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# HSBC Global Education Challenge:

# An Integrated Marketing Communication Plan to Support

# Education around the World

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**Introduction**

Integrated marketing communication (IMC) recognizes the value of a comprehensive plan that evaluates the strategic roles of a variety of communication disciplines -- advertising, public relations, personal selling, and sales promotion -- and combines them to provide clarity, consistency, and maximum communication impact. (American Advertising Agencies, 2008).

In this paper, I will discuss the IMC campaign of HSBC’s Global Education Challenge, which was conducted over a seven-month period in 2002-03. I will begin with a brief situation analysis from the SOSTAC marketing framework, followed by a SWOT analysis, and concluding with a detailed presentation of HSBC’s plan of achieving greater corporate awareness of its support of children’s education.

**1.0 Situation Analysis/Where Are We Now?**

HSBC is one of the world’s largest banking and financial services firms with 6,500 branch offices in 78 countries. The bank’s Community Investment division, which has teams in many of these countries, spends approximately 75 percent of HSBC’s charitable donations in programs related to education and the environment. (LS PR, 2003)

With its long history of supporting education, HSBC founded the Education Trust in the United Kingdom in 2001. Its two objectives were:

* Support education programs in the U.K.
* Advise on best practices for education support in HSBC offices worldwide

But internally-generated market research discovered low awareness, both internally and externally, of HSBC’s support for education. The bank’s internal marketers believed a global sponsorship would remedy this problem. (Ibid.)

In July 2001, the bank was approached by Graham Dalton, a New Zealand yachtsman, who proposed it sponsor his yacht *Hexagon* in the *Around Alone* yacht race in 2002-03.

HSBC and its outside public relations counsel LS PR realized a round-the-globe yacht race was an ideal sponsorship opportunity for several compelling reasons. First, the *Around Alone* race is a global event and one of the most strenuous sporting challenges for any individual. Second, Dalton is known for his passion for youth development programs and believes that the skills learned excelling in competitive sports are transferable to life. (Ibid.)

Dame Mary Richardson of HSBC's Education Trust, which invested more than $1 million in the Hexagon sponsorship, said Dalton’s race around the world appealed to HSBC because it is heavily committed to education all around the world. (Southern Daily Echo, 2002)

Third, HSBC and graphic design firm Terabyte were convinced they could develop exciting educational resources for school children between the ages of 9-12 years. These materials would get kids involved in the race while at the same time raise awareness of the bank’s long-term commitment to education. (Terabyte, 2002)

The *Around Alone* race, which was celebrating its 20th anniversary, started in New York on September 15, 2002. The fleet of 18 competitors sailed to Torbay (England), Cape Town (South Africa), Tauranga (New Zealand) and Salvador (Brazil), before returning to Newport, R.I. in April 2003 for a total of 28,800 nautical miles (33,140 miles). (Juarez, P., 2002).

Prior to the start of the race, school teachers across the U.K. received more than 25,000 resource packets for their students. Each packet contained a race map, stickers for students and a personal invitation to view the website [www.education.hsbc.com](http://www.education.hsbc.com) in advance of the new academic year. Together these resources – collateral materials and a website -- made the race an exciting educational experience. (Ibid.)

On the website students accessed 32 online weekly modules focusing on different aspects of the natural world that Dalton’s *Hexagon* faced on it sped around the globe. These included lessons and information about weather systems, energy, wildlife, geography, nutrition and culture. Students could also read Dalton’s daily blog, updating students on Hexagon’s progress. (Ibid.)

**1.1 SWOT Analysis**

 SWOT Analysis is a strategic planning method to evaluate the Strengths, Weaknesses, Opportunities, and Threats in a project or business venture. It specifies the objective of the project and identifies the internal and external factors that are favorable and unfavorable to achieving that objective. (SWOT Analysis, 2008) A SWOT analysis was conducted by HSBC.

**1.1.1. Strengths –** HSBC identified seven strengths in IMC campaign. They were: 1) educational project is not for corporate gain, 2) project provides credible learning resource tied into the U.K.’s National Curriculum, which consists of certain basic material now covered by all primary and secondary students, 3) project offers a notable, well-known sailor, 4) a unique proposition, 5) a strong brand, 6) global reach, 7) tapped into a trend attractive to both children and the media – ICT in education, i.e., information and computer technologies, such as computers, the Internet, radio, television, and telephony. (LS PR)

I think HSBC’s choice of education globally was a strong, compelling corporate endeavor. Moreover, the bank and its strategic partner, Graham Dalton, shared a common, long-term vision of raising education standards worldwide.

**1.1.2. Weakness –** The bank identified only *one* weakness: 1) the need to dissociate “corporate influence from education,” i.e., appearing overly commercial. (Ibid.) This *is* a big weakness, and one that must be dealt with great care and sensitivity. If not, it could undermine the credibility and impact of HSBC’s IMC program.

Several large companies have become “poster children” of how not to conduct education sponsorships. For example, Channel One, the TV news and advertising program broadcast into U.S. middle schools and high schools, forces students to watch two minutes of TV commercials every school day. Reaching 8 million middle school and high school students each day, Channel One is the single largest form of commercialism in schools. In 2006, a research study by the American Academy of Pediatrics reported that children who watched Channel One remembered the commercials more than they remembered the news. (Channel One News, 2008)

Educational materials and website developed by sponsors must offer lesson plans and genuine classroom activities. In one blatantly commercial classroom activity McDonald's had students design a McDonald's restaurant. A Shell Oil video taught students that the way to experience nature is to drive there -- stopping to fuel up your Jeep at a Shell gas station on the way. The Shell logo appeared on the screen throughout the video. (Center for Commercial-Free Education, 2005)

Corporate hucksterism, posing as educational material, can be subtle. Some teachers were duped by Exxon's lesson plan about the healthy, flourishing wildlife in Prince William Sound, Alaska, which showed eagles, sea otters, and sea birds flourishing in their habitat. In reality, the program was a public relations vehicle designed to help Exxon clean up its image after the Valdez oil spill. Clearly, if all that corporate sponsors of education offer students is corporate propaganda, there will be a strong and negative backlash. (Ibid.)

I was also surprised that HSBC didn’t identify other weaknesses; I can think of several. For example, HSBC’s support of education is hardly unique. In reality, companies ***not*** supporting education are more the exception than the norm. Thousands of corporations, both large and small, national and multi-national, support educational programs and initiatives. An IMC campaign has to be very good to stand out from the crowd. In addition, yachting as a sport may be foreign to many children in the developing world. If I am a teacher or a student living in landlocked New Delhi, India, yachting probably doesn’t mean much to me.

**1.1.3. Opportunities –** HSBC identified four opportunities: 1) The first online education program for children between 9-12, 2) opportunity to raise awareness of HSBC’s commitment to education around the world, 3) create long-term links among schools around the world, 4) promote the concept of “The World’s Local Bank” by communicating with key audiences regionally. (LS PR)

**1.1.4 Threats –** HSBC identified one threat: 1) the unpredictability of round-the-world sailing. This is a legitimate threat and one that is difficult to plan for. Despite its casual, champagne-popping image, yachting can be a very dangerous sport. In rough seas catastrophe is never far off. (Ibid.)

In 1998 115 boats were competing in the Sydney to Hobart Yacht Race along a 630-nautical-mile route when the fleet ran into a severe and deadly storm. Winds were clocked at up to 78 knots and waves crested as high as 33 feet (10 meters). Fifty-five yachtsmen were rescued, 50 of them by helicopters in gale-force winds. Only 44 of the 115 boats finished the race. Tragically, six sailors died. (Rivera, 1998)

**1.2 Objectives/Where do we want to go?**

HSBC identified two categories of objectives: 1) Sponsorship objectives, and 2) Global Education Challenge objectives. Sponsorship objectives were to:

* Generate awareness and interest in the HSBC Global Education Challenge through the sponsorship of Graham Dalton’s entry in *Around Alone* in 2002.
* Raise awareness of HSBC’s commitment to education around the world.
* Involve and motivate staff and raise the profile of existing education support.
* Help project the new brand positioning of “The World’s Local Bank.” (LS PR)

Global Education Challenge objectives were to:

* Create a credible learning resource that can be used by teachers and children as part of their classroom and home learning in HSBC’s operational countries.
* Drive traffic to [www.education.hsbc.com](http://www.education.hsbc.com)
* Encourage website registrations from target audiences (middle-school teachers, students, 9-12 years old, and parents of students.)
* Use the website to teach children about National Curriculum subjects, and broadening their horizons’ about the world. (Ibid.)

**1.3 Strategy/How do we get there?**

HSBC and LS PR developed a comprehensive strategy utilizing many key elements of the standard marketing mix, starting with media relations, to achieve its sponsorship and educational objectives.

**1.3.1 Media Relations –** LS PR crafted a pro-active media relations campaign that targeted middle-school children through key influential groups. To reach these groups, the following media sectors were targeted:

**Media Sector Examples**

|  |  |
| --- | --- |
| National daily and weekly newspapers | Education, News, Sport |
| Regional daily and weekly newspapers | Herald Express, Southern Daily Echo, Shropshire Star, Newbury Weekly News |
| Local TV | Westcountry Today, BBC South Today |
| Local Radio | BBC Radio Solent news, Telford FM, BBC  Radio Shropshire, 105.2, The Quay |
| Internet | CNN.com, sail-world.com |
| Education Media, including technology in education and ICT publications | Trade: Education Today, Primary Times, Junior Education, Headteacher Update  Consumer: The Times Education Supplement |
| Family and Parents Media | Families Magazines, Parent’s Online |
| Kids Media | Blue Peter Magazines, Funday Times |
| Computing and Online Media | PC Advisor, ictadvice.org.uk, PC Home |
| Yachting and Sailing Media | Yachts & Yachting, Yachting Life, Seahorse International Sailing |
| Marketing and PR Media | Sponsorship News |
| Business Media | Total Business |
| HSBC customer and internal publications | Premier, Group News |
| Event Guides | *Around Alone* Event Guide |
| International Media | New York Times, Cape Times, New Zealand Herald, etc. |

Source: LS PR

**1.3.2 Timeline --** The timeline for the media relations outreach was over an 11-month period: four months prior to the race and throughout the seven-month race. Therefore, the strategy was to “drip feed” the media fresh story angles throughout the campaign, and ensure that different news angles were created at stop-over points during the race, such as:

* **Regional angle** – a school in Cape Town, South Africa, created a video diary of what they learned about the world since following the race on the Education Challenge website.
* **Education angle –** a class of learning disabled students in Brazil wrote about how they used the website to help them with their disabilities.
* **ICT angle** – a profile of web education content developer David Berry was written and posted on the website. (Ibid.)

**1.3.3 Pre-Arranged Publicity Placements --** Targets for the number of publicity placements were established for each media sector. In addition, to achieve optimal publicity HSBC pre-arranged coverage with selected publications. For example, Dalton’s diary blog was arranged to be run in the Herald Express, the local daily newspaper in Torbay; a monthly feature article was carried on learn.co.uk, and educational website, and part of The Guardian newspaper. (Ibid.)

**1.4 Tactics/What specific tactics will fulfill the strategy?**

LS PR utilized numerous tactics to reach out to media sectors.

**1.4.1 Media Relations**

**S**elected several key messages and terms were included in each piece of media collateral. On the top on the list of keywords were: “Education,” “Graham Dalton,” “Global Education Challenge” and “The World’s Local Bank.” To convey key messages and terms to target media sectors a variety of media relations tactics were employed, such as: press kits, containing press releases, media alerts and announcements, feature stories, case studies and photos of Graham Dalton. The media were invited to special events at and school visits for interviews with key people and photos. (Ibid.)

. **1.4.2 Search Engine Optimization (SEO)**

Keywords were used throughout the website to optimize search engine ranking by Google and other Internet browsers

**1.4.3 Event Management and Corporate Hospitality**

**S**top-over educational events were held in various cities along the race, such as Cape Town, South Africa, and Salvatore, Brazil. Departure parties were also arranged, and the media were invited.

**1.4.4 Competitions and Promotions –** Concepts for competitions and promotions to publicize the Education Challenge were developed and advertised in key publications, such as The Funday Times and Primary Times. Promotions and competitions were also posted on the dedicated website.

**1.4.5 Internal Communications** – Acomprehensive internal communications program was developed for HSBC employees, including regular articles, competitions, and a dedicated intranet.

**1.4.6 Internet** – A dedicated Global Education Challenge website was developed and launch for the project and content was supplied and updated on a daily basis.

**1.4.7 HSBC Branding –** The HSBC logo and slogan “The World’s Local Bank” were placed at key exposure points, e.g., stop-over locations, on clothing (caps, T-shirts, sweat shirts, shoulder bags, etc.), on the *Hexagon,* with other competing skippers and yachts.

**1.4.8 Direct Mail** – Concepts were developed and direct mail pieces were designed, printed and distributed for promotions and competitions.

**1.4.9. Partnerships** – Key partnerships, such as HSBC and Graham Dalton, agreed to cooperative publicly with other third parties, such as competing teams, other sponsors, and other educational organizations involved in the yacht race. All parties engaged in “sportsman-like conduct.” No one criticized anyone else in front of the media.

**1.4.10 Photography** – Photography of the *Hexagon*, Dalton and his crew were used for all promotional activities. (Ibid.)

**1.5. Action/ What actions are needed for each tactic?**

As noted above, LS PR began “pitching” stories to the media four months in advance of the *Around Alone* race. When the race began on September 15, 2002, they continued to implement their “drip feed” media strategy by pitching fresh story angles to the media to local, region, national and international electronic, print and online media. They especially sought to capitalize on media opportunities at stop-over points – Torbay, England, Cape Town, South Africa, Tauranga, New Zealand, and Salvador, Brazil, and Newport, R.I. -- throughout the race.

**1.6 Control/How do we know we have arrived?**

The response HSBC received from its Global Education Challenge was a resounding success. Below is a summary report of several of the key components of IMC program that involved media relations, website development, and event management.

* Total circulation of print media subscribers (publications in which story placements appeared), excluding broadcast and online media – 30, 987,971
* Total advertising dollar value equivalents of publicity placements -- $2.93 million.
* The Global Education Challenge [website](http://classic.terabyte.co.nz/Portfolio/Web/Default.aspx?id=63&PageNumber=5), designed by New Zealand’s Terabyte, received an average of 33,581 hits per day.
* In the four months of the media campaign about 12,000 children worldwide registered on the site to complete the weekly challenges set by the skippers of the *Around Alone* race.
* Average time spent on the website per visitor was approximately 15 minutes.
* U.S., U.K., Canada, New Zealand, Canada and Australia were the top five countries of website usage, but users also came from 35 countries around the world.
* More than 3,000 school children from around the world met with skipper Graham Dalton.
* One of the more interesting aspects of the program was the outreach to children with learning disabilities. The website encouraged these children to convey via email their learning experience following the *Around Alone* race. These responses were posted on the website.
* The site was voted as one of Yahoo’s Top 12 sites of 2002. (Terabyte, 2002)

**1.6.1 Evaluation of Campaign Objectives**

Here is a more detailed evaluation of HSBC/LS PR’s success in achieving both sponsorship and education objectives.

**HSBC Sponsorship Objectives**

|  |  |
| --- | --- |
| Objective | Outcome |
| To generate awareness and interest in HSBC Global Education Challenge through sponsorship of Dalton’s Around Alone 2002 | 374 articles in target media;  All articles mentioned at least one keyword |
| To raise awareness of HSBC’s commitment to education globally and provide a medium for local offices to fundraise for education causes | Coverage achieved in every in every education publication in the U.K.;  76% of articles mentioned at least one keyword |
| To involve and motive HSBC staff | Features place in each of HSBC’s internal and customer publications; Involved local branches in local events, i.e., stopovers in Cape Town, |
| To help project the new brand positioning of “The World’s Local Bank” | Website hits from 35 different countries;  Prominent branding on all public-oriented material and equipment. |

**HSBC Global Education Challenge Objectives**

|  |  |
| --- | --- |
| Objective | Outcome |
| Create a credible learning resource that can be used by teachers and children as part of their classroom and home learning in HSBC’s operational countries. | The site received around 200,000 user sessions from its target market.  Three of HSBC’s most important markets, e.g., U.S., U.K., and N.Z. received the most hits. |
| Generate hits on [www.educate.hsbc.com](http://www.educate.hsbc.com) | Over 1 million website hits generated. |
| Encourage site registration of target audiences | 12,328 regular registered users |
| To use the website to teach children about National Curriculum subjects, while “broadening their horizons” of the wider world | Website was used as a regular, dependable learning resource for English, history, geography, math, science, technology, music, dance, and cultural studies. |

**1.7 Conclusion**

Graham Dalton did not win the *Around Alone* in 2002, but I believe the HSBC Global Education Challenge was winner, scoring a significant success in its IMC program.

Some of the outstanding features of that program were:

**1.7.1. Correct Marketing Mix** -- Given a budget of approximately $1 million, HSBC directed its messaging to a limited number of communication channels to coordinate them in a consistent way. It focused primarily on public relations, media relations, corporate sponsorship, planned events, employee and customer communication and a dedicated website. Meanwhile, it shunned traditional advertising on TV or radio and in newspapers, magazines, and outdoor media.

**1.7.2 Consistent Messaging** – All messaging contained four lead keywords: Education,” “Graham Dalton,” “HSBC Global Education Challenge,” and “HSBC, the World’s Local Bank.” There were 374 article placements in the media where at least one keyword was mentioned. Coverage was also reach in every educational publication in the U.K. where three-quarters mentioned a keyword.

**1.7.3 Persistent Media Relations –** The worldwide-wide publicity generated by the campaign contributed to the overall success of the campaign. In a real sense, media relations trumped the need for advertising. The project demonstrated that forging a exciting partnership with *Hexagon* and leveraging it to a major global need (education) makes the use of public relations more favorable than traditional advertising.

**1.7.4 Planned Events in the Community –** Events in stop-over cities were another success of the campaign. HSBC coordinated and arranged media events with HSBC branches and school children in each of the five stop-over ports. The “star” at each event was skipper Graham Dalton, who during the course of the seven-month race met with more than 3,000 children. Media were invited to each event, and articles and photos from each occasion were posted on the Education Challenge website.

**1.7.5 Imaginative Use of Website –** Terabyte’s website for the HSBC Education Challenge was colorful and inviting while providing a platform for educating middle-school children in a wide range of interesting topics. It attracted over 12,000 registered users and logged over 200,000 user sessions. Its inclusion of learning-disabled students was also an imaginative use of resources for kids who are often ostracized by other students. Such altruism reinforced the theme of “overcoming challenges.”

What could have been done better in the IMC campaign?

**1.7.6 Pre-Planning for Disaster** – I was surprised to read that the unpredictability of around-the-world sailing was identified as a potential threat in HSBC’s SWOT Analysis but apparently no contingency plans were outlined in the IMC. This is a tremendous oversight. Murphy’s Law is the law of the land in event planning. Admitting the obvious, i.e., you can’t control Mother Nature, is not an adequate excuse for marketing professionals. Discussions should have taken place and alternative plans should have been developed to manage a potential disaster, especially when millions of dollars of the sponsorship/marketing budget are at stake.

Here’s one proposal that might have been discussed prior to the start of the race. If *Hexagon* was taken out of the race due to weather conditions or operational breakdowns, HSBC would be permitted contractually to co-sponsor another boat in the race, say, fellow Brit Emma Richards who piloted the *Pindar* in *Around Alone i*n 2002.

Here’s another. If HSBC was unable to co-sponsor another boat, then Dalton should be allowed to crew on another boat, or at the very least follow the race as closely as possible. The point is the IMC campaign must continue.

**1.7.7 Corporate Hucksterism –** Anotherweakness identified in the SWOT Analysis was the potential for corporate hucksterism in educational materials. Again, I didn’t see that weakness addressed directly or indirectly in the IMC.

As I pointed out above, hucksterism is a potentially serious problem and must be dealt with if the HSBC wishes to have its education initiative perceived as credible and beneficial.

# One potential solution to have Scholastic, Inc., which publishes books, textbooks, educational videos, software, and corporate sponsored educational materials, develop educational materials for HSBC. According to Rick Delano, Director of Scholastic's Education Marketing Group, the company recognizes the problems inherent in producing corporate-sponsored educational materials and has established its own guidelines to make sure that any materials it produces are minimally commercial, educationally sound, and objective. (Consumers Union, 2008)

A second concern among educators who participate in corporate-sponsored education programs is “dumbing down” of educational materials. “Dumbing down” is a growing problem in school districts around the world. Dr. Kevin Donnelly, an educational consultant in Melbourne, Australia, says the problem of declining test scores among Australia’s students is due to dumbing down curricula. (McDonald, 2007)

A prominent educator consulting on HSBC educational materials for the Global Education Challenge could have removed any hints of hucksterism or “dumbed down” educational materials.

# HSBC could have retained a prominent children’s educator -- someone like Joan Ganz Cooney in the U.S, co-founder in 1968 of Children's Television Workshop and originator of the preschool educational series, *Sesame Street --* to develop educational materials that conform to the U.K.’s National Curriculum.

**1.7.8 A Final Comment on Social Media & Word of Mouth**

It’s interesting to study an IMC program from 2002-3 – a Web 1.0 world. HSBC/LS PR could have generated a great deal more buzz, especially word-of-mouth (WOM) exposure, through today’s Web 2.0 at little or no additional expense. WOM is by far the most potent tool in consumer markets.

Taylor and Smith (2004, p. 590) note that no amount of advertising or personal selling can compete with a trusted colleague, friend or influencer – someone who you know is on your side – recommending or criticizing a product, service or company. While WOM generally is considered as face-to-face spoken communications, WOM can be spread via phone conversations, text messages/SMS, and web communities such as Flickr, Facebook, MySpace, Twitter, blog posts, IMs, and emails.

But HSBC’s campaign pre-dated social media revolution which didn’t exist or was in their infancy.

Today, if HSBC/LS PR was rolling out the IMC campaign, they would probably put a fresh video of Dalton and the crew of *Hexagon* on YouTube every couple of weeks; create and update their Flickr, MySpace and Facebook page everyday; and assign someone to provide daily updates (140 characters or less) on Twitter or the dedicated HSBC Education Challenge website.

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