

FY19 Tax Time Toolkit (AU)

Campaign dates: 1 June - 30 June 2019

Omni-channel

How to use the toolkit

The FY19 Tax Time Toolkit (AU) is intended to provide internal and external partners (e.g., agencies) with the necessary tools to inspire and guide the creative development process across channels in support of the business priorities this season. Please reach out to Nazia Shafinaz and Josephine Princi for any additional needs.

The toolkit serves to:

- ✓ Provide the necessary inputs to develop messaging and creative assets.
- ✓ Create consistency across storefronts, channels, and markets-domestic and international.

The toolkit is not:

- ✗ A static document. Updates will be made throughout the campaign, so remember to check back in.
- ✗ An editable document. If you find that your workstream(s) needs have not been met by the toolkit to support this year's Tax Time campaign, please contact: Nazia at a-nashaf@microsoft.com or Josephine at a-joprin@microsoft.com

Campaign overview

SALE PERIOD

- Tax Time occurs at the end of one financial year and at the commencement of another. In Australia, this is June 30.
- Small business are resolving their tax obligations for the previous year - so to minimise tax on unexpended revenue, many take the opportunity for capital expenditure.
- At the same time, many manufacturers and retailers are clearing excess inventory and aggressively discounting to sell what may soon be superseded stock.

OBJECTIVE

- To direct sole traders and small businesses with ready money to Microsoft Store to purchase hardware, software, accessories and services at ideal prices.
- For Microsoft Store Business Specialists to engage with small business operators as an ongoing source of advice and service, rather than just irregular one-off purchases.
- To be a destination for those entering the workforce or starting their own business concerns and who need quality entry level products at reduced prices.

TARGET AUDIENCE

- Sole traders
- Small Business Owner/Operators
- Tertiary students recently graduated and preparing for the workforce
- Domestic consumers looking to acquire/upgrade home tech at the best price

Campaign Overview

Target market

Rationale

Concept

Voice and tone

On using the term, 'Tax Time'

Campaign Funnel

Typography

Colour palette

Additional graphics

Additional Messaging

Approved UIs

Illustrations

Target Market

The primary target market for this campaign are small to medium business owner operators, but we will also be appealing to domestic consumers who like to have the latest home tech either for household management, or projects they have on the side of their main employment. It's also an ideal time of year for students of all disciplines and persuasions take advantage of reduced prices to update their tech for academic pursuit.

As at 2108, The SMB market in Australia accounted for 44% of total employment in selected private sector industries, 35 percent of all value generated in Australia and a fifth of the nation's gross domestic product. The small business sector is incredibly diverse - spanning entertainment, hospitality, transport, technology, finance, engineering, construction, trades, production, arts, media and communication to name just a few.

Successful small business people in Australia have a few things in common. Their businesses and their lives are indivisible. They feel great pride in their success and as such have no problem identifying themselves as 'Small to Medium' business, as it's a badge of honour to have achieved so much on their own.

They are 'hands-on', no-nonsense types who rely on their instincts and detailed knowledge of their customers. They eschew cutesy, arty or high concept. They are skeptical about promises of overnight success or miracle improvements, and are dubious of slick talkers, focus-group research and any person or brand that attempts to insinuate themselves as 'partners'.

They're careful with their time, and also their money. They don't spend what they don't have to, or when they don't have to. A good deal on something is not enough - they have to recognise a *need*. They want a good *reason* to buy, then a good price.

Rationale

From many retailers' point of view, Tax-time always has the potential to be a very exciting and successful trading period. The need to acquit inventory and rationalise product lines lead to aggressive discounting and keen pricing, which in turn, create opportunities for substantial sales. Our "EOFY" sales, and entreaties to "Get Ready for June 30" can yield welcome results.

For us.

Unconsciously, *we*, like most other retailers, focus on the *end* of the financial year, because from our point of view it's a relief to clear the decks, make some impressive sales, maybe earn the odd bonus. *But do we have the semantics right from our SMB customers' point of view?*

For our SMB customers, the end of the financial year is an ordeal that takes them from their passion, and core business, to becoming part-time lawyers, tax agents and human resource experts. *'End of financial year'* implies consolidating receipts, meeting accountants, filing returns and all the other tedious housework that small business must endure to meet their responsibilities.

However, in this circumstance, the close of one thing coincides with the opening of something else. The end of one financial year is also the beginning of another, when the paper-chase drudgery will be over, and SMBs will be grateful that they made smart purchases while prices were good.

That's why we want to shift focus from the year *ending*, to the year *commencing*, and encourage small businesses, sole traders, students and even households to...

Concept

Set up for the new financial year

Let's talk to **our** customers about the optimism and energy of their **new** financial year, complete with new technology, systems, procedures and hopefully even greater success. While other outlets focus on the end, we can talk about beginnings. We can be the positive voice in the market at that time.

Many service providers to SMBs try to insinuate themselves as de-facto business partners, which their customers often regard as invasive and patronising. By using the term 'Set up', we are saying our customers, '**You** decide what **you** need and we'll help you find the right fit for you and your business'

Moreover, we want to be very specific about this time of year as the best time to buy. 'Set yourself up for success' and similar may be more esoteric and emotionally appealing, but they are also what retailers are saying to SMBs **throughout the entire year** to push any kind of product.

Framing it very firmly in this period creates the urgency - it's well entrenched in the Australian market that tax time is the best period to buy new or to upgrade products. 'Set up' indicates that there is a **suite of integrated products and solutions** that will build success, rather than just 'Buy This One Thing From Us'

This is a creative strategy that aligns itself perfectly with Microsoft's brand mission '**to empower every person and every organisation on the planet to achieve more.**'

Voice and tone

Unlike other selling periods during the year, there is nothing sentimental about Tax Time. It's a purely transactional affair whereby retailers sell out their own stock for tax reasons, and customers recognise it as a time to save good money on products for home or work. Australians in their SMB hats are traditionally very matter-of-fact consumers.

SMBs don't buy things they just because they're cheap. They use Tax Time to acquire products and services for which they have already identified a need. As previously said, they need a good *reason* to buy, then a good price.

They need to believe that a product or service is definitely a benefit to their business, is made by a superior manufacturer and sold by a reputable retailer. They depend on quality products that don't often fail, and retailers who'll support them if they do.

In a small business, operations are kept economically tight, and that means fully operational staff and services are critical every day. Things that fail cost money and opportunity with every minute of downtime.

Therefore in communicating with our SMB customers, we talk in terms of their needs, and how our products can help them to keep succeeding. We talk truthfully about the solutions that suit them, not just what we most want to sell.

There is nothing sentimental about Tax Time...therefore in communicating with our SMB customers, we talk in terms of *their* needs, and how our products can help them to keep succeeding.

We talk truthfully about the solutions that suit *them*, not just what we most want to sell.

Important note

On using the term 'Tax Time'

We have decided to avoid the term 'Tax Time' for a very particular reason in 2019. A federal election has been called for May 18, and 'Tax' will be a constant negative term throughout the entire period.

The current Liberal/National Coalition Government is the equivalent of the Republican Party in the U.S., as the Labor Opposition is the equivalent of the Democratic Party.

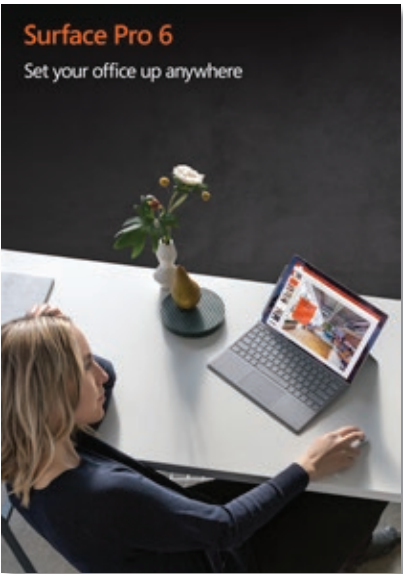
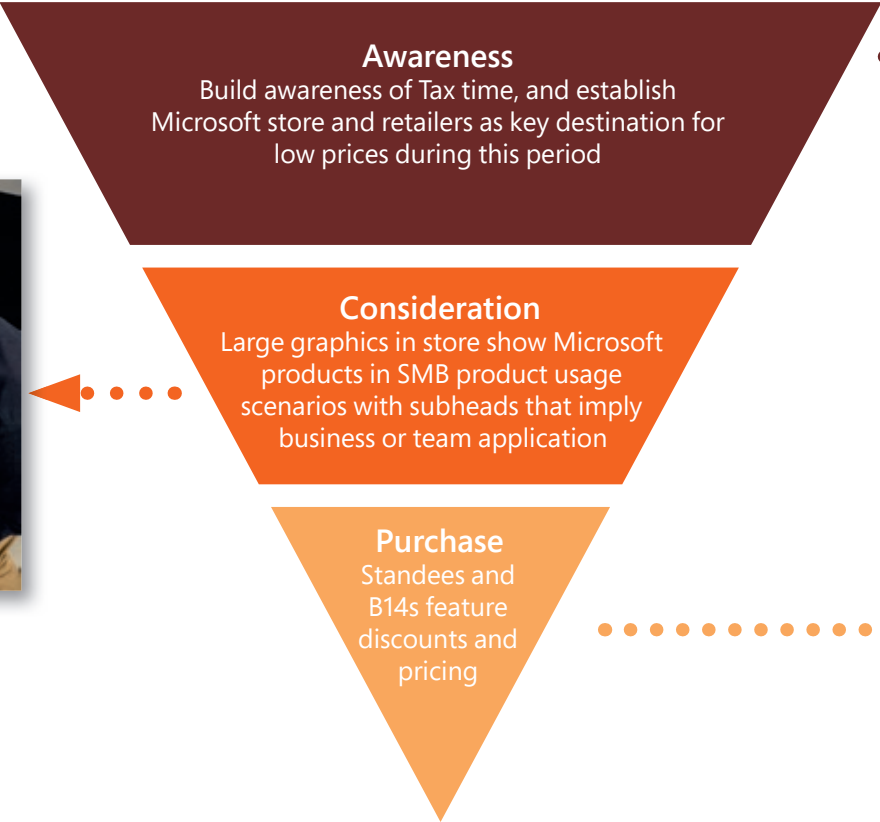
Undoubtedly, both sides will run threatening messages about the taxation policies of the other. So the terms 'Tax' and 'Taxation' will have even more of a constant negative connotation than usual. Nothing slows retail spending more than pre-budget apprehension and federal elections.

Regardless of who wins, the public will still be learning the intentions of a new government or an incumbent one. For this reason, we should avoid association with the word 'Tax' in any form. It also means that any deals should be extra keen to overcome general hesitation.

We have the flexibility to interchange terms like 'Buy before June 30', 'Save before June 30', 'Sale ends June 30', or simply identify the product or category in the top strap line. The SMB community will still register the period, without the use of the word 'tax'.

Campaign Funnel

There will be no ATL for this campaign, however we expect a significant investment in paid media and website support. Online will serve the Awareness agenda to reinforce the time of year messaging and drive customers to store to take advantage of keen pricing.



Typography

Print: Segoe Pro

Heading
Segoe Semibold

Subheading
Copy & CTAs
Segoe Pro Regular

Digital: Segoe UI

Heading
Segoe UI Semibold

Subheading
Copy & CTAs
Segoe UI Regular

Colour palette

General
campaign

| | | | | |
|---------------------|---------------------|-----------------------|---------------------------|---------------------------------|
| Orange Dark Blue | White Rich Black | Light Orange White | Dark Orange Rich Black | White Light Orange Orange |
|---------------------|---------------------|-----------------------|---------------------------|---------------------------------|

Xbox

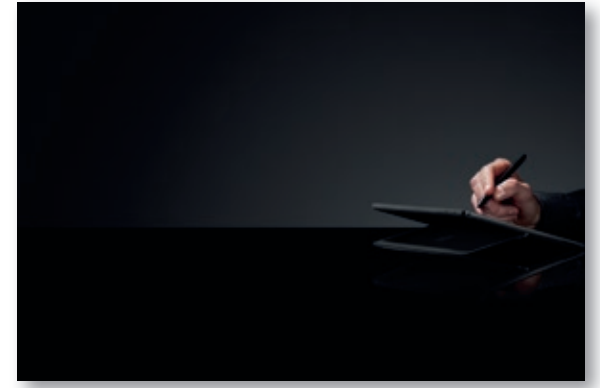
| | | | | |
|---------------------|-------|----------------------|--------------------------|----------------------|
| Green Dark Green | White | Light Green White | Dark Green Rich Black | White Light Green |
|---------------------|-------|----------------------|--------------------------|----------------------|

Type/Grey

| | | | | | | | |
|---|---|---|----------------------------|-------|--|--|--|
| Rich Black Ex Dark Gray Dark Gray Mid Gray | Rich Black Ex Dark Gray Dark Gray | Rich Black Ex Dark Gray Dark Gray | Rich Black Ex Dark Gray | White | White Ex Light Gray Light Gray Gray | White Ex Light Gray Light Gray Gray | White Ex Light Gray Light Gray Gray |
|---|---|---|----------------------------|-------|--|--|--|

Additional Graphics - Surface Pro

Excite/Attract



Consideration/Contextual



Additional Graphics - Surface Go

Excite/Attract



Consideration/Contextual



Additional Graphics - Surface Laptop 2

Excite/Attract



Consideration/Contextual



Campaign alternative messaging

Set up for the new financial year

Buy before June 30

Sale ends June 30

Set up for a big financial year

Save before June 30

On sale until June 30

Product messaging

Surface Pro 6

Set your office up anywhere

Surface Hub

Set your team up to collaborate

Accessories

Set your device up

Surface Pro 6

Set your team up with the best

Surface Hub

Set your office up to work together

Accessories

Get set up with the extras

Surface Go

Set your day up

Office 365

Set your office up at home

Cloud Services

Set up to work anywhere

Surface Go

Set your work up to go

Office 365

Set your office up your way

Cloud Services

Set up your online office

UIs

The UIs shown here have been taken from Brand Central and Retail DAM, however minor edits have been made including converting dates to this calendar year and in Australian Time/Date format.

Please use exclusively the UIs in the provided resource kit.

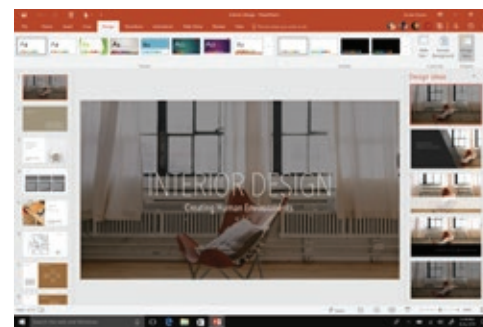
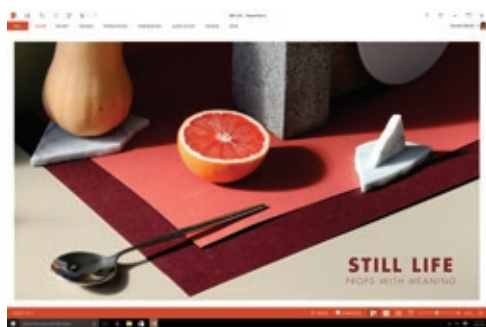
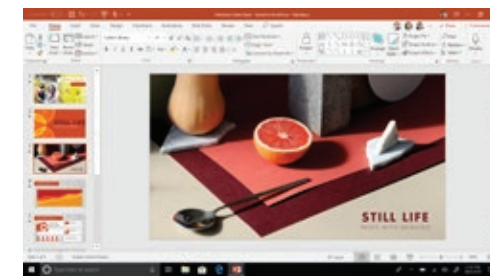
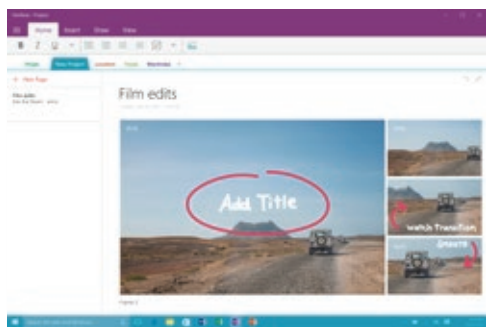
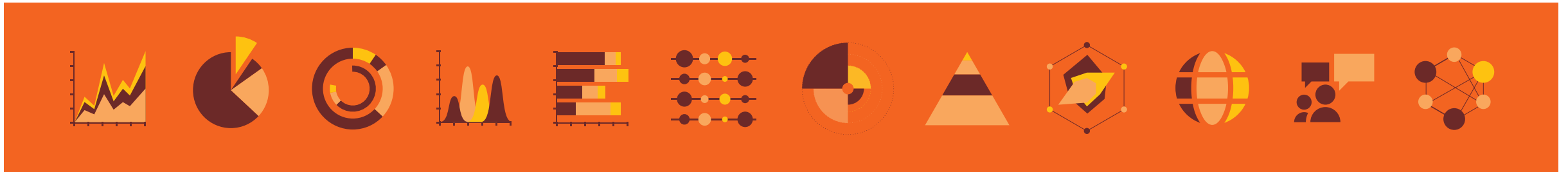
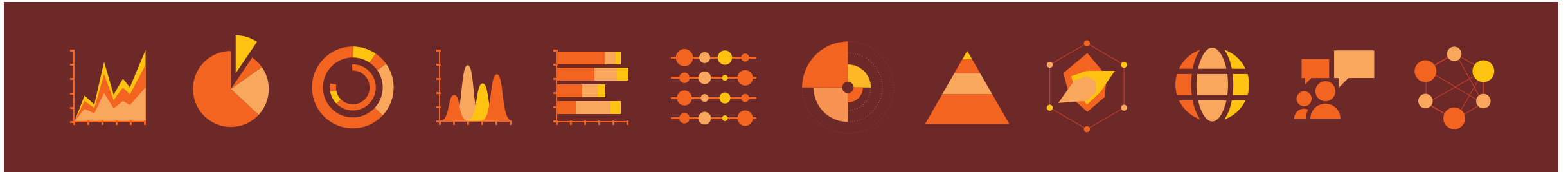


Illustration exploration

Illustration based around abstract business style graphics. Allows for interesting combinations of shape and colour.



In store large graphics


Surface Pro 6

Set your office up anywhere



Office 365

Set your office up at home

[illegible]

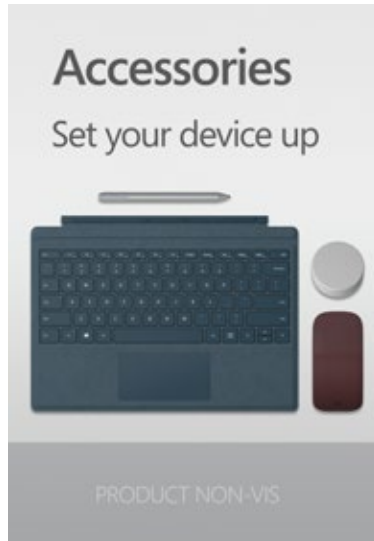
Living Room BAG



Surface Hub BAG



Accessories

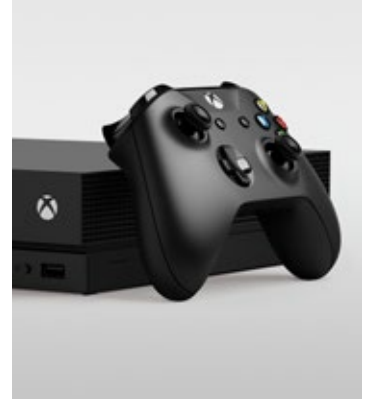
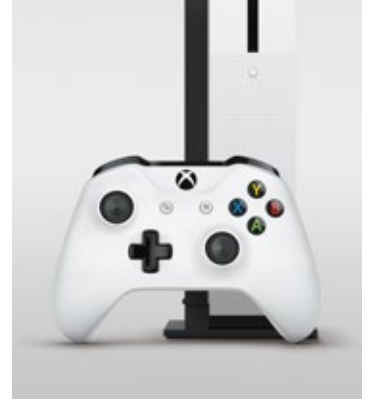


Jcurves

Gaming

Office 365

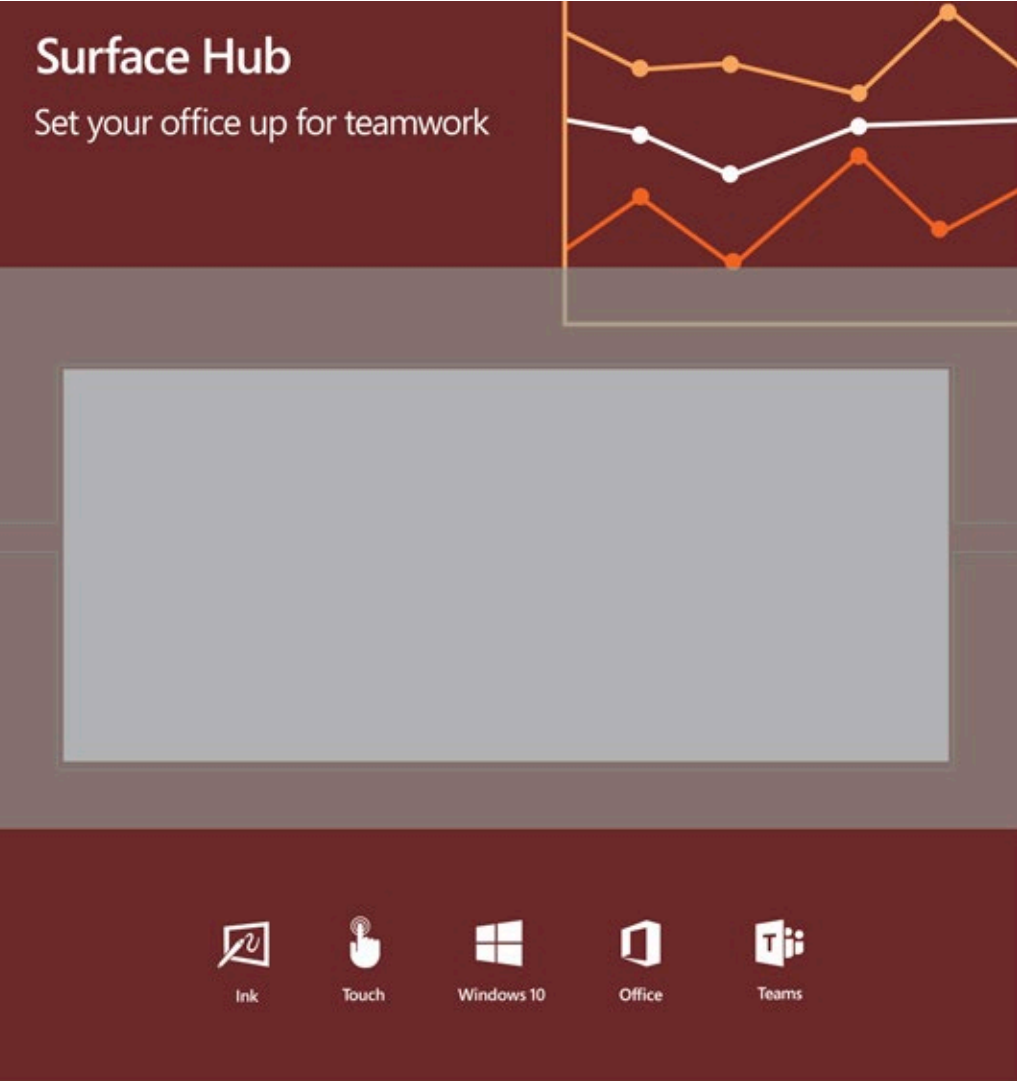
Minifranks



EBC BAG



EBC Surface Hub BAG



Cloud services




Accessories



Incidental signage

Save \$50


on select Bose audio.
Get set up for fitness.



Offer valid from November 4, 2015 to June 30, 2016. Offer is available while supplies last. Available in Microsoft retail and online store in Australia only. Available to customers who qualify as eligible customers. Supply and stock may impact availability of eligible products. Microsoft reserves the right to change the offer. Not eligible for the offer will be: Surface and other products that are not sold by Microsoft. The offer cannot be combined with any other offer. Microsoft will not be responsible for any loss of data or damage to equipment. Microsoft reserves the right to modify or discontinue the offer at any time. Limit one offer per customer. Offer includes gift cards, volume licensing.

Save up to \$800


on select PCs. Set up for the new financial year



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Save \$300


On select Surface Book



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Save 15%


on select Surface devices



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Surface Pro 6 bundle

Select Surface Pro 6 with Type cover.
From \$1299



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Confidential


Microsoft Stores

Standee

Buy before June 30

Save \$50
on select
Bose audio






FPO

Buy before June 30

Save up to
\$800 on
select PCs





FPO

Buy before June 30

Save \$300
on select
Surface Book






FPO

Buy before June 30

Save 15%
on select
Surface devices







FPO

Buy before June 30

Surface Pro 6
bundle

Select Surface Pro 6 with Type cover.
From \$1299



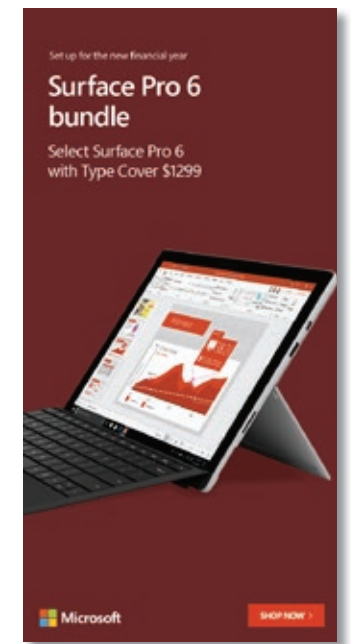
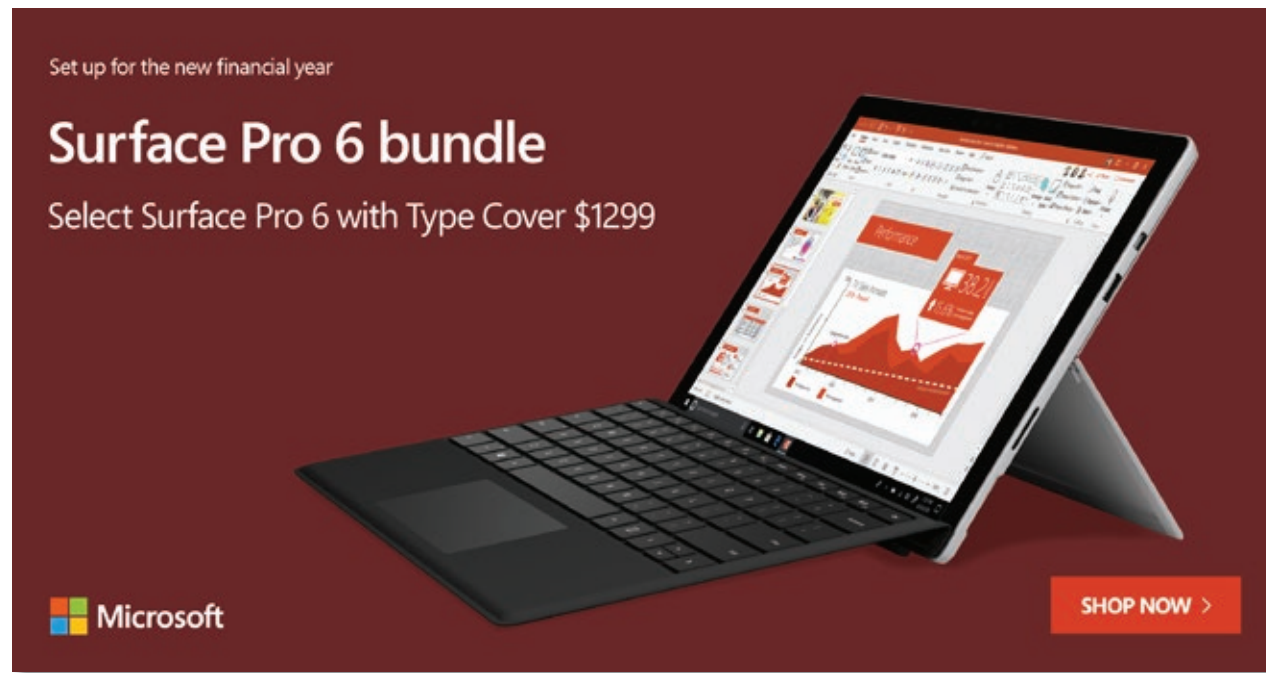


FPO

Demand Gen - Offer product based

When developing online assets, particularly for Facebook, be aware that there might be an overall text limit applied to the piece. With Facebook, it's no more than 20% of the overall visual area. If you breach this minimum area, the art may not reach all of the intended audience. All pieces on this page have been tested and are compliant.

You can check your outgoing JPEG or PNG at www.facebook.com/ads/tools/text_overlay. Drop your art on the indicated window and Facebook will scan it for text percentage. It will advise whether your ad is ok, or will have reduced delivery. **Note: It may detect text in UIs, logos and other objects that feature type, so keep this in mind if you have to adjust your art.**



In-store renders

Level 2



Level 2



Level 2



Level 2



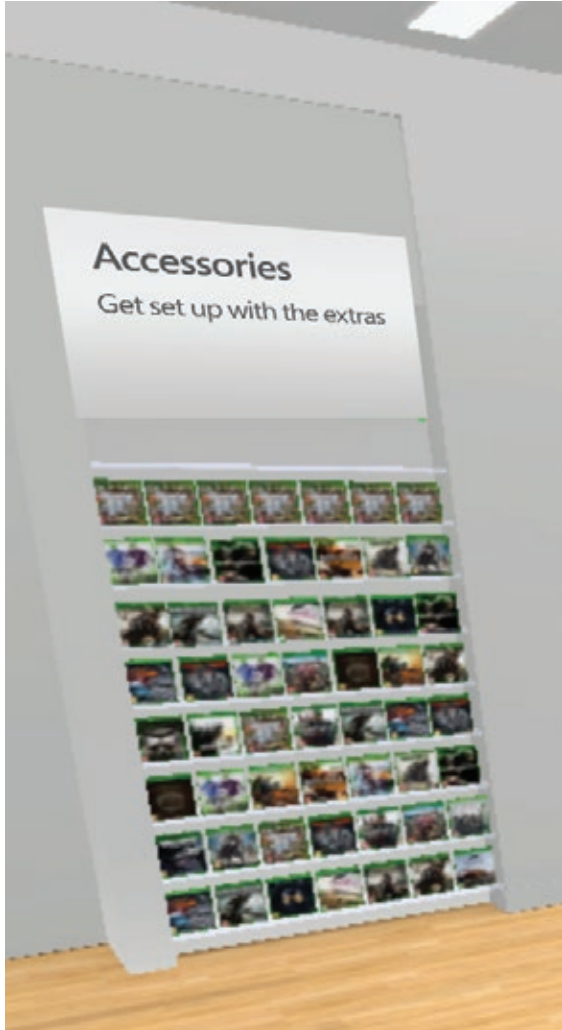
Level 2



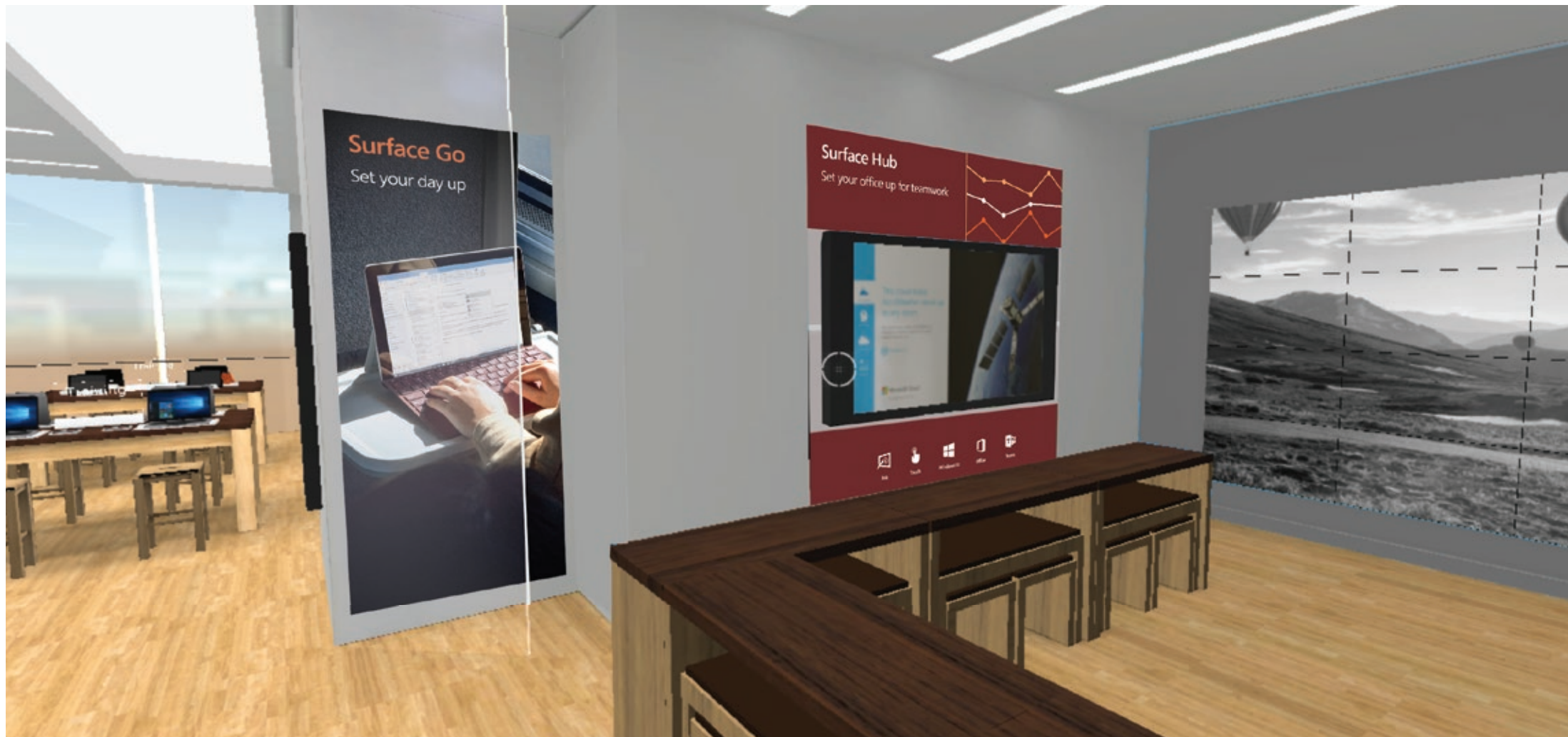
Level 2



Level 3



Level 3





Thank you.