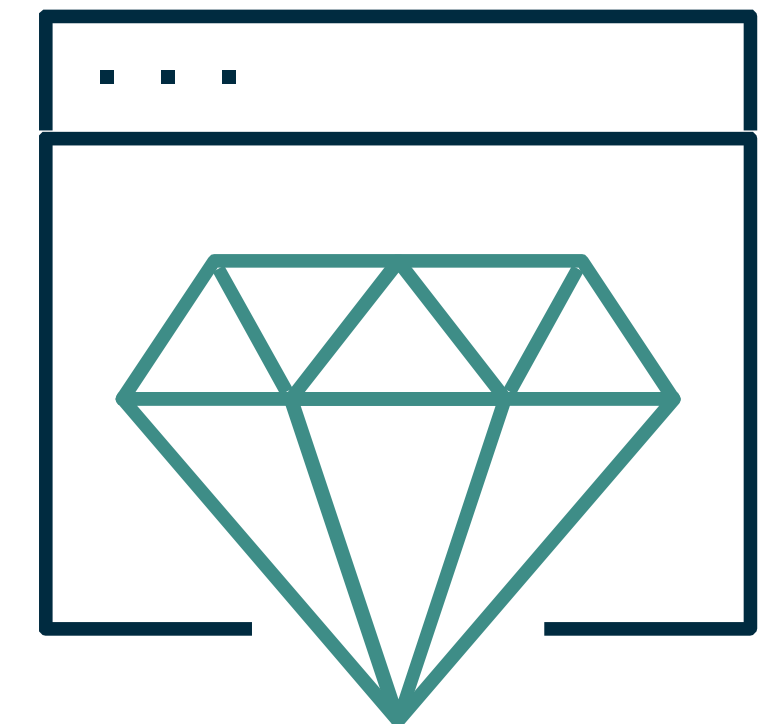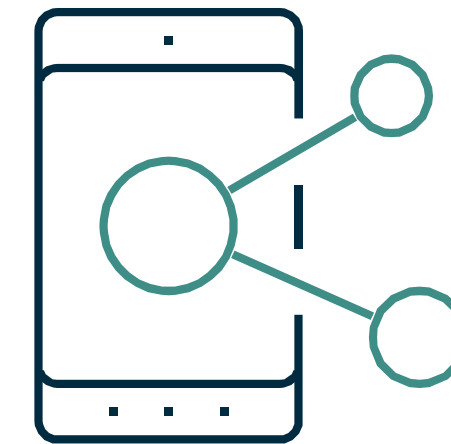
Next Steps

DemandLab

- Share 6 mo. Review & Q1 Accomplishments Overview deck
- Share weekly projects status tracking (ongoing)
- Schedule/coordinate:
  - Overview of Activation Plan Visualization Map
  - Scope discussion: Q3 & Q4 needs

IHS Markit – SPG

- Share any additional plans, priorities
- Confirm needs scope as able for Q3 & Q4
- Provide any updates:
  - Org chart
  - Brand guidelines
  - Priorities
  - Team members onboarding

Thank you.

ihsmarkit@demandlab.com | 267.297.2192 | www.demandlab.com

demandlab