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Questions?
Visit sww.sas.com/sasbrand. Contact sas.brand@sas.com.
Introduction

This document gives an overview of the different types of sales and marketing collateral available to support SAS® products and solutions. You will find a description of each collateral type available, including the target audience, subject matter, content elements, source content requirements and a visual example. If you have questions about any of the information contained in this document, please contact Jeff Alford in Marketing Editorial: Jeff.Alford@sas.com.

Collateral types
SAS produces the following types of collateral to support its products and solutions:

- **Annual report/corporate overview.** Combined annual brochure that includes an introduction to the SAS brand and a recap of the prior year’s highlights.
- **E-book.** Covers a topic to some degree of depth. Typically used early in the sales cycle. Takes a unique style, tone or approach to presenting a story.
- **Solution/industry overview.** Covers a family/suite of solutions (e.g., SAS Customer Intelligence 360) or a family of solutions for a specific industry (e.g., defense and security). Typically aimed at business decision makers.
- **Product brief.** Gives a high-level overview of a single SAS product/offering. Generally aimed at a business audience.
- **Solution brief.** Focuses on a specific customer issue – often from an industry perspective – and how SAS approaches that issue. Aimed primarily at business users or decision makers.
- **Service brief.** Describes a business service provided by SAS. Aimed at decision makers looking for a vendor to help them solve a business problem, implement a methodology or set up a process for resolving technical issues.
- **White paper.** Covers a topic to some degree of depth, offering education, thought leadership and/or best practices. Aimed at an executive or business user audience, depending on the topic.
- **Brief.** A relatively short piece that is used when other collateral formats do not fit our needs. Use sparingly, as briefs may not fit the same purposes as other types of collateral and may not receive the same level of ongoing promotion.
- **Customer success story.** Describes how a specific customer has solved a business issue using SAS software.

Accessibility
At SAS, we strive to produce digital content (including marketing collateral) that is accessible for people with disabilities. There are three reasons why this is important:

- **Customers expect it.** Equal access for people with disabilities has gained momentum globally – and failure to meet customer expectations causes friction in the sales process.
- **Our peers and competitors in the tech sector are doing it** – including leading companies like Microsoft, Adobe, IBM and others.
- **The concepts behind diversity and inclusion (D&I) are a cornerstone of the SAS brand.** Accessibility is one of the places where the rubber meets the road for D&I.

Learn more about accessibility and how we practice and enforce best practices to ensure we meet the needs of our customers – and even legal requirements – to make sure our content is accessible.
Content agility

This chart provides an at-a-glance view of publication time frames (i.e., level of agility) for various types of marketing collateral. Carefully consider these time frames when planning and requesting content.

Content Agility Scale

- **LinkedIn/Social Media**: 1 week
- **Blog Posts**: ~2 weeks
- **Insights Article/Third Party (PR)**: ~4 weeks
- **Service, Solution and Product Briefs**: 5 to 6 weeks
- **White Paper**: 6 to 10 weeks
- **E-books**: 8 to 12 weeks

Legend:
- ➡️ Timing for standard projects
- ☠️ Timing for more complex projects

Average Time To Completion (in weeks)
Production process

To request marketing collateral, you must enter a Global Marketing System (GMS) request for the type of collateral you need. GMS is where we maintain workflows and schedules. Be specific and detailed when you enter the description of what you need. If you're new to the process, or if you're unsure which type of collateral is most appropriate, contact Marketing Editorial to help you get started.

To streamline production, review cycles are limited to two, except under extenuating circumstances. Please note that technical collaboration on messaging and content should be completed before submitting materials for production. The results of that collaboration should be conveyed through relevant positioning documents and other source materials. The two rounds of review include:

1. **A first draft** (may be either a Word document or PDF). The first draft is for polishing the way the content is conveyed.

2. **A final review**, which is typically a PDF of the final, designed collateral. This final review is for identifying technical inaccuracies or last-minute, minor changes.

You should provide high-resolution graphics during the first draft review, if not before. If a team of reviewers is involved, their collaboration and review should be limited to the first draft. The primary contact (often a Go-To-Market [GTM] lead, or product or industry marketing manager) is responsible for routing drafts to all relevant reviewers and then consolidating feedback. The final review is when the primary contact should check for mistakes and approve publishing and distribution of the collateral.

Production time frames

Standard time frames for the primary types of collateral we produce are applicable only AFTER complete content (positioning document, draft, etc.) is submitted and accepted. Schedules include time for writing, copy editing, review, design, critical back-end processes, promotion to internal channels (such as the GMS asset library), and sometimes printing. Please use the recommended time frames when assigning a goal date in GMS. Keep in mind that we cannot control the amount of time required for review cycles, so we cannot control resulting delays in production.

Collateral can be produced according to these timelines only if all steps are completed and review cycles are timely. If your request is tied to a time-sensitive activity or commitment, please indicate that in your request when you set the goal date.
Annual report/corporate overview

Subject matter
• A high-level overview of SAS and introduction to the SAS brand, focusing on both who we are and what we do. An online version of the annual report is available.

• A summary of the previous year (including financial results, company stats, awards and accolades, important events, etc.).

• Consult our annual report before you request new content. It’s a great resource that can be shared to provide an overview of our company, culture, customer use cases and more.

Target audience
Executives are the primary audience for the annual report/corporate overview.

Source content requirements/elements
Source content varies for the annual report. For more information, contact Shannon Heath in Public Relations: Shannon.Heath@sas.com.
E-books

E-books are similar to white papers in that they cover a broad range of topics. But they are less formal, more visually interesting and not sales/product-driven.

**E-books are:**
- **Visual, not text heavy.** Maximum word count per page should be 200-300 words (less is recommended).
- **A creative presentation** of facts, figures and key points (fewer words, more facts and visuals).
- **Educational**, not sales- or product-driven. Should tell a compelling story, taking a unique tone, style and approach.

**E-book topics can include:**
- Thought leadership. Example: *Resilience: The best way to beat the coronavirus.*
- Emerging technologies or trends. Example: *What’s next for life sciences?*
- Trends in an industry or technology. Example: *Brilliant decision.*
- Research results. Example: *Experience 2030.*
- Key business issues. Example: *High velocity decisions. Trusted outcomes.*

**When to request**
E-books should be requested as a cornerstone asset (limited exceptions will be made on a case-by-case basis). **A strong and ongoing promotion plan**, including social media, must be in place. This is extremely important since e-books require intense time and effort from writing and design resources.

**Average production: 8-12 weeks**

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**Resilience: The best way to beat coronavirus**
Here's how you ensure operational and financial stability—no matter the circumstances

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**What to provide the editorial team:**
- Your desired timeline (when you need it).

Production time frames for **three types of e-books** are below.

1. **Existing, approved content from SAS channels** - 4 to 6 pieces pulled from insights articles, customer success stories, blog posts, etc. **6-8 weeks.**

2. **Combination of new and existing content.** 10-12 weeks.

3. **All new content** - this means you must provide all source material; content then has to be written, reviewed and approved. **12-16 weeks.**

- The overall call to action (which is usually an ungated solution page).
Solution/industry overview

Average production: 5-6 weeks

Subject matter
Solution overviews cover a portfolio/family of SAS solutions (e.g., SAS Customer Intelligence solutions, SAS Data Management, etc.). Industry overviews cover a portfolio of SAS solutions/products related to a specific industry (e.g., SAS solutions for retail, SAS solutions for manufacturing, etc.).

When to request
Solution and industry overviews are not mandatory pieces of collateral. They are created only when there is a legitimate need to cover an entire portfolio of solutions, or show the breadth of our coverage for a particular industry in a single piece of collateral. Requests for these collateral types will be considered on a case-by-case basis.

Target audience
Solution and industry overviews are targeted at a business audience, director level and above.

Source content requirements
• Completed product category or industry positioning document or equivalent.
• High-resolution graphics (e.g., screenshots) if needed.

Content elements
The content elements vary depending on the available content, marketing objectives, etc. Specific content elements are included at the writer’s discretion. These pieces are typically four pages in length. Layout treatment dictates space requirements. Word-count limit is approximately 175 for sidebar copy. Content placed in regular body copy ranges from around 100 to 500 words per section. Examples of possible content elements include some or all of the following:

1. Title/Kicker
   The title should include any identified SEO (search engine optimization) keyword and/or the name of the portfolio/suite of products along with the industry (if relevant). The kicker

   Sample solution overview front and inside pages with key features example.
should contain the SEO keyword if it is not included in the title. It should also provide a short description of what the portfolio does.

2 Business benefits
The business benefits of the solution/industry portfolio (use three to five bullets if placed in a sidebar). Word count varies, depending on format.

3 Overview
An overview of the portfolio, including customer pains/issues and a high-level mention of the products/capabilities that comprise the portfolio. This section should not extend beyond the first page. Word count is approximately 125 to 175.

4 How SAS can help (not shown here)
An optional section that describes what SAS brings to the table for the customer. May include overarching or differentiating capabilities unique to this solution/industry portfolio and SAS. Word count varies.

5 Key capabilities
Includes subheads that describe what the customer can accomplish. Paragraphs underneath tell how those accomplishments are achieved. Word count varies.

6 Challenges
Three to five bullets that describe the challenges a customer/prospect may be facing that the SAS solution/industry portfolio addresses. Word count is approximately 150 to 200.

7 Differentiators
Subhead for this section is typically in this format: “The SAS® Viya® Difference.” Bullets tell what sets SAS apart, our unique value and/or why customers should pick SAS over other vendors. Word count varies.

8 Components
In addition to a Capabilities section, a solution/industry overview may also include a listing and description of the individual products/solutions that make up the portfolio. Word count varies.
Product brief

Subject matter
A product brief focuses on a single solution/product (e.g., SAS Enterprise BI Server, SAS Risk Management for Banking).

When to request
It is appropriate to request a product brief only if there is no product page on sas.com that can be used to provide product-level details (features/functions). For most products, there is a product web page on sas.com. For new products, a new product web page can be requested. Because web-based product information is much faster and easier to create and update than a PDF, this digital approach aligns with the company goal of continuous delivery.

Target audience
Business audience, director level and above, or public sector equivalent.

Source content requirements
- Completed product positioning document or equivalent.
- High-resolution screenshots or other graphics if needed.

Content elements
The content elements listed below are the basic elements in product briefs. However, there can be variation. You may have additional or different sections than those listed below. This is not a rigid template; some variability is expected and necessary.

1. Title/Kicker
The title should be the name of the product. The kicker should contain the identified SEO keyword and provide a short description of what the product does.

2. Key Benefits
SAS Health: Episode Builder enables you to:
- Flexibly define episodes of care. Construct and analyze claims as episodes of care using transparent clinical definitions of your choice and automatically detect associations for a holistic patient view.
- Measure care value. Services, and their care costs, are categorized as being value-added or potentially avoidable. Expected and risk-adjusted costs are automatically calculated and can then be used as quality/efficiency measures or payment metrics. Other quality metrics, such as length of stay and readmissions, are also captured.
- Create physician accountability for patient care. Assign episodes to providers based on user-selected rules. Apply risk-based calculations to compare provider performance based on relative patient severity or to set reimbursement targets.

3. Overview
As health care incentives spotlight value, providers and payers are struggling to define care delivery as it relates to value. Several factors contribute to patient care complexity: better patient outcomes, new reimbursement models, increased focus on risk management and accountability, and a more accurate understanding of costs. But the complexity can be better understood in the context of episodes of care when you know what services are provided at a patient level and in aggregation. SAS Health: Episode Builder enables you to:
- Analyze and optimize care pathways in terms of cost and quality.
- Know what to modify to reduce unwarranted admissions and readmissions.
- Decrease length of stays.
- Improve cost-effective prescribing.
- Reduce variation in care and treat patients holistically.

Going far beyond traditional claims grouping, SAS enables you to flexibly construct clinical episodes, identify variations and opportunities for improvement, and assess your financial risk in value-based reimbursement agreements. All while understanding your patients in more detail from multiple data sources.
The Solution
By analyzing health care claims data, SAS Health: Episode Builder allows health care organizations to construct and analyze claims as episodes of care. Clinical rules define which services are related to an episode (for instance, a knee replacement) and what care is unrelated (such as a service performed for another episode occurring in the same time period). Services are categorized based on their value to the patient care experience. Quality metrics – such as readmissions, rule-based provider attribution and patient severity adjustment – extend the value SAS Health: Episode Builder brings to an organization.

Based on clinical definitions best suited for your organization, SAS Health: Episode Builder allows you to gain more accurate insights for effective decision making about quality and cost of care.

Capabilities
Automatically define episodes of care
The size of claims data sets makes it impractical to manually identify patients with conditions and the cost and quality of their care. Building in-house solutions for episode definitions is time consuming (on average, more than three person-months to code, test and deploy one publicly available episode definition). Services are categorized based on their value to the patient care experience. Quality metrics – such as readmissions, rule-based provider attribution and patient severity adjustment – extend the value SAS Health: Episode Builder brings to an organization.

1. Key benefits
The business benefits of the solution in at least three bullets, each starting with an action verb. Word count is approximately 50 to 150.

2. Overview/Introduction
A high-level overview of the product, including a brief mention of customer pains/issues that are relevant to that product. This section is in narrative form and should not extend beyond the first page. Word count is approximately 125 to 250.

3. Why SAS?
Three to five bullets that describe how a SAS capability sets SAS apart from competitors, or – in other words – why customers should choose the SAS solution over another vendor’s solution. Word count is approximately 150 if in a sidebar.

4. Challenges (not shown here)
Three to five bullets that describe the challenges a customer may be facing. Note: This section is not used very often. The preference is to focus on “Why SAS” instead. Word count is approximately 150 if in a sidebar.

5. Solution description
An opening paragraph with a high-level description of the solution, followed by three to five bullets on the solution’s capabilities. Word count is approximately 125 to 175.

6. Capabilities
What the customer can accomplish. Subheads often start with a verb. Paragraphs underneath describe how the product portfolio helps achieve those accomplishments. Word count varies.

7. Differentiators (not shown here)
An introductory paragraph on what sets SAS apart, followed by bullets that detail why customers should choose the SAS solution over another vendor’s solution. Word count is approximately 150.
Solution brief

**Average production: 5-6 weeks**

**Subject matter**
Solution briefs focus on a specific customer issue—often from an industry perspective—and how SAS addresses it. This collateral is ideal for starting sales conversations. Specific products or solutions are rarely mentioned by name; rather, the focus is on the “SAS best answer” for solving the issue.

**When to request**
Request a solution brief when there is a need for collateral that focuses on how SAS solves a specific customer issue, particularly when there’s no single solution that solves the problem.

**Target audience**
Solution briefs usually target a business audience.

**Source content requirements**
Completed customer issue positioning document, or equivalent.

**Content elements**

1. **Title**
Main title is a very brief description of the topic our solution addresses. Kicker should be in a statement format starting with an action verb, summarizing the key benefit of our solution, or highlighting how we solve the problem.

2. **The issue**
This is typically a two-paragraph narrative that sums up the issue from an industry or customer perspective. Word count: 175 words.

3. **The Challenge**
A bulleted list that describes barriers to solving the issue. One sentence for the challenge and another sentence for how SAS addresses the challenge. Word count: 150.

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**End-to-end supply chain scenario planning**

**Identify the best supply chain response to satisfy demand shifts and minimize operational costs**

**The Issue**
COVID-19 has significantly changed consumer shopping behaviors. From stocking pantries with household products and nonperishable foods to increasing our online shopping, demand has shifted across product categories and channels. This has generated disruptions to the end-to-end supply chain for retailers and consumer packaged goods (CPG) companies. Suppliers are facing limited capacities, production lines are at risk of shutdowns and delays, distribution centers have reduced labor, transport capacity is strained, and demand patterns continue to be volatile and uncertain.

To better deal with this instability, retail and CPG companies need a comprehensive approach for developing consistent and data-driven supply chain planning across the enterprise.

Accurately estimating the impacts on revenue and operational costs across multiple demand scenarios enables organizations to identify the best responses across the supply chain and be better positioned for recovery and future growth.

**Challenges**

- **Meet shifts in demand while minimizing costs and lost sales.** With significant changes in demand patterns and constant market disruptions, retailers and CPG companies are struggling to stabilize supply chains. SAS® helps provide the best supply chain response to maximize profitability and satisfy as much demand as possible.

- **Manage disruptions in the supply chain.** Organizations are facing reduced capacity and staffing and increased/demanded demand due to the pandemic. Using SAS, retailers and CPG companies can better account for these disruptions across the enterprise.

- **Plan for multiple recovery scenarios.** The situation is changing daily, so it is imperative to understand the effects of different demand recovery patterns. SAS quickly identifies the best course of action with feasible what if capabilities across multiple demand, capacity and cost scenarios.
Our Approach
SAS offers strategic end-to-end supply chain planning to help organizations holistically respond to disruptive events such as COVID-19. Using analytical optimization, SAS determines how you can change production and supply chain strategies to account for changes in demand. We can help by:

• Providing the best response across the end-to-end supply chain using an optimization model. Using robust optimization techniques, SAS balances supply chain costs and constraints with meeting sales goals.

• Creating a set of consistent and synchronized plans for purchasing, inventory, transportation, sales and manufacturing. Incorporating any expected or potential changes to the supply chain capacity, SAS captures major disruptions to end-to-end operations.

• Capturing inventory, demand, capacity and cost data across the entire supply chain from suppliers to manufacturing plants to distribution centers to stores.

• Running multiple scenarios for demand forecasts derived from different recovery expectations or potential markdown and promotion strategies.

• Showing how demand affects the entire product portfolio, including regular, perishable and seasonal goods.

The SAS Difference
Combining leading analytics and deep industry knowledge, SAS enables organizations to develop a rapid response to disruptions of any type and prepare for success. Our end-to-end supply chain scenario planning offers:

• Powerful, intuitive optimization modeling. SAS provides a streamlined mathematical optimization model tuned for performance and designed to tackle complex supply chain problems and help you resolve them quickly.

• Data-driven, flexible approach. SAS integrates data from internal and external sources and applies proven data preparation techniques. Our data-driven approach provides a flexible framework for running different recovery scenarios rapidly.

• Quick, accurate decisions. SAS quickly identifies the best supply chain response to the pandemic. Our agile, iterative process from data to analytical insights is crucial for making prompt and accurate decisions in times of uncertainty.

End-to-End Supply Chain Planning
Holistically plan and optimize

Suppliers
Choose best supply locations and amounts from potentially limited choices.

Distribution Centers
Send inventory to best locations to meet demand while creating transport cost savings.

Plants*
Scale plant production up or down as labor availability and product demand changes.

Demand
Meet sales goals under a variety of potential demand recovery forecasts.

*Manufacturing planning is optional for retailers.

Learn more at the SAS COVID-19 Resource Hub
Service brief

**Subject matter**
A service brief describes the value and components of a service that SAS consultants provide based on their business or technical expertise. Service briefs explain how a particular SAS service can help customers solve a problem, implement a methodology, design a road map or establish a process for a business or technical issue.

**When to request**
A service brief is created when there is strong business justification to develop a brochure for customers seeking a vendor for a certain type of service. A service brief can be targeted to a specific industry, line of business or technology area. Requests for service briefs will be reviewed on a case-by-case basis.

**Target audience**
IT and business audience, director level and above, or public sector equivalent.

**Source content requirements**
- Completed product positioning document, or equivalent.
- Detailed list of the service offering, including (as applicable) what’s provided to the customer at the completion of the service engagement, expectations from both SAS and the customer, etc.

**Content elements**
The content elements listed below are the basic elements in service briefs. However, there can be variation. You may have additional or different sections than those listed below. This is not a rigid template; some variability is expected and necessary.

### Title/Kicker
The title should be the name of the service. Kickers are optional; they can be used to provide a short description of what the service is.

**Overview**
SAS Data Governance Master Plan is a comprehensive consulting engagement to develop, launch and scale data governance that will serve as a strong foundation for your data management, reporting and analytics needs.

More than ever, data is the lifeblood of the business, so taking control of your data and managing it as a valuable corporate asset is vital to your success. This requires proper data governance based on a framework that defines a comprehensive data strategy, objectives and policies. However, organizations often struggle to answer key questions, such as why, how, who, what, and where to begin. This leads to ineffective programs that fragment how data is managed.

Are you ready to take control of your data? To get started, your organization needs a road map for success—one that’s tailored for your business. The SAS Data Governance Master Plan service helps you establish this road map while taking into consideration your existing practices and technologies, staff skill sets, organizational structures and company culture. SAS experts work closely with you to establish a sustainable data governance program and share expert knowledge on how to develop and use your people, processes and technologies to transform disparate data into a valuable corporate asset.

**Key Benefits**
With the insights, recommendations and guidance SAS experts provide through this service, you can develop a sustainable data governance execution strategy and business-driven road map that enable you to:

- Gain a robust, extensible data governance framework— that includes objectives, guiding principles, decision-making bodies and decision rights.
- Align data governance activities— to support business strategies and key initiatives by creating a comprehensive program.
- Establish a sustainable data governance program— that addresses data management issues and transforms disparate data into a key asset.
- Enable more effective data management— by establishing clear business definitions, business rules and policies for corporate data.
Overview/Introduction
This section is a high-level overview of the service, describing what it is and why it’s important. It includes a brief mention of customer pains/issues that are relevant to the service. This section should not extend beyond the first column of text. Word count is approximately 100 to 225.

Key benefits
The three to four key business benefits of the service, described briefly under subheads, each starting with an action verb. Should not extend beyond the first page. Word count is approximately 75 to 200.

Solution description
This section begins with the subhead: How Does It Work? Its goal is to show customers exactly what services they should expect to receive from SAS. The section provides a somewhat detailed description of how the service is structured, the steps involved, and the outcomes or deliverables customers will receive. Word count is approximately 175 to 250.

Commitment
This one-paragraph section begins with a subhead: What Is the Commitment? Its goal is to give the customer an idea of the duration of the service, the locations involved (on- or off-site), and what is included in the cost. Word count is approximately 25 to 50.

Call to action
This section tells the reader how to get more information. It begins with a subhead: How Do I Find Out More About the [service name goes here] XYZ? Word count is approximately 10 to 25.
White paper

Subject matter
White papers are our most sought-after type of collateral and are often gated (requiring registration) on sas.com. Overall word count for white papers typically ranges between 2,000 and 4,000. White papers can cover a broad range of topics, including but not limited to:

- Key business issues.
- Emerging technologies.
- Product features/functions.
- Persona-based challenges.
- Compliance issues.

Topics are covered to some degree of depth. White papers offer education, thought leadership and/or best practices, and they keep the sales pitch to a minimum.

Note: We do not use bylines on SAS-authored white papers.

When to request
White papers are created on an as-needed basis to fill a marketing need, serve as fulfillment for a campaign or event, or when there is a compelling subject that needs the deeper exploration white papers can provide. Requesters should contact Marketing Editorial to discuss their plans for a white paper before entering the GMS request.

Target audience
The target audience for a white paper is usually a business audience, but can also include users, IT or any relevant persona (CIO, data scientist, etc.).

Source content requirements
Sometimes a draft of a white paper already exists prior to a request being submitted. If that’s the case, and if the need for and validity of the white paper are verified, then papers typically only require review by a writer and copy editor prior to production. In situations when a white paper is not yet written, the following source content is required before production begins:
Content elements

Content elements for white papers vary depending on topic. Commonly used elements include:

1. **Title/Kicker**
   - A descriptive title and a kicker (when needed). Include SEO keywords when relevant.
   - Title/kicker should be compelling enough to entice someone to read the entire paper.

2. **Executive summary or introduction**
   - A brief overview of what the paper is about, what information will be presented, etc.
   - Alternatively, the introduction could be a scenario that sets up the white paper’s “story.” Ideally, should not exceed one page.

3. **Body of paper**
   - The body of a white paper can vary greatly depending on the topic, content, etc. Here are several key elements that are usually included in the body of a paper:
     - Identification of the issue(s), including background information, challenges, possibilities, etc.
     - Approach to solving the issue (best practices of lead organizations using analytics).
     - How SAS can help.
     - Case studies, if available.
     - Conclusion.
     - **Call to action**
       - Always offer a call to action or a way for the reader to get more information.

Sample white paper inside pages.
Briefs

Subject matter
Briefs are short pieces that can cover a broad range of topics. For example, they may tackle narrowly focused industry- or technology-specific topics. They are sometimes used as partner collateral when there is no other format that suits the need. They sometimes express a specific point of view and are considered thought leadership. At other times, briefs are primarily journalistic in nature.

When to request
You may request a brief when you have a compelling topic to write about but no other collateral format is appropriate for your purpose or audience. In some cases, briefs can be an alternative to a white paper if the material isn't lengthy or in-depth enough for an eight- to 10-page paper. When you have article-length content (500 to 1,000 words), it may be preferable to create an Insights article for sas.com rather than creating a brief.

Target audience
The target audience varies widely, depending on topic, usage, purpose, etc. A brief could be aimed at a business audience, or at users, IT or any relevant persona (CMO, CRO, etc.).

Source content requirements
Source content for a brief can be anything from a prewritten, original draft to an outline. Source content requirements may include:

• Approval by Marketing Editorial.
• Completion of a white paper briefing document if deemed necessary by Marketing Editorial.
• Suggested outline.
• Kickoff meeting (as needed).
• Source materials (varies, depending on topic).

target audience
The target audience varies widely, depending on topic, usage, purpose, etc. A brief could be aimed at a business audience, or at users, IT or any relevant persona (CMO, CRO, etc.).

Source content requirements
Source content for a brief can be anything from a prewritten, original draft to an outline. Work with your Marketing Editorial contact to determine exactly what is needed. Content requirements may include:

• Approval by Marketing Editorial.
• Completion of a white paper briefing document if deemed necessary by Marketing Editorial.
• Suggested outline.
• Kickoff meeting (as needed).
• Source materials (varies, depending on topic).

Average production: 5-6 weeks

18 | TOOLKIT COLLATERAL PRIMER

1 Ten Ways Analytics Can Improve Refinery Operations

Work in oil and gas refineries can be intense, “always on,” and hazardous. As refinery managers adapt practices to accommodate variations in feedstock to meet changing customer demands, it’s more important than ever to establish an agile operating environment, which can prevent unplanned downtime and maximize margins.

To achieve these goals, refineries are investing in new technologies and modernizing processes on refinery floors. For example, technologies such as intelligent sensors can provide vast amounts of granular data about equipment performance and status in real time. Harnessing insights from this data is the first step in applying advanced predictive analytics to optimize refinery operations.

But where are the best opportunities for improving efficiencies? Where can management make the most impact on performance and throughput? And how can the Internet of Things improve the bottom line?

Exploring the Value: Real-World Use Cases

To better understand how analytics is being used to solve problems in today’s complex oil and gas refineries, we have outlined 10 real-world examples from over three decades of our experience. They illustrate the huge range of opportunities for your refinery business – and the kinds of value you can expect to realize.

2 Fuel Blending

Manufacturing gasoline is a complicated process, requiring the blending of multiple products to meet strict quality and financial objectives. But managing octane and ethanol content requires more than just optimizing the blending process. It requires a keen understanding of economics and market dynamics and a systems approach to blending from raw materials to finished product.

SAS® Analytics can help refiners reduce ethanol and octane giveaway, boost reformed blends and optimize the entire blending process. Our customers realize higher operational efficiency in the refining process, and they are able to find the optimal spread between supply feedstocks and demand requirements.

3 Market Analytics and Trading

To set appropriate hedging strategies and forecast future cash flows, refiners need access to current trade and pricing data – and the right tools to analyze it, gain insights and make informed decisions.

SAS analyzes the cash flows associated with operational plans and contracts, and insights gained to determine:
1) the physical contracts to secure for operations and 2) the financial hedges to reduce risk. SAS also provides credit risk analysis software to better understand the risk associated with customers, suppliers and trading counterparts.

4 Fluid Catalytic Cracker Optimization

It’s estimated that one-third of the crude oil refined for the global market passes through a fluid catalytic cracker (FCC). This is one of the most important conversion processes used in petroleum refineries – and one of the most profitable. So keeping the FCC running at a critical to margin protection for refiners worldwide. In addition, disposal of catalyst contaminated effluent is expensive and a significant environmental concern.

One refiner prevented catalytic loss during the fluid catalytic cracking process by using SAS to analyze the optimal range of controllable parameter values to achieve the best operational results. This reduced the expense of replacing catalyst, which has increased threefold in recent years. SAS analytics enabled one refinery to save US$175,000 per day.

Air Blower Performance Improvement

Many refinery assets require a constant flow of air into and across production units to ensure consistency in product quality and proper function of the units themselves. Predictable and consistent operation of these blowers is critical to the success of the refinery.

SAS helps customers detect and correct issues that contribute to improper air blower functions by predicting impending failures and modeling optimal operating parameters. The benefits can be significant. For example, for one refinery customer, fluctuations in air flow were causing production quality issues and high wear and tear on the blower, resulting in costly maintenance and asset replacement. SAS analyzed high-volume sensor data from the actuators, digital governors, compressors and advance processes to determine the causes behind the anomalous behavior. Using the insights gained, the refinery was able to identify issues with the digital governor and address them. As a result, the company reduced its network and maintenance costs.

Hydrocracker Downtime Prevention

The hydrocracker is designed for certain crude qualities and diesel yields, but the present feedstocks are of heavier and more sour crude than per design, and the current...
Subheads help break up briefs into digestible chunks that are easy to follow. They also
There’s no limit or restriction on subheads. The only guideline is to use them wisely.

Content elements for briefs vary, but they do include certain elements, described below:

- **Title/Kicker**
  A compelling title and kicker makes the brief more attractive to readers. Kickers aren’t mandatory, but they often entice a reader to read the entire article.

- **Subheads**
  There’s no limit or restriction on subheads. The only guideline is to use them wisely. Subheads help break up briefs into digestible chunks that are easy to follow. They also provide the reader with more information on the general topics that are covered, while serving as a navigational tool.

- **Graphics**
  Images - whether in the form of charts, screenshots, infographics, artwork, photography, etc. - add visual interest to a brief while imparting information.

- **Body of paper**
  The body of a brief can vary depending on need, but it can include the following elements:
  - Introduction of the business issue/challenge/trend/regulation and explanation of why it’s a pressing issue for the reader.
  - SAS’ perspective on it and/or solution to the issue. Focus on the positive, and set up what’s possible with the right mindset/approach/technology.
  - A list of recommendations, steps or best practices that savvy business leaders can apply to move forward in a positive direction (or take advantage of the opportunity defined upfront).
  - Conclusion.
  - Call to action

Always offer a call to action or a way for the reader to get more information.

For the company by reducing operating cost and the amount of off-spec product that has to be sold at a lower price.

**Flaring**
Gas flaring is a required, but highly controlled, refinery process. Inefficiently managed flaring can result in significant financial implications, including higher operating expense and even regulatory fines.

For one customer, managing this process for a Naphtha Splitter facility was proving to be a challenge. Intermittent flaring from process columns was being caused by column pressure. SAS analyzed multiple sensors throughout this complex process to discover the root causes of the column upsets. SAS software was then used to create a dynamic model that manages controllable set points that respond to changes in the process caused by changing feedstocks.

**Conclusion**
SAS helps several refineries that experience routine trips in steam turbine and combustion air blowers leading to the sulfur recovery unit. With advanced analytics, operators can now predict an impending trip and select a different mode of operation to prevent the sulfur recovery process from going offline. For one customer, SAS provides four days’ notice of unstable conditions.

SAS improves uptime of hydrocracker units by reducing H₂S slippage through dynamic modeling of the hydrocracker process. For one customer, this approach resulted in $6.4 million in savings per year and enabled the company to avoid a one-week, unplanned shutdown that typically occurred every five years. Each shutdown avoided saves the company $7 million.

**Furnace and Heater Analytics**
Malfunctioning furnaces and fired heaters are dangerous, and if they fail catastrophically, they can be fatal. Without the benefits of analytical insight, assets can fail before they appear normal, but actually be in the process of failing.

SAS enables early detection of impending furnace and heater events by using machine learning algorithms and analytics on data from Internet of Things analytics to analyze pressure, temperature, time stamps, device ID, CO, NO, SO₂, and other data elements from furnace and heater assets. This software detects abnormal variations in the data, quickly identifies any significant deviations and generates alerts so that the right people take quick, preventative action.

**Sulfur Recovery Unit Optimization**
Sour crude refining involves removing sulfur compounds by liberating them as H₂S gas. This reduced form of sulfur is carcinogenic, so once the H₂S gas is separated from the oil, it must be captured and re-processed in order to comply with environmental, health and safety regulations. When running smoothly, sulfur recovery units are typically 95 percent to 99 percent effective in removing sulfur compounds.

SAS has helped several refineries that experience routine trips in steam turbine and combustion air blowers leading to the sulfur recovery unit. With advanced analytics, operators can now predict an impending trip and select a different mode of operation to prevent the sulfur recovery process from going offline. For one customer, SAS provides four days’ notice of unstable conditions.

**Pump Performance Improvement**
Pumps are critical to many functions within refineries. Their performance is directly correlated to the efficiency of the entire refining operation, from energy consumption to product throughput. So maximizing uptime is a top priority for refineries.

SAS can detect and predict future events that affect availability of pumps. For one customer, a vacuum distillation unit column bottom pump had 14 failures in one year. These included problems with mechanical shaft bearings, impellers and case wear rings. After a root cause analysis, SAS identified leading indicators of the associated equipment failure, significantly reducing maintenance costs and downtime.

The refinery has now implemented advanced monitoring capabilities to establish early warning indicators that enable preventative actions.

**Product Quality**
Refining operations often run processing units at more energy-intensive settings to provide a cushion for variability in the inputs (also referred to as “flexibility”). These operations are costly and often result in suboptimal product yield. With profit margins under constant scrutiny, refineries need to determine the optimum operating parameters that achieve the desired product specifications even in the presence of process variability.

For example, one refinery is using SAS to optimize the refining process for chemical-grade propylene. By optimizing each unit within the process, they are able to add millions of dollars of incremental revenue.

To learn more, please visit: sas.com/oilgas

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Customer success story

**Target audience**
Typically a business audience or the public sector equivalent.

**Source content requirements**
Before a customer success story is created you must have:

- Approval by the reference manager. [Guidelines for gaining approval](#) are on the Sales & Marketing Portal.
- A quotable customer who can speak publicly on his or her company’s behalf.
- A prep call with relevant SAS stakeholders (e.g., PMM, AE, reference manager, Marketing Editorial representative).
- An interview with the customer.

**Subject matter**
Customer success stories are engaging, feature-type stories that focus on how an organization uses SAS solutions to achieve noteworthy benefits. These narratives are from the customer’s perspective, documenting its journey and achievements. [More details, and special writing guidelines for customer stories, are available online.](#)

**When to request**
You may request a customer success story if your story idea meets the following criteria:

- Is relevant to SAS’ core initiatives; aligns with GTM strategies; covers topics, industries or solutions listed as high-priority by GTM teams; focuses on gaps in coverage areas.

- Is clear to the average sas.com reader. Plainly states the customer’s challenge, its impact, why SAS was the right solution and what the results were; is not overly technical; talks to the customer’s industry AND to the broader sas.com audience.

- Is focused on business results and the impact of SAS. Reflects a mature deployment with tangible results that are specific and detailed (such as quantifiable ROI, time reduction, percentage of increases/decreases and increased profitability/revenue); includes examples of what the customer is doing and achieving.

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**Please note:** Customer success stories are typically published only on sas.com. PDFs are created only in special cases where business justification is provided.
Cancer treatment enters a new era with artificial intelligence

Amsterdam UMC uses the SAS® Platform and AI solutions to increase speed and accuracy of tumor evaluations

The application of artificial intelligence (AI) is gaining traction in oncologic care, and Amsterdam UMC is leading the way by using computer vision and predictive analytics to better identify cancer patients who are candidates for lifesaving surgery.

With one of Europe’s largest academic oncology centers, Amsterdam UMC strives for every patient to contribute to the care of the next patient. This is done by collecting enormous amounts of data on each patient, including biomarkers, DNA and genomic data.

“Our opportunity is to use AI to help us with our ever-growing data volumes,” says Dr. Geert Kazemier, Professor of Surgery and Director of Surgical Oncology at Amsterdam UMC. His search for a robust analytics platform led Kazemier to SAS, kicking off a partnership that has furthered the science of using AI to evaluate liver tumors pre- and post-systemic therapy. Additionally, the SAS Platform gives thousands of cancer researchers at Amsterdam UMC access to cutting-edge analytics to improve research and collaboration.

Human limitations in tumor assessments

Colorectal cancer is the third-most common cancer worldwide, and it spreads to the liver in about half the patients. Kazemier, who specializes in liver surgery, says the best way to treat this type of cancer is to remove it. But some tumors are too large to be removed, and these patients must undergo systemic therapy, such as chemotherapy to shrink the tumors.

After a period of treatment, tumors are manually evaluated using computerized tomography (CT) scans. At that time, medical professionals can see if a tumor shrunk or changed in appearance. How a tumor reacts to systemic therapy determines whether lifesaving surgery is possible or if a different chemotherapy regimen is necessary.

This manual approach presents many challenges.

Evaluating tumors is a time-consuming process for radiologists. And for each CT scan, typically only the two largest tumors are measured – possibly leaving vital clues hidden in the remaining tumors, if a patient has more than two. Furthermore, the manual
We’re now capable of fully automating the construed as constituting an additional warranty. Customers have shared their successes with SAS as part of an agreed-upon contractual exchange or project success vary depending on individual customer configurations and conditions. SAS does not guarantee or represent that every customer will achieve similar results. The only warranties experience is unique, based on business and technical variables, and all statements must be considered nontypical. Actual savings, results and performance characteristics will the results illustrated in this article are specific to the particular situations, business models, data input and computing environments described herein. Each SAS customer’s summarization following a successful implementation of SAS software.

Together with SAS, Amsterdam UMC is transforming tumor evaluations with AI. It uses computer vision technology and deep learning models in SAS Visual Data Mining and Machine Learning to increase the speed and accuracy of chemotherapy response assessments. Data scientists also take advantage of the SAS Deep Learning Web Python (DLPy) API to create deep learning models. Capabilities like automatic segmentation help doctors quickly identify changes in the shape and size of tumors and note their color.

“We’re now capable of fully automating the response evaluation, and that’s really big news,” Kazemier says. “The process is not only faster but more accurate than when it’s conducted by humans.”

The project started by training a deep learning model with data from 52 cancer patients. Every pixel of 1,380 metastases was analyzed and segmented. This taught the system how to instantly identify tumor characteristics and share vital information with doctors.

Prior evaluation methods limited what doctors could see, but the AI model provides total tumor volume and a 3D representation of each tumor, allowing doctors to more accurately determine whether花瓣ing surgery a viable or a different treatment strategy should be chosen.

AI will help us save lives... I’m absolutely sure about that,” Kazemier says.

Advanced analytics for cancer researchers

Outside the clinic, the SAS Platform is also available to more than 1,100 Amsterdam UMC cancer researchers to enhance their research efforts. SAS Visual Analytics allows them to quickly spot hidden trends, while SAS Visual Statistics provides a powerful tool to perform advanced analytics and predictive modeling.

Additionally, SAS Vasa supports the automatic translation of raw images to objective metrics in a clinical setting. Such automation will save radiologists a lot of time, while reducing the number of dangerous false negatives and false positives.

By running these solutions on SAS Vasa, Amsterdam UMC gives researchers an open analytics platform to collaborate and obtain innovative results faster. Now, biologists, doctors, medical students and even business analysts working to improve the patient journey can benefit from analytics regardless of their data abilities and coding language preference.

“This is the next phase of analytics for us, and I see tremendous opportunities ahead.”

**Explainable AI**

For Kazemier, AI technology must be transparent and open if it’s going to revolutionize healthcare. “If you create algorithms to help doctors make decisions, it should be explainable what that algorithm is actually doing,” he says. “Imagine if an algorithm came up with something bad for the patient and the doctor follows it. What’s the effect of that? Is err not only human.”

A critical factor in the ongoing deployment of analytics within clinical settings is to establish an end-to-end auditable and transparent process for decision management in health care. The SAS Platform provides a summary of how each analysis is performed, making it easier for doctors to track their models and algorithms. This improved collaboration between human and machine builds more trust in AI. This level of transparency attracted Kazemier to SAS.

“We needed an explainable model while still maintaining a high level of learning performance,” he says. “SAS was the most trustworthy solution we found.”

Looking forward, Kazemier sees a bigger role for AI at Amsterdam UMC.

“In the future, we may be able to predict the outcome of surgery and overall patient survival,” he says. “While we are currently using AI technology with colorectal liver cancer patients, AI has the potential to be used in assessing many solid tumor types, including breast and lung cancer. We have only touched the tip of the iceberg.”

To contact your local SAS office, please visit: sas.com/offices

**Improved treatment strategies**

The results illustrated in this article are specific to the particular situations, business models, data input and computing environments described herein. Each SAS customer’s experience is unique, based on business and technical variables, and all statements must be considered nontypical. Actual savings, results and performance characteristics will vary depending on individual customer configurations and conditions. SAS does not guarantee or represent that every customer will achieve similar results. The only warranties experience is unique, based on business and technical variables, and all statements must be considered nontypical. Actual savings, results and performance characteristics will vary depending on individual customer configurations and conditions.

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Collateral FAQ

This FAQ covers questions that collateral writers are frequently asked. If you have a question that isn’t covered, email Jeff.Alford@sas.com.

Q: How do I decide what type of collateral I need? Is there a core set of collateral produced for every SAS solution?
A: A variety of factors determine what type of collateral gets produced. The following items serve as a general guideline:

For products - In the past, SAS produced “fact sheets” for every major new product and major update. We no longer create PDF versions of fact sheets. Instead, we build new product web pages or update existing product pages as needed. In cases where we do not have an external product page on sas.com for a particular product, we may be able to produce a product brief (PDF).

For customer/prospect issues - Most other collateral production is driven by our desire to help customers understand how SAS can help them solve a problem or achieve better results. The type of collateral needed varies according to the goals and intended audiences. Review the various types of collateral described in this Primer, then contact Marketing Editorial to discuss options if you have any questions.

For lead-generation events - Marketing collateral generally should not be tied to a deadline for an event. But some collateral is used at – or as follow-up to – major events and trade shows, webcasts, etc. Such requests are determined on a case-by-case basis.

Q: Can I always expect these turnaround times to apply when I request collateral?
A: The time frames described in this Collateral Primer are general guidelines. They vary based on length and complexity of the content, quality and completeness of the source material, availability of our resources, and promptness of reviews.

Q: How do I begin the process of having collateral created?
A: You must first submit a GMS request. Contact Marketing Editorial if you have any questions about how to get started.

Q: Does SAS have other types of content and formats to cover more technical information?
A: Yes, our Documentation division produces technical papers and technical documentation. Read more details below.

For technical papers - Certain tasks that are useful, apply to a subset of users or reflect best practices (with specific use cases and examples) may be covered in technical papers. You can download the technical paper template here. Before you start writing, we strongly suggest you open a technical paper request.

For official technical documentation - Tasks that most customers need to understand, and steps that are officially supported, are covered by technical documentation. For examples, see our Help Center, our Learn pages and our videos. Enter a request for technical documentation here.

Q: I’m told the quality of the screenshots I have provided isn’t sufficient. Are there any guidelines for capturing screenshots?
A: Use the following screenshot guidelines to ensure the best quality.
Screenshot capture instructions

Overview
Product screenshots are important for marketing collateral, sales presentations and sas.com in that they visually represent and support what we describe in the text and help to accurately show our software. All product screenshots are stored in the SAS Product Screenshot Repository. To learn more, read the instructions for how to use this self-service repository. For additional information, or if you have problems, you may contact Jae.Cody@sas.com. Illegible, blurry screenshots are detrimental to the SAS brand and marketing messages.

Although a screenshot may look clear at 72 dpi on a monitor, after it is modified for print or the web, the quality will degrade to the point where it is not possible to regain the clarity. The following instructions explain how to capture clear screenshots and store them in the Product Screenshot Repository where they will be available to creative teams and other users.

To capture screenshots, use the Windows Snipping Tool on a PC or the Screenshot App on a Mac. Also, before submitting a new screenshot, please search the repository to see if your image is already there.

Setup

Windows 10 display settings
1. Set your Windows Display settings to ensure a high-resolution screenshot is captured. To set the screen resolution, go to Settings and select System ➤ Display ➤ Advanced display settings. Choose the highest-resolution setting in the list. It must be set to a minimum of 1920x1080. If your monitor does not support 1920x1080 resolution, please find a computer with one that does or submit an iNeed request to get a new monitor.

2. ClearType text must be turned off. To do so, go to Settings and select System ➤ Display ➤ Advanced display settings. Under Related settings, select ClearType text. Make sure the box “Turn on Clear Type” is unchecked. If it is checked, uncheck it and follow the steps for turning it off.

3. To set your Windows Theme, in Settings, select Personalization (Or right-click on your Windows Desktop and select Personalize to open the Display Properties window.) ➤ Themes ➤ Theme Settings. On the Theme window that displays, select the Themes that are titled Windows Default and select Windows. The colors of the theme will show up well in a printed or electronic graphic and is the default most customers have as their setting. The changes will automatically occur.

Browser settings
If you are capturing a screen displayed in a browser window (e.g., Internet Explorer), set the browser zoom level to 100% and maximize the browser window size to full-screen.

Screenshot library
Product Marketing and Product Management are responsible for uploading screenshots to the official SAS Screenshot Library, the repository for screenshots that have been approved for use in marketing and sales materials.
Design and layout

Templates

Templates for all types of collateral are provided on the SAS Brand Site. Templates ensure a standard look and feel, contributing to the integrity of our visual brand.

Although design and production of most collateral is managed at our headquarters in Cary, NC, there are times when countries or third parties need to create pieces that adhere to corporate design standards. In such cases, you should enter a Global Marketing System (GMS) request so that independently created collateral is properly identified and loaded into our asset sharing systems.

Essential elements

The visual style of SAS collateral reflects the corporate design standards outlined in our Brand Creative Guide, available on our Brand Site. This guide provides detailed information about color choices, typography, image style and more.

Style sheets and color palettes

Templates include paragraph and character styles for most typographical components. Also embedded are the color palettes described in the Brand Creative Guide.

There are standard characteristics/elements required for all collateral:

1. **Trim size**
   All collateral types are the same size.

2. **Label**
   Identifies collateral type; appears in the upper right-hand corner of the cover.

3. **Title bar**
   Color is Midnight Blue. Type is Avenir Next Thin reversed to white.

4. **Energy line**
   Vibrant color rule complements Midnight Blue title bar and matches color block behind SAS logo.
Most collateral features realistic color photography on the cover, following the style outlined in the Brand Creative Guide. Fact sheets and product briefs feature a partial view of a screenshot that appears inside the brochure.

The SAS logo must appear on the covers of all collateral. It is reversed to white on a vibrant color block. The color in the block behind the SAS logo determines the colors of other standard elements within the same piece, as indicated in the template style sheets.

The color of the address bar is Midnight Blue, matching the color bar on the front page. The color scheme throughout the brochure.

The full legal statement should appear on all collateral. Type is set in Avenir Next Regular.

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Tracking numbers follow the legal statement. (Cosmos_GMS.MonthYear)
Appendix/references

Follow the links below for complete and full versions of the examples used in this primer.

Annual report
E-book
Solution/industry overview
Product brief
Solution brief
Service brief
White paper
Brief
Customer success story

Follow the links below to various marketing resources referenced in this guide:

COSMOS (Sales collateral database)
SAS brand site
Global Marketing System (GMS)
SAS product screenshot repository